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STRATFORD-ON-AVON DISTRICT COUNCIL

STRATFORD-ON-AVON DISTRICT RETAIL STUDY

JUNE 2008

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APPENDICES

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COLLIERS CRE

EXECUTIVE SUMMARY

1) Colliers CRE was instructed by Stratford-on-Avon District Council in January 2008 to prepare a study of convenience goods retailing in Stratford-on-Avon District. The main purpose of the study is to provide part of the evidence base that the District Council will use in their preparation of its Core Strategy, which covers the period to 2026. The principal focus of the study is to provide the Council with robust evidence and advice on the need for additional convenience goods floorspace given current national and regional policy and in the light of demographic and economic trends.

2) This study adopts a traditional approach to quantifying retail floorspace need and is underpinned by a substantial body of new data including:-

- a telephone survey of 750 households living throughout Stratford-on-Avon District and its shopping hinterland;
- updated retail floorspace statistics for main towns and supermarkets located throughout Stratford-on-Avon District;
- bespoke consumer retail expenditure per head estimates for small areas within Stratford-on Avon District and its hinterland;
- current and projected populations by ward; and
- details of food stores with planning consent and/or proposed throughout Stratford-on-Avon District.

3) The key objective of Government retail planning policy is to promote and enhance existing town centres. This requires that any development for food store retailing must follow the "sequential approach" to site location. Other 'tests', relating to 'need', 'scale', 'impact' and 'accessibility', must also be addressed.

4) Regional retail policy states that Stratford-upon-Avon is the 'preferred location' for major retail development within Stratford-on-Avon District, whilst the network of smaller town, district and local centres should provide for day-to-day needs. Regional policy further states local authorities should be pro-active in encouraging appropriate retail development in these smaller centres in order to maintain and enhance their function. The main focus should be on meeting local needs, in particular the provision of convenience goods shopping. The broad thrust of regional policy is reflected in the existing Warwickshire Structure Plan and Stratford-on-Avon District Local Plan Review.

5) Using the results of the household telephone survey, we estimate that the residents of Stratford-on-Avon District will generate some £189 million of convenience goods expenditure in 2008. Of this total, £71 million will leak out to centres/stores outside of the District. Thus only 62% of available spend (c. £118 million) will be retained within the District. To this we add an estimated £19 million of food spend which flows into the District from residents living outside and from tourists. This pushes up the turnover of the convenience goods sector in Stratford-on-Avon District to £137 million. On our figures, food stores within Stratford upon-Avon soak-up around 72% of District-wide sales, with each of the three rural market towns (Alcester, Shipston-on-Stour and Southam) accounting for around 6%. The balance (c.10%) of sales are generated by other smaller centres/stores located throughout the District.

6) In terms of market shares of available convenience goods expenditure, Stratford-upon-Avon dominates four of the seven 'zones' comprising the District, whilst Shipston-on-Stour captures the largest share in one zone. The remaining two zones in the District are dominated by Redditch and Royal Leamington Spa, which are located in adjoining areas. All three rural market towns are currently experiencing high levels of expenditure leakage, primarily to stores outside of the District. In our view, this points to a healthy quantitative and qualitative need for additional retail floorspace provision, because the existing food retail offer available in each town primarily caters for top-up rather than main food shopping and a better range and bigger scale of food store is required.

7) Our recommended retail strategy for convenience goods shopping within Stratford-on-Avon District is shaped by the household survey results which show that 38% of the expenditure generated by the District's residents is currently spent at stores located elsewhere. This level of leakage is relatively high and indicates that the present pattern of food shopping is not sustainable, with many residents currently driving over relatively long distances to do their main food shopping. We believe there is the potential to plan for new food store provision within the District in a manner that is more consistent with the Government's key sustainability objectives of minimising reliance on the car for shopping and reducing the number and length of car journeys.

8) We therefore recommend that Stratford-on-Avon District's overall level of expenditure retention for convenience goods shopping should increase in line with the Government's commitment to sustainability. Furthermore, we consider this objective is best met by increasing the target market shares for each of the three rural market town, which are located towards the edge of the District, and by increasing Stratford upon-Avon's target market share in two zones. We recommend realistic target market shares, since the close proximity of centres/stores outside of the District will always attract a significant number of trips. The effect of our upwards adjustments to individual centre market shares is to increase the overall level of spend retention for convenience goods shopping in Stratford-on-Avon District by 19% points. The uplift from the current 62% rate to 81% reflects what we consider to be an appropriate, realistic and achievable target in planning terms.

9) Adopting a mid-range sales density for converting headroom expenditure into a floorspace requirement, and taking into account existing retail commitments, we estimate the following quantums of additional convenience goods floorspace need within the main towns in Stratford-on-Avon District.

Forecast Year	Floorspace Need (sq m net)			
	Stratford-upon-Avon	Alcester	Shipston-on-Stour	Southam
2011	-1,460	1,290	1,640	2,250
2016	-1,280	1,350	1,680	2,310
2021	1,020	1,360	1,750	2,410
2026	-750	1,490	1,810	2,490

10) In summary, our recommended retail strategy for the Council is to actively plan for additional food store provision within Stratford-on-Avon District, but in a way that not only meets the sustainability objectives of reducing expenditure leakage (and trips) to centres outside of the District, but also reduces the need to travel longer distances by car for main food shopping within the District. The best way to achieve these objectives is to plan primarily to improve the food store offer in the three peripherally located rural market towns of Alcester, Shipston-on-Stour and Southam, whilst continuing to recognise the potential for Stratford-upon-Avon to capture a larger share of available spend in its nearby zones. The strategy is all about clawing back expenditure currently being lost from the District and providing a more sustainable pattern of food store provision throughout the District.

1.0 INTRODUCTION

Terms of Reference

1.1 Colliers CRE was instructed by Stratford-on-Avon District Council in January 2008 to carry out a study of **convenience goods** retailing in Stratford-on-Avon District. The main purpose of the study is to provide part of the evidence base that the District Council will use in their preparation of its Core Strategy, which will cover the period to 2026. The principal focus of the study is to provide the Council with robust evidence and advice on the provision of additional convenience goods floorspace given current national and regional policy and in the light of demographic and economic trends.

1.2 The key requirements of the retail study as set out in the Consultants Brief are as follows:-

- to assess the quantitative need for additional convenience goods floorspace through to 2026 in Stratford-upon-Avon and the three rural market towns of Alcester, Shipston-on-Stour and Southam;

- to advise on whether there is a need to widen consumer choice for convenience goods shopping in any of the four centres;

- to provide guidance on a sequential assessment of potential locations for providing any additional retail provision that has been identified;

- to comment on the likely impact of any additional out-of-centre food store provision on the vitality and viability of each of the four centres; and

- to make recommendations to the Council on the most appropriate policy approach to be taken forward in the Core Strategy.

Study Approach

1.3 In preparing this report, we have drawn on our wider knowledge of retail planning and experience gained in undertaking many other retail need/capacity studies throughout the UK, including the previous retail study of Stratford-on-Avon District carried out in 1997 and a study update in 2003. Specifically, we have sought to combine experience in terms:-

- Research
- Retail Agency
- Planning
- Consumer/Market Research

As such the study seeks to blend detailed **research** with relevant **commercial** and **planning** expertise.

1.4 Although some data was available prior to the commencement of this study, it soon became clear that a substantial body of **new** information was required in order to satisfactorily meet the objectives in a robust manner. This new data falls into two broad categories as follows:-

- we undertook a telephone survey of **750 households** living throughout Stratford-on-Avon District and its shopping hinterland;

- we have incorporated the very latest and most accurate **statistics** available in respect of the following:

  - **retail floorspace** of existing centres and shops throughout Stratford-on-Avon District[1];

[1] This data has been provided by Stratford-on-Avon District Council and, in part, by Colliers CRE through detailed fieldwork.

- consumer **retail expenditure per head** for small areas within Stratford-on-Avon District and its shopping hinterland;[1]

- current and projected **populations** by ward.[2]

- details of **retail floorspace in the development pipeline** within Stratford-on-Avon District[2] (eg. retail commitments and proposal(s)).

In practice, much of the survey and other technical data feeds through into our quantitative assessment of retail floorspace need.

Structure of The Report

1.5 This report consists of seven sections, followed by a number of Appendices which contain supporting technical information and spreadsheets, which set out the quantitative retail floorspace need assessment.

1.6 Following this Introduction, Section 2 describes the planning context to the study at the national, regional and local level, and summarises the main findings from the recent Competition Commission report into the grocery sector.

1.7 In Section 3, we describe our approach to assessing the quantitative need for additional convenience goods floorspace within Stratford-on-Avon District. The sources of data are identified, the methodology of the 'model' is described and our key assumptions are explained.

1.8 In Section 4, we consider the present shopping hierarchy of Stratford-on-Avon District and, drawing on the results of the household telephone survey, examine the current pattern of shopper behaviour for convenience goods (food) shopping. Using this

[1] This data is derived from Experian.

[2] This information has mainly been provided by Stratford-on-Avon District Council.

information, we quantify the retail trading performance of the District as a whole, Stratford-upon-Avon and the three rural market towns.

1.9 In Section 5 we describe the methodology for quantifying the need for additional convenience goods floorspace within Stratford-on-Avon District and its main towns. This quantitative need assessment is carried out for the forecast years of 2011, 2016, 2021 and 2026.

1.10 Section 6 sets out in full the results of our retail floorspace needs assessment within Stratford-on-Avon District for convenience goods shopping.

1.11 In the final Section 7, we present our conclusions and recommendations to the Council on the most appropriate retail policy approach for inclusion in the Core Strategy.

2.0 PLANNING CONTEXT

Introduction

2.1 This section describes the planning context to the assessment of convenience goods retailing within Stratford-on-Avon District and its main centres. Existing retail planning guidance and policy at the national, regional and local levels is reviewed, whilst the recent report by the Competition Commission (CC) on UK grocery retailing is summarised.

Planning Policy Statement 6: Planning for Town Centres

2.2 The Government's key objective for town centres is to promote their vitality and viability by:-

- planning for the growth and development of existing centres; and
- promoting and enhancing existing centres, by focusing development in such centres and encouraging a wide range of services in a good environment, accessible to all.

2.3 Additional aims of Government in relation to retail are:-

- to enhance consumer choice, particularly to socially-excluded groups;
- to support efficient, competitive and innovative retailing;
- to improve accessibility by ensuring that new development is well-served by a choice of means of transport.

2.4 PPS 6 also states that it is not the role of the planning system to restrict competition, preserve existing commercial interests or to prevent innovation.

2.5 Government guidance also recommends that local planning authorities should actively plan for growth and manage change in their town centres over the period of new development plans.

2.6 PPS 6 advises that regional spatial strategies should set out a vision and strategy for a region's growth, particularly for higher level centres, and provide a strategic framework for planning at the local level.

2.7 At the local level, PPS 6 advises that local authorities should assess the need for new retail floorspace, taking into account both quantitative and qualitative considerations, and to identify any deficiencies in provision.

2.8 Specifically, in selecting sites for retail development, local authorities should:-

- assess the need for development;
- identify the most appropriate scale of development;
- apply the sequential approach to the site selection;
- assess the impact of development in existing centres;
- ensure that locations are accessible and well served by choice of means of transport.

2.9 In relation to rural market towns, PPS 6 states that they should be the main service centres in rural areas, providing a range of facilities, shops and services at a scale appropriate to the needs and size of their catchment area.

2.10 PPS 6 (in Annex A) sets out a number of Typologies. The relevant definitions in relation to this study are as follows:-

- **Town Centres (Type of Centre)** – will usually be the second level centres after city centres and, in many areas, they will be the principal centre or centres in a local authority's area. In rural areas they are likely to be market towns.

- **Town Centre (Type of Location)** – a defined area, including the primary shopping area and areas of predominantly leisure, business and other main town centre uses within or adjacent to the primary shopping area.

- **Primary Shopping Area (Type of Location)** – a defined area where retail development is concentrated (generally comprising the primary 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.

- **Edge of Centre (Type of Location)** – for retail, it is a location that is well connected to and within easy walking distance (i.e. up to 300 metres) of the primary shopping area.[1]

- **Out of Centre (Type of Location)** – a location which is not in or on the edge of a centre, but not necessarily outside the urban area.

- **Convenience Shopping (Type of Development)** – is the provision of everyday essential items, including food, drink, newspapers/magazines and confectionery. There are two main types of convenience stores:-

    - Supermarket: self-service stores selling mainly food, with a trading floorspace less than 2,500 sq m, often with car parking.

    - Superstores: self-service stores selling mainly food, or food and non-food products, usually with more than 2,500 sq m of trading floorpace, with supporting car parking.

[1] **Note:** A site for retail located more than 300 metres from the primary shopping area is not defined as a 'town centre' or even an 'edge of centre location', but is considered to be 'out of centre'. Thus it is possible to have a site within the town centre boundary that is, in fact, 'out of centre' in terms of PPS 6.

2.11 The Government has stated that it intends to publish a revised consultation draft of PPS 6 during the Summer of 2008. It is expected that this draft will include proposed changes to the existing 'needs' test, and may introduce a 'competition test' (see paragraph 2.26 below).

West Midlands Regional Spatial Strategy (WMRSS)[1]

2.12 The main purpose of the WMRSS, which incorporates the Regional Transport Strategy (RTS), is to provide a Spatial Strategy to guide the preparation of local authority development plans and local transport plans so that they can deliver a coherent framework for regional development. Local authorities in preparing their plans must take the WMRSS into account. The WMRSS may also be material to decisions on individual planning applications and appeals.

2.13 The WMRSS defines a network of 25 town and city centres across the region within four Tiers 1,2,3, and 4. Stratford-upon-Avon is one of 12 Tier 4 centres. These locations are the preferred locations for major retail developments, particularly where the comparison goods element exceeds 10,000 sq m gross. All 25 centres are deemed to play a 'strategic role' and to be the main foci for higher level retailing, commercial, cultural and service activities. These town and city centres are to be balanced by a network of smaller town, district and local centres, which should provide for day-to-day needs.

2.14 The WMRSS states that local authorities should be proactive in encouraging appropriate development in these smaller town, district and local centres in order to maintain and enhance their function. The main focus of such centres will be on meeting local needs, in particular convenience goods shopping, the provision of local services (such as banks, post offices, local healthcare facilities, sports centres, libraries and restaurants) and a limited amount of comparison goods shopping.

[1] West Midlands Regional Spatial Strategy, Phase Two Revision – Draft, Preferred Option, December 2007.

2.15 The WMRSS also advises that the role and regeneration of centres should not be undermined by larger-scale out-of-centre retail development. However, it is accepted that local circumstances vary, and retail requirements, which cannot be met in-centre, may occasionally arise. In these cases, proposals should be considered against the tests for out-of-centre retail development established in PPS 6 and any additional local criteria set out in Local Development Frameworks.

Warwickshire Structure Plan, 1996-2011 (WASP)

2.16 The saved Policy TC.2 of the WASP defines four main town centres (including Stratford-upon-Avon) and four other town centres within the county. These centres should be the location for all major shopping developments of 1,000 sq m or above. The policy seeks to actively consolidate the role of town centres, through the location of appropriate development, and to prevent potential adverse impact from developments elsewhere.

2.17 The WASP states that it is likely that local plans will extend the hierarchy of Policy TC.2, as necessary, to define district, local and village centres and set out criteria for determining the scale and nature of development appropriate to each tier.

Stratford-on-Avon District Local Plan Review, 1996-2011

2.18 This Plan sets out policies and proposals to guide development in Stratford-on-Avon District in the period up to 2011. Together with the WMRSS and the WASP, 1996-2011, it forms the Development Plan for the whole of Stratford-on-Avon District.

Stratford-upon-Avon

2.19 The market town has a population of just 23,000, but because of its association with Shakespeare attracts considerable numbers of visitors each year. Accordingly, the town centre supports a wide range of shops and facilities, far greater than would normally be expected for a town of Stratford-upon-Avon's size.

2.20 Virtually all of the town centre lies within a Conservation Area. Therefore, proposals for new retail development is supported in certain streets (only), subject to the character of the area being maintained. Other policies are aimed at ensuring ground floor areas on primary shopping streets are in retailing use.

Main Rural Centres

2.21 The Plan identifies eight main rural centres, including Alcester, Shipston-on-Stour and Southam, which are the focus of this study. The Plan seeks to promote and enhance the role of these centres, which includes underpinning their retail and commercial sectors. However, this should be implemented within the context of the WMRSS which supports only limited development in these centres.

2.22 Policy MRC.1 states that proposals for retail development within the existing commercial cores of the main rural centres will be encouraged, since they are recognised as important local retail and commercial destinations. As none of the main rural centres are identified in the town centre hierarchy set out in Policy TC.2 in the WASP (see paragraph 2.16 above), then no retail schemes in excess of 1,000 sq m gross should be permitted.

Competition Commission (CC)

2.23 After a two year inquiry into food retailing – the fifth in seven years – the CC published on 15 February, 2008, its proposals designed to remedy its competition findings in UK grocery retailing.

2.24 The key recommendation is the proposed introduction of a local competition test designed to ensure that no one grocer captures a dominant market share of a local market. If adopted, this test will prevent a retailer from opening additional stores if it already has a 60% share of net grocery floorspace in a local catchment area. In practice, this is unlikely to impact on the expansion plans of retailers in most areas. Accordingly, the CC inquiry in itself is unlikely to do much to put a halt to superstore development and therefore offer protection to small scale high street retailers. The CC has recognised that the highly competitive grocery sector does largely work in the

interests of the consumer. Specifically, the CC states that a lack of competition in certain local markets not only disadvantages consumers in those areas but also allows retailers to weaken their offer to consumers nationally.

2.25 The CC report makes it clear that it is not intending to make any recommendations for other changes to the planning system such as the 'need' test or 'town centre first' policy. Any such changes will be made by the relevant government departments.

2.26 The Final Report of the CC was published on 30th April. In general it confirms many of the proposals set out in its February report, including the recommendation that a "competition test" becomes integrated into the planning system and that the Office of Fair Trading (OFT) should become a statutory consultee for all planning applications for food stores (including extensions) in excess of 1,000 sq m net to prevent any over domination by a single retailer occurring.

3.0 QUANTITATIVE NEED METHODOLOGY: DATA SOURCES AND ASSUMPTIONS

Objectives

3.1 The principal objective of this study is to utilise the most recent and robust sources of data and estimate the need for additional retail convenience goods floorspace within Stratford-on-Avon District through to 2026 the end date of the Core Strategy.

3.2 Although the assessment is necessarily detailed and relatively complex, we have at all stages sought to achieve transparency in our calculations. We have followed a traditional approach to estimating quantitative retail need and have incorporated the very latest published data and the results of a specially commissioned household telephone survey. This should ensure that our assessment is up to data, comprehensive and robust.

3.3 This section of the report introduces the need methodology, summarises the role of the household telephone survey and (for convenience) set out in one place the main assumptions and definitions which we have used and our principal sources of data. Section 4 quantifies the current (base year) consumer food shopping patterns within Stratford-on-Avon District drawing on the results of the household telephone survey, whilst Section 5 describes the quantitative need assessment process itself.

Quantitative Need Methodology

3.4 The quantitative need for additional retail floorspace within an area (or centre) is dependent on the future relationship between the demand for and supply of space, ideally after taking into account the extent (if any) of any over/under trading that is occurring at the base year. The demand for floorspace is then determined by assessing the likely growth in the volume of consumer retail expenditure, while an assessment of floorspace supply involves quantifying the extent to which proposed changes in the location, quality and quantity of retail floorspace will meet the forecast increases in expenditure. Any monetary shortfall of supply relative to demand in the

future indicates there is a need for more floorspace in quantitative terms. The scale of any additional retail provision is then determined by converting excess consumer expenditure (or headroom expenditure) into a retail floorspace need by applying appropriate sales densities. In practice, because shopping patterns are complex and vary for different types of goods, the methodology utilises survey data to determine base year shopping patterns.

3.5 Our methodology for estimating quantitative need is presented diagrammatically in **Figure 3.1** (overleaf). The key steps are set out below. **Appendix 6A** provides a more detailed description of the principal stages involved.

Step 1 Catchment Area Definition

3.6 The catchment area should be defined with regard to the study objective. For this study it includes all of Stratford-on-Avon District and its wider shopping hinterland.

Step 2 Analyse Consumer Demand

3.7 This involves multiplying population by retail expenditure per head for the present and projected forecast year(s). This should include resident population, but also any in-flow retail expenditure from people living outside the catchment area. The main types of inflow expenditure come from long distance shoppers, commuters and tourists.

Step 3 Analyse Retail Supply

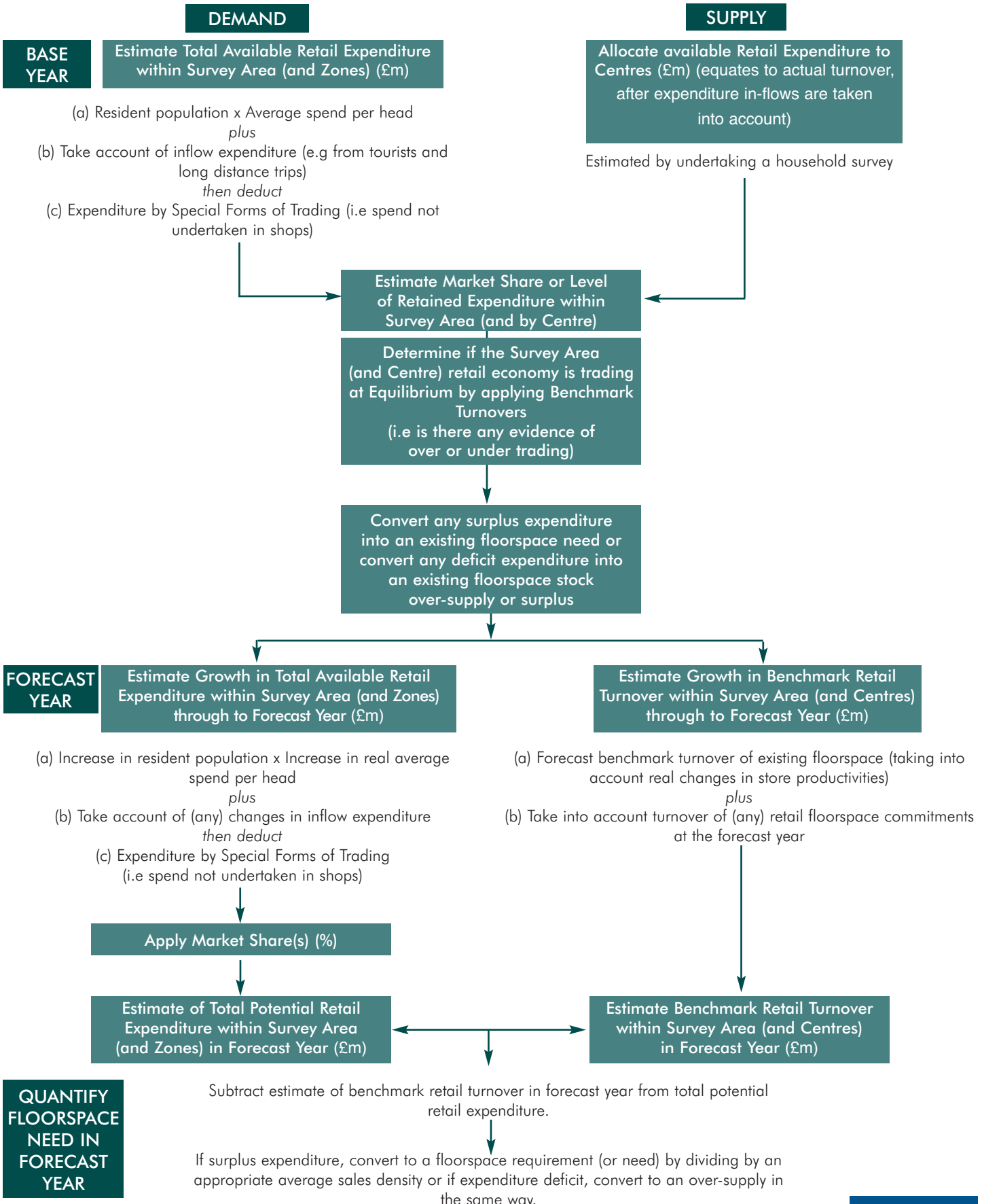
3.8 This step comprises an assessment of the turnover of the retail floorspace stock at the base year. This will involve a household survey to estimate the actual retail turnover of centres and stores and a comparison with benchmark turnover.

Step 4 Retail Demand Vs Retail Supply in the Base Year

3.9 At this stage, the adequacy of the existing convenience goods retail provision within Stratford-on-Avon District in quantitative terms is assessed. For example, if actual turnovers assessed in Step 3 exceed the benchmark turnovers, it could be argued that the floorspace is over-trading and, therefore, there may be an existing need for

QUANTITATIVE NEED METHODOLOGY

Fig. 3.1



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additional retail floorspace. Alternatively, if actual turnovers are less than benchmark levels then the floorspace may be assumed to be under-trading, signalling a potential over-supply of existing retail floorspace.

Step 5 Changes in Retail Demand and Retail Supply through to Forecast Year(s)

3.10 This step projects forward total available expenditure in the catchment area and the turnover of existing and committed retail floorspace. In simple terms, the difference between the forecast totals of available expenditure and retail turnover gives a measure of the quantitative need for additional retail floorspace. If there is an expenditure surplus, this is converted into potential floorspace by dividing by an appropriate sales density. Similarly, if there is an expenditure deficit, a floorspace over supply may exist.

The Household Telephone Survey

Objectives of the Survey

3.11 The household survey forms an important role in the quantitative need assessment since it provides important information on the current pattern of shopping activity throughout Stratford-on-Avon District and surrounding areas. As such, it forms the foundation upon which the retail floorspace need estimates are built.

3.12 A major aim of the survey is to generate quantitative data on consumer retail expenditure flows between areas or zones (where people live) and retail centres (where they spend their money). This has been carried out for the following three types of shopping:-

- convenience goods
- non-bulky comparison goods
- bulky comparison goods

although this report (and the quantitative floorspace need assessment which follows) focuses entirely on convenience goods shopping in accordance with the Brief.

Definition of the Survey Area

3.13 We reached agreement with the District Council on the outer boundary of the household survey area. The survey area is shown in **Figure 3.2** overleaf. It comprises all of the District, together with an area to the south west (within Cotswold and Wychavon Districts) where we anticipate material amounts of in-flow expenditure.

Definition of the Expenditure Zones

3.14 For the purpose of sampling and analysis the survey area has been divided into eight zones. These zones are defined on the basis of ward boundaries and each zone comprises one or more wards. In broad terms they relate to natural shopping activity areas on the ground and to the size and distribution of retail centres. Zones 1 to 7 inclusive cover Stratford-on-Avon Disrict.

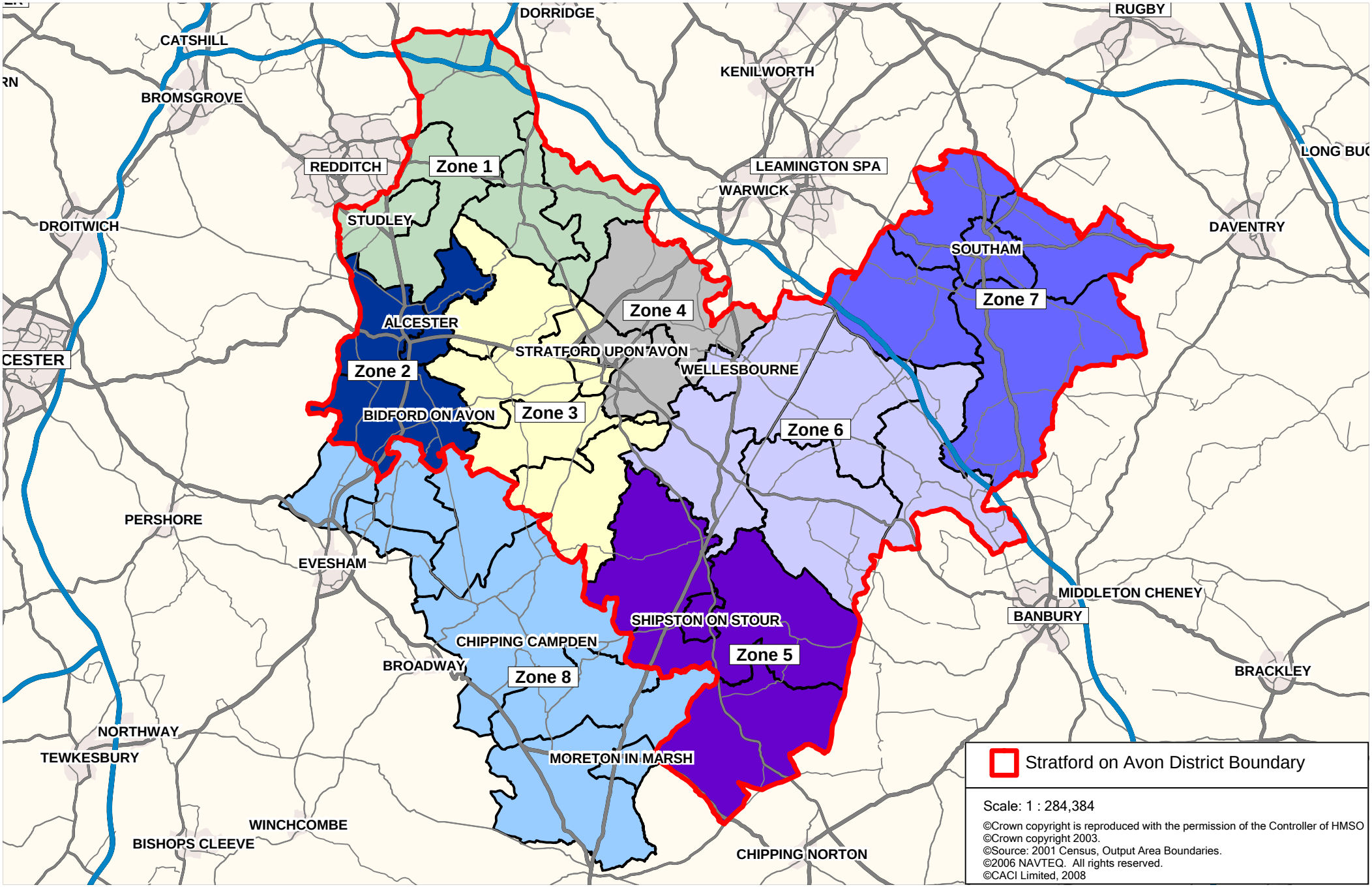
3.15 **Figure 3.2** shows the locations and general configuration of the zones throughout the survey area.

Sampling

3.16 For the household telephone survey, structured interviews were carried out with the person responsible for the main shop in a total of 750 households to ascertain their actual shopping patterns and views. This exceeds the normally accepted minimum size for statistical purpose of around 80-90 interviews per zone. Adopting what is standard practice, a consistent absolute sample in each zone was selected, rather than one proportional to zone population. This is because the latter approach would have meant a significantly larger number of interviews overall to ensure a minimum absolute number of interviews in the less densely populated zones, which was not considered essential.

3.17 By adopting a consistent number of interviews within the zones irrespective of the population size of each zone, there is over-sampling in some zones and under-sampling in others, while the same overall sample size is maintained. At the analysis stage of the survey, the individual samples are then “weighted” to their appropriate

Fig. 3.2. Household Telephone Survey: Definition of Eight Zones



representation within the survey population to produce an overall result which is representative of the survey area as a whole. Without the weighting, the less densely populated zones would have a disproportionately large effect on the overall survey results, contrary to their population size. The whole principle of weighting therefore allows the characteristics of less densely populated zones to be represented without the unnecessary cost of a grossly inflated sample. **Appendix 1A** provides a more detailed statistical synopsis of the sampling methodology and the degree of confidence which can be attributed to the results.

The Survey Questionnaire

3.18 The survey questionnaire was drafted in consultation with the District Council and their agreement was obtained prior to the commencement of interviewing. A copy of the questionnaire is reproduced in **Appendix 1B.**

Implementation, Analysis and Results

3.19 Fieldwork for the household survey was carried out between during February, 2008. In so far as we use the survey results to inform our assessment of the need for additional convenience goods floorspace within Stratford-on-Avon District, the key data which the survey generates is the percentage market share (in terms of available convenience goods expenditure) of the towns and other centres within each of the eight zones. Using this quantitative information, it is possible to build-up a picture of existing shopper behaviour within Stratford-on-Avon District and the survey area as a whole. In particular, the data allows the existing catchment areas and retail turnovers of main centres to be determined. **Appendix 1C** sets out the key results of the household telephone survey in respect of convenience goods shopping, whilst **Appendix 1D** provides full details of the convenience good shopping expenditure market shares produced by the survey for each centre store and zone. The survey forms the foundation for the retail floorspace need assessment, which is presented in full in Sections 5 and 6.

Principal Data Sources

3.20 The quantification of shopper behaviour and retail floorspace need, which we present in the following sections, utilise five major sources of data. All of the sources are **new** to this study. The data sources are as follows:-

Data on shopping trips patterns and consumer retail expenditure flows

Source: We have incorporated the results from a new household telephone survey of Stratford-on-Avon District and surrounding areas carried out during February, 2008. This has been described at paragraphs 3.11 to 3.19 above.

Data on population and population projections

Source: Population figures for zones 1 to 7 have been provided by Stratford-on-Avon District Council. They are based on ward populations for 2005 produced by Warwickshire Observatory and incorporate forecasts of the number of dwellings to be completed between 2005 and 2026 according to the West Midlands Spatial Strategy Preferred Option. Full details are set out in **Appendix 2**. For zone 8 (covering Cotswold and Wychavon Districts) populations have been sourced from Gloucestershire and Oxfordshire County Councils.

Data on consumer retail expenditure per head

Source: Bespoke data on average convenience goods expenditure per head for 2006 has been obtained from Experian for the populations living within each of the eight zones. The expenditure per head data is set out in **Appendix 3B**.

Data on existing retail floorspace

Source: Colliers CRE carried out detailed visits to Stratford-upon-Avon and the three rural market towns of Alcester, Shipston-on-Stour and Southam during March, 2008. Where retail floosrpace information is not available from either published sources; (eg. The Institute of Grocery Distribution or Goad) or from the District Council's own planning records, we have identified (from our 'fieldwork') all supermarkets and other small convenience goods shops in each centre (town centre and out of centre) and plotted them onto maps (see **Appendix 5A**). The gross floorspace of each shop has then been estimated by scaling from the plans.

Details of existing convenience goods floorspace by centre are set out in **Appendix 5B.**

Data on retail commitments and proposals

Source: The District Council has provided us with the latest available information on retail commitments and proposals across the District as a whole. Full details of the retail development pipeline (as at April 2008) are produced in **Appendix 5C.**

Interpretation and Definition

3.21 In addition to the principal sources of data, there are a number of further definitions, assumptions and forecasts which we have adopted throughout this study. Although many are referred to again in Sections 4 and 5, we hope that grouping them together below this will assist the reader in understanding the technical analysis which follows.

Study Centres

3.22 In this study we assess the need for additional convenience goods floorspace within:

- Stratford on-Avon-District as a whole;
- The main town of Stratford-upon-Avon;
- The three rural market towns of:-
  - Alcester
  - Shipston-on-Stour
  - Southam.

Composition of Main Retail Goods Categories

3.22 In this study we undertake a quantitative assessment to establish the need for (any) additional convenience goods shopping floorspace. The detailed product types which constituent this category of goods are detailed in **Appendix 3A**.

Base Year

3.23 We adopt a base year of 2008.

Forecast Year(s)

3.24 The District Council has requested that we forecast quantitative retail need to 2011, 2016, 2021 and 2026, which is the end date for the Core Strategy.

Price Base

3.25 All monetary figures in this report are given in **constant 2006 prices**. This is the price base for the consumer expenditure per head data obtained from Experian.

Future Growth in Consumer Retail Expenditure Per Head

3.26 Future spending levels have an important bearing on the need for additional retail floorspace. The assumptions used are therefore critical to the validity of the overall quantitative need assessment and it is vital that up to date, realistic and robust sources are used.

3.27 In this study, we adopt the 2006-based UK expenditure forecasts published by Experian. These are set out in full at **Appendix 3C** and incorporate the move by the Office of National Statistics (ONS) in 2003 to an annual chain linking approach to producing constant price economic aggregates.

3.28 Experian's expenditure forecasts are estimates of future spending based on an economic model of disaggregated consumer spending. They differ from expenditure projections published by Experian (and also MapInfo) that are estimates of future spending based on the extrapolation of past trends. Experian advise that when carrying out longer term retail need assessments, the use of forecasts is preferred to projections. Experian state that:-

> *"Projections of spend per head based on past trends are currently considerably higher than forecasts based on econometric models. This is because we have reached the top of the cycle for consumer and retail spending. This is reflected in very low household savings rates and high levels of household sector debt. Measuring trend growth rates from a point at (or near) the top of the cycle pushes up the projections. On the other hand, economists and forecasters believe this means that spending growth in the future is likely to be weaker as the economy and households' finances are rebalanced. We consider that the expenditure forecasts incorporate this important information in a way that projections cannot and therefore the economic forecasts are to be preferred over the projections for planning for future demand growth."* (Source: Experian's Head of Global Economics).

3.30 Following the advice of Experian, we therefore adopt their latest expenditure forecasts which are summarised in **Table 3.1**. We assume that the forecast real annual increase in spend per head for the period 2007-16 will continue beyond the Experian forecast time frame and we therefore apply this growth rate to the time-period 2016 to 2026.

3.31 **Table 3.1: Expenditure Per Head Growth Forecasts**

Goods Category	Time Period	
	2007-2011	**2007-2016[1]**
Convenience Goods	0.7% pa	0.8% pa

[1] We also use this forecast for estimating need through to the forecast years of 2021 and 2026. The 0.8% pa growth rate is the same as Experian's Long-Term Trend (middle projection trend) for the period 1977-2006.

In- Flow Expenditure

3.31 Our approach to estimating the volume of convenience goods expenditure flowing into Stratford-on-Avon District from outside takes into account the available scale, range and quality of food retail offer at the different centres within the District and the market shares generated by these centres across the eight zones.

3.32 In practice, because our survey area is relatively large and the three rural market towns are small (with relatively limited food retail offers) we have assumed that the inflow of convenience goods expenditure from outside the survey area from residents is low. Our estimates are set out in **Appendix 4A**. In relation to the larger centre of Stratford-upon-Avon, however, we have assumed a much larger in-flow for convenience good shopping. This is because of its food superstore offer and also because of the food spending generated by the large number of visitors/tourists to Stratford-upon-Avon each year. (**Appendix 4B** sets out our approach to estimating visitor/tourist spend on convenience goods shopping).

Special Forms of Trading and E-tailing

3.33 It is normal practice in the preparation of quantitative retail need studies to make deductions from the consumer retail expenditure per person figures adopted to allow for expenditure by 'special forms of trading' (SFT). This is retail expenditure that does not take place in shops, such as that via mail order houses, door to door salesmen and stalls and markets. It also includes spending using digital TV and over the internet.

3.34 Recent evidence suggests that e-tailing sales are increasing as a proportion of total retail expenditure, although perhaps not at the rate many commentators forecast at the height of the dot.com boom a few years ago. Much of the initial growth in e-tailing has been achieved through the cannibalisation of existing retail expenditure on traditional catalogue-based mail order. However, this cannot continue, so any further gains in e-tailing will directly feed through into an increase in retail sales through SFT. Accordingly, we feel it is prudent to take this into account in our quantitative need assessment.

3.35 In preparing this study, we have examined a range of published material on the subject of e-tailing. However, in our view, the most up to date and forward-looking statistics available on the topic have been prepared by Experian[1]. These are reproduced in full in **Appendix 3D.**

3.36 Experian note that after a slow start, the UK now appears to be in the take-off phase of the spread of e-tailing, although growth will eventually plateau. The company publish projections of the future market share for SFT (including e-tailing) through to 2016 for convenience goods shopping. Their projected market shares for SFT are set out in **Table 3.2** overleaf.

[1] Source: Experian Retail Planner Briefing Note 5.1, November 2007.

Table 3.2 Special Forms of Trading: Market Share Assumptions

Year	Convenience Goods (%)
2004	2.5
2008	5.6
2011	7.0
2016*	7.3

Source: Experian Retail Planner Briefing, Note 5.1, November 2007 (Table 5.1)
***** We assume the market shares for 2021 and 2026 will be the same as for 2016, since, according to Experian, the rate of increase will already have plateaued by 2016.

3.37 It must be stressed that the Experian forecasts are only estimates, since it is very difficult to predict precisely what will happen, particularly over a long time frame. Obviously, if the actual growth in SFT is higher than that which we have assumed, then our estimates of additional convenience goods floorspace need within Stratford-on-Avon District will be too high. Alternatively, if SFT increases at a lower rate than that which we have assumed then the floorspace need estimates set out in this report are likely to be too low.

Turnover Allocation for Existing Retail Floorspace

3.38 It would, in our view, be wrong to assume that all of the increase in retail expenditure within Stratford-on-Avon District is available to support additional retail floorspace. This is because it is appropriate that some of the forecast growth in expenditure should be allocated to existing retailers because the evidence confirms that existing retail shops, in fact, achieve real, and necessary, gains in sales productivities year on year. Rising sales densities are driven by a number of factors including growth in floorspace efficiency and changes in trading hours, net to gross ratios and the mix of goods. Rapidly rising costs also mean existing retailers must grow their sales densities in real terms to remain viable.

3.39 Consequently, to avoid making a turnover allowance for existing retailers would, in our view, lead to a "double-counting" of future available retail expenditure and thus an over-estimation of the need for additional retail floorspace (ie. the consumer spend soaked-up by existing retail floorspace would be used to justify the need for more retail floorspace).

3.40 Experian have recently published a Retail Planner Briefing Note on estimating and forecasting sales densities (reproduced in full in **Appendix 3E**), which sets out the new research they have undertaken on the subject and its relevance to quantitative retail floorspace need assessments. Experian conclude under their 'central case' forecast, that the forecast increase in sales density for convenience goods floorspace is likely to be 0.6% per annum.

3.41 Experian further advise that for centres (or areas) where there is a material over-trading at the present time, it is likely that the potential for real gains in sales productivity in the future will be less than the UK average of 0.6% per annum. Similarly, in centres (areas) where there is currently significant under-trading, there is likely to be potential for gains in sales productivity in excess of the national average. However, if the monetary effects of (any) over-trading and under-trading in the base year are fully taken into account in the quantitative need assessment – as is the case in this study – then it brings the Stratford-on-Avon District retail economy into a retail equilibrium position akin to the UK average consistent with Experian's research on the growth in store productivities. This link is important and has been established in discussions we have had with Experian. Consequently, it is perfectly reasonable to apply the Experian 'central case' store productivity figure of 0.6% per annum to the benchmark turnover of existing convenience goods floorspace within Stratford-on-Avon District and its main centres.

Forecast Sales Densities

3.42 Sales density measures the relative efficiency with which floorspace is used by retailers to convert sales floorspace into retail turnover. We use forecast sales densities at two stages in our quantitative floorspace need assessment:-

- to estimate the turnover of (any) retail commitments and proposals;

- to convert the available residual headroom expenditure at each of the forecast years into a need (or requirement) for additional retail floorspace.

3.43 In considering what are the most important sales densities to use it is necessary to bear in mind the following:-

- that sales densities relating to new stores (which will open in the future) are likely to be higher than those which apply to all of the existing retail floorspace stock in a centre at the base year (2008);

- that sales densities vary widely between different convenience goods (food) retailers;

- that sales densities for convenience goods will increase over time due to the real increases in store productivity which we apply to all retail floorspace (see paragraph 3.41).

3.44 In selecting what we consider to be the most realistic sales densities to adopt, we have had regard to the characteristics of the Stratford-on-Avon District retail economy and its main centres as well as published sources which give the average sales densities for leading food store operators. Due to the big range in sales densities that occur amongst food store operators, we opt for three scenarios:-

- a **'low'** sales density which approximates to the turnover efficiency of food specialists, the food discounters (eg. Aldi and Lidl), and smaller operators such as the Co-op;

- a **'middle'** sales density, which closely reflects store productivities for the grocery sector as a whole;

- a **'high'** sales density which equates to the turnover efficiency for the major grocery multiples such as Tesco, Morrisons, Sainsburys, Asda and Waitrose.

3.45 Our assumed sales densities for estimating the turnover of convenience stores in the development pipeline and for converting available headroom expenditure into a requirement for additional floorspace are set out in **Table 3.3**.

Table 3.3 Assumed Forecast Sales Densities for Convenience Goods Floorspace (£ psm net)

Scenario	Base Year 2008	Forecast Years			
		2011	2016	2021	2026
Low Scenario	5,000	5,091	5,245	5,404	5,568
Middle Scenario	7,500	7,636	7,868	8,107	8,353
High Scenario	10,000	10,181	10,490	10,809	11,137

Note: The sales densities are higher in 2011, 2016, 2021 and 2026 because they include real increase in store productivities.

Net to Gross Ratios

3.46 Where actual gross and net floorspace figures have been supplied by the District Council or another published source we have used them. However, where it has been necessary to convert from gross to net (or vice versa) we use a net to gross ratio for convenience goods shopping of 65:100.

Metric Conversion

3.47 Where necessary, we have converted square feet into metres (and vice versa) using the following formulae:

1 sq m = 10.764 sq ft
1 sq ft = 0.093 sq m

VAT

3.48 Expenditure and sales/turnover data used throughout the quantitative need assessment includes VAT.

Proposed Eco-Town

3.49 It should be noted that the quantitative retail floorspace need assessment presented in this report does not take into account the possible effects and requirements of the proposed Eco-town south of Stratford-upon-Avon, known as Middle Quinton. The effect of this proposal on future levels of available expenditure and shopper behaviour, and the resulting need for additional convenience goods floorspace, should be assessed in a separate study.

4.0 DISTRICT-WIDE FOOD SHOPPING PATTERNS

Introduction

4.1 The main purpose of this section is to quantify shopper behaviour and to determine the **present** retail trading performance of:

- Stratford-on-Avon District as a whole;
- the main town of Stratford-upon-Avon; and
- the three rural market towns of Alcester, Shipston-on-Stour and Southam;

in relation to **convenience goods** shopping.

4.2 The assessment draws on the results of a household telephone survey which was carried out during February, 2008 within Stratford-on-Avon District and its shopping hinterland. In addition, we refer to retail floorspace, population and consumer retail expenditure data. The sources of this information have already been described in Section 3.

4.3 Using the survey results, we also identify the main characteristics of consumer behaviour for convenience goods shopping within Stratford-on-Avon District.

Catchment Area Definition

4.4 The main objective of the household telephone survey was to obtain comprehensive information on consumer shopping trip patterns and expenditure flows for convenience goods shopping within the sub-region. Our approach permits the following important assessments to be carried out:

- for any given centre we are able to not only estimate its retail turnover, but also identify where these sales originate from across the sub-region;

- for any given local area (or zone) we are able to not only estimate the amount of available expenditure, but also identify the volume and source of in-flow expenditure and the volume and destination of out flow expenditure.

4.5 Within the survey area as a whole, we sought to determine the catchment areas of the main towns in Stratford-on-Avon District for convenience goods shopping using survey data on expenditure patterns. Our analysis permits the core, primary and secondary catchments (where they exist) to be determined for each town. For the purpose of this study we have adopted the following definitions:

- **core catchment:** comprises those zones from which a town attracts the **majority** of generated expenditure (i.e 51% or more);

- **primary catchment:** comprises those remaining zones from which a town attracts **25% or more** of generated expenditure;

- **secondary catchment:** comprises all remaining zones from which a town attracts **10% or more** of generated expenditure.

4.6 Beyond the secondary catchment, the detailed survey results show that certain towns may attract even smaller amounts of convenience goods expenditure from additional zones. Such expenditure flows will typically account for very low proportions of overall centre turnover and can, for most analytical purposes, be ignored. We have therefore excluded these zones from our definition of a town catchment area in this section, although such in-flows are taken into account in the quantitative retail need assessment (Sections 5 and 6).

Assessment of the Stratford-on-Avon District Retail Economy as a Whole

4.7 Using the results of the household survey, we first consider the retail trading characteristics of Stratford-on-Avon District as a whole in relation to convenience goods shopping at the base year of 2008. In particular, we are able to determine the volume of convenience goods expenditure in-flows and out-flows to and from the District.

4.8 By relating the scale of these expenditure in-flows and out-flows to the known 'pool' of available expenditure generated within Stratford-on-Avon District, we are able to estimate the present (2008) retail turnover of the area. In addition, by expressing turnover as a proportion of available expenditure, the level of expenditure 'retention' can be estimated.

4.9 In relation to **convenience goods** (**Figure 4.1** overleaf), we estimate that Stratford-on-Avon District currently attracts an in-flow of £19 million (including £7.4 million of visitor/tourist spend), but that some £71 million leaks out to competitor centres/stores in other areas. Therefore, Stratford-on-Avon District is a net exporter of £52 million of convenience goods spend. Moreover, the figures indicate that retail floorspace stock in Stratford-on-Avon District retains around 62% of the convenience goods expenditure generated within the area and has an estimated convenience goods turnover of some £137 million.

4.10 In **Figure 4.2** below the total convenience goods turnover of Stratford-on-Avon District is disaggregated by town. This confirms that the main town of Stratford-upon-Avon currently accounts for 72% of the District's convenience goods trade, whilst the three rural market towns collectively attract 18% of turnover. Other smaller centres/stores soak-up the balance of sales (c.10%).

Figure 4.2: Stratford-on-Avon District: Convenience Goods Turnover Disaggregated by Centre, 2008

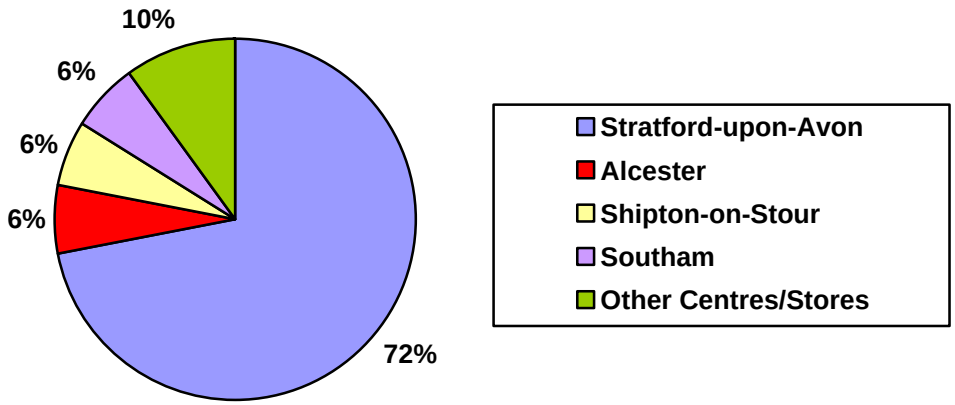
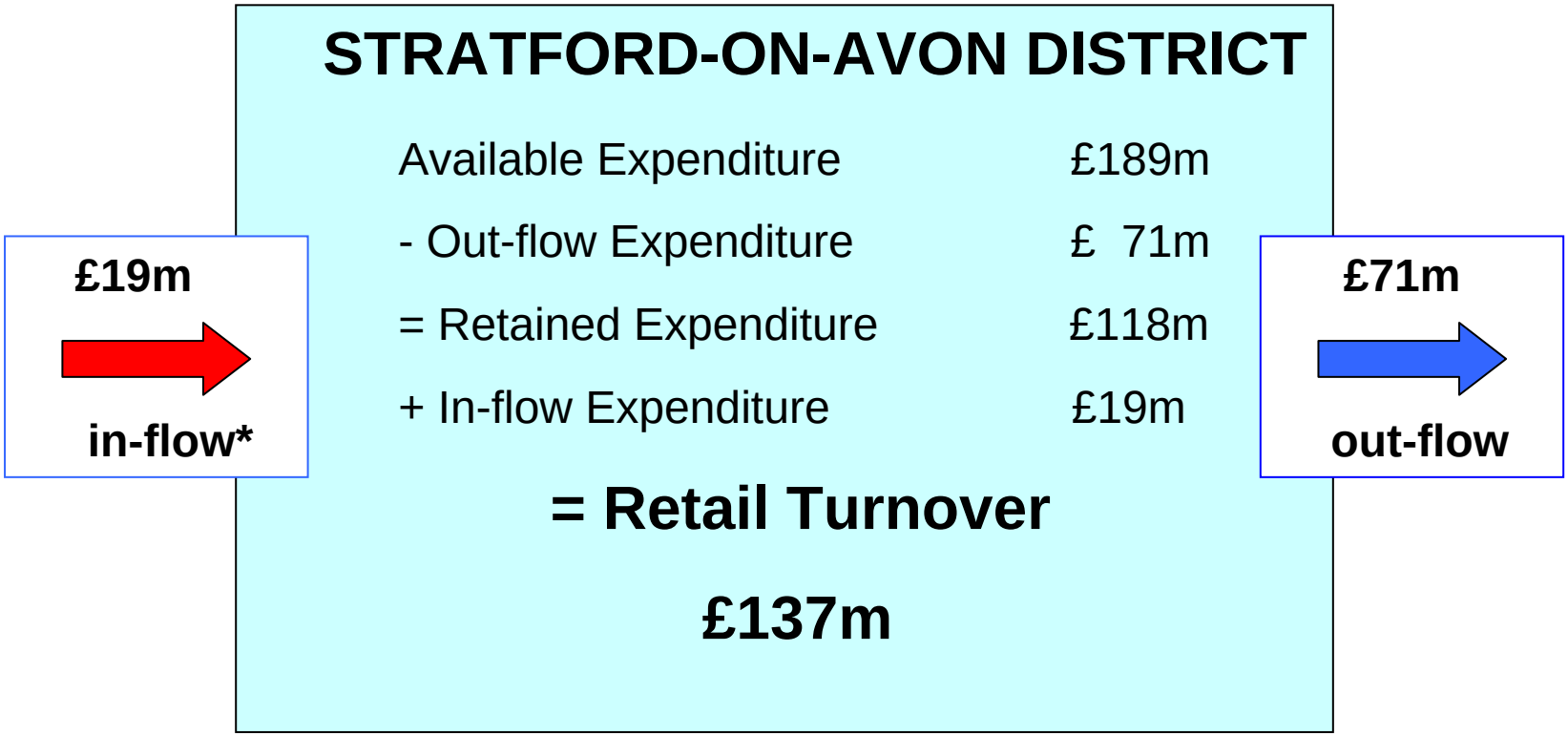


Fig 4.1:

STRATFORD-ON-AVON DISTRICT:

RETAIL TRADING CHARACTERISTICS: CONVENIENCE GOODS, 2008



*Indicates estimated visitor/tourist spend of £7.4 million

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Town Catchment Areas

4.11 We now turn to defining the convenience goods shopping catchment areas for the main towns in Stratford-on-Avon District, using the results of the household survey (and the catchment methodology set out at paragraph 4.5). It should be borne in mind in the following analysis that zones are dealt with in their entirety, although in practice parts of a zone may actually fall within the retail influence of a different centre to that being described.

Convenience Goods

4.12 The extent of the catchment area of Stratford-upon-Avon for convenience goods shopping is set out in **Figure 4.3** overleaf. The map confirms the strength of the town's food shopping offer. Stratford-upon-Avon's core catchment extends across two zones (zones 3 and 4) , whilst its primary catchment covers zones 2, 5 and 6. In addition, zones 1 and 8 fall within the town's secondary catchment. Thus Stratford-upon-Avon's catchment area embraces all zones within the District, except zone 7 (Southam), and also includes zone 8 in Cotswold and Wynchavon Districts.

4.13 **Figure 4.4** overleaf shows that Alcester's influence for convenience goods shopping is relatively weak with the town retaining just 27% of the available spend in its own zone 2. This is sufficient to generate a primary catchment area (but not a core catchment). Alcester faces stiff competition from nearby Stratford-upon-Avon, whilst there is also considerable expenditure leakage outside of the District to Redditch and Evesham.

4.14 Shipston-on-Stour is stronger than Alcester for food shopping, since it retains almost 40% of spend within its own zone 5. This zone forms the town's primary catchment (**Figure 4.5** overleaf).

4.15 Southam also generates a primary catchment embracing its own zone 7 (**Figure 4.6** overleaf), although the town retains just 26% of available convenience goods spend – less than Shipston-on-Stour and about the same as Alcester.

Fig. 4.3. Definition of Stratford upon Avon Town Catchment Area: Convenience Goods

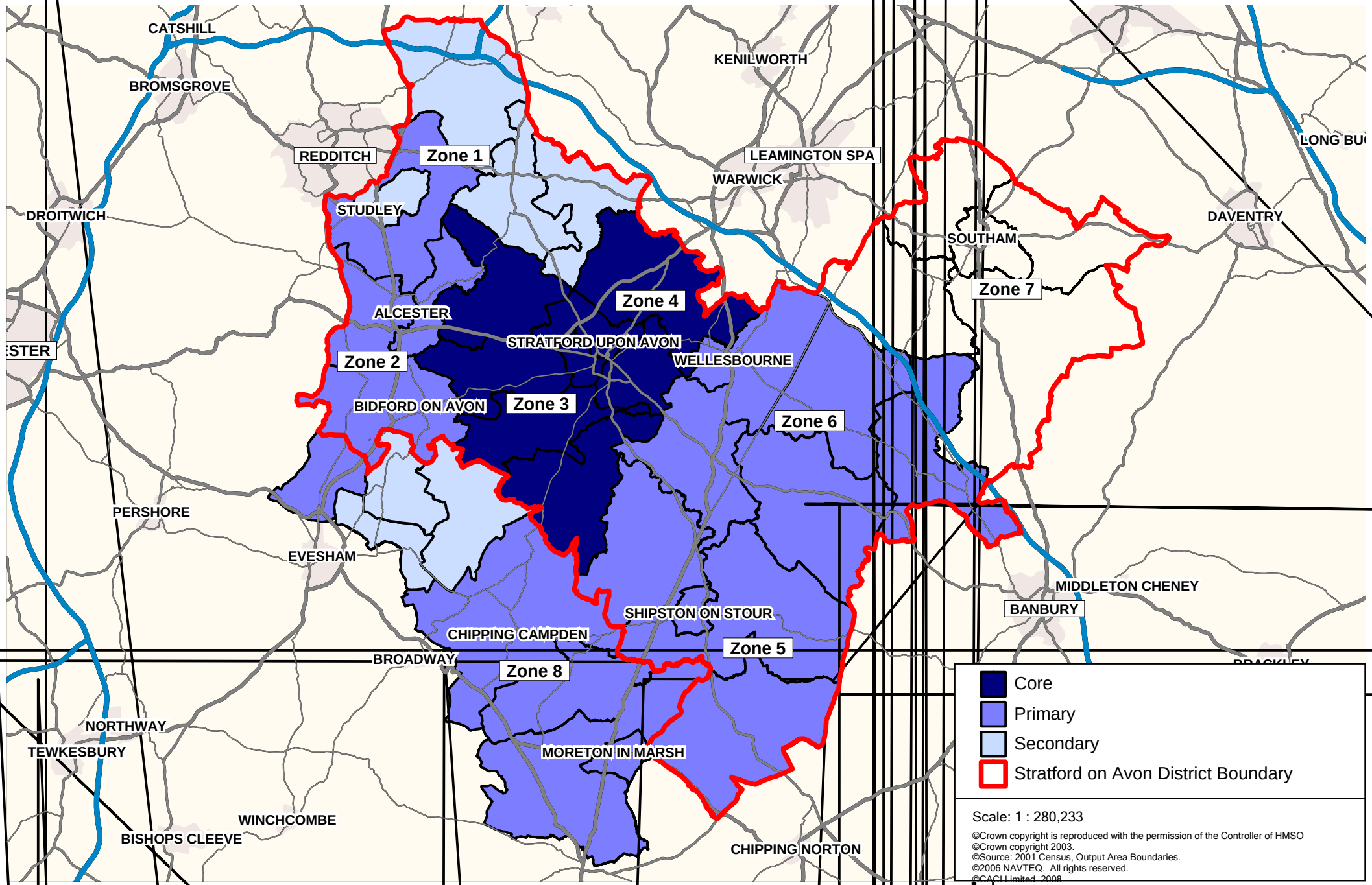
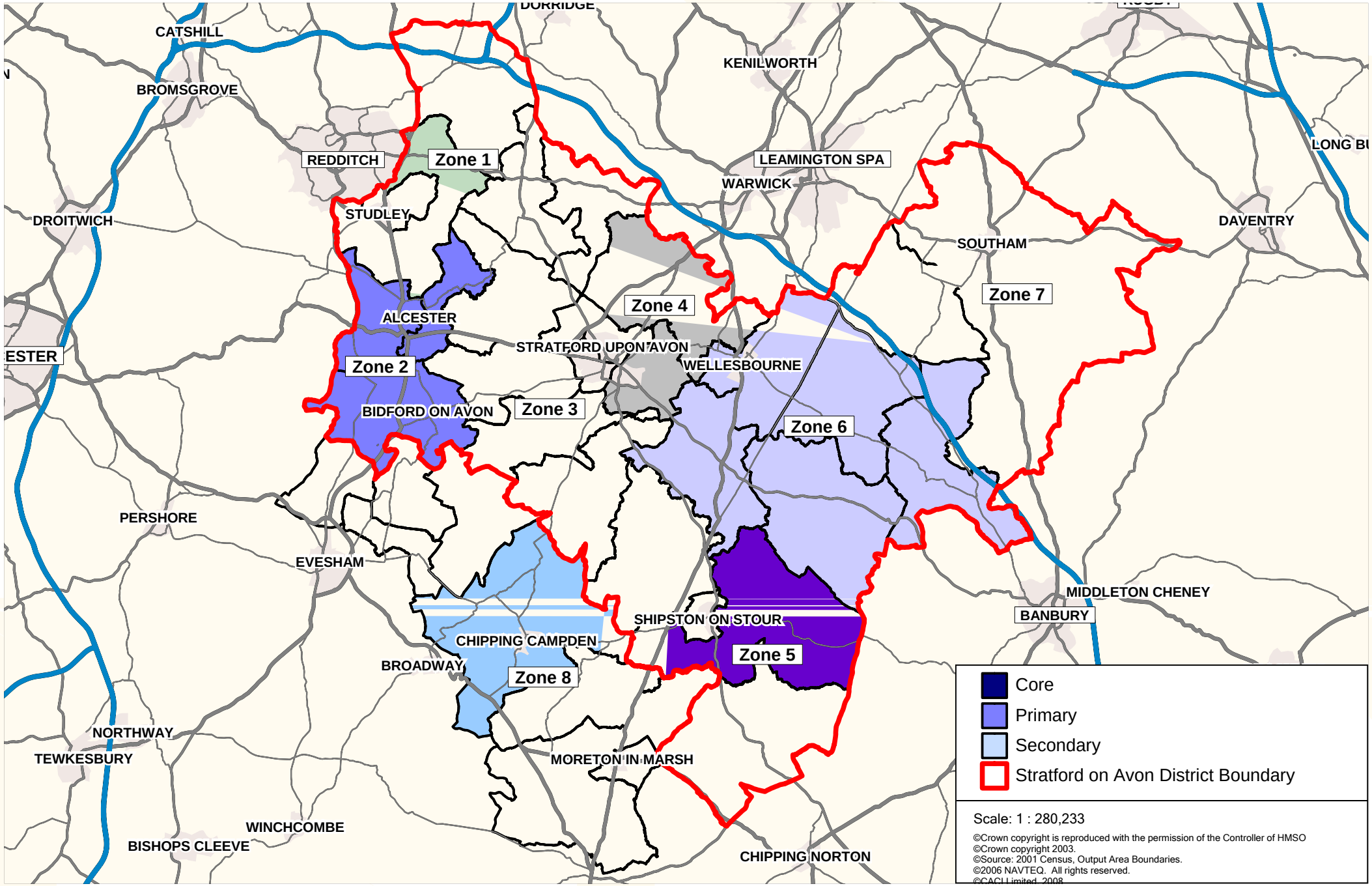


Fig. 4.4. Definition of Alcester Town [illegible] Area: Convenience Goods



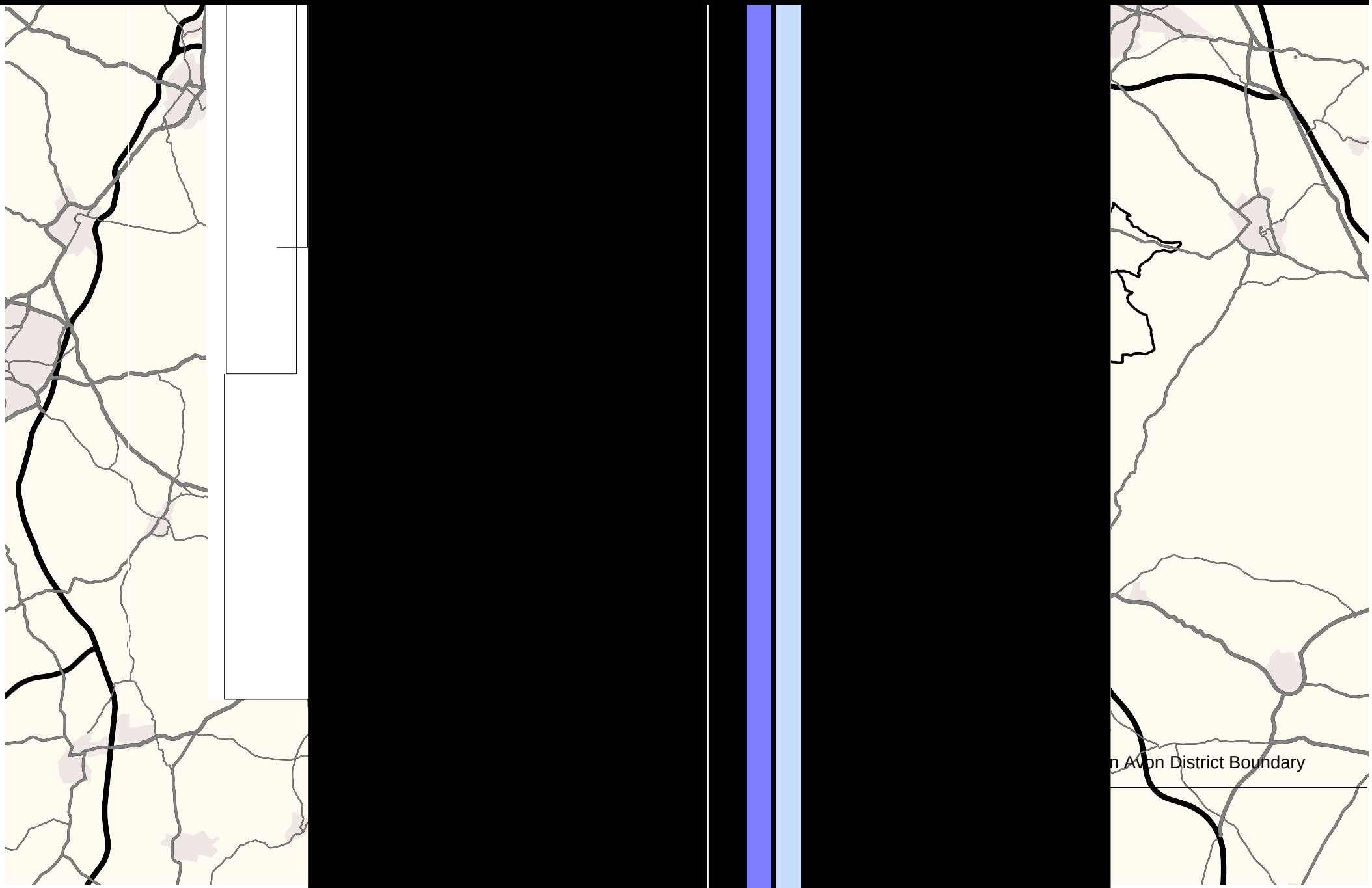
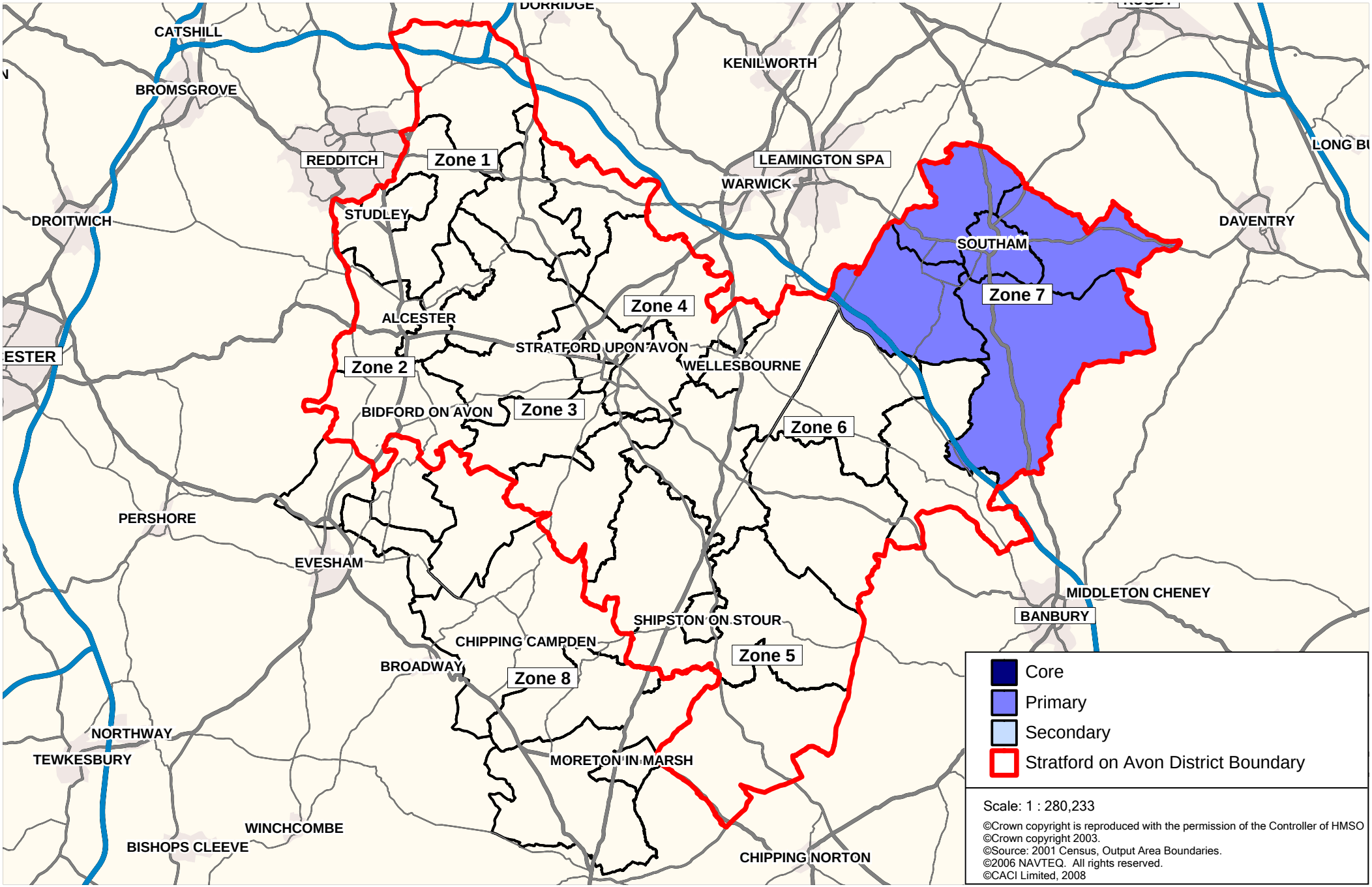

n Avon District Boundary

Fig. 4.6. Definition of Southam Town Catchment Area: Convenience Goods



Town Dominance

4.16 Towns or retail locations which capture the largest single share of available convenience goods expenditure within a zone we describe as being **dominant** within that area. **Figure 4.7** overleaf shows town dominance across our survey area for convenience goods shopping. The map provides a good visual indication of the relative strengths of towns across the survey area.

4.17 Five different towns dominate the convenience goods market, with Stratford-upon-Avon having the largest market share within four of the eight survey zones (zones 2, 3, 4 and 6). Shipston-on-Stour manages to generate the largest market share within its own zone 5, a feat not shared by Alcester (zone 2 is dominated by Stratford-upon-Avon) or Southam (zone 7 is dominated by Royal Leamington Spa). Although zone 8, which is located outside of Stratford-on-Avon District, contributes some expenditure to Stratford-upon-Avon and Shipston-on-Stour, it is nevertheless dominated by Evesham for food shopping. Lastly, although zone 1 lies within Stratford-on-Avon District, the majority of its convenience goods expenditure flows out to Redditch.

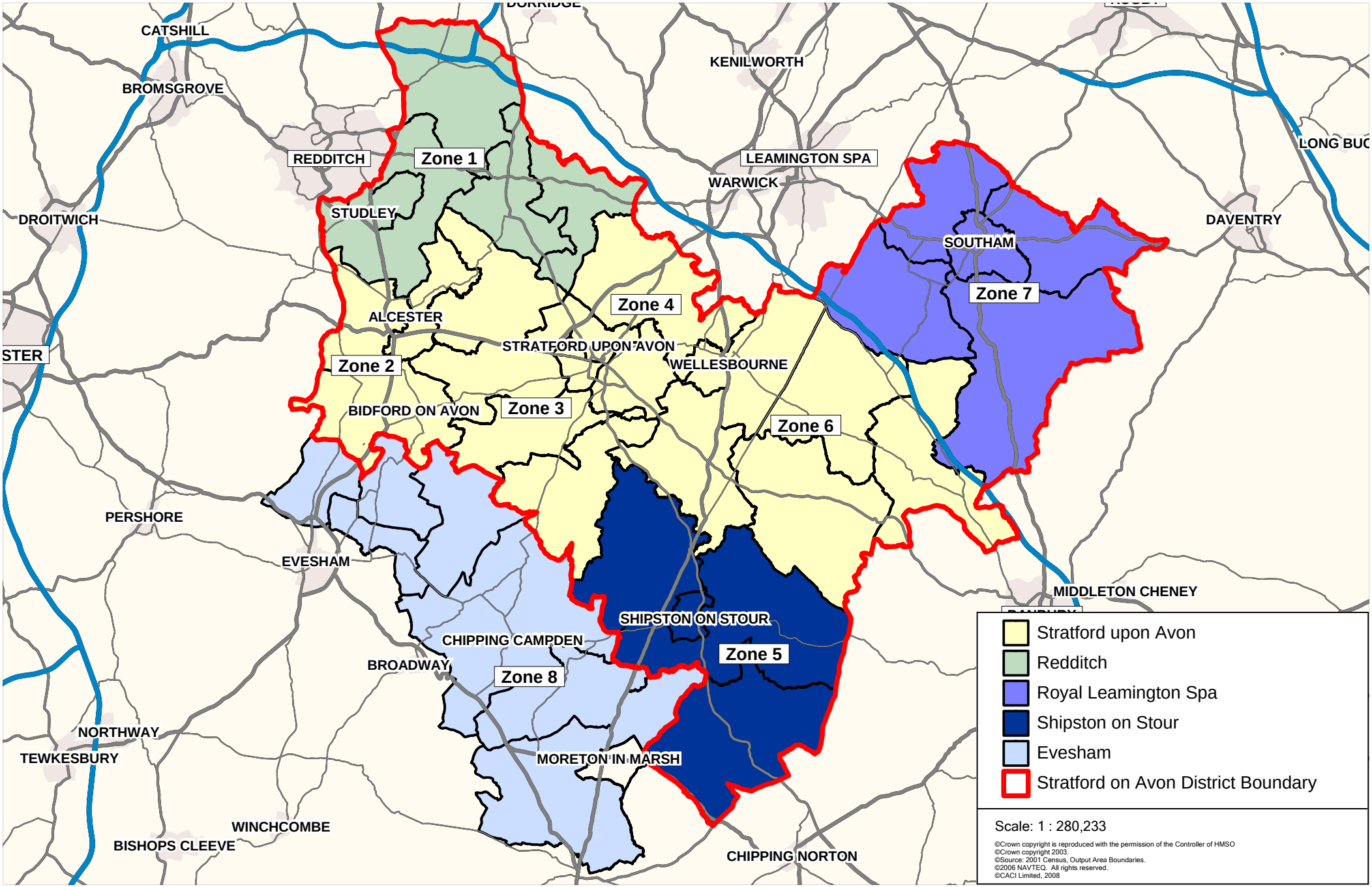
Characteristics of Shopper Behaviour

4.18 Information on shopper characteristics is drawn from the household telephone survey. We present the top-line results here, whilst **Appendix 1C** gives much more detailed findings.

4.19 Some 65% of convenience goods main shopping trips take place during the week (Monday through to Friday) with 56% being carried out during the day and 9% in the evenings. In comparison only 11% are undertaken at weekends, whilst 24% of households vary their pattern of main food shopping.

4.20 The location of a store close to home is the main reason influencing the choice of main food shopping destination in 72% of households. A wide choice of products available is the second ranked reason, but this scored only 7%. Significantly free / ease of parking is mentioned by just 2% of households. The importance of

Fig. 4.7. Town Dominance Map: Convenience Goods Shopping



convenience of location is reflected in the fact that almost half of all main food shopping trips take (on average) 10 minutes or less.

4.21 The most common frequency of carrying out a main food shop is once a week (67% of households), while an additional 26% undertake such trips even more frequently. Only 1% of households do a monthly bulk food shop.

4.22 Around 80% of survey area residents use a private car for their main food shopping (57% as driver), whilst 9% walk, 7% travel by bus and 1% use a taxi.

4.23 On average, some 28% of households in our survey link their main food shopping trip with another form of shopping. The food stores which generate the highest levels of linked trips are generally those located within town centres. The types of shop/service visited most frequently on a linked trip are bank/building society (30%), fashion/clothing store (26%), post office (25%, café/pub/restaurant/takeaway (19%) and chemist (17%).

5.0 FLOORSPACE NEED ASSESSMENT: METHODOLOGY

Objectives

5.1 This section describes our approach to estimating the quantitative need for additional convenience goods floorspace within Stratford-on-Avon District as a whole and its main centres.

5.2 The analysis estimates the amount of over/under-trading at centres in the base year (2008) by comparing actual (survey-based turnovers) against benchmark turnovers and takes any expenditure "surplus" or "shortfall" into account in determining the available headroom expenditure at the forecast years of 2011, 2016, 2021 and 2026. We consider this is a realistic approach, since it reflects the variability in the present retail performance of centres across Stratford-on-Avon District.

5.3 The assessment provides the following information:

- Estimates of total available convenience goods expenditure within the shopping catchment areas of centres within Stratford-on-Avon District at the base year of 2008 and the forecast years of 2011, 2016, 2021 and 2026.

- Estimates of the convenience goods turnover likely to be 'retained' by the centres at each of the forecast years; and

- Estimates of "headroom" expenditure and therefore convenience goods floorspace need within the centres at the forecast years.

5.4 The results of the need assessment will be used by Stratford-on-Avon District Council to help shape and underpin retail policies in the Core Strategy. The results should also assist the Council respond to any emerging food store proposals.

Our Approach

5.5 Our broad approach to estimating the need for (any) additional convenience goods floorspace comprises of seven main steps, which in aggregate cover the three main stages of analysis:

(i) Forecasting consumer demand;
(ii) Forecasting retail supply; and
(iii) The conversion of (any) surplus retail expenditure into a retail floorspace requirement.

5.6 We have sought to provide an analysis that is transparent and which, at the same time, seeks to be robust. The assessment is also presented in a way that enables it to be updated in the future as more up-to-date statistics become available and the emerging pattern of shopping activity becomes more established.

5.7 The quantitative need assessment for convenience goods shopping is supported by a number of tables (spreadsheets) which are reproduced in **Appendix 6B**[1]. In addition, the assessment refers to a number of key assumptions which have already been discussed in Section 3, and are reproduced as **Appendices 1** to **5** inclusive.

Convenience Goods Floorspace Need Assessment

Step 1: Calculate Total Available Expenditure in the Survey Area

5.8 The household survey area is shown in **Figure 3.1** (following page 13) and is defined to encompass the shopping catchment areas of all the main centres in Stratford-on-Avon District. Within this area the quantum of available convenience goods expenditure generated is derived by multiplying (resident) population by average annual expenditure per head (see **Appendix 3B** for the Experian spend per head

[1] **Appendix 6B** sets out the spreadsheets (tables) in relation to our Scenario 1 (as described below). **Appendix 6C** contains the tables for our Scenario 2 (see Section 6).

data). This calculation is carried out for each of the eight zones which comprise the survey area.

5.9 Population estimates by zone and for the survey area as a whole are set out in **Appendix 6B, Table 1**. In addition to estimates for 2008 (the base year), population forecasts for 2011, 2016, 2021 and 2026 are also included.

5.10 **Appendix 6B, Table 2** gives the average annual expenditure per person on convenience goods for residents living in each of the eight zones comprising our survey area. These figures have been obtained from Experian. We have projected the per person expenditure estimates forward to the forecast years of 2011, 2016, 2021 and 2026 by adopting Experian's 2006 – based expenditure forecasts. (see **Appendix 3C**).

5.11 At **Appendix 6B, Table 3** we make deductions to the per person expenditure estimates to account for retail expenditure which does not take place in shops such as that on mail order shopping, door to door salesmen and market and road-side stalls. This form of expenditure also includes e-tailing and is generally known as "special forms of trading" (SFT).

5.12 In presenting expenditure forecasts through to 2026, we are aware that there are currently a number of electronic shopping formats which, should they become widely established, could reduce significantly the proportion of retail expenditure that is now spent in conventional shops. We have reviewed the recently published research on the future growth in e-tailing expenditure (details at paragraphs 3.33 to 3.37 inclusive in Section 3 and at **Appendix 3D**) and concluded that SFT is likely to increase as a proportion of convenience goods retail expenditure over the next five years before levelling off. This important assumption is built into our quantitative need assessment. However, we would stress that this assumption should be reviewed from time to time, since, were it to change significantly, it could have a material impact on future levels of retail floorspace by either reducing or increasing the need for additional shopping provision.

5.13 Our estimates of total available consumer retail expenditure on convenience goods at the base year (2008) are set out in **Appendix 6B**, **Table 4**. Forecasts are also given for the forecast years of 2011, 2016, 2021 and 2026. The increases in available expenditure are due to:-

- The forecast growth in catchment population;
- Real annual increases in consumer convenience goods expenditure per head.

Step 2: Application of "Market Shares" to Determine Amount of Retained Expenditure

5.14 As a consequence of increases in the volume of consumer expenditure per head running in tandem with population growth, we estimate that the "pool" of available expenditure on convenience goods within the survey area will increase (in real terms) by some £44 million between the base year (2008) and the latest forecast year of 2026 (**Appendix 6B, Table 4**).

5.15 However, not all of this growth in consumer expenditure will be spent within Stratford-on-Avon District and is available to support new retail floorspace in its main centres. This is because competitor centres to those within Stratford-on-Avon District also lay claim to the same growing "pool" of expenditure. This requires us to quantify the "market shares" of the centres in Stratford-on-Avon District.

5.16 Existing "market shares" for convenience goods shopping have been derived from the household telephone survey. The survey provides important information on the geographical extent of catchment areas and trade penetration around existing centres by quantifying the pattern and volume of retail expenditure flows from each of our defined zones (where people live and money is generated) to a range of centres and out of centre stores (where people spend their money).

5.17 In addition, and of **critical** importance, our assessment also takes into account the distribution and volume of locally available consumer expenditure (or spending power) so as to ensure that **our retail turnover estimates are balanced against available retail consumer expenditure**.

5.18 The base year (2008) pattern of "market shares" is set out in **Appendix 6B, Table 5**. These market shares have been taken directly from our household telephone survey. The "market shares" are then applied to the 2008 "pools" of available convenience goods expenditure (as set out in **Table 4**). **Appendix 6B, Table 6** gives the monetary amounts of convenience goods expenditure flowing to Stratford-on-Avon District (and its main centres) by zone. The addition of these expenditure totals for each of the eight zones gives the total amount of convenience goods spend flowing to a centre from the survey area. For centres within Stratford-on-Avon District we make allowances (where appropriate) for in-flow expenditure from outside the survey area, including monies originating from visitors/tourists.

Step 3: Determine Whether the Existing Retail Economy is Trading at Equilibrium

5.19 At this stage of the assessment we consider whether the existing convenience goods retail economy of Stratford-on-Avon District (and its main centres) is broadly trading at equilibrium or not. This is important because if the amount of consumer retail expenditure flowing to the area is high in relation to the stock of available retail floorspace and this appears to be causing problems to retailers and / or shoppers, then the area's retail offer may be described as over-trading. Conversely, if the expenditure flows are low relative to available retail floorspace, then this can result in under-trading of the retail offer. PPS 6 (at paragraph 2.36) states that over-trading may be taken into account in assessing the need for additional retail floorspace.

5.20 If over-trading is occurring in an area (or centre) then it is commonly assumed that the turnover in excess of the equilibrium position is potentially available to support new shopping provision. If this occurs, then this element of expenditure should be added to the headroom expenditure which we later estimate from the future growth in the retail economy. Conversely, if an area (or centre) is under-trading at present, then it is also logical to deduct the amount of turnover shortfall relative to the equilibrium position from the defined headroom expenditures associated with the future growth in the retail economy.

5.21 The problem with this kind of analysis is determining whether an area (or centre) is trading in equilibrium or not. There are two principal difficulties. First, retailers need to achieve a certain trading level to be viable. However, this trading level varies substantially for individual retailers and for the same retailers for different centres across the UK, reflecting differences in type of business, profit margins, site, costs (eg. rents), size, financial structure and other factors. Without detailed financial data on all individual traders in an area it is virtually impossible to determine what the average equilibrium trading level is. The second major difficulty is that even if it can be proven that an area is trading above its retail equilibrium position, this does not automatically mean that problems associated with over-trading occur; these may include retailer operating difficulties, in-store congestion, over-busy streets leading to pedestrian safety and security problems, and congested car parks.

5.22 In estimating whether the Stratford-on-Avon District retail economy (and its centres) is in retail equilibrium at present in relation to convenience goods shopping, we have been handicapped by the unavailability of sales floorspace and trading data on individual shops in each centre. Nevertheless, we have attempted to be as robust as possible, since material conditions of over or under-trading in the base year do suggest there is an under or over-supply of retail floorspace already. In theory, in order to provide an accurate "benchmark" average sales density for a centre, one would require knowledge of the appropriate sales per square metre of each shop comprising the centre. Since this information is not available, we must derive broad estimates based on a range of criteria including:-

- Published company average sales per sq m for individual retailers;
- The breadth and depth of retailers in a centre;
- The number of multiple traders present; and
- The size of a centre (retail floorspace) and its position in the retail hierarchy.

5.23 Our benchmark convenience goods turnover estimates for existing centres within Stratford-on-Avon District are set out at **Appendix 6B, Table 6**[1]. We assume that the smaller centres (other centres/stores) are currently trading at retail equilibrium levels.

[1] The derivation of the benchmark turnover sales densities is set out in full in **Appendix 5B**.

5.24 For convenience goods shopping, the results of the household telephone survey suggest that existing floorspace in Stratford-on-Avon District as a whole is currently trading at close to retail equilibrium level. This indicates that the overall actual turnover closely matches that which is required by retailers in the area to achieve "benchmark" sales levels. At a town level, however, there are some material differences. Stratford-upon-Avon appears to be trading at close to retail equilibrium, whilst the survey suggests there is some over-trading at Shipston-on-Stour and Southam. Lastly, Alcester appears to be under-trading, being hit by major flows of convenience goods expenditure not only to Redditch and Evesham (outside of the District), but also to nearby Stratford-upon-Avon.

5.25 At **Appendix 6B, Table 7** some of the market shares are adjusted to reflect the potential which we believe exists in the future for each of the rural market towns to retain a much higher proportion of locally generated convenience goods expenditure than currently. Thus we assume expenditure leakage from each town's own zone to competing centres (including Stratford-upon-Avon) will reduce. This aim is consistent with the retail planning policy aspirations for these centres and, of course, is also in line with sustainability objectives by reducing the need for people to travel to carry out their food shopping. Similarly, we adjust Stratford-upon-Avon's market share in zones 1 and 6 to reflect the potential which exists for the town to attract more expenditure from these areas and to reduce expenditure leakage outside of the District. We comment further on the market share adjustments in Section 7, when we set out our overall conclusions and recommendations to the Council.

Step 4: Calculate Growth in Retained Expenditure through to the Forecast Years

5.26 Having determined the base year (2008) "market shares" and levels of retained convenience goods expenditure within Stratford-on-Avon District as a whole and its constituent centres, we use the principle of market shares to calculate how much more spending or trade Stratford-on-Avon District (and its main centres) could expect to attract in the future as a result of the forecast growth in available catchment area expenditure.

5.27 For each of the forecast years we apply the adjusted market shares set out in **Appendix 6B, Table 7** to the increased "pools" of available expenditure in each zone. The calculations for the forecast years of 2011, 2016, 2021 and 2026 are set out in **Appendix 6B, Tables 8, 11, 14 and 17** respectively. Due to the increase in demand (as a result of population growth and rising consumer expenditure per head, plus the effect of adjusting some of the market shares) the assessment produces at 2011 higher retail turnover potentials for Stratford-on-Avon District and its constituent centres than in the base year (2008). Similarly, the turnover potentials are even higher for the forecast years of 2016, 2021 and 2026.

Step 5: Determine Level of Potential Headroom Expenditure at the Forecast Years

5.28 It would be wrong to assume that all of the increase in turnover potential within Stratford-on-Avon District (and its main centres) will be available by the forecast year(s) to support additional convenience goods shopping. This is because some of the forecast growth in expenditure must be allocated to existing retailers because the evidence confirms that they increase their sales productivities in real terms over time.

5.29 In **Appendix 6B, Table 9** the turnover allocation for existing retailers is deducted from the 2011 turnover potential for Stratford-on-Avon District as a whole and each centre. This calculation produces an estimate of residual turnover potential for each centre and for Stratford-on-Avon District. The base year (2008) turnovers are then subtracted from the 2011 residual turnovers to determine the quantum of potential headroom expenditure available in 2011 in each centre and for Stratford-on-Avon District as a whole. A similar analysis is carried out in relation to convenience goods for the forecast years of 2016, 2021 and 2026 in **Tables 12**, **15** and **18** respectively.

Step 6: Determine Level of Residual Headroom Expenditure at the Forecast Years

5.30 **Appendix 6B, Table 10** sets out our calculations to estimate the residual headroom expenditure for Stratford-on-Avon District (and its main centres) at the forecast year

of 2011 for convenience goods floorspace. The same assessment is carried out for the forecast years of 2016, 2021 and 2026 in **Tables 13, 16** and **19** respectively.

5.31 The first stage is to adjust the potential headroom expenditures calculated for 2011 by taking into account the extent (if any) of any over or under-trading that is occurring at each centre and in Stratford-on-Avon District as a whole at the base year (2008). This is necessary because the headroom expenditures set out so far assume that each centre and a Stratford-on-Avon District is a whole are currently trading in retail equilibrium. We have already commented upon the fact that this assumption may be viewed as unlikely.

5.32 Despite the difficulties of determining the extent of any over or under-trading within Stratford-on-Avon District and its main centres, we consider that including such estimates makes our quantitative need assessment more reliable and robust than ignoring them. Therefore, we use the over/under-trading estimates determined at **Appendix 6B, Table 6** to **"adjust"** our headroom expenditure totals. In practice, if an area (or centre) is estimated to be under-trading at the present time, this will reduce the quantum of headroom expenditure at the forecast year(s) since some of the growth in expenditure should be set-aside to bring the existing retail stock up to a retail equilibrium trading position. Alternatively, if an area or centre is over-trading, this will increase the quantum of headroom expenditure at the forecast year(s) since the 'surplus' sales are assumed to be available to support additional retail floorspace. **Table 10** sets out our calculation for making this adjustment to the 2011 headroom expenditures for convenience goods. **Tables 13, 16** and **19** repeat the calculations for the forecast years of 2016, 2021 and 2026.

5.33 At this stage, in order to convert the adjusted headroom expenditures into residual headroom expenditures at the forecast years of 2011, 2016, 2021 and 2026, we make further (if applicable) deductions to account for that quantum of retail expenditure which is likely to be soaked up by retail floorspace commitments and proposals within Stratford-on-Avon District (commitments are retail developments in the pipeline, which are either under construction or have planning consent, whilst proposals are submitted applications which have yet to be determined).

5.34 From information supplied to us by the District Council, we have produced a schedule of retail commitments and proposals within Stratford-on Avon District. The schedule is reproduced in **Appendix 5C**. This schedule also gives our estimates of the retail turnovers of each commitment and proposal for each of the forecast years. These turnovers are then deducted from the adjusted headroom expenditure totals for each centre as appropriate. This calculation is set out in **Appendix 6B**, **Tables 10,13,16** and **19** for the forecast years of 2011, 2016, 2022 and 2026 respectively.

5.35 The residual headroom expenditure totals for Stratford-on-Avon as a whole and its main centres at the forecast years of 2011, 2016, 2021 and 2026 are summarised in **Appendix 6B, Tables 10,13, 16** and **19** respectively.

5.36 In our view these residual headroom expenditure totals are important because they provide an estimate of the amount of potential turnover which will be available to Stratford-on-Avon District as a whole and each of its main centres by 2011, 2016 and 2021 and 2026. In Section 6, we set out the last step of the assessment, which is to convert these residual headroom expenditures into requirements for additional convenience goods floorspace. The output of this last step involves the application of average sales densities. However, in practice, the quantum of floorspace need will depend on the actual sales densities of the operators taking up the space, since levels of sales per sq m vary considerably between different retailers. Accordingly, we provide 'high', 'mid' and 'low' scenarios in respect of the application of sales densities, in order that their variation on the scale of the floorspace need may be determined. It is as a result of this wide divergence in retailer store productivities that we recommend that appropriate weight is attached to the **residual headroom expenditure** totals.

Summary

5.37 The purpose of this section has been to assess in quantitative terms the likely retail expenditure capacity for additional convenience goods floorspace within Stratford-on-Avon District and its main centres through to 2026. It must be stressed, however, that any quantitative analysis over such a long time-period (18 years from the base year of 2008) may be subject to a significant margin of error, particularly in the later years,

since it is based on a number of assumptions which are difficult to forecast accurately. In addition, there are two further key assumptions which have a material bearing on the forecast levels of residual headroom expenditure. These are as follows:

- **Special Forms of Trading** – we have assumed Experian's 'central case' forecast for the growth in non-store retail sales through to 2016. Thereafter, we have assumed no further increase in the proportion of consumer convenience spend by SFT. However, if the actual growth was to exceed these rates, then the projected levels of retail floorspace need would be **less** than those forecast in this report. Alternatively, if SFT growth was less than we have forecast, then the quantums of floorspace need will be **more** than those set out in this report.

- **Over / Under Trading at the Base Year** - our household survey results indicate that Stratford-on-Avon District as a whole is currently trading at close to a retail equilibrium level for convenience goods shopping, although some towns are over/under-trading. These results have been taken into account in our quantitative floorspace need assessment. Clearly if we have over-estimated the amount of over-trading, for example, the retail expenditure capacity estimates will be lower than those set out above; conversely, if we have under-estimated the amount of over-trading the capacity estimates will be higher.

6.0 FLOORSPACE NEED ASSESSMENT: RESULTS

6.1 In this section, we present the results of our assessment of the need for additional convenience goods floorspace within Stratford-on-Avon District as a whole and the constituent towns of Stratford-upon-Avon, Alcester, Shipston-on-Stour and Southam. Our results are presented under two alternative scenarios as follows:-

- **Scenario 1:** we adjust the current (base year) market shares generated by the household telephone survey to reflect what we consider to be appropriate retail planning aspirations for the three rural market towns – in other words, we increase their market shares to realistic levels, which reflect much higher levels of locally retained expenditure consistent with PPS 6 advice on market towns (paragraph 2.60) and the Government's overall sustainability objective to reduce the need for people to travel over long distances for their food shopping. The market shares of Stratford-upon-Avon are also increased in zones 1 and 6 to reflect the potential which exists in these areas to clawback expenditure that currently leaks out of the District.

  This is our recommended forward strategy, although we recognise it is far from easy to develop appropriately sized new food stores within the rural market towns. We return to this important issue later in this section.

- **Scenario 2:** we do not adjust the current (base year) market shares - thus we assume that the existing relative strengths and attractions of centres will continue unchanged through to 2026. Under this scenario, the three rural market towns will continue to leak high volumes of locally generated expenditure to more distant towns, whilst Stratford-on-Avon District as a whole will also continue to leak 38% of its convenience goods spend to centres/stores in surrounding areas.

6.2 Under each scenario, we estimate for each of the forecast years the need for (any) additional convenience goods floorspace assuming 'low', 'mid' and 'high' average sales densities for converting available headroom expenditure into floorspace

requirements (see paragraph 3.44 in Section 3). Our 'central case' assumption is the middle sales density equating to £7,500 psm net in the base year (2008).

The District-Wide Convenience Goods Retail Economy

6.3 The household telephone survey indicates that the existing convenience goods floorspace within the District is currently trading at a retail equilibrium level, with actual sales very close to benchmark turnover. However, the survey also reveals that £71 million of the District's available convenience goods spend of £189 million is currently leaking out to centres/stores outside the area. Thus the District is retaining just 62% of its available convenience goods expenditure in 2008. In our view, this is a relatively low proportion for food shopping, which is normally undertaken locally.

6.4 Therefore 38% of the convenience goods spend generated by Stratford-on-Avon District's residents is currently spent at centres in other Districts, mainly at major superstores in Banbury, Evesham, Redditch, Royal Leamington Spa and Warwick. This pattern of shopping is not sustainable, in our view, with many residents currently driving over relatively long distances to do their main food shopping. There is clearly the potential to plan for new food store provision within the District in a manner that is more consistent with the Government's key sustainability objectives of minimising reliance on the car for shopping and reducing the number and length of car journeys.

6.5 Having said this, the population of Stratford-on-Avon District is not huge (just 115,600 in 2008) and these people generate a relatively limited amount of annual spend on convenience goods. Moreover, the growth in the District's population is expected to be no more than 8,800 over the next 18 years (based on current dwelling requirements). Therefore, although the current development of food store commitments within Stratford-upon-Avon should lead to a small reduction in expenditure leakage, the limit to the 'pool' of available spend even by 2026 (the end date of the Core Strategy) means that careful attention should be placed on the number and location of any further new stores.

6.6 The underlying thesis of our **scenario 1** – adjusting the base year market shares – is that Stratford-on-Avon District's overall level of expenditure retention for convenience

goods shopping should increase in line with the Government's commitment to sustainability, and that this goal is best achieved by increasing the target market shares for each of the three rural market towns which are located towards the edge of the District and by increasing Stratford-upon-Avon's target market share in zones 1 and 6. The scale of the increase that is realistic to plan for is determined by the geographic shape of the District and the proximity of competing centres. **Figure 6.1** and **Table 6.1** overleaf confirm that many areas of Stratford-on-Avon District closely abut major centres/stores located in other Districts, such as Banbury, Evesham, Royal Leamington Spa, Redditch and Warwick. Thus it is unreasonable to plan for excessively high levels of expenditure retention, since the locations of centres/stores will always attract a significant number of trips out of the District for food shopping.

6.7 Accordingly, we have adjusted upwards the expenditure market shares of the three rural market towns and Stratford-upon-Avon, which taken together increase the District's overall level of spend retention for convenience goods shopping by 19% points. This uplift from the current 62% rate to 81% reflects what we consider to be an appropriate, realistic and achievable target in planning terms.

6.8 The adjustments to the market shares are set out in **Appendix 6B, Table 7**. These directly impact on the need for additional convenience goods floorspace within Stratford-on-Avon District at each of the forecast years. The effects of the adjustments are two-fold:-

- by increasing the District's overall retention rate, we increase the total requirement for additional convenience goods retailing provision in the District as a whole;

- by adjusting the market shares for individual towns within the District, as part of the process, we seek to allocate the available spend to centres in order to better reflect the Government's sustainability objectives and regional/local planning policy to provide food shopping facilities on a more localised basis to further reduce the need to travel by car. The adjustments for individual towns are described below in the relevant sections.

Fig. 6.1. Stratford on Avon District: Location of Major Competitor Food Stores

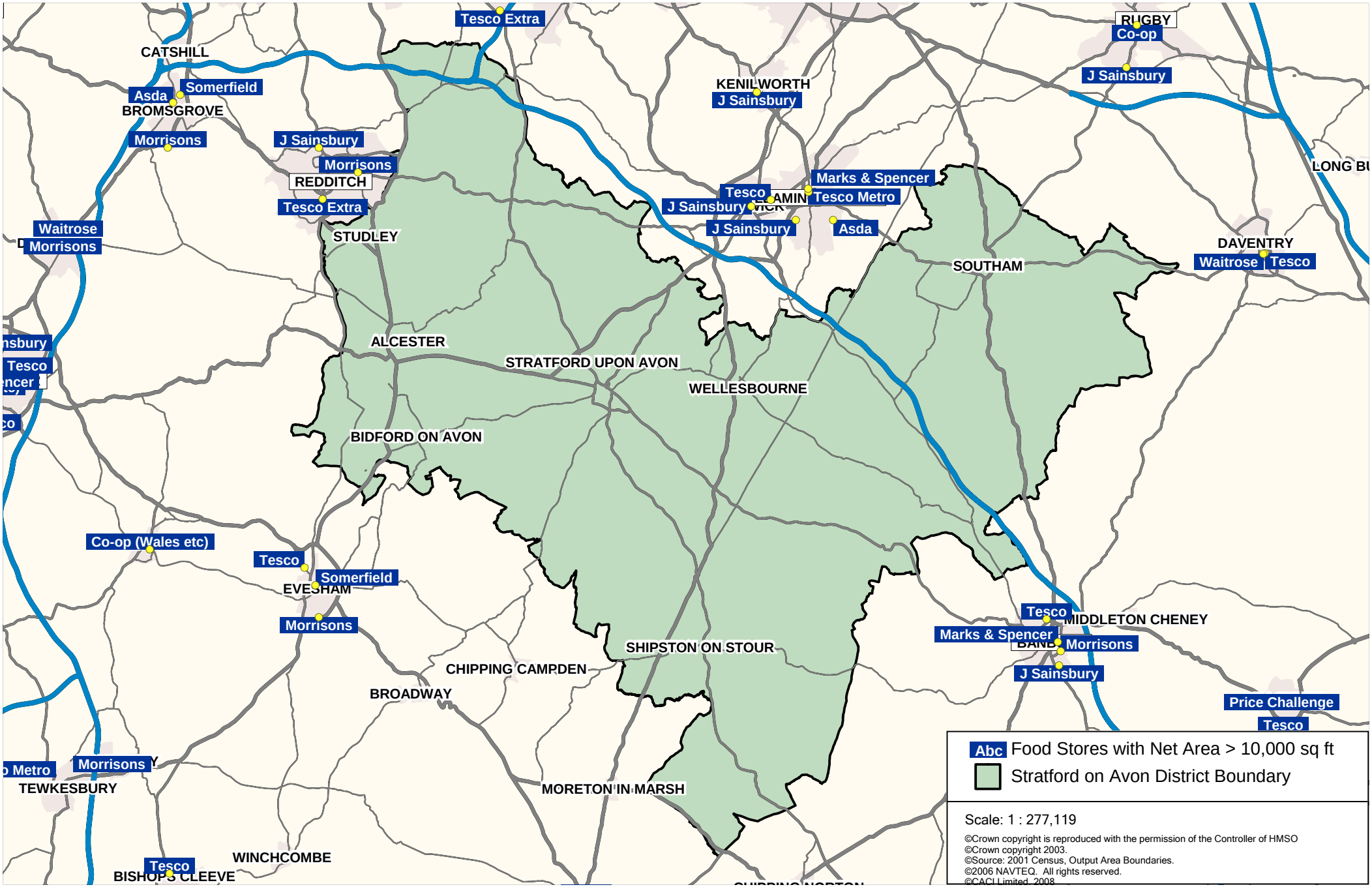


Table 6.1. Details of Major Competitor Food Stores (those shown in Fig. 6.1)

FASCIA	TOWN	GROSS AREA SQ FT	NET AREA SQ FT
Tesco	Banbury	67,500	50,246
J Sainsbury	Banbury	67,159	44,637
Morrisons	Banbury	72,598	32,683
Marks & Spencer	Banbury	47,300	10,379
Tesco	Bishops Cleeve	18,120	16,741
Asda	Bromsgrove	58,660	35,579
Morrisons	Bromsgrove	56,950	27,990
Somerfield	Bromsgrove	14,000	10,500
Tesco	Daventry	47,031	30,518
Waitrose	Daventry	-	20,787
Tesco	Evesham	73,255	47,574
Morrisons	Evesham	45,000	27,900
Somerfield	Evesham	21,027	12,464
J Sainsbury	Kenilworth	28,460	16,506
J Sainsbury	Leamington Spa	75,752	54,080
Asda	Leamington Spa	64,300	46,313
Marks & Spencer	Leamington Spa	52,200	31,800
Tesco Metro	Leamington Spa	38,880	19,246
Co-op (Wales etc)	Pershore	19,500	16,210
Tesco Extra	Redditch	119,078	79,734
J Sainsbury	Redditch	79,985	46,160
Morrisons	Redditch	58,500	31,500
J Sainsbury	Rugby	84,381	51,534
Co-op	Rugby	50,000	42,000
Tesco Extra	Solihull	73,787	49,423
Tesco	Warwick	65,571	45,641
J Sainsbury	Warwick	54,339	28,707

***Source**: Institute of Grocery Distribution, 2008*

6.9 Under Scenario 1, the quantum of additional convenience goods floorspace within Stratford-on-Avon District as a whole at each of the forecast years and for differing assumptions regarding sales densities are as set out in **Table 6.2**.

Table 6.2 Additional Convenience Goods Floorspace Need: Stratford-on-Avon District (Scenario 1)

Forecast Year	Floorspace Need (sq m net)		
	Low Sales Density	Mid Sales Density	High Sales Density
2011	**4,840**	**3,230**	**2,420**
2016	**5,510**	**3,670**	**2,760**
2021	**6,470**	**4,310**	**3,240**
2026	**7,400**	**4,930**	**3,700**

6.10 We therefore conclude (under Scenario 1) that by 2026 (the end date for the Core Strategy), there will be a need to provide for between 3,700 and 7,400 sq m net of additional convenience goods floorspace within Stratford-on-Avon District; the actual level being dependent on the likely sales densities of the operators taking up the space. This equates to a c. 5,700 to 11,400 sq m gross, assuming a net to gross ratio of 65:100. These totals also reflect the distribution of additional floorspace need between the towns as set out below. If the Council were to plan for different levels of need across the District's main towns, then this would have an impact on the overall quantum of need within the District as a whole.

6.11 For our Scenario 2, which assumes constant market shares and therefore no clawback of expenditure from outside of the District, **Table 6.3** overleaf summarises the floorspace need results for Stratford-on-Avon District as a whole through to 2026.

Table 6.3 Additional Convenience Goods Floorspace Need: Stratford-on-Avon District (Scenario 2)

Forecast Year	Floorspace Need (sq m net)		
	Low Sales Density	Mid Sales Density	High Sales Density
2011	- 2460	- 1,640	- 1, 230
2016	- 1,940	- 1,300	- 970
2021	- 1,210	- 800	- 600
2026	- 470	- 310	- 240

6.12 Without the benefit of expenditure clawback, it is clear that after taking into account current retail commitments and proposals (listed in **Appendix 5C**), there is no material need for any additional convenience goods shopping floorspace in the District until beyond 2026.

6.13 The floorspace need requirements set out in **Tables 6.2** and **6.3** assume that all existing convenience goods floorspace in the District continues to trade through to 2026 at viable levels of turnover. In practice, some of the existing convenience goods floorspace stock may naturally fall out of retail use (eg. from relocations, retirements or end of lease etc.) and/or the Council may accept some loss of shops as a result of impact from new store developments. There may also be a dilution of turnover efficiency from a potential over-supply of convenience goods floorspace. All of these factors (if they occur and are considered to be acceptable to the Council) may lift the need for new floorspace above the levels set out in **Tables 6.2 and 6.3**.

Stratford-upon-Avon

6.14 There is an estimated 10,809 sq m net of convenience goods floorspace currently trading in Stratford-upon-Avon generating an estimated (actual) turnover of £107.21 million (**Appendix 6B, Table 6**). This equates to an average sales density of £9,919 psm net, which, in our view, is close to a retail equilibrium level.

6.15 The map at **Appendix 5A** shows the location of the 23 convenience goods shops in the town centre. Together these stores occupy some 3,474 sq m net of floorspace. The key occupiers are a Somerfield, Marks and Spencer Food Hall and a Co-op. Many of the specialist food shops sell items that are aimed at the lucrative visitor/tourist market.

6.16 There are currently two large superstores trading out of centre – a Tesco and a Morrisons. We estimate these two stores together offer some 7,335 sq m net of convenience goods floorspace, which means that around two-thirds of Stratford-upon-Avon's food retail offer is located out of centre.

6.17 Earlier this year, a proposed Marks and Spencer Simply Food Store was granted planning consent on an extension to the Maybird Retail Park. This store will have a convenience goods sales area of 743 sq m net. In addition, a 500 sq m gross Sainsburys Local convenience store is currently being created in a sub-division of the Woolworth store in the town centre, whilst Aldi have submitted an application to develop a 1,500 sq m gross discount food store on the Birmingham Road. All three stores are therefore included in our floorspace need assessment as retail commitments/proposals, although it should not be assumed that Aldi will be granted planning permission.

6.18 The household telephone survey indicates that the three rural market towns of Alcester, Shipston-on-Stour and Southam currently retain relatively low proportions of locally generated convenience goods expenditure. In our view, each offers considerable opportunity to clawback trade that currently leaks out to competitor centres. This would mean more people shopping locally and lead to a reduction in the number of car journeys in line with the Government's sustainability agenda. In practice, this clawback of trade will lead to a reduction of expenditure leaking out of Stratford-on-Avon District, but will also lead to a reduction in the amount of spend generated by the residents of these three towns flowing to Stratford-upon-Avon. As a partial counterbalance to this loss of spend, we increase Stratford-upon-Avon's market shares in zones 1 and 6, since we believe there is scope to reduce the

amount of expenditure leakage from these areas to centres/stores outside of the District.

6.19 The household survey also indicates that Stratford-upon-Avon is already retaining 94% of available convenience goods expenditure within zones 3 and 4, which covers the town and its immediate shopping household. We do not consider there is any further scope to increase this level of retention, since some spend will always leak out to other centres on the back of work and comparison goods shopping trips. In addition, given the close proximity of Warwick and Royal Leamington Spa to the north east, and their extensive existing food retailing offers, we do not consider there is scope to materially increase in-flow spend from this area.

6.20 The effect of making these adjustments to the target market shares is that Stratford-upon-Avon's overall market share of available convenience goods expenditure in the District will fall a little. Our assessment indicates that Stratford-upon-Avon's market share of spend will decrease from 43% now (2008) to 42% by 2011.

6.21 In terms of qualitative need, we consider that Stratford-upon-Avon already offers a comparatively wide range of food store operators and convenience goods from a choice of out-of-centre superstores and numerous town centre top-up convenience shops and food specialists. The only potential 'gap' in the offer appears to be for a food discounter, which we have assumed would be filled adequately by the current Aldi proposal on Birmingham Road, should it go ahead.

6.22 Reflecting these many quantitative and qualitative assumptions, our estimates under Scenario 1 of the need for additional convenience goods floorspace in Stratford-upon-Avon are set out in **Table 6.4** overleaf.

Table 6.4 Additional Convenience Goods Floorspace Need in Stratford-upon-Avon (Scenario 1)

Forecast Year	Florspace Need (sq m net)		
	Low Sales Density	Mid Sales Density	High Sales Density
2011	- 2,930	- 1,950	- 1,460
2016	- 2,560	- 1,710	- 1,280
2021	- 2,030	- 1,360	- 1,020
2026	- 1,510	- 1,000	- 750

***Note**: Figures assume the Aldi application on the Birmingham Road is approved/will proceed to be developed.*

6.23 The assessment therefore indicates that there is no material need for any additional convenience goods floorspace (beyond commitments) in Stratford-upon-Avon until beyond 2026. Although the figures show a significant over-supply in the early years, this assumes that the three rural market towns will have already benefited from new food store provision.

6.24 For Scenario 2 (constant market shares), the floorspace need figures for Stratford-upon-Avon are set out in **Table 6.5.**

Table 6.5 Additional Convenience Goods Floorspace Need in Stratford-upon-Avon (Scenario 2)

Forecast Year	Florspace Need (sq m net)		
	Low Sales Density	Mid Sales Density	High Sales Density
2011	- 2,790	- 1,860	- 1,390
2016	- 2,420	- 1,610	- 1,210
2021	- 1,880	- 1,260	- 940
2026	- 1,350	- 900	- 680

6.25 The levels of potential future over-supply of convenience goods floorspace in the town are marginally less than for Scenario 1, because adopting a constant market share produces a slightly higher total of available headroom expenditure pre-commitments. However, it is clearly evident that no further significant provision of convenience goods floorspace is necessary or appropriate in Stratford-upon-Avon even under Scenario 2.

Alcester

6.26 On our estimates there is currently 1,757 sq m net convenience goods floorspace in Alcester generating (actual) sales of £7.8 million. This is equivalent to an average sales density of just £4,423 psm net, which suggests the town's food retailing offer is under-trading (**Appendix 6B**, **Table 6**). The survey suggests this is because of major expenditure leakage not only outside of the District to Redditich and Evesham, but also to nearby Stratford-upon-Avon. In fact, almost 40% of the available convenience goods spend within Alcester's own zone 2 flows to Stratford-upon-Avon. In comparison, Stratford-upon-Avon captures just 28% of available expenditure within Shipston-on-Stour's zone 5 and no spend at all from Southam's zone 7.

6.27 The map at **Appendix 5A** shows the location of the seven convenience goods shops in Alcester town centre. The anchor trader is Somerfield with an estimated sales area of 780 sq m, which accounts for just over half of the town centre convenience goods floorspace (**Appendix 5B**). Out of centre there is also small Tesco Express with an estimated floor area of 289 sq m net. We understand there are currently no convenience goods retail commitments in Alcester.

6.28 The household survey indicates that Alcester is retaining just 27% of the convenience goods expenditure generated within its own zone 2. Thus almost three-quarters is flowing to other centres, including 3% to nearby Bidford-on-Avon. Around half of the spend is leaking out to Stratford-upon-Avon (mainly to Tesco and Morrisons), whilst most of the balance flows to Redditch (Tesco Extra and Sainsburys) and Evesham (Tesco) (**Appendix 1D**). Clearly, there is considerable potential for Alcester to

improve its retention rate, which would mean many fewer car journeys being made to Evesham, Redditch and Stratford-upon-Avon for main food shopping.

6.29 We believe that a maximum retention rate of 70% could be achievable for Alcester, since this would still allow for a realistic leakage of 30% of available spend to other centres. This adjustment to Alcester's market share is set out in **Appendix 6B**, **Table 7**. Since the market shares for any zone must continue to sum to 100%, because we have adjusted upwards Alcester's from a current low of 27% to a target of 70%, we have had to adjust downwards the market shares for Stratford-upon-Avon and centres located outside of Stratford-on-Avon District. The effect of increasing Alcester's target market share in zone 2 to 70% will be to produce a higher total of quantitative need for additional convenience goods floorspace in the town in the future.

6.30 In terms of qualitative need, we consider there is scope for extending retail choice to the residents of Alcester and the surrounding hinterland, since the current main food offer consists of just a small Somerfield and even this store is being used extensively for top-up food shopping.

6.31 Reflecting the quantitative and qualitative considerations described above, our estimates of the need for additional convenience goods floorspace in Alcester under our Scenario 1 are set out in **Table 6.6.**

Table 6.6 Additional Convenience Goods Floorspace Need in Alcester (Scenario 1)

Forecast Year	Florspace Need (sq m net)		
	Low Sales Density	Mid Sales Density	High Sales Density
2011	**1,940**	**1,290**	**970**
2016	**2,020**	**1,350**	**1,010**
2021	**2,140**	**1,360**	**1,020**
2026	**2,240**	**1,490**	**1,120**

6.32 We conclude that there is potentially a need for a new main food store in Alcester of between 1,120 sq m net and 2,240 sq m net by 2026. This equates to a store of c.1,700 to 3,500 sq m gross. The actual size of store required will depend on the sales density of the operator taking up the space.

6.33 If we assume that Alcester's market share of available expenditure continues at its current level (our Scenario 2), then the levels of floorspace need will be as set out in **Table 6.7**.

Table 6.7 Additional Convenience Goods Floorspace Need in Alcester (Scenario 2)

Forecast Year	Florspace Need (sq m net)		
	Low Sales Density	Mid Sales Density	High Sales Density
2011	**- 410**	**- 270**	**- 200**
2016	**- 380**	**- 250**	**- 190**
2021	**- 340**	**- 230**	**- 170**
2026	**- 300**	**- 300**	**- 150**

6.34 Under this Scenario, there will be no need to plan for any additional convenience goods floorspace in Alcester through to 2026. As a result, many main food shopping trips will continue to be made to Stratford-upon-Avon and centres outside of the District such as Redditch and Evesham.

Shipston-on-Stour

6.35 We estimate there is currently 1,246 sq m net of convenience goods floorspace trading in Shipston-on-Stour generating (actual) sales of £8.5 million. This equates to an average sales density of £6,882 psm net, which is indicative of a relatively substantial level of over-trading (see **Appendix 6B, Table 6**).

6.36 The map at **Appendix 5A** shows the location of the nine convenience goods shops trading in the town centre. The key food stores are Somerfield and Co-op, but with estimated sales areas of just 325 sq m net and 260 sq m net respectively these units are relatively small. Unlike at Alcester, there are no further food shops located out of centre in Shipston-on-Stour.

6.37 The results of the household survey indicate that the town is currently retaining 39% of the available convenience goods spend in its own zone 5. Thus 61% of spend is currently leaking out of the local area with Stratford-upon-Avon attracting a market share of 28% and the balance of 53% flowing outside of the District, mainly to the Tesco and Morrisons at Banbury, and the Tesco at Stow-on-the-Wold (**Appendix 1D**). We believe there is considerable scope for Shipston-on-Stour to improve its market share from its current level. Given the 'stand alone' location of the town, away from close competitors, we consider a target market share of 75% is likely to be achievable – slightly higher than the 70% we have assumed for Alcester.

6.38 The adjustment to Shipston-on-Stour's market share is set out in **Appendix 6B, Table 7**. As a result of increasing Shipston-on-Stour's market share, we reduce those for Stratford-upon-Avon and centres outside of the District in order that all market shares for zone 5 continue to sum to 100%. Under Scenario 1, we therefore assume that Shipston-on-Stour has the potential to retain three-quarters of its available expenditure with much less leakage to Stratford-upon-Avon and to centres outside of the District. This assumption therefore increases the <u>quantitative</u> need for additional convenience goods floorspace in the town.

6.39 We also consider there are <u>qualitative</u> arguments in support of the need for further convenience good shopping in Shipston-on-Stour. With the largest food store offering only 325 sq m of sales space, it is not surprising that 75% of locally generated <u>main</u> food expenditure leaks outside of the town. Thus most of the retained spend is in fact top-up food shopping. Clearly there is a need to provide for bulky food shopping in Shipston-on-Stour in order that longer distance trips by car are reduced. Moreover, the household survey also shows a considerable degree of over-trading in the town, which suggests there is an existing need for more convenience goods floorspace.

6.40 Taking into account these quantitative and qualitative considerations **Table 6.8** summarises the need for additional convenience goods floorspace in Shipston-on-Stour under our Scenario 1.

Table 6.8 Additional Convenience Goods Floorspace Need in Shipston-on-Stour (Scenario 1)

Forecast Year	Florspace Need (sq m net)		
	Low Sales Density	Mid Sales Density	High Sales Density
2011	2,460	1,640	1,230
2016	2,520	1,680	1,260
2021	2,620	1,750	1,310
2026	2,710	1,810	1,360

6.41 Our assessment therefore indicates that there is a need for a new food store of between 1,400 and 2,700 sq m net in Shipston-on-Stour by 2026. This equates to around 2,100 to 4,200 sq m gross. Due to big variations in operator sales densities, the actual size of the store required will depend on the retailer taking up the space.

6.42 For our Scenario 2, which assumes that Shipston-on-Stour will retain its existing market share of available expenditure, the floorspace need totals are set out in **Table 6.9** overleaf.

Table 6.9 Additional Convenience Goods Floorspace Need in Shipston-on-Stour (Scenario 2)

Forecast Year	Florspace Need (sq m net)		
	Low Sales Density	Mid Sales Density	High Sales Density
2011	500	330	250
2016	530	360	270
2021	580	380	290
2026	620	410	310

6.43 Under this scenario, there is a modest need for further food shopping provision primarily to alleviate the over-trading which the survey suggests is presently occurring in Shipston-on-Stour. Accordingly, large numbers of main food shopping trips will continue to be made to Stratford-upon-Avon and Banbury.

Southam

6.44 We estimate there is currently 1,328 sq m net of convenience goods floorspace in Southam generating an annual turnover of £8.3 million. This equates to a sales density of £6,253 psm net, which indicates a degree of over-trading (**Appendix 6B, Table 6**).

6.45 The map at **Appendix 5A** shows the locations of the seven convenience goods shops trading in the town centre. The three key stores are Budgens (520 sq m net), Co-op (260 sq m net) and Acorn (260 sq m net) (see **Appendix 5B**), although all three are relatively small. There are no food stores located out of centre in Southam.

6.46 The household survey indicates that Southam is currently retaining just 26% of the available expenditure in its own zone, almost as much as Alcester, but less than Shipston-on-Stour. Thus almost three-quarters of available spend is leaking to other

centres and because of Southam's location, this means to stores located outside of Stratford-on-Avon District. The main retail destinations are the Asda and Sainsbury's at Royal Leamington Spa and the Sainsbury's at Banbury (See **Appendix 1D**).

6.47 We believe there is considerable scope for Southam to increase its market share to a more realistic level of 70% (see **Appendix 6B, Table 7**). Such an increase would significantly reduce expenditure leakage and trips made outside of the District for main food shopping. Adjusting upward Southam's target market share pushes up the quantitative need for additional convenience goods floorspace.

6.48 We also believe there is a qualitative need to improve Southam's food retail offer. Not only is the existing floorspace over-trading (on our figures) but none of the current stores is of sufficient size to attract material numbers of main food shopping trips – hence the huge leakage of spend. In fact, the survey indicates that 80% of locally generated main food spend is leaking out of the area and the District. Accordingly, the current range of stores in the town centre attract primarily top-up food shopping trips.

6.49 Reflecting both quantitative and qualitative considerations, our estimates of the need for additional convenience goods floorspace in Southam are summarised in **Table 6.10.**

Table 6.10 Additional Convenience Goods Floorspace Need in Southam (Scenario 1)

Forecast Year	Florspace Need (sq m net)		
	Low Sales Density	Mid Sales Density	High Sales Density
2011	**3,370**	**2,250**	**1,690**
2016	**3,470**	**2,310**	**1,730**
2021	**3,610**	**2,410**	**1,810**
2026	**3,740**	**2,490**	**1,870**

6.50 Our assessment (under Scenario 1) indicates there is a potential for a new food store in Southam of between 1,900 and 3,700 sq m net, equivalent to 2,900 to 5,700 sq m gross by 2026. The actual size of the store will be dependent on the operator, due to the wide range of sales densities which different retailers achieve.

6.51 For Scenario 2, which assumes Southam's market share of available expenditure will remain constant through to 2026, the floorspace need estimates are summarised in **Table 6.11.**

Table 6.11 Additional Convenience Goods Floorspace Need in Southam (Scenario 2)

Forecast Year	Florspace Need (sq m net)		
	Low Sales Density	Mid Sales Density	High Sales Density
2011	230	150	120
2016	260	170	130
2021	300	200	150
2026	350	230	170

6.52 Under this scenario, we forecast only a limited need for additional convenience goods shopping in Southam in order to alleviate the over-trading which we estimate is occurring at the present time. As a result, the vast majority of main food shopping trips will continue to be made to competitor centres outside of the District.

7.0 CONCLUSIONS AND RECOMMENDATIONS

7.1 The household survey indicates that almost 40% of convenience goods expenditure generated within Stratford-on-Avon District is currently spent at stores outside the District. This considerable leakage generates high numbers of (relatively) long distance car journeys for main food shopping. Reflecting this pattern of shopping behaviour, it is not surprising that the Council is experiencing some pressure from food retailers for new store representation within the District.

7.2 Our recommended retail strategy for the Council is to actively plan for additional food store provision within Stratford-on-Avon District, but in a way that not only meets the sustainability objectives of reducing expenditure leakage (and trips) to centres outside of the District, but also reduces the need to travel longer distances by car for main food shopping within the District.

7.3 In practice, given the geographical shape of the District and the location of its towns, the best way to achieve the required clawback of expenditure, in our view, is to plan primarily to improve the food store offer in the three peripherally located market towns of Alcester, Shipston-on-Stour and Southam, whilst continuing to recognise the potential for Stratford-upon-Avon to capture a larger share of available spend in nearby zones 1 and 6 (see **Figure 3.2**). This approach underpins our Scenario 1.

7.4 An alternative approach would be to maintain the existing market shares of the towns within the District for convenience goods shopping - our Scenario 2. However, this approach would rule out the need for any major new food stores in the three rural market towns, thus doing nothing to reduce the numerous trips made from these towns to Stratford-upon-Avon and to centres outside of the District for main food shopping. Accordingly, there would be no clawback of expenditure. In addition, maintaining Stratford-upon-Avon's market share would result in only a similar quantum of floorspace need for the town as under Scenario 1.

7.5 A further alternative, planning for an increase in Stratford-upon-Avon's market share, whilst also seeking to maintain the existing market shares of the three rural market

towns, is likely to prove difficult to achieve in practice. This is because any significant additional major food store provision in Stratford-upon-Avon (beyond current commitments) is unlikely to be supported by material increases in in-flow spend from outside of the District due to the location of the town. Instead, much of the turnover required to support any major new stores(s) will be drawn from existing retailers in the town (especially Morrisions and Tesco) but also from food stores located throughout the rest of the District. Depending on the location of any new major food store(s) in Stratford-upon-Avon the retail economies of the rural market towns of Alcester and, in particular, Shipston-on-Stour could be undermined by trade diversion.

7.6 If the Council were to receive any applications for additional large food stores in Stratford-upon-Avon, we would therefore recommend that a rigorous retail impact assessment is carried out in order to establish the scale and pattern of any adverse effects.

7.7 Although difficult to quantify, allowing another major food superstore in Stratford-upon-Avon could also dampen the prospects of Alcester and Shipston-on-Stour attracting new main food operators of their own. Such a development in Stratford-upon-Avon is likely to impact upon the scale of any new food stores in these two rural market towns.

7.8 Our preferred **Scenario 1** is about clawing back expenditure currently being lost from the District and providing a more sustainable pattern of food store provision throughout the District. This is best achieved, as noted earlier, by planning for each of the three rural market towns to retain much higher levels of locally generated convenience good expenditure.

7.9 The floorspace need totals set out in **Tables 6.2** to **6.11** earlier give a broad indication of the size of store required in each town, although the exact size will depend on the sales density likely to be achieved by the operators involved. The **key issues** in planning for new food store provision in Alcester, Shipston-on-Stour and Southam are as follows:-

- **Format** - any new food store must be capable of attracting the main food shopping trips of local residents; thus any new provision will largely complement the existing food stores within each town, which cater primarily for top-up food shopping.

- **Size** – our view is that any new store should have a minimum sales floorspace of c.1,300 sq m net in order for it to be of a sufficient scale to attract main food trips (this equates to c. 2,000 sq m gross). This would make any new store almost double the size of the present Somerfield in Alcester (c.780 sq m net), which is currently the largest food store in any of the three rural market towns. Moreover, because regional planning policy states that retail provision should reflect the hierarchy of centres, any new food store which is developed in the rural market towns should not be of size (or level of attraction) that attracts trips from people living in larger centres (eg. Stratford-upon-Avon). We therefore recommend that any new food store in the rural market towns should ideally have a maximum floorspace of c.1,800 sq m net (c. 2,800 sq m gross).

- **Mix** – we would recommend that any new food store is restricted to selling convenience goods; this maximises the food product range for any size of store and limits the availability of comparison goods which could impact on existing town centre shops. For the same reason, we recommend that service uses (eg. post office, dry cleaners, photo developing and pharmacy) do not form elements of these new stores.

- **Location** – ideally, and in line with the sequential approach, any new large food store should be located within the primary shopping area of each town centre. However, given the historic nature of all three rural market towns, it is unlikely that, in practice, appropriate sized sites can be identified in these areas. In these circumstances the sequential approach should be applied to site selection. PPS 6 states that any site within 300 metres of a primary shopping area is defined as edge of centre, with any site beyond this classified as being out of centre.

- **Impact** – the potential negative impact of any new large food store not located in the primary shopping area of a rural market town must be carefully considered. However, the household survey indicates that all the relatively small food stores currently located within the towns are essentially performing a top-up food shopping role for local residents, whilst the vast majority of main food shopping is undertaken at much larger food stores in Stratford-upon-Avon or outside of the District (see **Appendix 1C Table 10**). Therefore, we believe that if any new food store is of sufficient size to cater for, and attract, main food shopping trips, its sales will be derived primarily from the clawback of expenditure to the town and its impact on the existing retail provision will be limited.

- **Linked trips** - The provision of a new food store catering for main food shopping will clawback to each rural market town shoppers who currently carry out their bulk food shop at other centres. It is likely that at least some of these shoppers will go on to support shops and services in the town centre, since they will not be travelling out of the area to do their main food shop. Moreover, the potential for linked trips will also increase amongst shoppers living within the hinterland of each rural market town, whilst an enhanced food retail offer in the rural market towns could attract a modest amount of additional in-flow expenditure from people living outside of Stratford-on-Avon District.

- **The 'do-nothing' approach** – if new food stores are not encouraged to locate in the three rural market towns, is it more likely that pressure for additional large food stores will increase in Stratford-upon-Avon. Any further development here will suck-in even more spend from across the District. Potentially this could undermine the retail economies of these towns.

7.10 Under our preferred Scenario 1, **Table 6.4** summarises the floorspace need results for Stratford-upon-Avon. The **key issues** in planning for the future of food retailing in Stratford-upon-Avon are as follows:-

- there will be an apparent over-supply of convenience goods floorspace by 2011 if all three included commitments and proposals – the Marks and Spencer Simply Food, the Sainsbury's Local and Aldi - open for trading by then, although this over-supply steadily diminishes through to 2026 as a result of slowly rising available expenditure;

- accordingly, there is no apparent quantitative or qualitative need, in our view, for another food superstore through to 2026;

- because of this lack of quantitative need (or available headroom expenditure), any such store, if developed, would have to attract its sales from the following sources:-

  - *in-flow expenditure from outside the District*: given the location of Stratford-upon-Avon within the District and the close proximity of Warwick/Royal Leamington Spa (with its existing strong retail offer) we do not consider there is any scope to attract material amounts of additional trade from this source.

  - *clawback expenditure:* Stratford-upon-Avon already retains 94% of the available convenience goods expenditure in zones 3 and 4 (covering the town and its hinterland) and therefore there is little or no scope to clawback further expenditure from this area.

  - *trade diversion from existing stores in the town:* we believe a large proportion of the turnover of any new food-based superstore in Stratford-upon-Avon will be diverted from existing retail provision, primarily the existing out of centre superstores of Morrisons and Tesco. Competition between out of centre retailers, however, is not of concern to planners. Town centre food shopping – underpinned mainly by the tourist spend and top-up trips – is likely to avoid any material impact.

- *in-flow expenditure from the rest of the District*: it is likely, in our view, that a further superstore in Stratford-upon-Avon would suck-in even more food expenditure at the expense of other centres, mainly the existing rural market towns of Alcester and Shipston-on-Stour, but also small foodstores in other settlements such as Bidford-on-Avon and Wellesbourne. Southam is located a considerable distance from Stratford-upon-Avon and the household survey indicates there is virtually no over-lap in their food catchments. This centre is therefore likely to remain largely unaffected by further food store provision in Stratford-upon-Avon. The scale of any additional expenditure in-flow would be minimised, however, if the rural market towns had already benefited from improved food retail offers themselves. This is because many residents of these towns would be likely to shop locally for their bulk food, once this form of shopping was adequately catered for.

APPENDIX 1

The Household Telephone Survey

APPENDIX 1A

Survey Methodology
Sampling

RESEARCH

BEACON

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STRATFORD ON AVON HOUSEHOLD SHOPPING SURVEY

JANUARY 2008

Presented to: Colliers CRE
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London
W1M 6HL

Presented by: Beacon Research
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Bridge St
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CONTENTS

STRATFORD ON AVON HOUSEHOLD SURVEY (JANUARY 2008)

BACKGROUND & METHODOLOGY

The client, Colliers CRE, wished to conduct a telephone shopping survey within the Stratford on Avon District Council area. This was to establish the following:

- Where respondents go for their general non-food shopping such as clothing, footwear and household goods.
- How frequently they visit their main and secondary centre.
- How their expenditure on such goods is divided between main and secondary centres.
- Why they choose their main centres, how they travel and the length of their journey from home.
- Similar information regarding food & grocery shopping.

A total of 750 interviews were targeted, in eight different zones, each zone defined by Postal Geography. Interviews were conducted over a period of two weeks, between January 23rd and February 9th 2008.

In order to provide meaningful and reliable data in each of the zones an equal number of interviews (94) were allocated to each of the 6 zones. The results were then weighted, at the analysis stage to take account of the different populations in each zone and their importance to the overall survey area.

STRATFORD ON AVON SAMPLE BREAKDOWN

ZONE	Popn	%	Achieved Sample	Weighted Sample	Weight
1	19,164	13.0	94	98	1.037
2	15,595	10.6	94	79	0.844
3	21,286	14.4	94	108	1.152
4	16,926	11.5	94	86	0.916
5	12,056	8.2	92	61	0.667
6	18,495	12.5	94	94	1.001
7	19,072	12.9	94	97	1.032
8	24,810	16.8	94	126	1.343
TOTAL	**147404**	**100**	**750**	**750**	**-**

The sample used for making telephone calls was obtained by Beacon Research from Datalinx, who supplied names, addresses and telephone numbers by electoral geography.

Full details of the samples achieved in each zone and the weightings subsequently applied within the analysis, are shown in the preceding table.

The following table summaries the details of calls made and interview outcome.

	Number	%
Initial Sample	1800	100.0
Completed interviews	750	41.7
Refusals	79	4.4
Wrong numbers / Unobtainable / Answer phone	160	8.9
No reply (after 4 calls)	288	16.0
Not used	523	29.1

STATEMENT OF RELIABILITY

Assessment of the standard error:

1. The Stratford on Avon Household Shopping Survey has been undertaken by a series of individual sample surveys for a combination of zones.
2. The results are subject to the following sampling error, of which there follows an analysis.
3. The following analysis indicates the methodology used to calculate the standard error, with the standard 95% probability of being correct. The formulae for these calculations are as follows:

$$SE\% = \sqrt{\frac{p\% * q\%}{n}}$$

Where p% = sample value recorded

q% = 100% - p%

n = sample size

And where:

1.96*(SE%) = 95% probability that the correct answer lies in the range calculated.

4. Using the above formulae, we can predict the variation between the sample results and the 'true' values from our knowledge of the size of sample on which the results are based and the number of times that a particular answer is given. The table below illustrates the predicted ranges for the total sample and percentage results at the 95% confidence level.

Approximate sampling tolerances applicable to percentages at or near these levels.

Size of sample on which survey result is based	10% or 90% ±	20% or 80% ±	30% or 70% ±	40% or 60% ±	50% ±
750 interviews	2.15	2.86	3.28	3.51	3.58

For example, with a sample of 750 where 30% give a particular answer, the chances are 19 in 20 that the 'true' value (which would have been obtained if the whole population had been interviewed) will fall within the range of ± 3.28 percentage points from the sample results.

APPENDIX 1B

Copy of Survey Questionnaire

Job No: GW/07/362

ZONE

STRICTLY CONFIDENTIAL
BEACON RESEARCH
The Resource Centre, Bridge Street, Garstang, Lancs PR3 1YB
Tel: 01995 606330 Fax: 01995 605336

STRATFORD ON AVON DISTRICT RETAIL STUDY
HOUSEHOLD TELEPHONE SURVEY
ON BEHALF OF COLLIERS CRE (Jan 2008)

Name: _____

Address: _____

_____ Postcode: _____'

C1 Age:

16-24	1
25-34	2
35-44	3
45-54	4
55-64	5
65 +	6

C2 Sex:

Male	1
Female	2

C3 Do you have the use of a car for shopping?

Yes	1
No	2

C4 What is the occupation of the chief wage earner in your household?

Full/Part time employed	1
Retired	2
Unemployed	3

Occupation _____

Rank/Status _____

No. of Employees _____

Qualifications _____

Supervisor/Manager/Self Employed
Size of company _____
No. of employees _____

If Retired
Company pension–ask previous occupation
State pension only – code 5 below

If Unemployed
Less than 2 months – ask about previous occupation
Over 2 months – code 6 below

Now Assess Social Grade

AB	1
C1	2
C2	3
D	4
E1 (Retired)	5
E2 (Unemployed)	6
Refused	7

C5 Day / Time of interview

Weekday	1	Morning	1
Weekend	2	Afternoon	2
		Evening	3

Interviewer Name: _____ Date: _____

Interviewer Signature: _____

Job No: GW/07/362

Good morning / afternoon, my name is .....

We are doing some research on behalf of Stratford on Avon District Council about shopping facilities and shopping behaviour in this area and I'd like to ask you a few questions.

Are you / May I speak to the person responsible for the majority of your household shopping?

YES	1
NO	2 - CLOSE INTERVIEW

As we need to speak to people across a number of areas, could you please tell me your full postcode?

WRITE IN POST CODE HERE _____

Refer to quota and check that respondent is eligible for interview - if not, thank and close.

Q1a Can I ask you first of all, excluding Mail Order and shopping over the Internet at which Town, Centre or Retail Park do you do most of your shopping for non-food goods such as clothing & footwear, books, gifts and jewellery?(SINGLE CODE

Q1b And how often do you visit..... Town, Centre or Retail Park, for this type of non-food shopping?

Q1c And excluding Mail Order and shopping over the Internet, what percentage or proportion of your total expenditure on non-food goods such as clothing & footwear, books, gifts and jewellery would you say that you do in .....Town, Centre or Retail Park?

Q2a Excluding Mail Order and shopping over the Internet what is your second most important Town, Centre or Retail Park for non-food shopping such as clothing & footwear, Books, gifts and Jewellery? (SINGLE CODE)

Q2b And how often do you visit..... Town, Centre or Retail Park, for this type of non-food shopping?

Q2c And excluding Mail Order and shopping over the Internet what percentage or proportion of your total expenditure on non-food goods such as clothing & footwear, books, gifts and jewellery would you say that you do in ..... Town, Centre or Retail Park?

RECORD ANSWERS BELOW & OPPOSITE - CHECK PERCENTAGES ADD TO 100% AT Q1c/2c

A	CENTRE	Q1	Q2
	CODE FROM LIST 'A'		
	Local shops / local village shop	29	29
	Other (Write In)		
	No Particular Centre / Varies	30	30
	None / Don't buy these goods / Internet / Mail Order only	31	31
	No second centre		32
	DK / Can't remember	33	33
B	**FREQUENCY OF VISIT**		
	More than once a week	1	1
	Once a week	2	2
	2-3 times a month	3	3
	Once a month	4	4
	Once every 2-3 months	5	5
	Once every 4-6 months	6	6
	Less often	7	7
	DK / Can't remember / Varies	8	8
C	**% In Location (Write In)**	%	%

Q3a You said that ..... is the Town, Centre /Retail Park, where you do most of your non-food shopping? What is your main reason for choosing that Centre?

Close to home/convenient	1	Good/Cheap Public Transport	7
Close to work	2	Ease of parking	8
Good choice of shops/range of good stores	3	Free/cheap parking	9
Good range of major stores	4	Good quality goods/products	10
Pedestrianised streets/attractive environment	5	Part of joint trip to other facility/centre	11
Good prices/Good value for money	6	Other (Write In)	

Q3b How do you normally travel, to / from this Town, Centre / Retail Park? (If more than one mode of transport used, code transport used for longest part of journey)

Car (Driver)	1	Park & Ride	5	Taxi	9
Car (Passenger)	2	Walk	6	Other	10
Bus	3	Cycle	7		
Train	4	Motor Cycle	8		

Q3c Where does your journey usually start from?

Home	1 (Go to Q3d)	Other *write in* (Go to Q4)
Work	2 (Go to Q4)	

Q3d On average, how long does it take you to travel to this Town, Centre / Retail Park from home?

10 minutes or less	1	31 – 40 minutes	4	51 – 60 minutes	6
11 – 20 minutes	2	41 – 50 minutes	5	Over 60 minutes	7
21 – 30 minutes	3				

Q4 At which Town, Centre or Retail Park do you normally undertake most of your Christmas or special occasion shopping? (Write in)

_____

Q5a **Excluding Mail Order and shopping over the Internet at which Town, Centre or Retail Park do you do most of your shopping for bulky non-food goods such as DIY, large electrical goods, furniture and carpets (SINGLE CODE)**

Q5b **And how often do you visit ……. Town, Centre / Retail Park, for your main bulky non-food goods shopping?**

Q5c **And excluding Mail Order and shopping over the Internet what percentage or proportion of your total expenditure on bulky non-food goods shopping would you say that you do, in ..... Town, Centre / Retail Park?**

Q6a **Excluding Mail Order and shopping over the Internet which is your second most important Town, Centre / Retail Park for bulky non-food goods such as DIY, large electrical goods, furniture and carpets? (SINGLE CODE)**

Q6b **And how often do you visit ……. Town, Centre / Retail Park, for your main bulky non-food goods shopping?**

Q6c **And Excluding Mail Order and shopping over the Internet what percentage or proportion of your total expenditure on bulky non-food goods shopping, would you say that you do in ..... Town, Centre / Retail Park?**

RECORD ANSWERS BELOW & OPPOSITE - CHECK PERCENTAGES ADD TO 100% AT Q5c/6c

A	CENTRE	Q5	Q6
	CODE FROM LIST 'A'		
	Local shops / local village shop	29	29
	Other (Write In)		
	No Particular Centre / Varies	30	30
	None / Don't buy these goods / Internet / Mail Order only	31	31
	No second centre		32
	DK / Can't remember	33	33
B	**FREQUENCY OF VISIT**		
	More than once a week	1	1
	Once a week	2	2
	2-3 times a month	3	3
	Once a month	4	4
	Once every 2-3 months	5	5
	Once every 4-6 months	6	6
	Less often	7	7
	DK / Can't remember / Varies	8	8
C	**% In Location (Write In)**	%	%

Q7a You said that ..... is the Town, Centre /Retail Park, where you do <u>most</u> of your bulky non-food goods shopping? What is your main reason for choosing that Centre?

Close to home/convenient	1	Good/Cheap Public Transport	7
Close to work	2	Ease of parking	8
Good choice of shops/range of good stores	3	Free/cheap parking	9
Good range of major stores	4	Good quality goods/products	10
Pedestrianised streets/attractive environment	5	Part of joint trip to other facility/centre	11
Good prices/Good value for money	6	Other (Write In)	

Q7b How do you normally travel to / from this Town, Centre / Retail Park? (If more than one mode of transport used, code transport used for longest part of journey)

Car (Driver)	1	Park & Ride	5	Taxi	9
Car (Passenger)	2	Walk	6	Other	10
Bus	3	Cycle	7		
Train	4	Motor Cycle	8		

Q7c Where does your journey usually start from?

Home	1	(Go to Q7d)
Work	2	(Go to Q8a)
Other (write in)_____		(Go to Q8a)

Q7d On average, how long does it take you to travel to this Town, Centre / Retail Park from home*?*

10 minutes or less	1	41 – 50 minutes	5
11 – 20 minutes	2	51 – 60 minutes	6
21 – 30 minutes	3	Over 60 minutes	7
31 – 40 minutes	4		

Q8a At which store and centre do you usually do most or all of your main food and grocery shopping? (Store and Centre needed - Single code)

Q8b And when during the week, would you normally shop at your main food store?

Q9 And at which Store and Centre do you usually do your remaining top-up food and grocery shopping? (Store and Centre needed)

RECORD ANSWERS BELOW AND OPPOSITE

		Q8a Main Store / Centre	Q9 Second Store / Centre
A	**CODE FROM LIST 'A'**		
	Local shops / Village store	58	58
	Other (Write In)		
	Varies / No particular store	59	59
	DK / Cant remember	60	60
	No second Centre		61
B	**WHEN SHOP**		
	Weekdays (Mon- Fri) Daytime	1	
	Weekdays (Mon – Fri) Evening	2	
	Saturday	3	
	Sunday	4	
	Varies / No particular time	5	

Q10a On average, how much in total do you and your household spend on food and groceries each week?

Q10b And how much on average do you spend on food and groceries each week in your main food store?

RECORD BELOW	£	p
(a) Total weekly total expenditure		
(b) ' Main' store weekly total expenditure		
(c) 'Top up' store weekly food expenditure		

[NOTE: (c) is calculated as (a - b)]

Q11a You said that..... is your <u>main</u> store for food/grocery shopping. How often do you visit that store for food and grocery shopping?

Three times a week or more often	1
Twice a week	2
Once a week	3
Once a fortnight	4
Once a month	5
Once every two months	6
Less often	7

Q11b What is the <u>main</u> reason why you and your household choose to shop at the store where you do your main food / grocery shopping? (SINGLE CODE)

Close to home / convenient	1	Wide choice of goods / products	6
Close to work	2	Close to other shops	7
Ease of parking	3	Good prices/value for money	8
Free / cheap parking	4	Good quality goods / products	9
Good / cheap public transport	5		
Other (WRITE IN) _____			10

Q11c How do you normally travel to / from this store? (If more than one mode of transport used, code transport used for longest part of journey)

Car (Driver)	1	Walk	6
Car (Passenger)	2	Cycle	7
Bus	3	Motor Cycle	8
Train	4	Taxi	9
Park & Ride	5	Other	10

Q11d Where does your journey usually start from?

Home	1	(Go to Q11e)
Work	2	(Go to Q12a)
Other (write in)_____		(Go to Q12a)

Q11e On average, how long does it take you to travel to this Store from home?

10 minutes or less	1	41 – 50 minutes	5
11 – 20 minutes	2	51 – 60 minutes	6
21 – 30 minutes	3	Over 60 minutes	7
31 – 40 minutes	4		

Q12a When you do your <u>main</u> food and grocery shopping at…….do you or your household usually visit any <u>other</u> shops/service outlets in the <u>same</u> area as part of that trip?

Yes	1	(Ask Q12b – Q12d)
No	2	(Go to Q13)

Q12b Which town/centre is this?

(Write In) _____

Q12c And do you drive to the other shops/service outlets, or walk or use another form of transport?

Drive	1	Taxi	4
Walk	2	Other Form of Transport	5
Bus	3		

Q12d And what other shops/services do you normally visit (MULTI-CODE)

Financial outlets (eg Banks, Building Societies)	1
Professional Services (eg Solicitors, Accountants)	2
Post Office	3
Cafe/Restaurant/Pub/Take-Away	4
Specialist food shops (eg Baker, Greengrocer, Butcher)	5
Chemist	6
Newsagents/Confectioners/Tobacconists	7
Fashion Shops (eg for clothing, footwear etc)	8
Charity Shops	9
Department/Variety Store	10

Other type of shop (WRITE IN) _____

_____

Q13a From what you know about <u>Alcester</u> Town Centre how would you describe the food shopping in the Town Centre, in terms of the balance between large and small shops? (READ OUT)

Too many small shops/not enough large stores	1
Too many large stores/not enough small shops	2
About right	3
Don't know	4

Q13b From what you know about <u>Southam</u> Town Centre how would you describe the food shopping in the Town Centre, in terms of the balance between large and small shops? (READ OUT)

Too many small shops/not enough large stores	1
Too many large stores/not enough small shops	2
About right	3
Don't know	4

Q13c From what you know about Shipston upon Stour Town Centre how would you describe the food shopping in the Town Centre, in terms of the balance between large and small shops? (READ OUT)

Too many small shops/not enough large stores	1
Too many large stores/not enough small shops	2
About right	3
Don't know	4

Q13d From what you know about Stratford upon Avon Town Centre how would you describe the food shopping in the Town Centre, in terms of the balance between large and small shops? (READ OUT)

Too many small shops/not enough large stores	1
Too many large stores/not enough small shops	2
About right	3
Don't know	4

Q14 What other major change, if any, would you like to see in Stratford upon Avon Town Centre for you and your household to visit it more often for shopping? *(SINGLE CODE ONLY)*

None / Quite happy	1	Better security / Make the centre safer	13
None / DK / Can't think of any	2	A bigger / better weekly market	14
More car parking	3	Make Centre more attractive (e.g. better shop fronts, planting, paving etc.)	15
More covered shopping opportunities	4	More / better signage	16
Wider variety of stores	5	More / better information displays	17
Better quality stores / Goods	6	Less traffic congestion	18
More / better places to eat or drink	7	More Pedestrianisation	19
More / better toilets	8	More Street entertainment / More things going on	20
More / better parking facilities	9	More shops open on Sunday	21
Better public transport	10	More shops open in the evenings	22
Better cleanliness / Make the centre tidier	11	Other (Write In)	
Cleaner air / Less traffic pollution	12		

Q15 Finally, are there any particular food retailers that you would like to see in Stratford upon Avon, which are not here at present, or are you quite happy? *(WRITE IN UP TO THREE)*

None / Quite happy	1
None / DK / Can't think of any	2
Other (Write In) _____	

CLOSE INTERVIEW - COMPLETE CLASSIFICATION

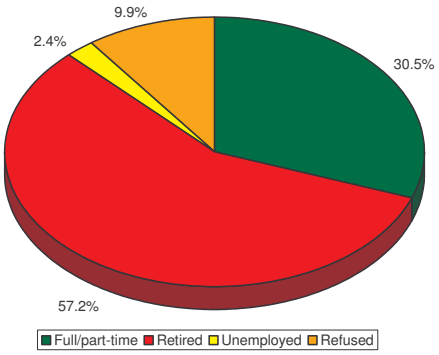
APPENDIX 1C

Key Results

STRATFORD ON AVON DISTRICT RETAIL STUDY
HOUSEHOLD TELEPHONE SURVEY
KEY RESULTS: CONVENIENCE GOODS SHOPPING

- The household telephone survey was carried out during February 2008.
- In total 750 interviews were carried out over 8 zones.
- 258 interviewees were male (34.4%) and 492 (65.6%) were female.
- 60% of respondents were retired and unemployed, while 31% were workers (**Figure 1**).
- The respondent was the person responsible for the majority of the household shopping.

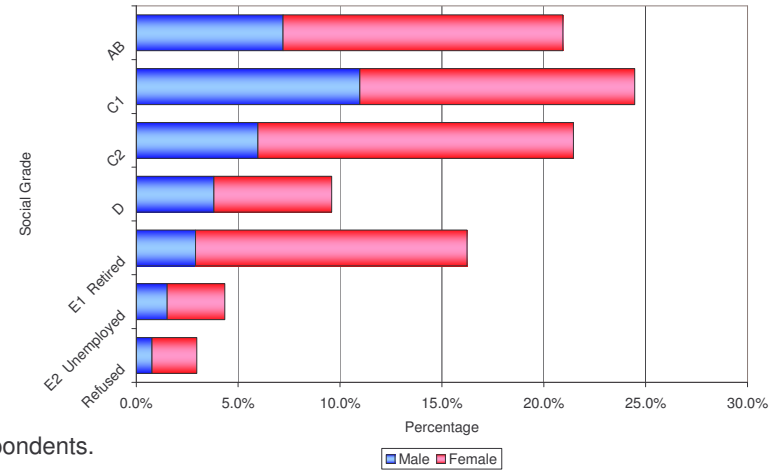
Figure 1 – Employment Status



Sample size: 750 respondents.

- In terms of social grades, it can be seen that the most common grade for respondents was the C1 bracket, lower middle class – see **Figure 2**.

Figure 2 – Social Grades by Gender



Sample size: 750 respondents.

- In all zones, apart from Zone 4, the survey shows that households tend to do their main food shopping during the day on weekdays, this being most popular in Zone 3 with 80.5%.
- For Zone 4 most respondents (70.5%) do not shop at a particular time and are more varied.

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- **Table 1** shows the results for the more popular stores[1] among respondents. The majority fit the same pattern as the zonal results, with most stores attracting shoppers during weekday daytimes. However, for Tesco and Morrisons in Stratford upon Avon almost 11% of respondents shop there on weekday evenings.
- Southam's largest store, Budgens, also saw a higher proportion of people preferring to shop on weekday evenings.

Table 1 – Filtered Results – When Do You Do Your Main Food Shop by Store

	Weekday Day	Weekday Evening	Saturday	Sunday	Varies
Stratford Morrisons	62.3%	10.8%	7.8%	0.9%	18.1%
Stratford Somerfield	45.7%	0.0%	5.4%	10.9%	38.0%
Stratford Tesco	42.1%	10.7%	7.7%	9.0%	30.5%
Alcester Somerfield	88.6%	4.4%	0.0%	0.0%	7.0%
Shipston Somerfield	78.8%	6.0%	0.0%	0.0%	15.1%
Southam Budgens	42.8%	28.5%	7.2%	0.0%	21.5%

- Linked to the subject of when people shop is how frequently they visit their main food store. Overall most respondents said that they visit their main store once a week (66.6%). This was the same for all zones apart from Zone 4 where more people shop twice a week (45.3%).
- The results for popular stores against frequency of shop are broadly similar.
- For the smaller stores, people are more inclined to visit more frequently probably because they tend to attract more top up food shopping . For example, over 75% of respondents visit Stratford upon Avon Somerfield more than once a week. This could also reflect its central location.
- **Table 2** overleaf shows the reason for choosing main food store by filtered popular store. It can be seen that convenience is the most important factor for the majority of respondents. However, this dips for the bigger stores where understandably the wider choice of goods becomes more significant.

[1] The results have been filtered to include only those stores in the main towns in Stratford on Avon District with more than 10 responses. This filter has also been applied elsewhere in the report where popular shops are discussed.

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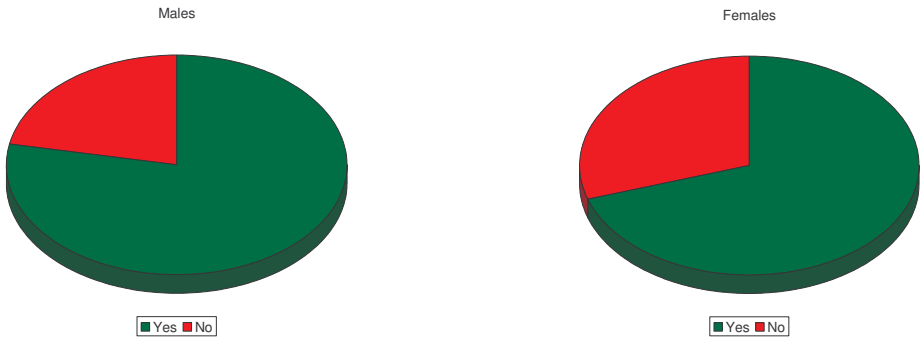
Table 2 – Filtered Results – Reason for Choosing Main Food Store by Store

	Startford Morrisons	Stratford Somerfield	Stratford Tesco	Alcester Somerfield	Shipston Somerfield	Southam Budgens
Convenient	72.9%	100.0%	80.2%	80.3%	97.0%	92.8%
Close to Work	0.0%	0.0%	0.7%	0.0%	0.0%	7.2%
Easy Parking	0.9%	0.0%	0.7%	0.0%	0.0%	0.0%
Good Public Transport	0.0%	0.0%	0.0%	0.0%	3.0%	0.0%
Wide Choice of Goods	7.6%	0.0%	4.7%	11.4%	0.0%	0.0%
Close to Other Shops	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Good Prices	5.2%	0.0%	0.8%	0.0%	0.0%	0.0%
Quality of Goods	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%
Other	9.9%	0.0%	4.6%	3.5%	0.0%	0.0%
Home Delivery	0.0%	0.0%	6.3%	0.0%	0.0%	0.0%
No Reason	1.0%	0.0%	2.1%	4.8%	0.0%	0.0%

- The vast majority of respondents use a car for shopping (73%), while men are slightly more inclined to drive to the shops than women (see **Figure 3a and 3b**).

Figure 3a and 3b – Car Use for Main Food Shopping by Gender



Sample size: 750 respondents.

- The high percentage of people who use a car for shopping is reflected by the results for the mode of travel to main food store. Combined car travel accounts for 80% of trips, while 9% walk, 7% use the bus and 1% take a taxi.
- When combined car travel is analysed by zone (**Figure 4** overleaf) it can be seen that a

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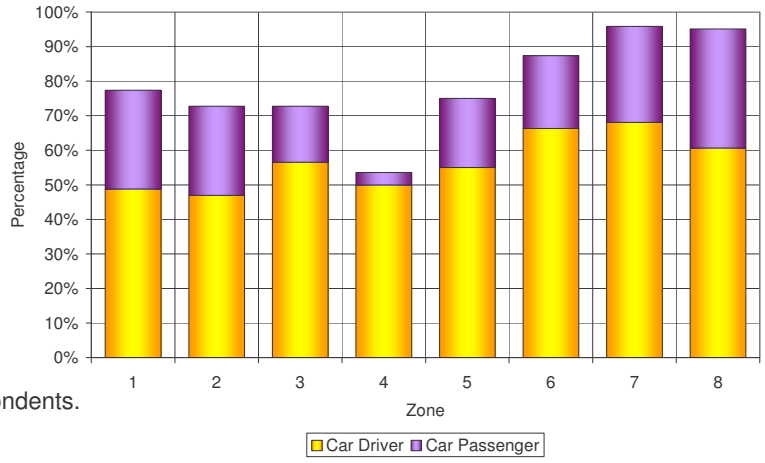
number of zones (Zones 6, 7 and 8) have higher than average car usage. This could be because of their location towards the edge of the survey area and their relatively long distance from a large food store.

- Respondents in Zone 4 are less likely to travel by car (53.3%), possibly because they are closer to larger food stores already.
- This notion of closeness to stores is also shown when looking at popular stores and mode of travel. In this instance the smaller stores have much higher levels of walk in shoppers, up to 42.2% for Somerfield in Alcester, for example.

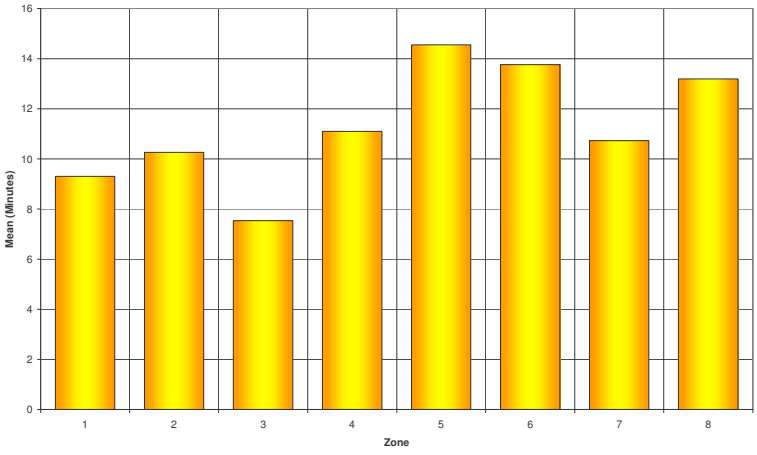
Figure 4 – Car as Mode of Travel to Main Food Store by Zone



Sample size: 567 respondents.

- For all zones and popular stores, the vast majority of respondents trips to their main food store, originated from home – 90% and over (apart from Zone 4, which was 85.6%).
- The overall mean journey time to main food store was 11 minutes. When broken down by zone, the highest mean was 14.5 minutes for Zone 5 and the lowest was 7.5 minutes for Zone 3 (**Figure 5**).

Figure 5 – Mean Journey Time in Minutes to Main Food Store by Zone



- When asked whether they combined main food shopping with other shops/services, the majority of respondents (71.9%) said that they did not. This was consistent across all zones with the exception of Zone 5, where the majority (59.1%) said they did undertake combined shopping trips.

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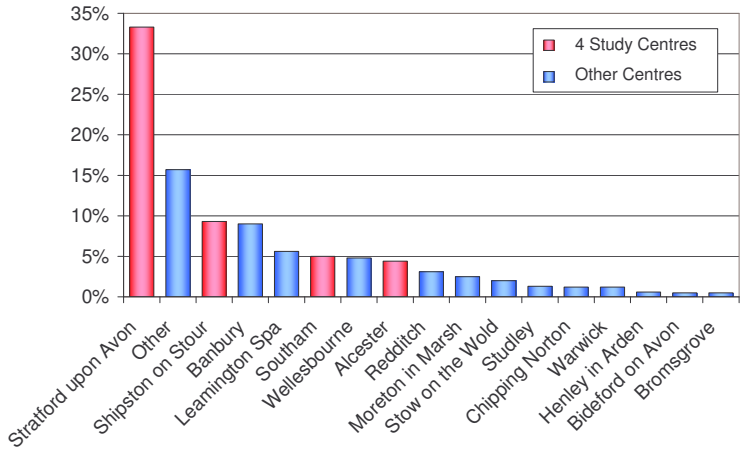
- This pattern is reflected when looking at popular stores, where generally around 70% of respondents did not carry out linked trips.
- By far the most popular centre to visit on a linked trip was Stratford upon Avon (**Figure 6**) reflecting its dominance for main food shopping.

Figure 6 – Towns Respondents Combined Food Shopping With



Sample size: 166 respondents.

- The results for popular stores in **Table 3** indicate that respondents tend to combine trips with the centres they are already visiting for food shopping (i.e. most linked trips are very localised).

Table 3 – Filtered Towns Respondents Combined Food Shopping With by Store

	Stratford Morrisons	Stratford Tesco	Shipston Somerfield
Stratford upon Avon	100.0%	95.4%	0.0%
Shipston on Stour	0.0%	0.0%	100.0%
Other	0.0%	4.6%	0.0%

- The types of other shops or services visited by respondents on a linked main food shopping trip are listed in **Table 4** overleaf.
- Services feature quite prominently in the top five, with financial outlets, post office and restaurants all listed.

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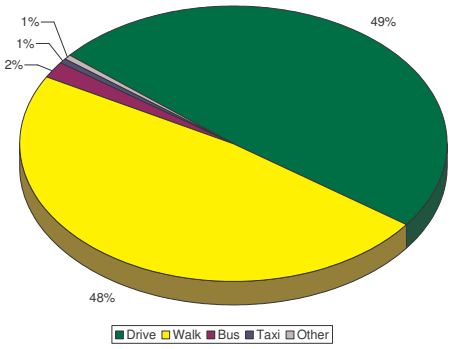
Table 4 – Type of Other Shop / Service Outlet Visited

Outlet	Number	%
Financial Outlets	60	16.4
Fashion Shops	52	14.2
Post Office	49	13.4
Other Type of Shop	40	11.0
Café / Restaurant / Pub / Take-Away	38	10.4
Chemist	34	9.3
Department / Variety Store	32	8.8
Specialist Food Shops	30	8.2
Newsagents / Confectioners / Tobacconists	17	4.7
Charity Shops	12	3.3
Professional Services	1	0.3

Sample size: 199 respondents with multiple coding.

- Perhaps unsurprisingly, the mode of travel to other shops/services on a linked trip (**Figure 7**) shows a far higher proportion of people walking than for mode of transport to their main food store. As these are combination trips, shoppers appear much more likely to drive to just one location and then walk to their other shops/services.

Figure 7 – Mode of Travel to Other Shops / Service Outlets on a Linked Trip



Sample size: 198 respondents.

- Tables **5**, **6**, **7**, and **8** overleaf summarise the perceptions of all respondents (base) vs respondents living in the local zone, when asked about the balance between large and small food shops in town centres.
- **Table 5** shows that 27% of the residents of the Alcester area believe there are too many small food shops, whilst just 9% feel there are too many big food stores. However, the majority (64%) think the balance is about right.
- Residents views in Shipston on Stour (**Table 6**) match very closely those of Alcester with 24% feeling there are too many small food shops.
- Generally, local people appear to be more in favour of more larger food shops in Alcester and Shipston on Stour than the sample as a whole.
- The residents of Southam unanimously agree that their balance of large and small food shops is just right (**Table 7**).
- The response for Stratford upon Avon (**Table 8**) is different. Here 27% of local residents feel there are too many large food stores, whilst just 17% think there are too many small food

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shops. The findings for the whole sample are more evening matched.

Table 5 – Views on Balance Between Small and Large Food Stores in Alcester

	Base	Alcester Zone
Too Many Small Shops	14%	27%
Too Many Large Shops	7%	9%
About Right	80%	64%

Table 6 – Views on Balance Between Small and Large Food Stores in Shipston on Stour

	Base	Shipston on Stour Zone
Too Many Small Shops	14%	24%
Too Many Large Shops	11%	10%
About Right	75%	66%

Table 7 – Views on Balance Between Small and Large Food Stores in Southam

	Base	Southam Zone
Too Many Small Shops	10%	0%
Too Many Large Shops	7%	1%
About Right	83%	99%

Table 8 – Views on Balance Between Small and Large Food Stores in Stratford upon Avon

	Base	Stratford upon Avon Zone
Too Many Small Shops	14%	17%
Too Many Large Shops	11%	27%
About Right	76%	56%

- The majority (53%) of Stratford upon Avon residents living in Zones 3 and 4 do not want any changes to the town centre.
- However, potential changes that some people would like to see include more/better parking (7%), a wider variety of stores (6%) and more pedestrianisation (5%).
- When asked if there were any particular food retailers they would like to see in the town, the large majority were happy/couldn't think of any. Specifically named retailers are listed in **Table 9**.

Table 9 – Specific Food Retailers Stratford upon Avon Residents Would Like to See in Stratford upon Avon

	Percentage
None	80%
Asda	6%
Sainsbury	5%
Specialist Food Store	3%
Waitrose	3%
Iceland	2%

- **Table 10** sets out the share of locally generated convenience goods spend that is retained by each of the three rural market towns disaggregated by main and top up food shopping. This shows that Shipston on Stour and Southam attract virtually all the top up food shopping spend by local residents, whereas the towns retain only small shares of their main food spend. For Alcester, due to the close proximity of Stratford upon Avon, more top up food shopping is carried out elsewhere.

Table 10 – Market Share of Locally Generated Convenience Goods Expenditure Disaggregated by Main and Top Up Food Shopping

Zone	Main	Top Up	Overall
2 (Alcester)	27.5%	23.9%	27.1%
5 (Shipston on Stour)	25.4%	96.0%	39.2%
7 (Southam)	19.5%	100.0%	25.6%

APPENDIX 1D

Summary of Market Share Data by Centre/Zone

APPENDIX 1D - ESTIMATED CONVENIENCE GOODS CENTRE MARKET SHARES BY ZONE IN THE BASE YEAR, 2008 (COLUMN PERCENT)								
Retail Supply: Where the Money is Spent	**Consumer Demand: Where the Money Comes From (Zone)**							
	Zone 1	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**
Stratford upon Avon - M&S	0.0	6.8	4.6	2.9	0.0	0.0	0.0	0.3
Stratford upon Avon - Morrisons	1.1	27.3	35.5	13.4	8.2	12.0	0.0	2.9
Stratford upon Avon - Somerfield	0.0	0.2	3.1	9.2	0.0	0.0	0.0	0.0
Stratford upon Avon - Tesco	11.4	20.5	41.3	58.0	19.3	18.3	0.0	6.9
Stratford upon Avon - Local and Other	0.0	0.0	6.5	14.6	0.6	0.0	0.0	0.0
Stratford Total	**12.4**	**54.7**	**90.9**	**98.1**	**28.1**	**30.3**	**0.0**	**10.1**
Alcester - Somerfield	0.0	9.0	2.7	0.0	0.0	0.0	0.0	0.0
Alcester - Tesco Express	0.0	2.8	0.4	0.0	0.0	0.0	0.0	0.0
Alcester - Local and Other	0.0	0.0	0.7	0.0	0.0	0.0	0.0	0.0
Alcester Total	**0.0**	**11.8**	**3.8**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**
Shipston on Stour - Somerfield	0.0	0.0	0.0	0.0	22.7	1.4	0.0	0.0
Shipston on Stour - Local and Other	0.0	0.0	0.0	0.0	16.4	0.0	0.0	0.9
Shipston on Stour Total	**0.0**	**0.0**	**0.0**	**0.0**	**39.2**	**1.4**	**0.0**	**0.9**
Southam - Co-op	0.0	0.0	0.0	0.0	0.0	0.0	3.7	0.0
Southam - Budgens	0.0	0.0	0.0	0.0	0.0	2.1	10.9	0.0
Southam - Local and Other	0.0	0.0	0.0	0.0	0.0	0.0	11.0	0.0
Southam Total	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**2.1**	**25.6**	**0.0**
Bideford on Avon - Budgens	0.0	3.2	1.7	0.0	0.0	0.0	0.0	0.4
Bideford on Avon - Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Henley in Arden - Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Henley in Arden - Somerfield	2.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Studley - Co-op	16.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Studley - Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Studley - Tesco Express	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Within District - Local and Other	0.0	0.0	0.0	0.0	0.0	17.7	0.0	0.0
Other Within District Total	**18.7**	**3.2**	**1.7**	**0.0**	**0.0**	**17.7**	**0.0**	**0.4**
Banbury - Aldi	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Banbury - Kwik Save	0.0	0.0	0.0	0.0	1.1	0.0	0.0	0.0
Banbury - M&S	0.0	0.0	0.0	0.0	0.0	0.6	0.0	0.0
Banbury - Morrisons	0.0	0.0	0.0	0.0	6.9	3.6	1.3	0.0
Banbury - Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Banbury - Sainsbury	0.0	0.0	0.0	0.0	2.9	0.0	6.8	0.0
Banbury - Tesco	0.0	0.0	0.0	0.0	9.7	9.5	2.3	0.0
Birmingham - Any	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Bishops Cleeve - Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Bishops Cleeve - Tesco	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0
Broadway - Any	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Bromsgrove - Any	0.0	2.0	0.0	0.0	0.0	0.0	0.0	0.0
Cheltenham - Any	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Chipping Camden - Any	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Chipping Norton - Any	0.0	0.0	0.0	0.0	2.0	0.0	0.0	0.0
Coventry - Any	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Daventry - Aldi	0.0	0.0	0.0	0.0	1.1	0.0	0.0	0.0
Daventry - Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Daventry - Tesco	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Daventry - Waitrose	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Dudley - Any	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Evesham - Aldi	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.6
Evesham - M&S	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4
Evesham - Morrisons	0.0	1.8	0.0	0.0	0.0	0.0	0.0	31.9
Evesham - Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2
Evesham - Somerfield	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.8
Evesham - Tesco	0.0	11.2	0.0	0.0	0.7	1.1	0.0	32.3
Kenilworth - Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Kenilworth - Sainsbury	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Kenilworth - Somerfield	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Kenilworth - Tesco	0.0	0.0	0.0	0.0	0.0	2.4	0.0	0.0
Kiddlington - Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Kiddlington - Sainsbury	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Outside District - Local and Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0	9.0
Monkspath - Tesco	0.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Moreton in Marsh - Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.3
Moreton in Marsh - Tesco	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.1
Northampton - Any	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other	0.0	0.0	1.4	0.3	1.3	8.3	0.0	0.2
Oxford - Any	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Pershore - Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Pershore - Somerfield	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Pershore - Tesco Express	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Redditch - Aldi	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Redditch - Iceland	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Redditch - Kwik Save	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Redditch - M&S	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Redditch - Morrisons	20.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Redditch - Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Redditch - Sainsbury	11.6	5.2	0.0	0.0	0.0	0.0	0.0	0.0
Redditch - Tesco Extra	23.8	10.0	0.0	0.0	0.0	0.0	0.0	0.0
Royal Leamington Spa - Asda	0.0	0.0	0.2	0.0	0.0	14.7	50.7	0.0
Royal Leamington Spa - M&S	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Royal Leamington Spa - Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Royal Leamington Spa - Sainsbury, Shires Retail Park	0.0	0.0	0.0	1.5	0.0	1.1	8.2	0.0
Royal Leamington Spa - Tesco Metro	0.0	0.0	0.0	0.0	0.0	1.3	4.2	0.0
Rugby - Aldi	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Rugby - Co-op	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Rugby - Iceland	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Rugby - M&S	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Rugby - Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Rugby - Sainsbury	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Rugby - Tesco	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Shirley - Aldi	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Shirley - Other	1.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Shirley -Sainsbury	1.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Solihull - Any	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Solihull - M & S	1.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Solihull - Sainsbury	4.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Solihull - Tesco	3.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Solihull -Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Stow on the Wold - Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1
Stow on the Wold - Tesco	0.0	0.0	0.0	0.0	7.0	0.0	0.0	4.8
Warwick - Aldi	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Warwick - Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Warwick - Sainsbury	0.0	0.0	2.0	0.0	0.0	2.2	0.0	0.0
Warwick - Tesco	0.0	0.0	0.0	0.0	0.0	3.5	0.9	0.0
Worcester - Any	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Outside District Total	**68.9**	**30.3**	**3.6**	**1.9**	**32.7**	**48.5**	**74.4**	**88.6**
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**

APPENDIX 2

Population Projections: Methodology

Stratford District Retail Study 2008

Population Projections based on possible scale and location of future housing development in the District

Revised version

Zone	2005 Population	2005 Households[1]	%	2008 Households	2011 Households	2016 Households	2021 Households	2026 Households
1	17,873	7,771	15.6	7,877	8,008	8,227	8,445	8,663
2	14,848	6,456	12.9	6,513	6,622	6,803	6,983	7,164
3	19,783	8,601	17.2	8,685	8,829	9,070	9,311	9,552
4	14,834	6,450	12.9	6,514	6,622	6,803	6,983	7,164
5	11,195	4,867	9.8	4,948	5,031	5,168	5,305	5,442
6	17,782	7,731	15.5	7,827	7,957	8,174	8,391	8,608
7	18,534	8,058	16.1	8,130	8,265	8,490	8,716	8,941
District Sub-total	114,849	49,934	100.0	50,494	51,334	52,734	54,134	55,534
8	FIGURES MAY NEED TO BE CHANGED TO REFLECT NEW 2005 BASE DATE							

Methodology

The increase in population by 2026 is based on the number of dwellings to be built in Stratford District 2006-2026 according to the Regional Spatial Strategy Revision Preferred Options, ie. 5,600 dwellings

The increase in dwellings is apportioned pro-rata to each intermediate phase based on an annualised figure:

ie. 5,600/20 = 280 per annum

The increase in the number of households in each zone for each phase is derived by applying the distribution at 2005 to the total figure.

There are a number of health warnings in using this approach:

1. No attempt has been made to apply any potential shifts in policy relating to the location of future development
2. The total dwellings figure in the RSS Revision could change, ie. be higher, in the final version of the RSS Revision (possibly by between 500 and 1000)
3. There are differences (in definition and reality) between the total number of households and the total number of dwellings

[1] Based on average household size of 2.30 (see overleaf)

There are no forecasts known to exist for average household size. However, a trend can be applied based on changes over recent decades. The following values have been used to convert the household figures in the previous table to population figures given in the table below:

1981 = 2.61
1991 = 2.42
2001 = 2.33
2005 = 2.30
2008 = 2.29

2011 = 2.28
2016 = 2.26
2021 = 2.25
2026 = 2.24

Zone	2005 Population	2008 Population	2011 Population	2016 Population	2021 Population	2026 Population
1	17,873	18,038	18,258	18,593	19,001	19,405
2	14,848	14,914	15,098	15,375	15,712	16,047
3	19,783	19,889	20,130	20,498	20,950	21,396
4	14,834	14,917	15,098	15,375	15,712	16,047
5	11,195	11,331	11,471	11,680	11,936	12,190
6	17,782	17,924	18,142	18,472	18,880	19,282
7	18,534	18,618	18,844	19,187	19,611	20,028
District Sub-total	114,849	115,631	117,042	119,179	121,802	124,396
8	FIGURES MAY NEED TO BE CHANGED TO REFLECT NEW 2005 BASE DATE					

APPENDIX 3

Experian Data

APPENDIX 3A

Definition of Convenience Goods (Extract)

1. Estimating consumer spending on retail goods

1.1 SOURCES

Estimates of consumer spending on retail items are taken from estimates of household spending contained in the Office for National Statistics' (ONS) publication *Consumer Trends* (latest issue June 2007).[1] This breaks total household spending down according to the internationally recognised COICOPS categories (Classification of Individual Consumption by Purpose). This is consistent with the definitions used in the ONS' *National Accounts (Blue Book also June 2007)* publication.

Note that these estimates are based on surveys of consumers and are not the same as the ONS' estimates of retail sales, which are based on surveys of shops and businesses. The difference between the two estimates is discussed in Section 1.3 below and in more detail in Section 5.

1.2 DEFINITIONS

In Retail Planner, consumer spending on retail goods is available at either a 'fine' or 'coarse' level of detail.[2] Forecasts and market share estimates (see Sections 2 and 4) are only provided at a coarse level. The coarse categories are aggregations of the fine categories and are detailed in Table 1.1. Other special aggregations are also available, such as 'comparison goods', 'convenience goods', 'core DIY goods' and 'core bulky goods' (see Section 1.5 below).

1.3 ALLOWANCE FOR NON-RETAIL SPENDING

In all cases but one, spending estimates refer to retail outlets.[3] The exception is tobacco, where the figures include spending in pubs, clubs and restaurants. We allow for this non-retail spending and for tobacco which is smuggled into the country. Estimates are based on data from the Annual Business Inquiry (ABI).

1.4 ALLOWANCES FOR SPENDING MADE BY FOREIGNERS

The National Accounts definition of household outlays includes spending in the UK by foreigners.[4] This is deducted from the sum of spending by category (which is also net of UK residents' spending abroad) to give the figure for total household spending by UK residents that appears in the *National Accounts* and the ONS' GDP releases.

In 2006, the ONS estimated that foreigners spend £18.6bn pounds in the UK out of total household spending in the UK of £746bn (2.4 per cent of the total). The bulk is used for

[1] The ONS now refers to consumer spending as household spending.
[2] Note that this does not represent the full level of detailed spending estimates available from Experian Business Strategies, but it is the most detailed level for which ONS currently publishes national spending totals (in *Consumer Trends* and the *Blue Book*).
[3] This includes spending in some non-retail outlets such as mail order and sales by wholly internet companies.
[4] European System of Accounts 1995 (or ESA95). Note that this was also the case with previous definitions of consumer spending.

accommodation, catering and travel services, but, on the basis of Input-Output tables and the *International Passenger Survey*, we estimate that some 25 per cent of this is spent on retail goods. Table 1.1 shows this estimate broken down by coarse category and Table 1.2 shows the full, fine category detail.

While this is genuine spending, most of which finds its way into UK retail outlets (rather than into special forms of trading), we have separated it out from the resident totals. This is because most spending by foreigners takes place around tourist centres and cannot be allocated to small areas on the basis of population and socio-economic mix as for residents.[5]

Note that the current version of Retail Planner covers spending by residents in the UK. It does not include any estimates of retail spend by tourists in local areas, although information on this is planned for future versions.

1.5 AGGREGATIONS

Aside from COICOPS, Retail Planner contains a number of special aggregations of retail goods. These are:

1. **Convenience goods** – low-cost, everyday items that consumers are unlikely to travel far to purchase. Defined as food and non-alcoholic drinks, tobacco, alcohol, newspapers and 90 per cent of non-durable household goods.[6]
2. **Comparison goods** – all other retail goods.
3. **Core DIY goods** – goods that might be sold in a DIY store. These are defined to be:
    a. Materials for repair and maintenance of the dwelling
    b. Small tools and miscellaneous accessories
    c. Major tools and equipment
    d. Gardens, plants and flowers
    e. Furniture and floor coverings (10 per cent of total sales)
    f. Non-durable household goods (10 per cent of total sales)

    There is also a category called **core DIY goods excluding gardening**.
4. **Bulky goods** – defined as:
    a. DIY goods (as above)
    b. Furniture and floor coverings (remaining 90 per cent of sales)
    c. Major household appliances whether electric or not
    d. Audio-visual equipment

1.6 NHS PRESCRIPTION COSTS

Official estimates of household spending include the cost of prescription charges but not the cost of the subsidy paid by the NHS. This means that household spending on medical goods will understate the potential sales of pharmacists. To allow for this shortcoming we have estimated, based on NHS data, that spending by the NHS on prescriptions was £151 per person in 2006.

[5] In 2004 almost half of all spending in the UK by overseas tourists took place in London (International Passenger Survey).

[6] Non-durable household goods comprise cleaning materials, kitchen disposables, household hardware and appliances, kitchen gloves, cloths etc and pins, needles, tape measures and nuts and bolts. We have assumed, based on EFS data, that 10 per cent of non-durable household goods are DIY-type goods and, therefore, are properly classified as comparison goods while the remaining 90 per cent have the characteristics of convenience goods.

APPENDIX 3B

Convenience Goods Expenditure Per Head

ZONE 1

Total Retail per Household	11,518	10,557	109.107	100

	Target	Base	Penetration	Index
Therapeutic appliances and equipment per Household				
Therapeutic appliances and equipment per Household	115	121	95.657	88
Total Retail per Household	11,518	10,557	109.107	100

	Target	Base	Penetration	Index
Tobacco (Retail) per Household				
Tobacco per Household	236	368	64.177	59
Total Retail per Household	11,518	10,557	109.107	100

	Target	Base	Penetration	Index
Prescription costs per Household				
Prescription costs per Household	356	356	100.000	-

Leisure per Household

	Target	Base	Penetration	Index
Total Leisure per Household				
Accommodation services per Household	323	265	121.689	120
Cultural services per Household	514	543	94.624	94
Games of chance per Household	289	379	76.173	75
Hairdressing salons & personal grooming establishments per Household	238	199	119.584	118
Recreational and sporting services per Household	336	274	122.846	121
Restaurants, cafes etc per Household	2,614	2,603	100.428	99
Total Leisure per Household	4,314	4,264	101.188	100

Total Retail per Person

	Target	Base	Penetration	Index
2006 Total Expenditure per Person (in 2006 prices)				
Total Comparison per Person	3,246	2,850	113.872	102
Total Convenience per Person	1,763	1,649	106.899	96
Total Retail per Person	5,008	4,499	111.316	100

	Target	Base	Penetration	Index
Alcohol (off trade) per Person				
Beer (off trade)	42	49	85.896	77
Spirits (off trade)	56	54	104.122	94
Wine, cider and perry (off trade)	132	102	129.922	117
Total Retail per Person	5,008	4,499	111.316	100

	Target	Base	Penetration	Index
Aplliances for personal care per Person				
Electric appliances for personal care per Person	17	17	102.652	92
Other appliances, articles & prods for personal care per Person	265	237	111.980	101
Appliances for personal care per Person	282	254	111.358	100
Total Retail per Person	5,008	4,499	111.316	100

	Target	Base	Penetration	Index
Audio-visual, photographic and information processing equipment per Person				
Eqpt fr recptn, recrding and reprdtn of sound and pics per Person	72	81	89.441	80
Information processing equipment per Person	73	88	83.273	75
Photographic and cine eqpt and optical instruments per Person	113	63	178.455	160
Telephone and telefax equipment per Person	17	15	109.878	99
Total Retail per Person	5,008	4,499	111.316	100

	Target	Base	Penetration	Index
Bicycles per Person				
Bicycles per Person	9	22	42.034	38
Total Retail per Person	5,008	4,499	111.316	100

	Target	Base	Penetration	Index
Books & stationary per Person				
Books per Person	63	58	107.555	97

ZONE 2

Total Retail per Household	10,793	10,557	102.236	100

	Target	Base	Penetration	Index
Therapeutic appliances and equipment per Household				
Therapeutic appliances and equipment per Household	98	121	81.464	80
Total Retail per Household	10,793	10,557	102.236	100

	Target	Base	Penetration	Index
Tobacco (Retail) per Household				
Tobacco per Household	269	368	73.172	72
Total Retail per Household	10,793	10,557	102.236	100

	Target	Base	Penetration	Index
Prescription costs per Household				
Prescription costs per Household	356	356	100.000	-

Leisure per Household

	Target	Base	Penetration	Index
Total Leisure per Household				
Accommodation services per Household	283	265	106.767	111
Cultural services per Household	511	543	94.019	98
Games of chance per Household	318	379	83.769	87
Hairdressing salons & personal grooming establishments per Household	202	199	101.525	105
Recreational and sporting services per Household	298	274	109.038	113
Restaurants, cafes etc per Household	2,496	2,603	95.896	100
Total Leisure per Household	4,109	4,264	96.361	100

Total Retail per Person

	Target	Base	Penetration	Index
2006 Total Expenditure per Person (in 2006 prices)				
Total Comparison per Person	2,905	2,850	101.910	102
Total Convenience per Person	1,584	1,649	96.070	96
Total Retail per Person	4,489	4,499	99.769	100

	Target	Base	Penetration	Index
Alcohol (off trade) per Person				
Beer (off trade)	43	49	88.127	88
Spirits (off trade)	51	54	95.330	96
Wine, cider and perry (off trade)	108	102	106.132	106
Total Retail per Person	4,489	4,499	99.769	100

	Target	Base	Penetration	Index
Aplliances for personal care per Person				
Electric appliances for personal care per Person	17	17	98.436	99
Other appliances, articles & prods for personal care per Person	241	237	101.878	102
Appliances for personal care per Person	258	254	101.648	102
Total Retail per Person	4,489	4,499	99.769	100

	Target	Base	Penetration	Index
Audio-visual, photographic and information processing equipment per Person				
Eqpt fr recptn, recrding and reprdtn of sound and pics per Person	71	81	87.207	87
Information processing equipment per Person	71	88	80.851	81
Photographic and cine eqpt and optical instruments per Person	98	63	154.716	155
Telephone and telefax equipment per Person	17	15	108.255	109
Total Retail per Person	4,489	4,499	99.769	100

	Target	Base	Penetration	Index
Bicycles per Person				
Bicycles per Person	11	22	48.694	49
Total Retail per Person	4,489	4,499	99.769	100

	Target	Base	Penetration	Index
Books & stationary per Person				
Books per Person	54	58	91.638	92

ZONE 3

Total Retail per Household	10,918	10,557	103.415	100

	Target	Base	Penetration	Index
Therapeutic appliances and equipment per Household				
Therapeutic appliances and equipment per Household	105	121	86.657	84
Total Retail per Household	10,918	10,557	103.415	100

	Target	Base	Penetration	Index
Tobacco (Retail) per Household				
Tobacco per Household	239	368	64.942	63
Total Retail per Household	10,918	10,557	103.415	100

	Target	Base	Penetration	Index
Prescription costs per Household				
Prescription costs per Household	356	356	100.000	-

Leisure per Household

	Target	Base	Penetration	Index
Total Leisure per Household				
Accommodation services per Household	298	265	112.241	116
Cultural services per Household	499	543	91.945	95
Games of chance per Household	301	379	79.422	82
Hairdressing salons & personal grooming establishments per Household	217	199	108.723	113
Recreational and sporting services per Household	315	274	115.002	119
Restaurants, cafes etc per Household	2,484	2,603	95.412	99
Total Leisure per Household	4,113	4,264	96.474	100

Total Retail per Person

	Target	Base	Penetration	Index
2006 Total Expenditure per Person (in 2006 prices)				
Total Comparison per Person	3,198	2,850	112.200	102
Total Convenience per Person	1,737	1,649	105.332	96
Total Retail per Person	4,935	4,499	109.683	100

	Target	Base	Penetration	Index
Alcohol (off trade) per Person				
Beer (off trade)	43	49	88.237	80
Spirits (off trade)	57	54	106.677	97
Wine, cider and perry (off trade)	126	102	124.357	113
Total Retail per Person	4,935	4,499	109.683	100

	Target	Base	Penetration	Index
Aplliances for personal care per Person				
Electric appliances for personal care per Person	18	17	105.224	96
Other appliances, articles & prods for personal care per Person	266	237	112.212	102
Appliances for personal care per Person	283	254	111.746	102
Total Retail per Person	4,935	4,499	109.683	100

	Target	Base	Penetration	Index
Audio-visual, photographic and information processing equipment per Person				
Eqpt fr recptn, recrding and reprdtn of sound and pics per Person	74	81	90.909	83
Information processing equipment per Person	74	88	84.043	77
Photographic and cine eqpt and optical instruments per Person	108	63	170.559	156
Telephone and telefax equipment per Person	17	15	110.874	101
Total Retail per Person	4,935	4,499	109.683	100

	Target	Base	Penetration	Index
Bicycles per Person				
Bicycles per Person	10	22	44.801	41
Total Retail per Person	4,935	4,499	109.683	100

	Target	Base	Penetration	Index
Books & stationary per Person				
Books per Person	60	58	102.694	94

Total Retail per Household	11,039	10,557	104.570	100

	Target	Base	Penetration	Index
Therapeutic appliances and equipment per Household				
Therapeutic appliances and equipment per Household	111	121	91.762	88
Total Retail per Household	11,039	10,557	104.570	100

	Target	Base	Penetration	Index
Tobacco (Retail) per Household				
Tobacco per Household	229	368	62.353	60
Total Retail per Household	11,039	10,557	104.570	100

	Target	Base	Penetration	Index
Prescription costs per Household				
Prescription costs per Household	356	356	100.000	-

Leisure per Household

	Target	Base	Penetration	Index
Total Leisure per Household				
Accommodation services per Household	314	265	118.393	120
Cultural services per Household	515	543	94.770	96
Games of chance per Household	270	379	71.318	72
Hairdressing salons & personal grooming establishments per Household	228	199	114.466	116
Recreational and sporting services per Household	324	274	118.299	120
Restaurants, cafes etc per Household	2,559	2,603	98.300	100
Total Leisure per Household	4,210	4,264	98.740	100

Total Retail per Person

	Target	Base	Penetration	Index
2006 Total Expenditure per Person (in 2006 prices)				
Total Comparison per Person	3,151	2,850	110.561	103
Total Convenience per Person	1,681	1,649	101.938	95
Total Retail per Person	4,832	4,499	107.401	100

	Target	Base	Penetration	Index
Alcohol (off trade) per Person				
Beer (off trade)	41	49	83.887	78
Spirits (off trade)	54	54	100.244	93
Wine, cider and perry (off trade)	128	102	125.466	117
Total Retail per Person	4,832	4,499	107.401	100

	Target	Base	Penetration	Index
Aplliances for personal care per Person				
Electric appliances for personal care per Person	18	17	105.153	98
Other appliances, articles & prods for personal care per Person	257	237	108.774	101
Appliances for personal care per Person	275	254	108.533	101
Total Retail per Person	4,832	4,499	107.401	100

	Target	Base	Penetration	Index
Audio-visual, photographic and information processing equipment per Person				
Eqpt fr recptn, recrding and reprdtn of sound and pics per Person	74	81	91.823	85
Information processing equipment per Person	71	88	81.392	76
Photographic and cine eqpt and optical instruments per Person	111	63	174.577	163
Telephone and telefax equipment per Person	16	15	106.490	99
Total Retail per Person	4,832	4,499	107.401	100

	Target	Base	Penetration	Index
Bicycles per Person				
Bicycles per Person	9	22	39.951	37
Total Retail per Person	4,832	4,499	107.401	100

	Target	Base	Penetration	Index
Books & stationary per Person				
Books per Person	68	58	116.118	108

ZONE 5

Total Retail per Household	11,367	10,557	107.670	100

	Target	Base	Penetration	Index
Therapeutic appliances and equipment per Household				
Therapeutic appliances and equipment per Household	107	121	89.030	83
Total Retail per Household	11,367	10,557	107.670	100

	Target	Base	Penetration	Index
Tobacco (Retail) per Household				
Tobacco per Household	235	368	63.926	59
Total Retail per Household	11,367	10,557	107.670	100

	Target	Base	Penetration	Index
Prescription costs per Household				
Prescription costs per Household	356	356	100.000	-

Leisure per Household

	Target	Base	Penetration	Index
Total Leisure per Household				
Accommodation services per Household	322	265	121.349	125
Cultural services per Household	501	543	92.304	95
Games of chance per Household	314	379	82.738	85
Hairdressing salons & personal grooming establishments per Household	214	199	107.586	111
Recreational and sporting services per Household	339	274	123.995	128
Restaurants, cafes etc per Household	2,452	2,603	94.174	97
Total Leisure per Household	4,142	4,264	97.150	100

Total Retail per Person

	Target	Base	Penetration	Index
2006 Total Expenditure per Person (in 2006 prices)				
Total Comparison per Person	3,217	2,850	112.858	102
Total Convenience per Person	1,774	1,649	107.577	97
Total Retail per Person	4,991	4,499	110.923	100

	Target	Base	Penetration	Index
Alcohol (off trade) per Person				
Beer (off trade)	44	49	89.462	81
Spirits (off trade)	59	54	110.296	99
Wine, cider and perry (off trade)	140	102	137.267	124
Total Retail per Person	4,991	4,499	110.923	100

	Target	Base	Penetration	Index
Aplliances for personal care per Person				
Electric appliances for personal care per Person	17	17	101.883	92
Other appliances, articles & prods for personal care per Person	253	237	106.830	96
Appliances for personal care per Person	270	254	106.500	96
Total Retail per Person	4,991	4,499	110.923	100

	Target	Base	Penetration	Index
Audio-visual, photographic and information processing equipment per Person				
Eqpt fr recptn, recrding and reprdtn of sound and pics per Person	67	81	82.184	74
Information processing equipment per Person	83	88	94.136	85
Photographic and cine eqpt and optical instruments per Person	102	63	160.647	145
Telephone and telefax equipment per Person	18	15	116.839	105
Total Retail per Person	4,991	4,499	110.923	100

	Target	Base	Penetration	Index
Bicycles per Person				
Bicycles per Person	12	22	55.005	50
Total Retail per Person	4,991	4,499	110.923	100

	Target	Base	Penetration	Index
Books & stationary per Person				
Books per Person	62	58	105.368	95

ZONE 6

Total Retail per Household	11,961	10,557	113.299	100

	Target	Base	Penetration	Index
Therapeutic appliances and equipment per Household				
Therapeutic appliances and equipment per Household	122	121	100.775	89
Total Retail per Household	11,961	10,557	113.299	100

	Target	Base	Penetration	Index
Tobacco (Retail) per Household				
Tobacco per Household	227	368	61.704	54
Total Retail per Household	11,961	10,557	113.299	100

	Target	Base	Penetration	Index
Prescription costs per Household				
Prescription costs per Household	356	356	100.000	-

Leisure per Household

	Target	Base	Penetration	Index
Total Leisure per Household				
Accommodation services per Household	354	265	133.322	129
Cultural services per Household	530	543	97.506	94
Games of chance per Household	291	379	76.613	74
Hairdressing salons & personal grooming establishments per Household	241	199	121.102	117
Recreational and sporting services per Household	366	274	133.698	129
Restaurants, cafes etc per Household	2,637	2,603	101.291	98
Total Leisure per Household	4,418	4,264	103.612	100

Total Retail per Person

	Target	Base	Penetration	Index
2006 Total Expenditure per Person (in 2006 prices)				
Total Comparison per Person	3,275	2,850	114.888	103
Total Convenience per Person	1,758	1,649	106.617	95
Total Retail per Person	5,033	4,499	111.857	100

	Target	Base	Penetration	Index
Alcohol (off trade) per Person				
Beer (off trade)	43	49	87.608	78
Spirits (off trade)	56	54	104.739	94
Wine, cider and perry (off trade)	140	102	137.631	123
Total Retail per Person	5,033	4,499	111.857	100

	Target	Base	Penetration	Index
Aplliances for personal care per Person				
Electric appliances for personal care per Person	17	17	99.165	89
Other appliances, articles & prods for personal care per Person	260	237	109.834	98
Appliances for personal care per Person	277	254	109.123	98
Total Retail per Person	5,033	4,499	111.857	100

	Target	Base	Penetration	Index
Audio-visual, photographic and information processing equipment per Person				
Eqpt fr recptn, recrding and reprdtn of sound and pics per Person	71	81	87.920	79
Information processing equipment per Person	76	88	86.363	77
Photographic and cine eqpt and optical instruments per Person	116	63	182.568	163
Telephone and telefax equipment per Person	19	15	121.716	109
Total Retail per Person	5,033	4,499	111.857	100

	Target	Base	Penetration	Index
Bicycles per Person				
Bicycles per Person	11	22	48.431	43
Total Retail per Person	5,033	4,499	111.857	100

	Target	Base	Penetration	Index
Books & stationary per Person				
Books per Person	60	58	102.211	91

Total Retail per Household	11,731	10,557	111.119	100

	Target	Base	Penetration	Index
Therapeutic appliances and equipment per Household				
Therapeutic appliances and equipment per Household	113	121	94.002	85
Total Retail per Household	11,731	10,557	111.119	100

	Target	Base	Penetration	Index
Tobacco (Retail) per Household				
Tobacco per Household	256	368	69.532	63
Total Retail per Household	11,731	10,557	111.119	100

	Target	Base	Penetration	Index
Prescription costs per Household				
Prescription costs per Household	356	356	100.000	-

Leisure per Household

	Target	Base	Penetration	Index
Total Leisure per Household				
Accommodation services per Household	322	265	121.312	117
Cultural services per Household	533	543	98.058	95
Games of chance per Household	310	379	81.880	79
Hairdressing salons & personal grooming establishments per Household	228	199	114.354	111
Recreational and sporting services per Household	345	274	125.879	122
Restaurants, cafes etc per Household	2,674	2,603	102.723	99
Total Leisure per Household	4,411	4,264	103.461	100

Total Retail per Person

	Target	Base	Penetration	Index
2006 Total Expenditure per Person (in 2006 prices)				
Total Comparison per Person	3,068	2,850	107.631	103
Total Convenience per Person	1,637	1,649	99.285	95
Total Retail per Person	4,705	4,499	104.572	100

	Target	Base	Penetration	Index
Alcohol (off trade) per Person				
Beer (off trade)	44	49	90.043	86
Spirits (off trade)	52	54	97.127	93
Wine, cider and perry (off trade)	120	102	117.984	113
Total Retail per Person	4,705	4,499	104.572	100

	Target	Base	Penetration	Index
Aplliances for personal care per Person				
Electric appliances for personal care per Person	17	17	98.229	94
Other appliances, articles & prods for personal care per Person	254	237	107.407	103
Appliances for personal care per Person	271	254	106.795	102
Total Retail per Person	4,705	4,499	104.572	100

	Target	Base	Penetration	Index
Audio-visual, photographic and information processing equipment per Person				
Eqpt fr recptn, recrding and reprdtn of sound and pics per Person	70	81	86.182	82
Information processing equipment per Person	72	88	82.598	79
Photographic and cine eqpt and optical instruments per Person	106	63	167.143	160
Telephone and telefax equipment per Person	17	15	110.574	106
Total Retail per Person	4,705	4,499	104.572	100

	Target	Base	Penetration	Index
Bicycles per Person				
Bicycles per Person	11	22	48.579	46
Total Retail per Person	4,705	4,499	104.572	100

	Target	Base	Penetration	Index
Books & stationary per Person				
Books per Person	54	58	92.948	89

Total Retail per Household	10,914	10,557	103.380	100

	Target	Base	Penetration	Index
Therapeutic appliances and equipment per Household				
Therapeutic appliances and equipment per Household	106	121	87.523	85
Total Retail per Household	10,914	10,557	103.380	100

	Target	Base	Penetration	Index
Tobacco (Retail) per Household				
Tobacco per Household	235	368	63.928	62
Total Retail per Household	10,914	10,557	103.380	100

	Target	Base	Penetration	Index
Prescription costs per Household				
Prescription costs per Household	356	356	100.000	-

Leisure per Household

	Target	Base	Penetration	Index
Total Leisure per Household				
Accommodation services per Household	296	265	111.599	120
Cultural services per Household	508	543	93.465	101
Games of chance per Household	286	379	75.346	81
Hairdressing salons & personal grooming establishments per Household	228	199	114.549	123
Recreational and sporting services per Household	297	274	108.375	117
Restaurants, cafes etc per Household	2,350	2,603	90.283	97
Total Leisure per Household	3,965	4,264	92.981	100

Total Retail per Person

	Target	Base	Penetration	Index
2006 Total Expenditure per Person (in 2006 prices)				
Total Comparison per Person	3,009	2,850	105.572	101
Total Convenience per Person	1,699	1,649	103.026	98
Total Retail per Person	4,708	4,499	104.639	100

	Target	Base	Penetration	Index
Alcohol (off trade) per Person				
Beer (off trade)	41	49	84.673	81
Spirits (off trade)	62	54	116.640	111
Wine, cider and perry (off trade)	131	102	128.942	123
Total Retail per Person	4,708	4,499	104.639	100

	Target	Base	Penetration	Index
Aplliances for personal care per Person				
Electric appliances for personal care per Person	17	17	102.049	98
Other appliances, articles & prods for personal care per Person	241	237	101.995	97
Appliances for personal care per Person	259	254	101.999	97
Total Retail per Person	4,708	4,499	104.639	100

	Target	Base	Penetration	Index
Audio-visual, photographic and information processing equipment per Person				
Eqpt fr recptn, recrding and reprdtn of sound and pics per Person	81	81	100.275	96
Information processing equipment per Person	93	88	106.118	101
Photographic and cine eqpt and optical instruments per Person	84	63	133.039	127
Telephone and telefax equipment per Person	19	15	123.099	118
Total Retail per Person	4,708	4,499	104.639	100

	Target	Base	Penetration	Index
Bicycles per Person				
Bicycles per Person	17	22	74.890	72
Total Retail per Person	4,708	4,499	104.639	100

	Target	Base	Penetration	Index
Books & stationary per Person				
Books per Person	62	58	106.209	102

APPENDIX 3C

Expenditure Forecasts (Extract)

3. Projections and forecasts

3.1 CONCEPTS

Future spending levels will have a critical bearing on the need for retail space. Consequently, stakeholders in the planning process, such as the local authority, retailers, consultants and surveyors, need to understand how spending on goods and services will change.

Traditionally, planners have used a mixture of methods to forecast spending levels. There is no one correct method for the different considerations of each planning application. But experts must decide which is best suited to the particular circumstance.

Retail Planner presents the two principal methods of looking at trends in spending on retail and leisure goods:

1 **Projections** – estimates based on the extrapolation of past trends, with alternative projections estimated over different time periods (say 5, 10, 20 and 40 years).

2 **Forecasts** – estimates of future spending based on an econometric model of consumer spending. This approach also allows scenarios to be produced with different assumptions about the key macroeconomic drivers (such as interest rates).

The following sections describe the methodology used to forecast retail spending and the results achieved, though we do not make value judgments about which is best.

3.2 CHAIN LINKING

Before we can estimate past trends in convenience and comparison goods spending, we need historical time series. Traditionally this has involved aggregating ONS constant price (or inflation adjusted) estimates of spending by detailed category. This is problematic because:

"Comparisons of aggregates of volume series over time are complicated by changes in the relative prices of different goods and services and by qualitative changes in the goods and services themselves. As time passes some goods escalate in price more rapidly than others. Others change so much that they become, in effect, different goods and services from those produced previously under the same name."[7]

Because of these shifts, relative prices of goods and services in the base year become increasingly unrepresentative over time. As a result, changes in measured volumes will also be less reliable in periods distant from the base year. This is particularly problematic for goods or services such as audio-visual equipment that have seen sharp declines in price over time. So, valuing this spending at 2005 prices, when estimating aggregate retail spending growth rates from 1965 for example, is likely to cause distortions.

Until 2003, the ONS approach used fixed-base chain linking, whereby estimates using different price bases were spliced together every five years. In 2003, the ONS moved to annual chain-linking for its constant price aggregates. This is similar to fixed-base chain linking except that the weights change every year and growth over time is estimated by linking together year-to-year estimates. This method is in line with the recommendations of the *System for National Accounts 1993 (SNA93)*, which is incorporated into the *European System of Accounts 1995*

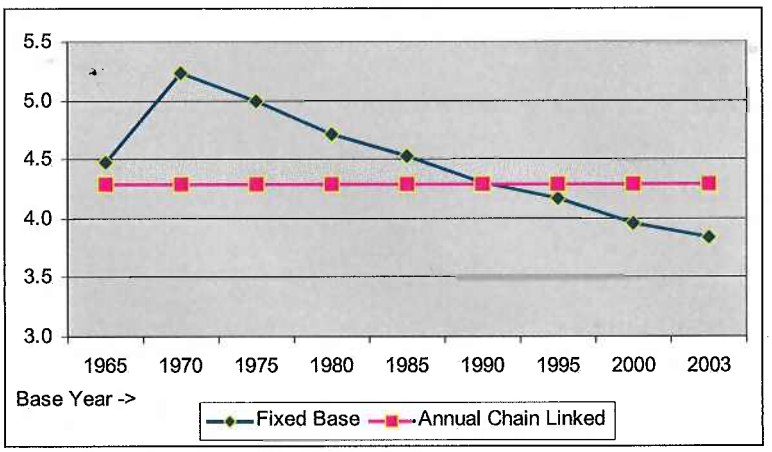
[7] National Statistics (1999), *United Kingdom National Accounts, the Blue Book*, p.25.

(ESA95) and has been widely adopted internationally. The main drawback of annual chain linking is a loss of additivity – as the components of, say, comparison spending only sum to totals in the base year.

Since 2004, we have adopted the annual chain-linking methodology. This brings an additional advantage in increasing the stability of retail spending growth, particularly for comparison goods where changes in relative prices are most pronounced. This is largely because the volume of spending on audio-visual equipment has been rising particularly rapidly in recent years, accompanied by sharp falls in price. So comparison spending growth tends to fall relative to the last estimate, as audio-visual equipment has a lower weight each time the data is re-based and this revision affects all previous years. This problem disappears with annual chain-linking.

Figure 3.1 shows how the estimated ultra long-term trend (25 years to 2003 in this example) would have varied with different base years and compares it against the stability in the annual chain-linked estimate. Using 1990 prices, for example, the fixed-base method gives an estimated annual growth rate of 4.3 per cent per annum, which is similar to the annual chain-linked estimate. But the fixed-based estimate gives an estimate of 5.2 per cent per annum when estimated at 1970 prices and a rate of 3.9 per cent per annum when estimated at 2003 prices.

FIGURE 3.1: COMPARISON GOODS ULTRA LONG-TERM TREND: FIXED BASED VS. ANNUAL CHAIN LINKING



National Accounts currently use annual chain linking to 2003 and a fixed-base methodology for 2004 onwards, with volumes being presented in 2003 prices. Retail Planner has adopted a slightly different convention, with annual chain linking for every year to the latest data point and volumes in 2006 prices. We believe it is useful to have spending volumes based in the closest year possible to current prices.

The annual chain-linked data has been used to estimate past trends for the broad aggregates and for projections. Forecasts have been prepared at a more detailed level and aggregated up to the broad totals using annual chain linking. Note the lack of additivity means spending on retail goods no longer equals the sum of convenience and comparison spend except in the base year, although the discrepancies tend to be small.

3.3 PROJECTIONS

We have estimated trends in spending per head on retail goods using the following equation:

$$\Delta \ln(Spend_t) = \beta + u_t$$

where:

$\Delta \ln(Spend_t)$ is the annual change in the log of spending per head.

β is the estimated annual growth rate.

This method has been used to estimate trends over the following time periods:

1. **1967-2006 – ultra long-term trend**
2. **1977-2006 – long-term trend**
3. **1987-2006 – medium-term trend**

Tables 3.1 and 3.2 show projections and forecasts of future spending volume growth by broad retail headings.

Results summary:

- Projections for future spending based on the medium-term (20-year) trend show the highest rates, reflecting the surge in retail expenditure during the 1980s and 1990s.
- Total retail spending growth over the next ten years is projected to be between 2.5 per cent (EBS, consensus) and 3.9 per cent per person a year (medium-term trend).
- Spending on comparison goods over the next ten years is projected to grow by between 3.5 per cent (EBS, consensus) and 6.0 per cent per cent, with projections of convenience spending growth of between 0.6 and 1.0 per cent.

TABLE 3.1

FORECASTS & PROJECTIONS OF UK SPENDING PER HEAD VOLUMES 2007-2011 (2006 PRICES)

	EBS forecast	Consensus forecast	Ultra long-term trend	Long-term trend	Medium-term trend
Convenience	0.7	0.6	0.6	0.8	1.0
Comparison	3.8	3.6	4.8	5.3	6.0
Total retail	2.6	2.5	2.9	3.3	3.9
Core DIY	2.4	2.2	3.0	3.5	3.0
Core DIY excluding gardening	2.5	2.3	2.9	3.6	2.7
Bulky goods	4.0	3.8	5.6	6.0	6.6
Non-bulky goods*	3.7	3.6	4.4	5.0	5.7
Leisure services	1.2	1.0	2.4	1.8	1.9
Total consumer spending	1.9	1.8	2.4	2.6	2.7

TABLE 3.2

FORECASTS & PROJECTIONS OF UK SPENDING PER HEAD VOLUMES 2007-2016 (2006 PRICES)

	EBS forecast	Consensus forecast	Ultra long-term trend	Long-term trend	Medium-term trend
Convenience	0.8	0.8	0.6	0.8	1.0
Comparison	3.5	3.5	4.8	5.3	6.0
Total retail	2.5	2.5	2.9	3.3	3.9
Core DIY	2.3	2.3	3.0	3.5	3.0
Core DIY excluding gardening	2.5	2.5	2.9	3.6	2.7
Bulky goods	3.5	3.5	5.6	6.0	6.6
Non-bulky goods*	3.4	3.4	4.4	5.0	5.7
Leisure services	1.1	1.1	2.4	1.8	1.9
Total consumer spending	1.8	1.8	2.4	2.6	2.7

* comparison goods only

3.4 FORECASTS

3.4.1 Experian Business Strategies

The forecasts presented in this paper are from Experian Business Strategies' model of disaggregated consumer spending. This uses our UK macroeconomic forecast variables (chiefly consumer spending, incomes and inflation) as an input and projects forward using assumptions about income and price elasticities. The shares of the individual components of consumer spending, not just the levels, will be sensitive to the UK outlook. Growth forecasts are also sensitive to the position of the base year in the economic cycle. If this is near to a cyclical peak, future growth will generally be lower than when close to a trough.

3.4.2 Consensus forecasts

Consensus views for GDP growth are taken from the Treasury (*Forecasts for the UK Economy, September 2007*) and also from Medium-Term Fiscal Projections in the 2007 *Budget Report*. Forecasts for household spending for 2007-08 are also from the Treasury. Differences between household spending and GDP growth after 2009 are taken from Consensus Economics (October 2007). We have not used their household spending or GDP forecasts, as they can be erratic due to the small sample.

Results summary:

- Experian Business Strategies' forecasts for total household spending over the next 5-10 years have moved close to the consensus, with growth at 1.8 per cent a year over the next decade.
- Forecasts for total retail and comparison goods spending growth are less buoyant than trend-based projections. This reflects a view among economists that the growth in spending will slow. Household savings rates are already very low and household indebtedness is at an all-time high - regarded as unsustainable in the long term.
- The trend-based projections are little changed from the last report, aside from some downward revisions to DIY spending.
- Spend per head volumes grew by 0.9, 4.9 and 3.5 per cent for convenience, comparison and total retail last year. The current forecasts for 2007 are for a pick up in convenience good growth to 1.9 per cent, but for comparison demand to slow to 4.6 per cent with total retail growing at 3.6 per cent.
- Note that the growth rates given are in volume terms. Trends in relative prices vary considerably between different categories of goods and services, so the volumes figures are not necessarily a guide to value trends. Annex 1 gives our view of future trends in values, volumes and prices.

TABLE 3.3
FORECAST VOLUME GROWTH FOR THE COARSE CATEGORIES (2006 PRICES)[1]

	2007-2011	2007-2016
Food and non-alcoholic beverages	1.1	1.2
Tobacco	-4.2	-3.5
Alcohol (off trade)	2.7	2.3
Newspapers and periodicals	-3.0	-2.8
Clothing materials & garments	4.8	4.2
Shoes and other footwear	2.9	2.4
Materials for maintenance & repair of the dwelling	1.7	1.5
Furniture and furnishings; carpets & other floorcoverings	1.9	2.0
Household textiles	4.7	4.4
Major household appliances whether electric or not	2.6	2.6
Small electric household appliances	-4.4	-0.1
Tools and miscellaneous accessories	4.3	4.4
Glassware, tableware and household utensils	3.2	3.3
Non-durable household goods	1.6	2.0
Medical goods & other pharmaceutical products	2.8	2.6
Therapeutic appliances and equipment	1.4	1.1
Bicycles	3.9	3.8
Recording media	3.0	3.3
Games, toys & hobbies; sport & camping equipment; musiccal instruments	5.1	4.6
Gardens, plants and flowers	1.9	1.8
Pets and related products	1.1	1.6
Books & stationary	1.5	2.0
Audio-visual, photographic & info processing eqpt	8.6	6.9
Appliances for personal care	2.8	2.8
Jewellery, clocks and watches	0.3	0.3
Other personal effects	3.7	3.4
Total Convenience	0.7	0.8
Total Comparison	3.8	3.5
Total Retail	2.6	2.5
Other Aggregations:		
Core DIY Goods	2.4	2.3
Core DIY Goods exc Gardening	2.5	2.5
Bulky Goods (Comparison)	4.0	3.5
Non-Bulky Goods (Comparison)	3.7	3.4
Leisure	1.2	1.1

[1] *Experian Business Strategies Forecasts, September 2007.*

APPENDIX 3D

Forecasts by Special Forms of Trading (Extract)

5. Non-store retail sales (special forms of trading)

The ONS/ABI definition of non-store retail sales fails to cover the full market, as it does not include the internet sales (e-tailing) of stores with a physical presence. This has been the subject of an earlier briefing paper.[8] Table 5.1, below, gives an update of this based on more recent data from ONS and IMRG.

Table 5.1
ESTIMATED AND PROJECTED MARKET SHARE OF NON-STORE RETAIL SALES

	ONS Definition of Non-store Retail Sales excluding E-tailing			E-tailing			Broad Definition of Non-Store Retail sales		
	Convenience	Comparison	Total	Convenience	Comparison	Total	Convenience	Comparison	Total
2004	0.9	4.0	2.9	1.6	3.1	2.6	2.5	7.1	5.5
2005	0.5	3.5	2.4	2.2	4.5	3.6	2.7	8.0	6.1
2006	0.5	3.2	2.2	3.0	5.6	4.7	3.6	8.8	6.9
2007	0.5	2.9	2.0	4.3	8.2	6.8	4.8	11.0	8.8
2008	0.5	2.6	1.8	5.0	9.5	7.9	5.6	12.1	9.7
2009	0.5	2.3	1.7	5.6	10.7	8.8	6.1	13.0	10.5
2010	0.5	2.1	1.5	6.1	11.6	9.6	6.6	13.6	11.1
2011	0.5	1.9	1.4	6.5	12.2	10.2	7.0	14.1	11.6
2012	0.5	1.7	1.3	6.7	12.7	10.6	7.2	14.3	11.8
2013	0.5	1.5	1.1	6.8	12.9	10.7	7.3	14.4	11.9
2014	0.5	1.5	1.1	6.8	12.9	10.7	7.3	14.4	11.9
2015	0.5	1.5	1.2	6.8	12.9	10.8	7.3	14.4	11.9
2016	0.5	1.5	1.2	6.8	12.9	10.8	7.3	14.4	11.9

Sources: National Statistics, Experian

The current estimates are based on the ONS e-commerce Survey of Business, updated using data from the monthly Interactive Media Research Group (IMRG) survey. The projections are based on work done by Forrester Research on behalf of IMRG.

Important points to note are:

- An internet sale does not necessarily imply that items have not passed through a retail outlet. Some supermarkets source internet goods from store space. This means that the 3.0 per cent share of e-tailing in convenience sales in 2006 may be an over-estimate.
- There is a high degree of uncertainty in projecting the uptake of new technology. Much speculation about e-commerce could be exaggerated, with the recent acceleration a one-off surge due to broadband.
- A plausible "low case" from the broad market share of all Non-Store Retail sales in 2016 (i.e. including e-tailing) would be around 6, 13 and 10 per cent for convenience, comparison and total spending respectively.

[8] Retail Planner Briefing Note 2.3D "Estimates & Projections of the Share of E-tailing in UK Retail Spending", December 2005.

APPENDIX 3E

Changing Store Productivities (Extract)

8. Changes in the efficiency of retail floor space

8.1 ESTIMATING SALES DENSITY

Experian Business Strategies has recently completed a research project for the British Council of Shopping Centres, which re-assessed retail efficiency estimates and projections.[9]

This new work includes a number of additions and, most importantly, it gives more coverage to two neglected areas: [10]

- changes in net-to-gross space ratios
- comparison sales in convenience stores

8.2 RETAIL SPACE AND SALES DENSITY

The total volume of sales that can be delivered by a given floorspace – the sales density – is a variable in any planning inquiry. Projections of sales density will profoundly influence how much of any increase in in-store retail sales can be accommodated from existing space without new building.

Sales density can change for many reasons, including:

- Improvements in the efficiency of existing processes or technology, for example, a more effective till arrangement to reduce peak-time queues
- The replacement of older capacity with newer, more efficient space
- Changes in opening hours (such as Sunday trading), potentially increasing the amount of sales made from the same floorspace in a given time
- Shifts in the mix of goods offered towards smaller or higher value items, such as a move from furniture to electronic equipment
- Planning restrictions limiting the amount of new space, forcing densities higher as sales increase from existing capacity
- Retailers squeezing more selling space out of a building, for example by cutting down on storage, increasing gross, but not net density

Sales densities also tend to move with the economic cycle. In sales booms, they tend to rise as people buy more, only to decline again in the subsequent slowdown. Although they do have an impact on sales density, such cyclical fluctuations in demand are temporary and need to be carefully isolated from the underlying trend in any long-term analysis.

Generally, more successful centres or stores in the UK will see high and rising densities, while those in decline experience the opposite. But this does not mean that high densities are good for profitability, as retailers face different cost structures in different places. It is entirely possible, for example, that a retailer could meet stronger demand and make more profit from a lower sales density, provided the space enabled the more efficient use of labour or logistics, or was in a location where rents and overheads were lower.

[9] Previous estimates and projections for the changes in the efficiency of retail floorspace were presented in Retail Planner Briefing Note 2.2 (April 2005).
[10] See http://www.bcsc.org.uk/publication.asp?pub_id=221 for a summary of the BCSC work.

8.3 MEASURING SALES DENSITIES

Sales density is typically measured as either:

- Sales relative to the total floorspace (gross) – as used in official statistics and planning requirements. This is sales relative to the actual area covered by the buildings.
- Sales relative to the net sales area (shopping space) only, as quoted by retailers. This excludes storage space, offices and toilets, but includes display areas.

An investigation of trends in sales densities is hampered by a lack of quantitative information. Estimation of sale density requires a space measure. At present, UK retail floorspace estimates are derived from two sources:

- The Valuation Office Agency (VOA), which is part of HM Customs and Revenues and publishes a measure of retail space close to the property industry's gross definition.
- Larger retailers provide net density estimates, although definitions are not standardised.

The VOA data is potentially most valuable, although it has limitations:

- These figures are defined as net space, but exclude only non-useable areas – such as staircases, but not storage – and so are actually closer to a total or gross floorspace.
- VOA totals vary between an all-retail and A1 space definition, depending on the year. Neither is precise and there are large jumps in the data, notably in 1998 and 2005.
- The data only covers England and Wales.
- There is no breakdown into comparison and convenience stores, or between comparison and convenience goods space.[11]

VOA numbers only indicate gross retail space (i.e. the total space occupied by the buildings), with no details on the split for different goods, or of how net capacity has changed. To provide a fuller breakdown, a combination of industry benchmarks and consultation was used to split the total into convenience and comparison, into in-town and out-of-town and to identify net, or actual shopping space, as well as the total space occupied by the buildings.

Experian's new methodology uses expert estimates to inform a view on the key unknowns:

- Gross floorspace split in-town, out-of-town, modern, old, convenience and comparison
- Net-to-gross ratios
- Proportions of convenience store space used for selling comparison goods
- Detailed sales densities in 2006 and growth rates between the benchmark years

These estimates are combined to estimate figures that can be compared with official data. For example, does net comparison floorspace multiplied by its sales density, summed across all types of comparison space (including space in convenience stores) give total in-store comparison goods sales? Afterwards, if there is any mismatch, this process is repeated until estimates are within £½ million of the figures.

The results are not data in the strict sense, but an educated guess consistent with the available evidence. There is little alternative to the iterative process used for the final figures and, given the uncertainty, some experts may reasonably question the estimates. But they provide the most satisfactory combination of the official data and expert opinion available.

The detailed calculations are given below, with data in bold type. [12] All other numbers are derived using assumptions in italics. Note spending and density figures are expressed in constant (2006) prices. This means that historical sales densities will be different from current price figures, except in the base year. Constant prices measures are necessary to gauge the relationship between sales and space required.

[11] It is important for this kind of analysis to distinguish between comparison and convenience goods (as defined earlier in this report) and convenience and comparison stores. Convenience or comparison stores can and do sell a mix of both convenience and comparison goods and an increasing share of convenience stores' sales has been coming from comparison goods.

[12] That is total gross space estimates (Valuation Office Agency definition) and constant price spending.

FIGURE 8.1: ESTIMATED FLOORSPACE, SALES AND SALES DENSITIES 1986-2006

						Growth rates (%p.a.)		
			1986	1999	2005	1987-99	2000-05	1987-05
1 Total (England & Wales) A1 Retail			**57,827**	**72,408**	**77,438**	1.7	1.1	1.5
2	*Proportion in town*		*0.85*	*0.80*	*0.75*			
3	*Proportion out-of-town*		*0.15*	*0.20*	*0.25*			
4	In-town		49,153	57926	58,079	1.3	0.0	0.9
5	Out-of-town		8,674	14,482	19,360	4.0	5.0	4.3
6 Allowance for Gross-VO definition discrepancy			*1.025*	*1.025*	*1.025*			
7	Convenience Store Share							
8	*In-town*		*0.30*	*0.25*	*0.25*			
9	*Out-of-town*		*0.55*	*0.41*	*0.34*			
Convenience Stores								
Stock of Space (VO definition)								
10	**In-town**		14746	14539	14520	-0.1	0.0	-0.1
11	*Proportion modern*		*0.50*	*0.55*	*0.60*			
12	Modern space		7373	7997	8712	0.6	1.4	0.9
13	Old space		7373	6543	5808	-0.9	-2.0	-1.2
14	**Out-of-town**		4771	5937	6582	1.7	1.7	1.7
15	*Proportion modern*		*1.00*	*1.00*	*1.00*			
16	Modern space		4771	5937	6582	1.7	1.7	1.7
17	Old space		0	0	0			
18	Total		19517	20477	21102	0.4	0.5	0.4
19	Proportion of all retail		0.34	0.28	0.27			
Net-to-Gross ratios								
20	In-town	*modern*	*0.64*	*0.67*	*0.70*			
21		*old*	*0.60*	*0.60*	*0.60*			
22	Out-of-town	*modern*	*0.64*	*0.67*	*0.70*			
23		*old*	*0.60*	*0.60*	*0.60*			
24	*All modern*		*0.64*	*0.67*	*0.70*			
Stock of Space (net)								
25	In-town	modern	4837	5492	6251	1.0	2.2	1.4
26		old	4534	4024	3572	-0.9	-2.0	-1.2
27	Out-of-town	modern	3130	4078	4723	2.1	2.5	2.2
28		old	0	0	0			
29	Total		12501	13593	14545	0.6	1.1	0.8

8. 1 continued

			1986	1999	2005	1987-99	2000-05	1987-05
Proportion of Convenience Store Sales Area Devoted to Comparison Goods								
30	*In-town*	*modern*	*0.05*	*0.10*	*0.20*			
31		*old*	*0.00*	*0.05*	*0.10*			
32	*Out-of-town*	*modern*	*0.10*	*0.20*	*0.30*			
33		*old*	*0.00*	*0.00*	*0.00*			
34	*Total*		*0.04*	*0.12*	*0.21*			
Stock of Convenience Space (net) in Convenience Stores								
35	In-town	modern	4595	4943	5001	0.6	0.2	0.4
36		old	4534	3823	3215	-1.3	-2.8	-1.8
37	Out-of-town	modern	2817	3262	3306	1.1	0.2	0.8
38		old	0	0	0			
39	Total		11946	12027	11521	0.1	-0.7	-0.2
Sales Densities for Convenience Space in Convenience Stores (net)								
40	*In-town*	*modern*	6329	7148	*7724*	*0.9*	*1.3*	1.1
41		*old*	2959	3053	*3090*	*0.2*	*0.2*	0.2
42	*Out-of-town*	*modern*	8489	9587	*10299*	*0.9*	*1.2*	1.0
43		*old*	2971	3356	*3605*	*0.9*	*1.2*	1.0
44	Total		5559	6508	7170	1.2	1.6	1.3
Convenience Spending - Total								
45	Spending (constant prices, UK)		**76974**	**90814**	**98761**	1.3	1.4	1.3
46	*E&W share of UK*		*0.891*	*0.893*	*0.890*			
47	Spending (KP, E&W)		68584	81097	87897	1.3	1.4	1.3
48	*Share of non-store share*		0.009	0.009	0.027			
49	Sales of convenience goods		67967	80367	85524	1.3	1.0	1.2
50	Convenience goods space (net)		11946	12027	11521	0.1	-0.7	-0.2
Aggregate Convenience Goods Sales Densities (net)								
51			5543	6509	7170	**1.2**	**1.6**	**1.4**
Comparison Stores								
Stock of Space (VO definition)								
52	**In-town**		34407	43387	43559	1.8	0.1	1.2
53	*Proportion modern*		*0.35*	*0.38*	0.40			
54	Modern space		12042	16487	17424	2.4	0.9	2.0
55	Old space		22365	26900	26135	1.4	-0.5	0.8
56	**Out-of-town**		3903	8544	12777	6.2	6.9	6.4
57	*Proportion modern*		*1.00*	*0.95*	0.90			
58	Modern space		3903	8117	11500	5.8	6.0	5.9
59	Old space		0	427	1278			
60	Total		38310	51931	56336	2.4	1.4	2.1
61	Proportion of all retail		0.66	0.72	0.73			

8.1 continued

			1986	1999	2005	1987-99	2000-05	1987-05
Net-to-Gross Ratios								
62	*In-town*	*modern*	*0.59*	*0.65*	*0.70*			
63		*old*	*0.55*	*0.58*	*0.58*			
64	*Out-of-town*	*modern*	*0.65*	*0.70*	*0.80*			
65		*old*	*0.60*	*0.70*	*0.70*			
66	All modern		0.60	0.67	0.74			
Stock of Space in Comparison Stores(net)								
67	In-town	modern	7283	10984	12501	3.2	2.2	2.9
68		old	12608	15992	15537	1.8	-0.5	1.1
69	Out-of-town	modern	2601	5824	9430	6.4	8.4	7.0
70		old	0	307	917			
71	Total		22491	33107	38385	3.0	2.5	2.9
Comparison Space in Convenience Stores (net)								
72	In-town	modern	242	549	1250			
73		old	0	201	357			
74	Out-of-town	modern	313	816	1417			
75		old	0	0	0			
76	Total		555	1566	3024	8.3	11.6	9.3
77 Total Comparison Space			23046	34673	41409	3.2	3.0	3.1
Sales Densities for Comparison Stores (net)								
78	*In-town*	*modern*	2644	3645	*4586*	*2.5*	*3.9*	2.9
79		*old*	1616	2228	*2802*	*2.5*	*3.9*	3.1
80	*Out-of-town*	*modern*	1469	2025	*2548*	*2.5*	*3.9*	3.1
81		*old*	735	1013	*1274*	*2.5*	*3.9*	3.1
82	Total		1932	2651	3284	2.5	3.6	2.8
Sales Densities for Comparison Goods in Convenience Stores (net)								
83	*In-town*	*modern*	2938	4050	*5095*	*2.5*	*3.9*	2.9
84		*old*	2057	2835	*3567*	*2.5*	*3.9*	3.1
85	*Out-of-town*	*modern*	2938	4050	*5095*	*2.5*	*3.9*	3.1
86		*old*	2057	2835	*3567*	*2.5*	*3.9*	3.1
87	Total		2938	3894	4915	2.2	4.0	2.7
Comparison Spending - Total								
88	**Spending (KP, UK)**		**51113**	**105889**	**166077**			
89	*E&W share of UK*		*0.891*	*0.893*	*0.89*			
90	Spending (KP, E&W)		45542	94559	147809	5.8	7.7	6.4
91	*Non-store share*		*0.026*	*0.026*	*0.080*			
92	Sales of comparison Goods		44357	92101	135984	5.8	6.7	6.1
93	- from convenience stores		1630	6098	14863	10.7	16.0	12.3
94	- from comparison stores		42727	86003	121121	5.5	5.9	5.6
Aggregate Comparison Goods Sales Densities (net)								
95			1956	2707	3403	**2.5**	**3.9**	**2.9**

8.1 continued

		1986	1999	2005	1987-99	2000-05	1987-05
Summary (net)							
96	Convenience spending	67967	80367	85524	1.3	1.0	1.2
97	Convenience goods space	11946	12027	11521	0.1	-0.7	-0.2
98	Convenience goods sales densities	5690	6682	7423	1.2	1.8	1.4
99	Comparison spending	44357	92101	135984	5.8	6.7	6.1
100	Comparison goods space	23046	34673	41409	3.2	3.0	3.1
101	Comparison sales densities	1925	2656	3284	2.5	3.6	2.9
102	Total spending	112324	172468	221508	3.4	4.3	3.6
103	Total space	34992	46700	52931	2.2	2.1	2.2
104	Total sales densities	3210	3693	4185	1.1	2.1	1.4
Summary Gross (all space)							
105	Total space	57,827	72,408	77,438	1.7	1.1	1.5
106	Total spending	112324	172468	221508	3.4	4.3	3.6
107	Total sales densities	1942	2382	2860	1.6	3.1	2.1

Units: Floorspace is in thousands of square metres; densities are £ per square metre and spending in £m at constant (2006) prices.
Source: *Experian*. Spending data are in constant (2006) prices. Estimates may not sum exactly.

The relationship between the rows

Rows 1-9 – show the breakdown of total gross space (VOA basis) into in-town and out-of-town and the assumed shares of convenience and comparison stores. The estimates show a continuing rise in total out-of-town share and a downward drift in the convenience share out of town.

Rows 10-19 – show the breakdown of convenience store space into 'modern' and 'old' space. Modern space can be newly built or created by the refurbishment of old space. So:
Row 10 = Row 4 x Row 8 Row 12 = Row 10 x Row 11 Row 13 = Row 10 - Row 12

Rows 20-29 – show the conversion of convenience store gross space into net space. This involves multiplying VOA basis space by a VOA discrepancy[13] and by the net-gross ratio. Thus:
Row 25 = Row 11 x Row 6 x Row 20.

Estimates show although gross convenience space increased by 0.4 per cent a year between 1987 and 2005, net space increased twice as fast, as a result of increases in the net-gross ratio.

Rows 30-39 – show the proportions of convenience store net floorspace devoted to the sale of comparison goods. It is estimated that this was 21 per cent for all space and 30 per cent for modern out-of-town space. The relationship between the rows, for example, is:
Row 35 = Row 25 x (1 – Row 30)

Estimates imply only a small increase in net convenience floorspace in convenience stores between 1987 and 1999 and a decline after 2000. Note estimates were put together with consistency to the data in mind and informed by net sales densities published by the major supermarket chains[14] (allowing for the increased share of comparison goods and performance more applicable to modern than old space).

Rows 40-51 – reconcile net floorspace, net sales densities and spending on convenience goods.

Row 44 is the weighted average of Rows 40-43 and Row 49 approximately equals Row 39 multiplied by Row 44 (divided by a thousand to correct the units). The answer is approximate because of the iterative process.

[13] The VOA measure is closest to the property industry definition, but still excludes gross space such as stairwells.
[14] These average under 1 per cent a year between 1987 and 1999 and under 1¼ per cent between 2000 and 2005.

Convenience goods densities increased at an average rate of 1.2 per cent a year between 1987 and 2000, but each of the individual components (Rows 40-43) increased more slowly. The reason for the discrepancy is the move from relatively-low-sales-density old space to relatively-high-sales-density modern space. A similar change is observed between 2000 and 2005.

Rows 52-61 – show the breakdown of comparison store space into 'modern' and 'old'. Thus: Row 52 = Row 4 x (1 - Row 8) Row 54 = Row 52 x Row 53 Row 55 = Row 52 – Row 54

Rows 62-71 – show the conversion of comparison store gross space into net space by multiplying estimated VOA space by VOA discrepancy and by the net-gross ratio. For example: Row 67 = Row 53 x Row 6 x Row 30

Estimates show average annual increases in net comparison store space of 3.0 per cent between 1987 and 1999, and 2.5 per cent from 2000 to 2005, comfortably outstripping the growth in gross comparison store space (at 2.4 and 1.4 per cent). As with convenience store space, this is due to increases in the net-gross ratio for comparison stores.

Rows 72-77 – show the estimated amount of comparison goods space in convenience stores and the implied total amount of comparison goods space. This is derived from Rows 25-28 multiplied by Rows 30-33.

We estimate that the amount of comparison goods space in convenience stores has been growing quite rapidly. So the total amount of comparison goods space (comparison store space plus comparison space in convenience stores) has been growing even faster (at 3.2 per cent and 3 per cent in 19987-99 and 2000-05, or Row 77 compared with Row 71).

Rows 78-92 – attempt to reconcile disaggregated estimated increases in sales densities (Rows 78-87) with estimate net floorspace (Rows 67-77) and estimated spending (Rows 88-92) for comparison goods. Thus: Row 71 x Row 82 + Row 76 x 87 ≅ Row 92

Where the relationship is close, but not exact, it is because of the iterative process. Estimates show sales and net space are consistent with densities for each type of comparison good space, increasing at average annual rates of 2.5 for 1987-1999 and 3.9 per cent in 2000-2005.

Rows 93-94 – show the derived estimates of sales and sales gross of comparison goods from convenience and comparison stores separately. Note that the new estimate for 1987-99 is less than the 3.1 per cent a year previously published by Experian.[15] The main reason for this is that the new sales density estimates are net rather than gross. More recent data on the impact of non-store retail sales also made a contribution.

Row 95 – shows sales density for all comparison goods space from Row 92 and Row 77.

Rows 89-107 – show a set of summary comparisons.

Our adjusted version of this series provides the most consistent estimate of recent trends in retail space available summarised below (see Figure 8.2). This shows growth in available retail space averaging 1.5 per cent a year between 1987 and 2005, though slowing in the recent past.

[15] Retail Planner Briefing Note 2.2, Table 1, April 2005.

FIGURE 8.2: FLOORSPACE, SALES AND SALES DENSITY GROWTH (ENGLAND & WALES)
(average annual growth, sales in constant prices)

	1987-1999	2000-2005	1987-2005
Floorspace (% p.a.)			
Total (gross)	*1.7*	*1.1*	*1.5*
Total (net)	2.2	2.1	2.2
Convenience (net)[1]	0.1	-0.7	-0.2
Comparison (net)[2]	3.2	3.0	3.1
Sales (% p.a.)[3]			
Convenience	1.3	1.0	1.2
Comparison	5.8	6.7	6.1
Sales Densities (% p.a.)			
Total (gross)	*1.6*	*3.1*	*2.1*
Total (net)	1.1	2.1	1.4
Convenience (net)[1]	1.2	1.6	1.3
Comparison (net)[2]	2.5	3.6	2.9

[1] excludes comparison space in convenience stores, volumes

[2] includes comparison space in convenience stores, volumes

[3] Based on official estimates of sales growth less non-store retail sales estimates described in the previous section.

Our estimates highlight a number of interesting trends since the late 1980s:

- **Comparison goods sales densities have shown exceptional growth** in the recent past. Comparison goods sales space increased at an average annual rate of 3.0 per cent between 2000 and 2005 (including for comparison goods sales in convenience stores). But sales volumes rose at an annual rate of almost 7 per cent over the same period, implying that net sales density has risen by 3.6 per cent a year to accommodate this (after rounding). This average was actually dragged down by an increase in the share of floor space taken by, lower density, out-of-town stores. Allowing for this the underlying growth rates were actually 3.9 per cent per annum. Retailers are therefore using new and existing space more efficiently to make more sales. For the earlier period, 1987-1999, both the underlying and actual growth rates were 2.5 per cent per annum.
- **Convenience goods sales density growth** has been considerably slower than comparison. In the case of convenience goods, however, the change in the space mix towards larger more efficient stores has pushed up the observed total increase relative to the underlying. Between 2000 and 2005 the overall increase in sales densities for convenience goods was 1.6 per cent per annum but the underlying growth rate was 1.2 per cent, the difference being accounted for by a move towards newer higher density stores. The equivalent figures for 1987-1999 were 1.2 and 0.9 per cent for actual and underlying respectively.
- **Net floorspace has consistently grown faster than gross** since the 1980s, implying an increasing proportion of floorspace has been converted to selling, and that space for storage and back-of-house activities has been reduced.
- **The growth in comparison space has greatly exceeded that for convenience**, which has been static or, more recently, contracting. This is partly because convenience stores such as supermarkets have expanded comparison goods lines, like clothes, electrical goods or DVDs. This trend is expected to continue, with Tesco aiming to reach an even balance between food and non-food in its larger stores in the next few years.
- **Comparison goods sales densities have increased at a far faster rate** than convenience goods, partly due to technological advances leading to smaller, higher-value products, for example the difference in size between a flat-screen and a traditional television.

On balance, the early 2000s was an unusually rapid phase of sales growth, reflected in big increases in densities. Part of this rise is likely to be cyclical and thus not sustainable. So it is important to also examine the 1987-99 figures in establishing a benchmark.

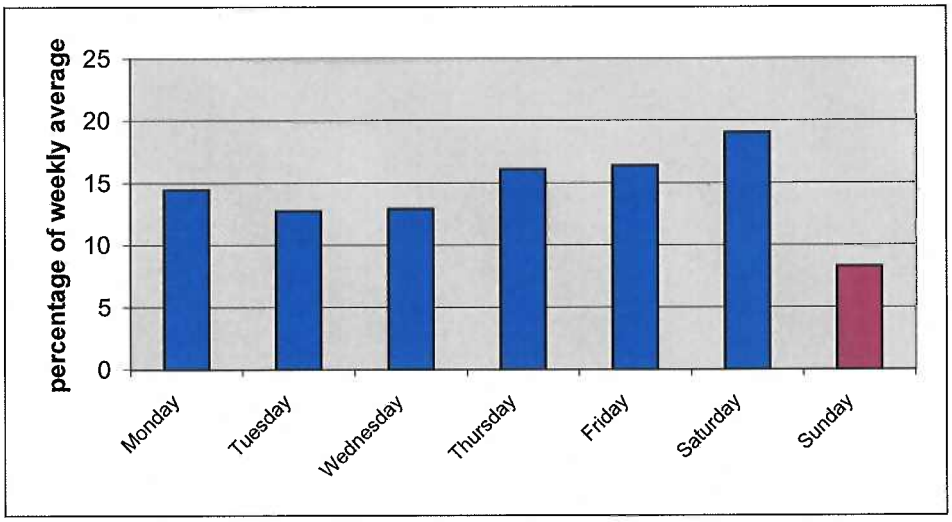
8.4 INFLUENCE OF LONGER OPENING HOURS

The introduction of Sunday shopping significantly lengthened opening hours in the 1990s, with profound implications for the trend in sales densities.[16] Unfortunately, there are no statistics on Sunday business, or, more importantly, on how the extension affected sales in the rest of the week. But related evidence points to a major shift in consumer behaviour. Footfall figures on visits to retail centres, for instance, show that shopping patterns have changed markedly, with on average, around 8 per cent of weekly activity now taking place on a Sunday (Figure 8.3).[17]

When Sunday trading was first introduced it is likely that total retail spending remained largely unaffected and was spread over more days, with little impact on sales or densities. Over time, however – as Sunday trading effectively increased retail capacity at a stroke – it enables more sales to be made from the existing floorspace. As such, it allows new sales growth without the corresponding requirement for new retail space.

A store opening for 16 hours for example, could potentially realise twice the sales density of one open for eight hours. In practice this would require a considerable change in consumer behaviour, not least the desire to shop first thing in the morning or last thing at night. Along the same lines, the impact of an extra day's trading is less, but still implies the potential for an increase in sales densities over time.

FIGURE 8.3: AVERAGE FOOTFALL BY THE DAY OF THE WEEK



Source: Footfall

But how much of the change in sales density does this explain? We can adjust our previous estimates to account for Sunday trading. Assuming that all of the impact occurred between 1986 and 1999 and that daily sales are proportional to footfall, longer opening would have accounted for 0.7 per cent of the annual increase in sales densities over this period.[18]

[16] The Sunday Shopping Act was brought in in 1994 but a number of chains were already opening by then.
[17] At any given time of the day stores may be busier on Sundays than on some weekdays, but shorter Sunday opening hours brings average Sunday footfall down relative to other days. Footfall data also shows big differences between shopping centres with Sunday being the second busiest day of the week in some centres.
[18] The Footfall figures show Sunday footfall accounting for just over 8 per cent of the weekly total implying that the introduction of Sunday trading has increased capacity by just over 9 per cent (eight divided by one hundred minus eight per cent). This is the equivalent of 0.7 per cent per annum over thirteen years.

8.4 INFLUENCE OF 24-HOUR SHOPPING

Sunday trading is now a normal part of the UK retail environment, but 24-hour shopping's potential remains disputed: it could have a similar impact on potential sales densities as Sunday trading. At one extreme, it can be argued that the move to all-day shopping alone could cause any future growth in retail sales to be absorbed in higher densities and remove the need for more retail space in future.

But the evidence is not strong. Although there is 24-hour opening in some supermarkets, this is usually seen at out-of-town convenience stores, or at times of heavy demand such as Christmas, or in urban centres where footfall is particularly heavy. This has often been possible because the stores are staffed anyway, with the need for over-night restocking, rather than a result of demand from shoppers. Few other retailers have followed the supermarkets. Current lifestyles and habits do not suggest a wholesale move to 24 hour shopping. This may change in the future, but it is too early to make strong assumptions in our forecasts.

8.6 THE FUTURE FOR RETAIL SALES DENSITIES

The rapid increase in comparison goods sales densities in the recent past was a product of the retail spending boom and is unlikely to be sustainable. On balance the 1987-99 trend of 2.5 per cent a year increases in sales density may be a better start point for projections.

Yet even this includes one-off changes because of the advent of Sunday trading. As noted, the introduction of Sunday trading could have accounted for up to 0.7 per cent a year of the estimated increase in sales densities in this period. On the other hand, not all Sunday trading effects occurred between 1986-99 and there is still scope for further changes were the current restrictions on hours to be relaxed.

Consequently, projected sales densities are only reduced from the 1987 and 1999 by 0.3 per cent a year in the central case, to **2.2 per cent and 0.6 per cent a year for comparison and convenience space respectively**. The move towards more modern, higher density, stores and the demolition of older inefficient space means that the observed comparison rate is likely to be closer to 2.4 per cent a year.

The combination of unsatisfactory data and uncertainty about underlying trends mean that risk analysis is particularly important. Much slower density increases than in the central forecast imply there is higher demand for capacity. One possible cause is that the impact of longer opening hours has been overstated; another that the gains from technological change and efficiency are exhausted. As a result, increased sales growth can only be met by new retail.

In this alternative view, it is assumed that comparison goods sales densities grow at only 1.5 per cent a year (or 0.25 per cent a year for convenience goods). This was the benchmark figure for retail planning studies until recently and is significantly slower than historical trends. On the other hand, the more recent growth rates (2000-2005) were much higher than for the 1987-99 growth rates that we have used to create the central case. This means that there must be a significant upside and we suggest that a realistic upside would be 2.8 and 0.8 per cent for comparison and convenience goods sales densities respectively.

APPENDIX 4

In-Flow Expenditure (to the Survey Area)

APPENDIX 4A

In-Flow Expenditure from Residents

APPENDIX 4A

In-Flow Expenditure to Stratford-on-Avon District from Residents Living Outside the Survey Area: Convenience Goods Shopping

Derivation of Expenditure Estimates

Stratford upon-Avon

1. We assume that convenience goods sales equivalent to 7.5% of survey generated turnover will flow to the town from residents living outside the survey area, primarily from areas to the north. This amounts to £6.3 million for 2008 (at 2006 prices).

   (Note: this excludes monies generated by visitors/tourists to the town see **Appendix 4B**).

Alcester

2. We assume that convenience goods sales equivalent to 5% of survey generated turnover will flow to the town from residents living outside the survey area, primarily from areas to the west, and from visitors/tourists.

3. This amounts to £0.4 million for 2008 (at 2006 prices).

Shipston-on-Stour

4. We assume that convenience goods sales equivalent to 2.5% of survey generated turnover will flow to the town from residents living outside the survey area, primarily to the south and south east, and from visitors/tourists.

5. This amounts to £0.2 million for 2008 (at 2006 prices).

Southam

6. We assume that convenience goods sales equivalent to 2.5% of survey generated turnover will flow to the town from residents living outside the survey area, primarily from the north, east and south east, and from visitors/tourists.

   This amounts to £0.2 million for 2008 (at 2006 prices).

APPENDIX 4B

In-Flow Expenditure from Visitors/Tourists

APPENDIX 4B

In-Flow Expenditure to Stratford-upon-Avon from Visitors/Tourists: Convenience Goods Shopping

Derivation of Expenditure Estimates

1. The household telephone survey provides data on the scale and pattern of expenditure on convenience goods shopping in Stratford-upon-Avon by residents living within the survey area, whilst **Appendix 4A** provides estimates of in-flow expenditure by residents living just outside the survey area. However, because of Stratford-upon-Avon's Shakespeare connections, the town also attracts significant numbers of visitors/tourists and their spending also needs to be estimated and taken into account in the quantitative convenience goods floorspace needs assessment.

2. A tourism study of Stratford-upon-Avon prepared by The Research Solution[1] in 2005 gave the number of visitors to the town as 1,278,000. Of this total, 343,000 (27%) were overnight visitors and 935,000 (73%) were day visitors. A further breakdown from the study indicates that the overnight visitors spent a total of 890,000 days in Stratford-upon-Avon in 2005.

3. Thus, according to the report, there was a total of 1,825,000 visitor days in Stratford-upon-Avon in 2005 broken down as follows:-

Day visitors	*935,000*
Overnight visitors	*890,000*

	1,825,000
	======

4. The Research Solution estimates that the total expenditure of visitors for 2005 in Stratford–upon-Avon was £118 million (at current prices). Just under two-thirds originated from overnight visitors (£75 million) with the balance coming from day visitors (£43 million). The report then disaggregates the total spend by sector and

[1] Stratford Town Tourism Economic Impact Assessment, 2005, The Research Solution.

estimates that £33.2 million of visitor expenditure in 2005 was on **retailing**,[1] with £14.4 million originating from overnight visitors and £18.8 million from day trippers.

5. We assume that the overall number of visitors will not have changed significantly since 2005. However, in order to produce a current (2008) estimate of visitor spend, we adjust upwards the total of £33.2 million to c. £37 million to reflect conversion to a 2006 price base and to take account of the annual real growth in retail spend per head between 2005 and our base year of 2008.

6. The Research Solution report does not disaggregate the visitor spend on retailing into expenditure on convenience goods and comparison goods shopping. However, visitor surveys carried out by Colliers CRE in other towns and cities indicates that the vast majority of visitor spend is on comparison goods (typically up to 70%-90% of the total). We therefore assume that visitors/tourists will spend 20% of their total retail expenditure of £37 million in 2008 in Stratford-upon-Avon on convenience goods. This gives a figure of £7.4 million.

7. We assume that this total of visitor/tourist spend on <u>convenience goods</u> shopping will grow in real terms at 1% per annum through to the latest forecast year of 2026. This annual growth rate is a little higher than that which we apply to the convenience goods expenditure of the resident population, because we also allow for some growth in the total number of visitors/tourists to Stratford-upon-Avon.

8. Our estimates for in-flow visitor/tourist expenditure on convenience goods shopping in Stratford-upon-Avon (at constant 2006 prices) are therefore as follows:-

Forecast Year	**£m**
2011	7.6
2016	8.0
2021	8.4
2026	8.9

[1] Excluding catering expenditure and spend on eating and drinking in hotels and pubs.

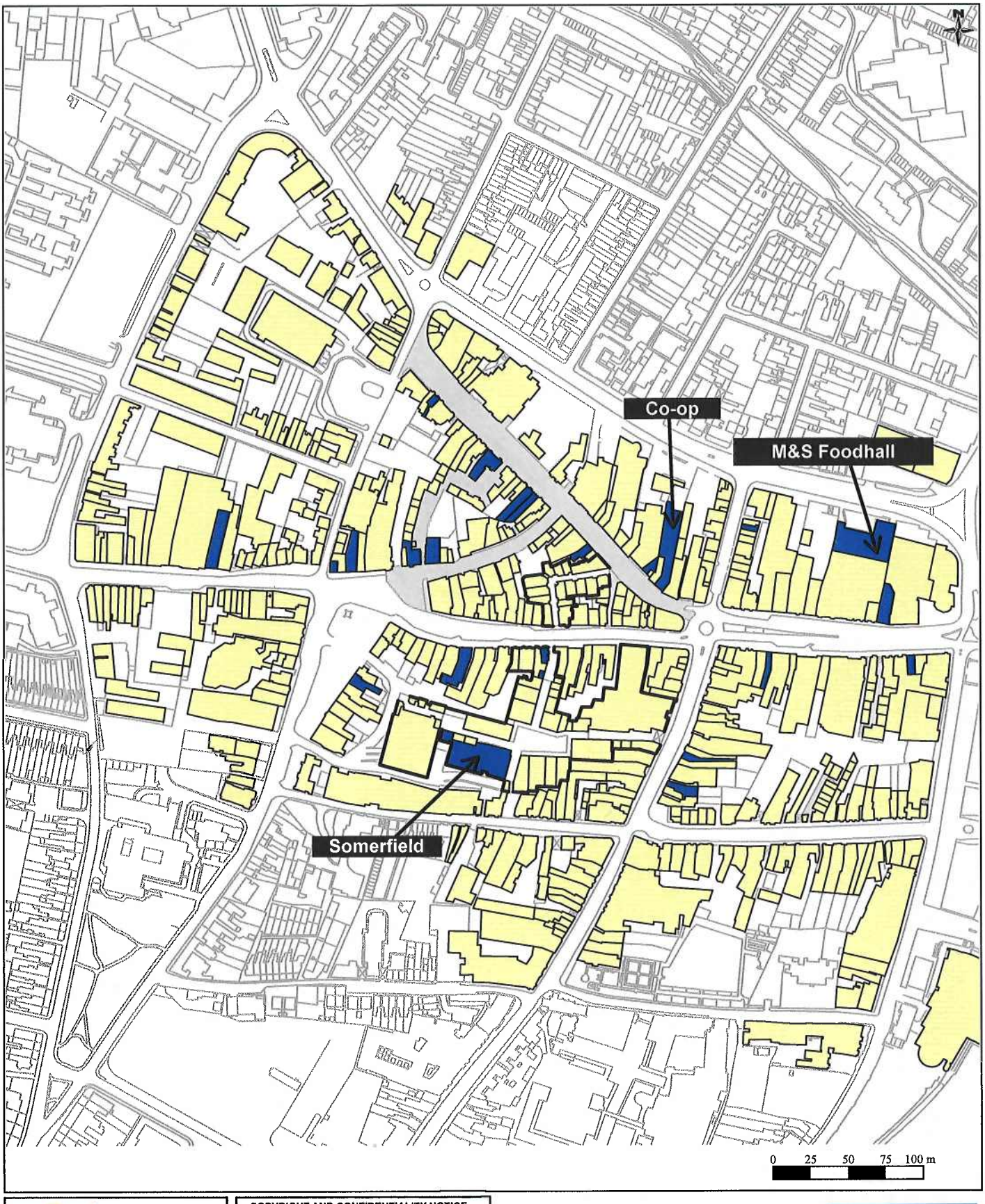
APPENDIX 5

Retail Floorspace Data

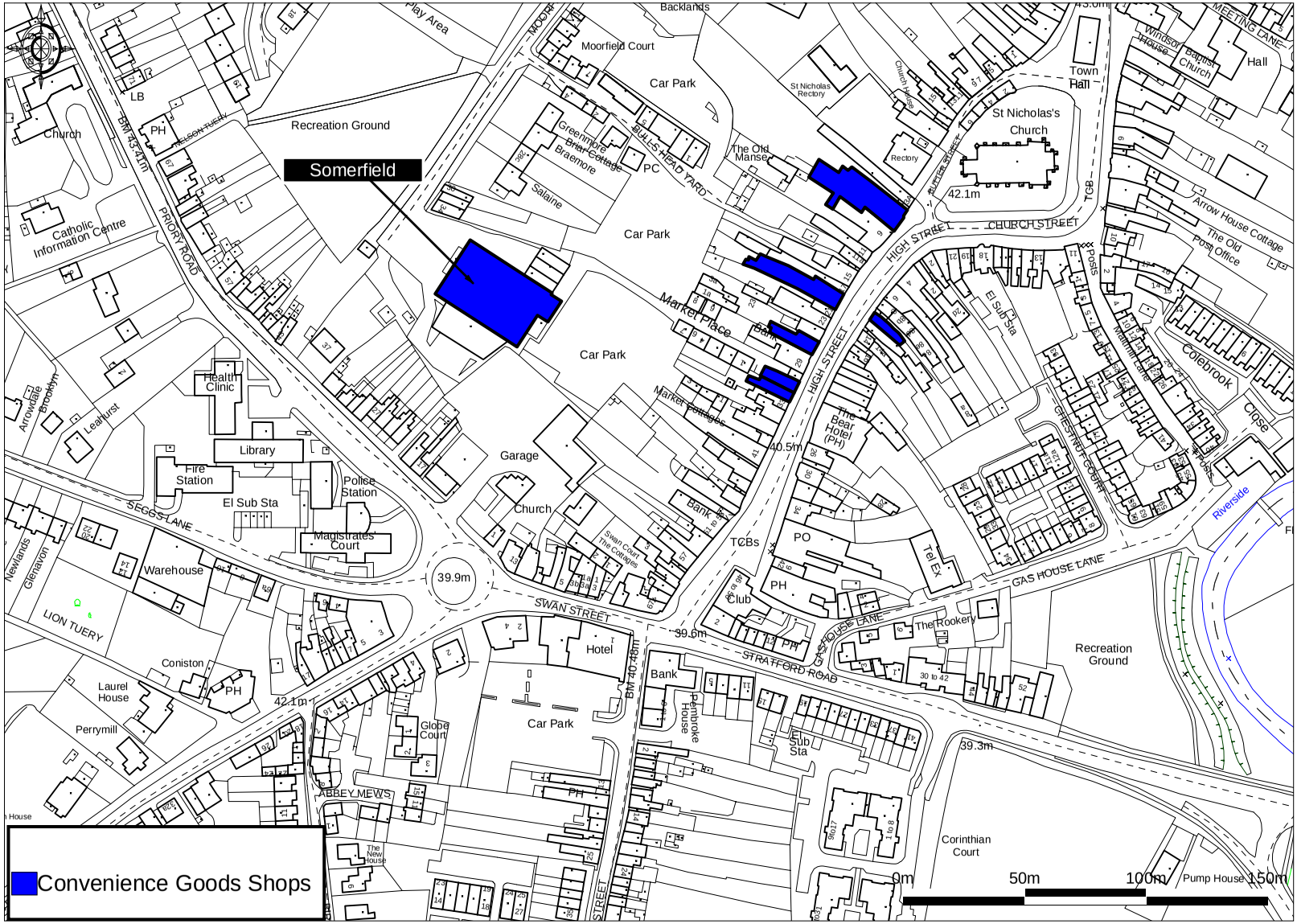
APPENDIX 5A

Convenience Goods Store Representation: Map of Each Town Centre

Stratford upon Avon Town Centre: Location of Convenience Goods Shops

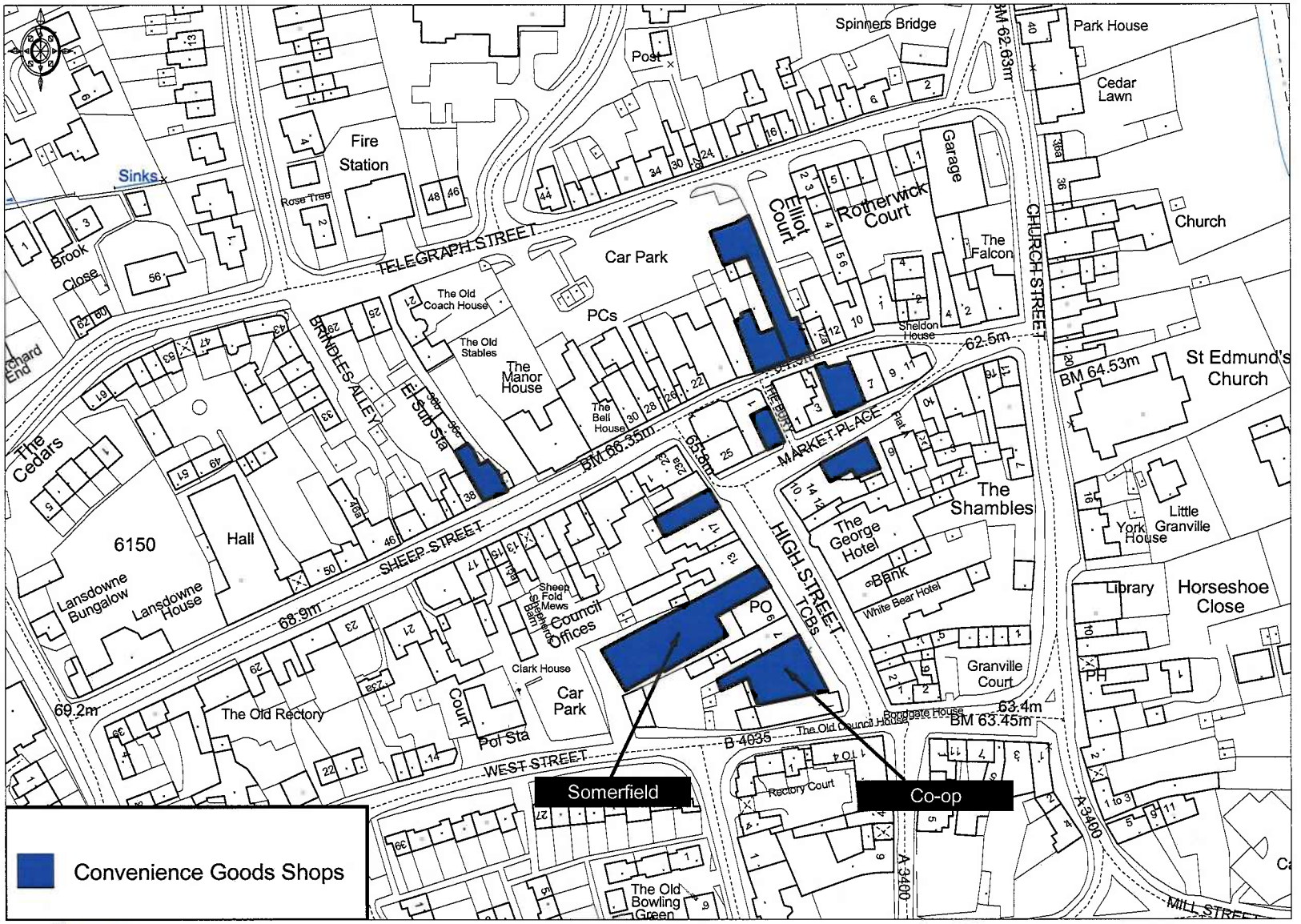


Alcester Town Centre: Location of Convenience Goods Shops

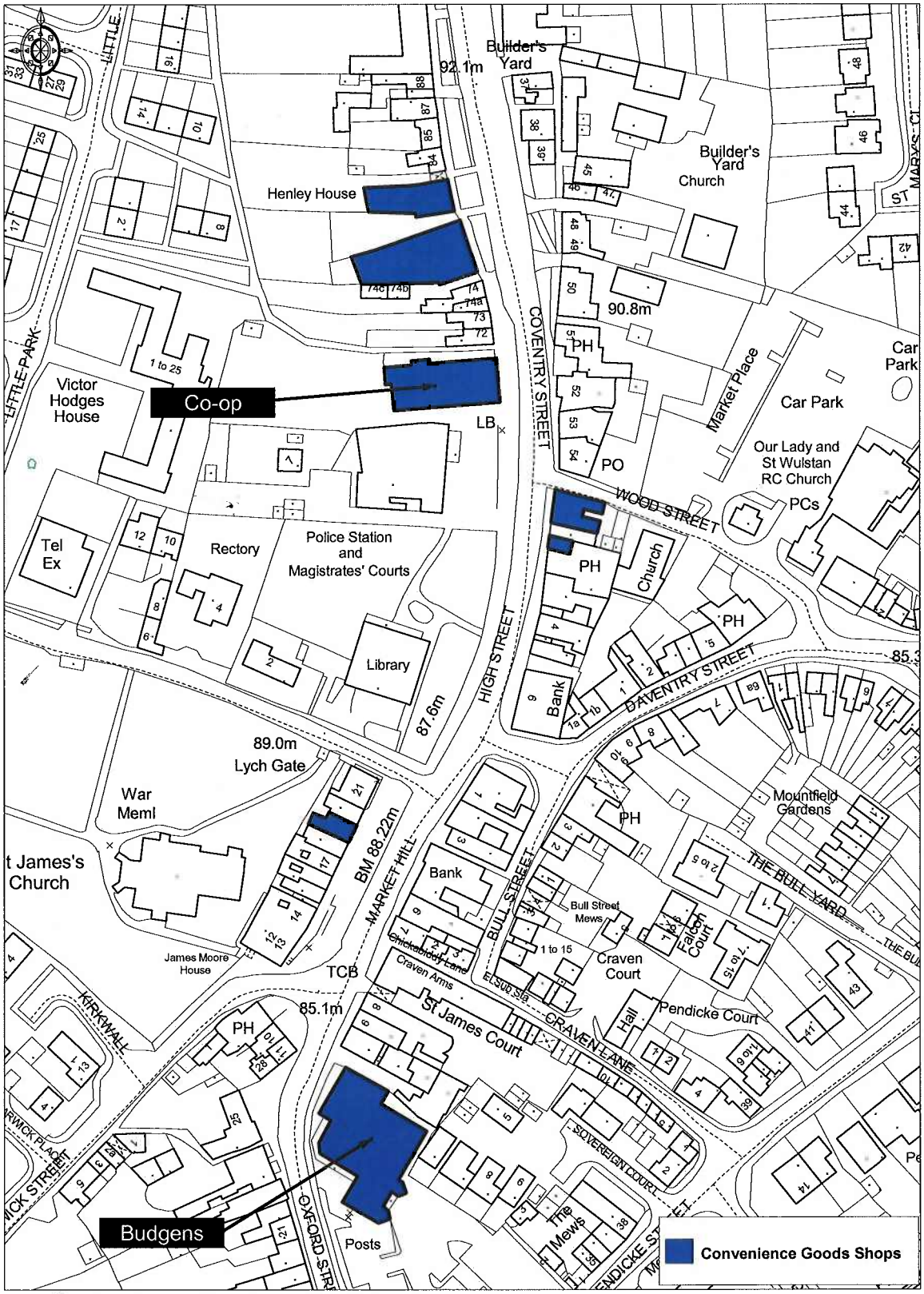


COLLIERS CRE

Shipston on Stour Town Centre: Location of Convenience Goods Shops



Southam Town Centre: Location of Convenience Goods Shops



COLLIERS CRE

APPENDIX 5B

Existing Convenience Goods Retailer Representation and Estimated Sales Floorspace by Town

STRATFORD UPON AVON TOWN - Schedule of Covenience Goods Shops and Estimated Floorspace (as at March 2008)						
Type of Goods	**Fascia**	**Estimated Gross Floorspace (SqM)**	**Source**	**Estimated Net Floorspace (SqM)**	**Estimated Benchmark Sales Density (£ per SqM Net)**	**Estimated Benchmark Turnover (£m)**
Supermarket	Tesco*	6,100	1,2	3,522**	12,000	42.26
Supermarket	Morrisons*	5,900	1,2	3,370**	10,000	33.70
Supermarket	Somerfield	800	1	520	6,100	3.17
Food Hall	Marks & Spencer Food Hall	1,603	2	1,042	10,000	10.42
Health Food	Holland & Barrett	204	2	133	4,000	0.53
Confectionery	Thorntons	93	3	60	4,000	0.24
Off Licence	Vin NEUF	37	3	24	7,000	0.17
Supermarket	Co-op	511	3	332	5,400	1.79
Bakers	Pasty Presto Bakers	56	3	36	4,000	0.14
Confectionery	Fudgetastic	74	3	48	4,000	0.19
Off Licence	Vinology	121	3	77	7,000	0.54
Confectionery	Truffles	167	3	109	4,000	0.44
Bakers	Druckers Bakers	195	3	127	4,000	0.51
Confectionery	The Little Sweet Shop	56	3	36	4,000	0.14
Delicatessen	Oscars	158	3	103	4,000	0.41
Delicatessen	Emerys	130	3	85	4,000	0.34
Convenience Store	One Stop	177	3	115	4,000	0.46
Delicatessen	Taste of Home	37	3	24	4,000	0.10
Health Food	Revital Health Food	307	3	199	4,000	0.80
Convenience Store	McColls	111	3	72	4,000	0.29
Off Licence	Bottoms Up	232	3	151	7,000	1.06
Delicatessen	Oil & Vinegar	46	3	30	4,000	0.12
Greengrocers	JACS Greengrocers	19	3	12	4,000	0.05
Bakers	The Hathaway Bakers	121	3	79	4,000	0.32
Off Licence	Vom Fass	93	3	60	7,000	0.42
TOTAL		**17,348**		**10,366**	**9,512**	**98.60**

Notes:
Sources: 1) Stratford-on-Avon District Figures; 2) Experian Goad / IGD Figures; 3) Colliers CRE Estimates
* Out of centre store
** Excludes estimated comparison goods floorspace.

ALCESTER - Schedule of Covenience Goods Shops and Estimated Floorspace (as at March 2008)						
Type of Goods	**Fascia**	**Estimated Gross Floorspace (SqM)**	**Source**	**Estimated Net Floorspace (SqM)**	**Estimated Benchmark Sales Density (£ per SqM Net)**	**Estimated Benchmark Turnover (£m)**
Supermarket	Somerfield	1,200	1	780	6,100	4.76
Newsagent	Mills CTN	190	2	124	4,000	0.50
Convenience Store	Select Save	590	2	384	4,000	1.54
Butcher	Reg Phillips	102	2	66	4,000	0.26
Off Licence	Threshers Wine Shop	65	2	42	7,000	0.29
Greengrocers	The Little Fruit & Veg Shop	65	2	42	4,000	0.17
Delicatessen	Fine Food Emporium	46	2	30	4,000	0.12
Convenience Store	Tesco Express	445	2	289	7,500	2.17
TOTAL		**2,703**		**1,757**	**5,580**	**9.80**

Notes:
Sources: 1) Stratford-on-Avon District Figures; 2) Experian Goad / IGD Figures; 3) Colliers CRE Estimates

SHIPSTON-ON-STOUR - Schedule of Covenience Goods Shops and Estimated Floorspace (as at March 2008)						
Type of Goods	**Fascia**	**Estimated Gross Floorspace (SqM)**	**Source**	**Estimated Net Floorspace (SqM)**	**Estimated Benchmark Sales Density (£ per SqM Net)**	**Estimated Benchmark Turnover (£m)**
Supermarket	Somerfield	500	1	325	6,100	1.98
Supermarket	Co-op	400	1	260	5,400	1.40
Convenience Store	Martins	113	3	73	4,000	0.29
Greengrocers	Turners Fruit & Veg	139	3	90	4,000	0.36
Delicatessen	Taste of the Country	118	3	77	4,000	0.31
Butcher	Rightons Butchers	149	3	97	4,000	0.39
Delicatessen	Ruperts Delicatessen	113	3	73	4,000	0.29
Bakers	The Bakery	321	3	209	4,000	0.84
Butcher	K.J Flatman Butchers	65	3	42	4,000	0.17
TOTAL		**1,918**		**1,246**	**4,840**	**6.03**

Notes:
Sources: 1) Stratford-on-Avon District Figures; 2) Experian Goad / IGD Figures; 3) Colliers CRE Estimates

SOUTHAM - Schedule of Covenience Goods Shops and Estimated Floorspace (as at March 2008)						
Type of Goods	**Fascia**	**Estimated Gross Floorspace (SqM)**	**Source**	**Estimated Net Floorspace (SqM)**	**Estimated Benchmark Sales Density (£ per SqM Net)**	**Estimated Benchmark Turnover (£m)**
Supermarket	Budgens	800	1	520	6,100	3.17
Off Licence	Wine Masters	67	3	44	7,000	0.31
Off Licence	Odd Binns	130	3	85	7,000	0.60
Supermarket	Co-op	400	1	260	5,400	1.40
Convenience Store	Acorn	400	1	260	4,000	1.04
Convenience Store	Martins	217	3	141	4,000	0.56
Bakers	Southam Bakers	27	3	18	4,000	0.07
TOTAL		**2,041**		**1,328**	**5,388**	**7.16**

Notes:
Sources: 1) Stratford-on-Avon District Figures; 2) Experian Goad / IGD Figures; 3) Colliers CRE Estimates

APPENDIX 5C

Details of Convenience Goods Retail Commitments with Stratford-on-Avon District

Retail Commitments and Proposals

1.	Marks & Spencer Simply Food – Retail Commitment
	Phase 2 Maybird Retail Park, Stratford-upon-Avon (has planning consent) **Estimated convenience goods floorspace: 743 sq m net.** **Estimate sales density: £10,200 psm net @2008 in 2006 prices.** **Turnover estimate - £7.6 million @ 2008.**

2.	Sainsbury's Local – Retail Commitment
	Stratford-upon-Avon Town Centre (sub-division of Woolworth/under construction) **Estimated convenience goods floorspace: 500 sq m gross** **Estimated convenience goods floorspace: 325 sq m net** **Estimated sales density: £10,200 psm net @ 2008 in 2006 prices** **Turnover estimate- £3.3 million @ 2008**

3.	Aldi – Retail Proposal
	Birmingham Road, Stratford-upon-Avon (application submitted*) **Estimated convenience goods floorspace: 1,500 sq m gross** **Estimated convenience goods floorspace: 975 sq m net** **Estimated sales density: £3,000 psm net @ 2008 in 2006 prices** **Turnover estimate - £2.9 million @ 2008**

*Although this is still a proposal, we have included it within our floorspace needs assessment.

APPENDIX 6

Retail Floorspace Need Assessment

APPENDIX 6A

Methodology for Assessing convenience Floorspace Need/Capacity

Methodology for Assessing Quantitative Retail Need / Capacity

Step 1 Catchment Area Definition and Study Time Frame

Step 1A The catchment (or survey) area should be defined with regard to the study objective.

Step 1B The catchment should then be subdivided into zones (or sub-areas) to reflect the number and location of retail centres and the accessibility between them.

The number of zones will depend on the size of the sample for the household survey. Ideally a minimum of around 80 interviews should be carried out within each zone.

Zone boundaries are normally defined in terms of administrative boundaries or postal geography.

Step 1C An assessment will normally adopt the current year as its starting point or "base year". The end year, or "forecast year", will normally be determined by the end date of the Plan.

In preparing quantitative need studies it is normally helpful to also produce need estimates for selected intermediate years, since this will show how floorspace need (if any) changes or grows over time.

Step 1D A constant price base must be adopted for the quantitative need assessment. Thus all monetary figures are given in real values and discounted for the affects of price inflation.

Step 2 Analyse Consumer Demand

Step 2A Population estimates for each zone at the base year are required. Each of the zone populations must then be projected forwards to the forecast year(s).

Step 2B Estimates of retail expenditure per head are required for either the catchment area as a whole or ideally for each zone.

Estimates are also likely to be required for different categories of goods; the most common are: convenience goods and comparison goods.

All expenditure data providers produce estimates for user defined areas which reflect the socio-demographics and affluence of the localities.

It is essential that the expenditure per head estimates are adjusted to the correct price base (see Step 1D) and also that spending on special forms of trading is excluded (i.e. this is expenditure that does not take place in shops e.g. that through mail order, through vending machines and also over the internet).

Step 2C Projection of Expenditure Per Head Estimates Through to the Forecast Year(s)

National expenditure growth forecasts are published by a number of organisations (e.g. Experian).

Step 2D Total available retail expenditure (for each goods category) should be calculated for the survey area and the constituent zones at both the base year and the forecast year(s). Thus the "growth" in available expenditure can be identified.

Total available expenditure at any particular year will originate from two sources:- inside the survey area and from outside the survey area.

Within the survey area – generated expenditure is calculated by multiplying the resident population by the estimate of average spend per head. This calculation can also be undertaken for each zone.

Outside the survey area – it is likely that there will be an in-flow of retail expenditure from people living outside the survey area. This is likely to be particularly significant if the survey area contains higher order centres and/or a popular tourist centre. The main types of in-flow are as follows:-

- Long distance shopping trips – the amount of spending from this source can be determined from household surveys carried out in adjoining areas or should be estimated by reference to the best available sources.

- Workers – a large daily working population will generate retail expenditure. For major commuter areas the spending produced by workers who live outside the survey area should be estimated and included.

- Tourists – visitors from the UK and overseas may for certain locations be an important generator of retail expenditure. Using survey data where available the spending from this source must also be estimated and included.

Estimates must be made of the extent to which the scale of in-flow retail expenditure will change through to the forecast year(s) in real terms.

Step 3 Analyse Retail Supply

Step 3A The existing stock of retail floorspace in the Plan area must be determined by the main goods categories analysed at Step 2B. This is essential since it is virtually impossible to provide a robust estimate of future quantitative need if the current floorspace supply is unknown.

All retail floorspace must be included – in centre, edge of centre and out-of-centre.

If existing stock figures are unavailable, it will normally be necessary to undertake or commission a thorough retail audit of the current retail provision.

As well as estimates of floorspace quantity, a survey of retail occupiers should ideally be carried out. This will ascertain information on the quality of the retail offer, the physical condition of the floorspace stock (e.g. size and configuration of units) and the trading performance of the shops.

The combination of comprehensive information on both the quantity and quality of the existing retail offer / floorspace stock will inform the assessment of whether the retail economy is currently trading at equilibrium or not (see Step 4A below).

Step 3B A household survey should be commissioned to establish the existing pattern of shopper behaviour and retail consumer expenditure flows within the Plan area and between the Plan area and adjoining areas.

This survey as a minimum should cover the whole of the Plan area. However, there are important benefits if the survey can be extended to cover other adjoining and nearby areas (i.e. it can then inform on the extent of in-flow expenditure from beyond the Plan area).

The most cost-effective form of household survey is by telephone. As stated at Step 1B, a minimum of 100 completed interviews per zone is recommended.

The survey should quantify shopper behaviour separately for the main goods categories.

Step 3C The household survey results can then be applied to the totals of available expenditure by zone (from Step 2D) in order to estimate the existing retail turnovers of centres and stores within the Plan area.

For centres which attract long distance shopping trips and/or which benefit from commuter and tourist expenditure (see Step 2D), allowances must be made for turnover contributions from these sources.

The actual centre and store turnovers derived from the household survey should, wherever possible, be cross-checked against actual turnover figures from other sources (e.g. the retailers themselves) where these are available.

The household survey will determine the actual levels of available retail expenditure retained by individual centres and the Plan area as a whole. These are the base year market shares and can be calculated for each main category of goods.

Step 3D A "benchmark" turnover for each of the main goods categories must be derived for the Plan area as a whole and for each centre. When compared to the actual turnovers calculated at Step 3C, this allows one to determine whether the existing floorspace is under or over-trading.

The best way to identify whether the existing floorspace is over or under-trading is to carry out a survey of the retailers themselves.

If this is not possible, then published company average sales densities for leading retailers may be used, although this will only give a partial view. In any event, company averages should be weighted up or down as appropriate to reflect local circumstances (e.g. the affluence of the area, the type and size of stores and the costs of the location to retailers).

Step 4 Retail Demand vs. Retail Supply in the Base Year

Step 4A It is necessary to test the adequacy of existing retail provision in the Plan area. If actual turnovers (from Step 3C) exceed the benchmark turnovers (from Step 3D) then it can be said that the current floorspace stock is over-trading, and that there is an existing need for additional floorspace. Conversely, if actual turnovers are less than the benchmark turnovers then there is an existing over-supply of floorspace. Lastly, if actual and benchmark turnovers are the same (or close) then the Plan area's retail economy for that category of goods can be said to be in equilibrium.

The extent of the existing retail floorspace over or under-supply can be estimated by converting the existing turnover surplus or deficit into floorspace by applying an appropriate average sales density.

Step 5 Changes in Retail Demand and Retail Supply through to the Forecast Year(s)

Step 5A Step 2D estimated the total available retail expenditure within the Plan area at the forecast year(s) for each of the main goods categories. The base year market shares (from Step 3C) may then be applied in order to obtain estimates of the levels of retained available expenditure at the forecast year(s).

It should be considered whether the application of the base year market shares are appropriate at the forecast year(s) in relation to the Plan area as a whole and/or individual centres. If it is considered that expenditure outflow (or leakage) is too high, or a centre is not achieving its true retailing potential, then a case could be made for increasing the market share(s). Alternatively, if it is thought that the proportion of expenditure being retained is too high, then the market share(s) could be reduced.

In either situation, the adjustment of the market shares should be the result of an interactive process, which focuses on realistic expectations of trade retention within individual zones within the Plan area.

It should also be borne in mind that adjusting the market share of a centre will have direct implications for the market shares of other centres. Similarly, increasing the market share for the Plan area as a whole will mean adjoining areas will lose their share of available expenditure. This may require collaboration and agreement with nearby Planning Authorities otherwise double counting of available expenditure is likely.

Step 5B Step 3D estimated the benchmark retail turnovers generated within the Plan area in the base year for the main categories of goods. These turnovers must then be projected to the forecast (year(s)) by taking into account any expected improvements in store efficiency (i.e. sales densities). In addition, the turnovers of any retail commitments (normally taken as comprising floorspace under construction or with planning consent) within the Plan area, must be added. It may also be appropriate to take into account the turnover associated with retail proposals and / or the re-use of vacant space.

Step 5C The monetary difference between the total potential retained expenditure at 5A and the forecast retail turnover at 5B gives a measure of the quantitative need for additional retail floorspace within the Plan area since the base year. If there is an expenditure surplus this is converted into a floorspace total by dividing through by an appropriate average sales density. Similarly, if there is an expenditure deficit, a floorspace over-supply can be calculated in the same way.

Step 5D To arrive at a final estimate of overall quantitative need the floorspace outputs from Step 5C must be combined with the existing floorspace over / under supply figures derived at Step 4A.

APPENDIX 6B

The Need for Additional Convenience Goods Floorspace: Scenario 1

SCENARIO 1: RETAIL FLOORSPACE NEED ASSESSMENT: CONVENIENCE GOODS (INCORPORATING ESTIMATES OF (ANY) UNDER / OVER TRADING AT THE BASE YEAR, 2008)

CONTENTS

Date of Preparation: 13/05/08

TABLE 1 - POPULATION CHANGE BY ZONE							
Zone	**2008 Population (Base Year)**	**2011 Population**	**2016 Population**	**2021 Population**	**2026 Population**	**Total Increase (2008-2026)**	**Percentage Increase (2008-2026)**
Zone 1	18,038	18,258	18,593	19,001	19,405	1,367	7.6%
Zone 2	14,914	15,098	15,375	15,712	16,047	1,133	7.6%
Zone 3	19,889	20,130	20,498	20,950	21,396	1,507	7.6%
Zone 4	14,917	15,098	15,375	15,712	16,047	1,130	7.6%
Zone 5	11,331	11,471	11,680	11,936	12,190	859	7.6%
Zone 6	17,924	18,142	18,472	18,880	19,282	1,358	7.6%
Zone 7	18,618	18,844	19,187	19,611	20,028	1,410	7.6%
Zone 8	24,142	24,330	24,559	24,846	25,267	1,125	4.7%
TOTAL	**139,773**	**141,371**	**143,739**	**146,648**	**149,662**	**9,889**	**7.1%**

Notes:
Population figures for zones 1 to 7 have been provided by Stratford on Avon District Council Planning Department. They are based on ward populations for 2005 produced by Warwickshire Observatory and incorporate forecasts of the number of dwellings to be completed between 2005 and 2026 (see Appendix). Populations for zone 8 (covering Cotswold and Wychavon Districts) have been sourced from the respective County Councils.

Date of Preparation: 13/05/08

TABLE 2 - EXPENDITURE ON CONVENIENCE GOODS PER HEAD OF POPULATION BY ZONE (INCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING)								
Zone		Expenditure Per Head (£) [1]						
	2006	2008 (Base Year)	2011	2016	2021	2026	Total Increase (2008-2026)	Percentage Increase (2008-2026)
Zone 1	1,763	1,788	1,826	1,890	1,957	2,027	239	13.4%
Zone 2	1,584	1,606	1,640	1,698	1,759	1,821	215	13.4%
Zone 3	1,737	1,761	1,799	1,862	1,929	1,997	236	13.4%
Zone 4	1,681	1,705	1,741	1,802	1,866	1,933	228	13.4%
Zone 5	1,774	1,799	1,837	1,902	1,970	2,040	241	13.4%
Zone 6	1,758	1,783	1,820	1,885	1,952	2,021	238	13.4%
Zone 7	1,637	1,660	1,695	1,755	1,818	1,882	222	13.4%
Zone 8	1,699	1,723	1,759	1,822	1,886	1,953	230	13.4%

Notes:
(1) Average consumer expenditure per head on convenience goods for 2006 has been estimated by Experian for each zone. The 2006 expenditure per head figures in each zone have been projected forwards to 2008 (the base year) and the forecast years of 2011, 2016, 2021 and 2026 by using UK expenditure per head growth forecasts provided by Experian (see Appendix 3c).

TABLE 3 - EXPENDITURE ON CONVENIENCE GOODS PER HEAD OF POPULATION BY ZONE (EXCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING)							
Zone	Expenditure Per Head (£) [1]						
	2008 (Base Year)	2011	2016	2021	2026	Total Increase (2008-2026)	Percentage Increase (2008-2026)
Zone 1	1,688	1,698	1,752	1,815	1,879	191	11.3%
Zone 2	1,516	1,525	1,574	1,630	1,688	172	11.3%
Zone 3	1,663	1,673	1,727	1,788	1,851	189	11.3%
Zone 4	1,609	1,619	1,671	1,730	1,792	182	11.3%
Zone 5	1,698	1,708	1,763	1,826	1,891	193	11.3%
Zone 6	1,683	1,693	1,747	1,809	1,874	191	11.3%
Zone 7	1,567	1,576	1,627	1,685	1,745	178	11.3%
Zone 8	1,626	1,636	1,689	1,749	1,811	184	11.3%

Notes:
(1) Expenditure per head on convenience goods has been discounted by 5.6% (over the figures in Table 2) for the base year of 2008, to exclude non-store retail sales, which includes e-tailing. At 2011 and 2016, discounts of 7% and 7.3% have been assumed. For the forecast years of 2021 and 2026 we assume the same discount of 7.3%, since the level of SFT is expected to plateau.
The SFT percentages are derived from in-depth research carried out by Experian (see Appendix 3d).

TABLE 4 - TOTAL AVAILABLE CONVENIENCE GOODS EXPENDITURE ZONE (EXCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING)							
Zone	Total Available Expenditure (£m) (1)						
	2008 (Base Year)	2011	2016	2021	2026	Total Increase (2008-2026)	Percentage Increase (2008-2026)
Zone 1	30.4	31.0	32.6	34.5	36.5	6.0	19.8%
Zone 2	22.6	23.0	24.2	25.6	27.1	4.5	19.8%
Zone 3	33.1	33.7	35.4	37.5	39.6	6.5	19.8%
Zone 4	24.0	24.4	25.7	27.2	28.7	4.7	19.8%
Zone 5	19.2	19.6	20.6	21.8	23.0	3.8	19.8%
Zone 6	30.2	30.7	32.3	34.2	36.1	6.0	19.8%
Zone 7	29.2	29.7	31.2	33.0	34.9	5.8	19.8%
Zone 8	39.3	39.8	41.5	43.4	45.8	6.5	16.5%
TOTAL	**228.0**	**232.0**	**243.4**	**257.2**	**271.8**	**43.8**	**19.2%**

Notes:
(1) Total available expenditure totals for convenience goods are calculated as follows: Population (Table 1) multiplied by consumer expenditure after making appropriate reductions for SFT (Table 3).

Date of Preparation: 13/05/08

TABLE 5 - CONVENIENCE GOODS CENTRE MARKET SHARES BY ZONE IN THE BASE YEAR, 2008 (COLUMN PERCENT)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)							
	Study Area							
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
WITHIN STRATFORD ON AVON DISTRICT								
Stratford Upon Avon	12.4	38.3	90.9	98.1	28.1	30.3	0.0	10.1
Alcester	0.0	27.1	3.8	0.0	0.0	0.0	0.0	0.0
Shipston on Stour	0.0	0.0	0.0	0.0	39.2	1.4	0.0	0.9
Southam	0.0	0.0	0.0	0.0	0.0	2.1	25.6	0.0
Other Centres / Stores	18.7	8.3	1.7	0.0	0.0	17.7	0.0	0.4
SUB TOTAL	**31.1**	**73.6**	**96.4**	**98.1**	**67.3**	**51.5**	**25.6**	**11.4**
OUTSIDE STRATFORD ON AVON DISTRICT								
All Centres / Stores	68.9	26.4	3.6	1.9	32.7	48.5	74.4	88.6
SUB TOTAL	**68.9**	**26.4**	**3.6**	**1.9**	**32.7**	**48.5**	**74.4**	**88.6**
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**

Notes:
The market share percentages are derived from the household telephone survey carried out within Stratford on Avon District and its shopping hinterland during January/February 2008.

Date of Preparation: 13/05/08

TABLE 6 - ESTIMATED CONVENIENCE GOODS EXPENDITURE PATTERN AND CENTRE TURNOVER ESTIMATES IN THE BASE YEAR, 2008 (£ MILLION)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)																
	Study Area								TOTAL HOUSEHOLD SURVEY AREA	Expenditure Drawn From Survey Area (Zones 1-8)	Estimated Inflow Expenditure (1)	Total Convenience Goods Turnover	Convenience Goods Floorspace (sq.m. net) (2)	Average Sales Density (£ per sq.m. net)	Benchmark Average Sales Density (£ per sq.m net) (3)	Benchmark Convenience Goods Turnover (£m)	Extent of Any Over / Under Trading (£m)
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8		A	B	C = A + B	D	E = C / D	F	G = F x D	H = C - G
WITHIN STRATFORD ON AVON DISTRICT																	
Stratford Upon Avon	3.8	8.7	30.1	23.6	5.4	9.2	0.0	4.0	**84.6**	84.6	13.7	98.3	10,366	9481.2	9,512	98.6	-0.3
Alcester	0.0	6.1	1.2	0.0	0.0	0.0	0.0	0.0	**7.4**	7.4	0.4	7.8	1,757	4423.3	5,580	9.8	-2.0
Shipston on Stour	0.0	0.0	0.0	0.0	7.5	0.4	0.0	0.4	**8.3**	8.3	0.2	8.5	1,246	6852.0	4,840	6.0	2.5
Southam	0.0	0.0	0.0	0.0	0.0	0.6	7.5	0.0	**8.1**	8.1	0.2	8.3	1,328	6253.2	5,388	7.2	1.1
Other Centres / Stores	5.7	1.9	0.6	0.0	0.0	5.3	0.0	0.1	**13.6**	13.6	0.0	13.6	-	-	-	13.1	-
SUB TOTAL	**9.5**	**16.7**	**31.9**	**23.6**	**13.0**	**15.5**	**7.5**	**4.5**	**122.0**	**122.0**	**14.5**	**136.5**	**14,697**	**27009.7**		**134.7**	**1.3**
OUTSIDE STRATFORD UPON AVON DISTRICT																	
All Centres / Stores	21.0	6.0	1.2	0.4	6.3	14.6	21.7	34.8	**106.0**								
SUB TOTAL	**21.0**	**6.0**	**1.2**	**0.4**	**6.3**	**14.6**	**21.7**	**34.8**	**106.0**								
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	**30.4**	**22.6**	**33.1**	**24.0**	**19.2**	**30.2**	**29.2**	**39.3**	**228.0**								

Notes:
(1) Estimated by Colliers CRE - includes visit / tourist expenditure (see Appendix 4 for full details).
(2) Floorpsace estimated from a range of sources (see Appendix 5b for full details).
(3) Benchmark sales densities estimated by Colliers CRE (see Appendix 5b for full details).

TABLE 7 - ADJUSTED CONVENIENCE GOODS CENTRE MARKET SHARES BY ZONE (COLUMN PERCENT)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)							
	Study Area							
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
WITHIN STRATFORD ON AVON DISTRICT								
Stratford Upon Avon	20.0	16.7	90.9	98.1	14.8	45.0	0.0	10.1
Alcester	5.0	70.0	3.8	0.0	0.0	0.0	0.0	0.0
Shipston on Stour	0.0	0.0	0.0	0.0	75.0	10.0	0.0	0.9
Southam	0.0	0.0	0.0	0.0	0.0	10.0	70.0	0.0
Other Centres / Stores	18.7	8.3	1.7	0.0	0.0	17.7	0.0	0.4
SUB TOTAL	**43.7**	**95.0**	**96.4**	**98.1**	**89.8**	**82.7**	**70.0**	**11.4**
OUTSIDE STRATFORD UPON ON DISTRICT								
All Centres / Stores	56.3	5.0	3.6	1.9	10.2	17.3	30.0	88.6
SUB TOTAL	**56.3**	**5.0**	**3.6**	**1.9**	**10.2**	**17.3**	**30.0**	**88.6**
TOTAL	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Notes:
Some of the market share percentages for the rurual market towns of Alcester, Shipston on Stour and Southam have been adjusted to reflect the potential of these centres to retain higher proportions of locally available expenditure in the future. Similarly, the market share percentages for Stratford on Avon have been adjusted in Zones 1 and 6 to reflect the potential of the town to capture more expenditure from these areas (see Section 6).

TABLE 8 - CONVENIENCE GOODS EXPENDITURE PATTERN AND CENTRE TURNOVER ESTIMATES, 2011 (£ MILLION)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)											
	Study Area								TOTAL HOUSEHOLD SURVEY AREA	Expenditure Drawn From Survey Area (Zones 1-8)	Estimated Inflow Expenditure (1)	Total Convenience Goods Turnover
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8		A	B	C = A + B
WITHIN STRATFORD ON AVON DISTRICT												
Stratford Upon Avon	6.2	3.8	30.6	24.0	2.9	13.8	0.0	4.0	**85.4**	85.4	14.1	99.5
Alcester	1.5	16.1	1.3	0.0	0.0	0.0	0.0	0.0	**18.9**	18.9	0.9	19.8
Shipston on Stour	0.0	0.0	0.0	0.0	14.7	3.1	0.0	0.4	**18.1**	18.1	0.5	18.6
Southam	0.0	0.0	0.0	0.0	0.0	3.1	20.8	0.0	**23.9**	23.9	0.6	24.5
Other Centres / Stores	5.8	1.9	0.6	0.0	0.0	5.4	0.0	0.1	**13.8**	13.8	0.0	13.8
SUB TOTAL	**13.5**	**21.9**	**32.5**	**24.0**	**17.6**	**25.4**	**20.8**	**4.5**	**160.2**	**160.2**	**16.1**	**176.3**
OUTSIDE STRATFORD ON AVON DISTRICT												
All Centres / Stores	17.5	1.2	1.2	0.5	2.0	5.3	8.9	35.3	**71.8**			
SUB TOTAL	**17.5**	**1.2**	**1.2**	**0.5**	**2.0**	**5.3**	**8.9**	**35.3**	**71.8**			
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	**31.0**	**23.0**	**33.7**	**24.4**	**19.6**	**30.7**	**29.7**	**39.8**	**232.0**			

Notes:
For each cell, the monetry figure is derived by multiplying the 2011 available convenience goods expenditure in the zone (excl. SFT) (Table 4) by the adjusted convenience goods market share of the specific centre in that zone (Table 7).
(1) Estimated by Colliers CRE (see Appendix 4).

Date of Preparation: 13/05/08

TABLE 9 - CALCULATION OF POTENTIAL CONVENIENCE GOODS HEADROOM EXPENDITURE, 2011 (£ MILLION)					
Centre	2008 Turnover	2011 Turnover Potential	Turnover Allocation for Existing Retailers 2008-2011	Residual Turnover Potential by 2011	Potential Headroom Expenditure by 2011
	A	B	C (1)	D = B - C	E = D - A
	(Table 6, C)	(Table 8, C)			
Stratford Upon Avon	98.3	99.5	1.8	97.7	-0.6
Alcester	7.8	19.8	0.2	19.7	11.9
Shipston on Stour	8.5	18.6	0.1	18.5	10.0
Southam	8.3	24.5	0.1	24.3	16.0
Other Centres / Stores	13.6	13.8	0.2	13.6	0.0
TOTAL: STRATFORD ON AVON DISTRICT	**136.5**	**176.3**	**2.4**	**173.8**	**37.3**

Notes:
(1) We assume that all existing convenience goods floorspace at the base year (2008) will achieve a real sales productivity gain of 0.6% per annum. This figure is based on in-depth research carried out by Experian (see Appendix 3e). The sales productivity gains are applied to the estimated 2008 benchmark convenience goods turnovers of each centre as set out in Table 6 (Column G).

TABLE 10 - QUANTITATIVE RETAIL FLOORSPACE NEED AT 2011

Centre	Potential Headroom Expenditure by 2011 (£m)	Adjustment for Over / Under Trading in Base Year (£m)	Adjusted Headroom Expenditure by 2011 (£m)	Reduction in Expenditure due to Convenience Goods Floorspace Commitments (as at April 2008) [1]	Adjusted Residual Headroom Expenditure by 2011 (£m)	Assumed Sales Density in 2011 [2] (£ per sq.m net)	Estimated Retail Floorspace Need in 2011 (sq.m net)
	A	B	C = A + B	D	E = C - D	F	G = E / F
	(Table 9, E)	(Table 6, H)					
Stratford Upon Avon	-0.6	-0.3	-0.9	14.0	-14.9	7,636	-1,952
Alcester	11.9	-2.0	9.9	0.0	9.9	7,636	1,291
Shipston on Stour	10.0	2.5	12.5	0.0	12.5	7,636	1,637
Southam	16.0	1.1	17.2	0.0	17.2	7,636	2,250
Other Centres / Stores	0.0	0.0	0.0	0.0	0.0	7,636	1
TOTAL: STRATFORD ON AVON DISTRICT	**37.3**	**1.3**	**38.6**	**14.0**	**24.6**		**3,227**

SCENARIO 2 - LOW

Stratford Upon Avon	5,091	-2,928
Alcester	5,091	1,936
Shipston on Stour	5,091	2,456
Southam	5,091	3,375
Other Centres / Stores	5,091	2
		4,841

SCENARIO 3 - HIGH

Stratford Upon Avon	10,181	-1,464
Alcester	10,181	968
Shipston on Stour	10,181	1,228
Southam	10,181	1,688
Other Centres / Stores	10,181	1
		2,420

Notes:
(1) Details and estimated 2011 turnovers of convenience goods floorspace commitments and proposals are set out in Appendix 5c.
(2) The derivation of our 2011 benchmark centre sales density estimates are set out in Section 5.

TABLE 11 - CONVENIENCE GOODS EXPENDITURE PATTERN AND CENTRE TURNOVER ESTIMATES, 2016 (£ MILLION)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)											
	Study Area								TOTAL HOUSEHOLD SURVEY AREA	Expenditure Drawn From Survey Area (Zones 1-8)	Estimated Inflow Expenditure (1)	Total Convenience Goods Turnover
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8		A	B	C = A + B
WITHIN STRATFORD ON AVON DISTRICT												
Stratford Upon Avon	6.5	4.0	32.2	25.2	3.0	14.5	0.0	4.2	**89.7**	89.7	14.8	104.5
Alcester	1.6	16.9	1.3	0.0	0.0	0.0	0.0	0.0	**19.9**	19.9	1.0	20.9
Shipston on Stour	0.0	0.0	0.0	0.0	15.4	3.2	0.0	0.4	**19.1**	19.1	0.5	19.6
Southam	0.0	0.0	0.0	0.0	0.0	3.2	21.9	0.0	**25.1**	25.1	0.6	25.7
Other Centres / Stores	6.1	2.0	0.6	0.0	0.0	5.7	0.0	0.2	**14.6**	14.6	0.0	14.6
SUB TOTAL	**14.2**	**23.0**	**34.1**	**25.2**	**18.5**	**26.7**	**21.9**	**4.7**	**168.3**	**168.3**	**16.9**	**185.2**
OUTSIDE STRATFORD ON AVON DISTRICT												
All Centres / Stores	18.3	1.2	1.3	0.5	2.1	5.6	9.4	36.8	**75.1**			
SUB TOTAL	**18.3**	**1.2**	**1.3**	**0.5**	**2.1**	**5.6**	**9.4**	**36.8**	**75.1**			
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	**32.6**	**24.2**	**35.4**	**25.7**	**20.6**	**32.3**	**31.2**	**41.5**	**243.4**			

Notes:
For each cell, the monetry figure is derived by multiplying the 2016 available convenience goods expenditure in the zone (excl. SFT) (Table 4) by the adjusted convenience goods market share of the specific centre in that zone (Table 7).
(1) Estimated by Colliers CRE (see Appendix 4).

Date of Preparation: 13/05/08

TABLE 12 - CALCULATION OF POTENTIAL CONVENIENCE GOODS HEADROOM EXPENDITURE, 2016 (£ MILLION)					
Centre	2008 Turnover	2016 Turnover Potential	Turnover Allocation for Existing Retailers 2008-2016	Residual Turnover Potential by 2016	Potential Headroom Expenditure by 2016
	A	B	C (1)	D = B - C	E = D - A
	(Table 6, C)	(Table 10, C)			
Stratford Upon Avon	98.3	104.5	4.8	99.7	1.4
Alcester	7.8	20.9	0.5	20.4	12.7
Shipston on Stour	8.5	19.6	0.3	19.3	10.7
Southam	8.3	25.7	0.4	25.3	17.0
Other Centres / Stores	13.6	14.6	0.6	13.9	0.3
TOTAL: STRATFORD ON AVON DISTRICT	**136.5**	**185.2**	**6.6**	**178.6**	**42.1**

Notes:
(1) We assume that all existing convenience goods floorspace at the base year (2008) will achieve a real sales productivity gain of 0.6% per annum. This figure is based on in-depth research carried out by Experian (see Appendix 3e). The sales productivity gains are applied to the estimated 2008 benchmark convenience goods turnovers of each centre as set out in Table 6 (Column G).

TABLE 13 - QUANTITATIVE RETAIL FLOORSPACE NEED AT 2016

Centre	Potential Headroom Expenditure by 2016 (£m)	Adjustment for Over / Under Trading in Base Year (£m)	Adjusted Headroom Expenditure by 2016 (£m)	Reduction in Expenditure due to Convenience Goods Floorspace Commitments (as at April 2008) [1]	Adjusted Residual Headroom Expenditure by 2016 (£m)	Assumed Sales Density in 2016 [2] (£ per sq.m net)	Estimated Retail Floorspace Need in 2016 (sq.m net)
	A	B	C = A + B	D	E = C - D	F	G = E / F
	(Table 12, E)	(Table 6, H)					
Stratford Upon Avon	1.4	-0.3	1.1	14.5	-13.4	7,868	-1,707
Alcester	12.7	-2.0	10.6	0.0	10.6	7,868	1,350
Shipston on Stour	10.7	2.5	13.2	0.0	13.2	7,868	1,682
Southam	17.0	1.1	18.2	0.0	18.2	7,868	2,310
Other Centres / Stores	0.3	0.0	0.3	0.0	0.3	7,868	40
TOTAL: STRATFORD ON AVON DISTRICT	**42.1**	**1.3**	**43.4**	**14.5**	**28.9**		**3,674**

SCENARIO 2 - LOW

Stratford Upon Avon	5,245	-2,561
Alcester	5,245	2,025
Shipston on Stour	5,245	2,524
Southam	5,245	3,465
Other Centres / Stores	5,245	59
		5,512

SCENARIO 3 - HIGH

Stratford Upon Avon	10,490	-1,281
Alcester	10,490	1,012
Shipston on Stour	10,490	1,262
Southam	10,490	1,733
Other Centres / Stores	10,490	30
		2,756

Notes:
(1) Details and estimated 2016 turnovers of convenience goods floorspace commitments and proposals are set out in Appendix 5c.
(2) The derivation of our 2016 benchmark centre sales density estimates are set out in Section 5.

TABLE 14 - CONVENIENCE GOODS EXPENDITURE PATTERN AND CENTRE TURNOVER ESTIMATES, 2021 (£ MILLION)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)											
	Study Area								TOTAL HOUSEHOLD SURVEY AREA	Expenditure Drawn From Survey Area (Zones 1-8)	Estimated Inflow Expenditure (1)	Total Convenience Goods Turnover
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8		A	B	C = A + B
WITHIN STRATFORD ON AVON DISTRICT												
Stratford Upon Avon	6.9	4.3	34.1	26.7	3.2	15.4	0.0	4.4	**94.9**	94.9	15.6	110.5
Alcester	1.7	17.9	1.4	0.0	0.0	0.0	0.0	0.0	**21.1**	21.1	1.1	22.2
Shipston on Stour	0.0	0.0	0.0	0.0	16.3	3.4	0.0	0.4	**20.2**	20.2	0.5	20.7
Southam	0.0	0.0	0.0	0.0	0.0	3.4	23.1	0.0	**26.5**	26.5	0.7	27.2
Other Centres / Stores	6.4	2.1	0.6	0.0	0.0	6.0	0.0	0.2	**15.4**	15.4	0.0	15.4
SUB TOTAL	**15.1**	**24.3**	**36.1**	**26.7**	**19.6**	**28.2**	**23.1**	**4.9**	**178.1**	**178.1**	**17.9**	**196.0**
OUTSIDE STRATFORD ON AVON DISTRICT												
All Centres / Stores	19.4	1.3	1.3	0.5	2.2	5.9	9.9	38.5	**79.1**			
SUB TOTAL	**19.4**	**1.3**	**1.3**	**0.5**	**2.2**	**5.9**	**9.9**	**38.5**	**79.1**			
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	**34.5**	**25.6**	**37.5**	**27.2**	**21.8**	**34.2**	**33.0**	**43.4**	**257.2**			

Notes:
For each cell, the monetry figure is derived by multiplying the 2021 available convenience goods expenditure in the zone (excl. SFT) (Table 4) by the adjusted convenience goods market share of the specific centre in that zone (Table 7).
(1) Estimated by Colliers CRE (see Appendix 4).

Date of Preparation: 13/05/08

TABLE 15 - CALCULATION OF POTENTIAL CONVENIENCE GOODS HEADROOM EXPENDITURE, 2021 (£ MILLION)					
Centre	2008 Turnover	2021 Turnover Potential	Turnover Allocation for Existing Retailers 2008-2021	Residual Turnover Potential by 2021	Potential Headroom Expenditure by 2021
	A	B	C (1)	D = B - C	E = D - A
	(Table 6, C)	(Table 14, C)			
Stratford Upon Avon	98.3	110.5	8.0	102.5	4.2
Alcester	7.8	22.2	0.8	21.4	13.6
Shipston on Stour	8.5	20.7	0.5	20.2	11.6
Southam	8.3	27.2	0.6	26.7	18.4
Other Centres / Stores	13.6	15.4	1.1	14.3	0.7
TOTAL: STRATFORD ON AVON DISTRICT	**136.5**	**196.0**	**10.9**	**185.1**	**48.6**

Notes:
(1) We assume that all existing convenience goods floorspace at the base year (2008) will achieve a real sales productivity gain of 0.6% per annum. This figure is based on in-depth research carried out by Experian (see Appendix 3e). The sales productivity gains are applied to the estimated 2008 benchmark convenience goods turnovers of each centre as set out in Table 6 (Column G).

TABLE 16 - QUANTITATIVE RETAIL FLOORSPACE NEED AT 2021

Centre	Potential Headroom Expenditure by 2021 (£m)	Adjustment for Over / Under Trading in Base Year (£m)	Adjusted Headroom Expenditure by 2021 (£m)	Reduction in Expenditure due to Convenience Goods Floorspace Commitments (as at April 2008) [1]	Adjusted Residual Headroom Expenditure by 2021 (£m)	Assumed Sales Density in 2021 [2] (£ per sq.m net)	Estimated Retail Floorspace Need in 2021 (sq.m net)
	A	B	C = A + B	D	E = C - D	F	G = E / F
	(Table 15, E)	(Table 6, H)					
Stratford Upon Avon	4.2	-0.3	3.9	14.9	-11.0	8,107	-1,356
Alcester	13.6	-2.0	11.6	0.0	11.6	8,107	1,427
Shipston on Stour	11.6	2.5	14.2	0.0	14.2	8,107	1,745
Southam	18.4	1.1	19.5	0.0	19.5	8,107	2,407
Other Centres / Stores	0.7	0.0	0.7	0.0	0.7	8,107	91
TOTAL: STRATFORD ON AVON DISTRICT	**48.6**	**1.3**	**49.9**	**14.9**	**35.0**		**4,314**

SCENARIO 2 - LOW

Stratford Upon Avon	5,404	-2,034
Alcester	5,404	2,140
Shipston on Stour	5,404	2,618
Southam	5,404	3,611
Other Centres / Stores	5,404	137
		6,472

SCENARIO 3 - HIGH

Stratford Upon Avon	10,809	-1,017
Alcester	10,809	1,070
Shipston on Stour	10,809	1,309
Southam	10,809	1,805
Other Centres / Stores	10,809	68
		3,236

Notes:
(1) Details and estimated 2021 turnovers of convenience goods floorspace commitments and proposals are set out in Appendix 5c.
(2) The derivation of our 2021 benchmark centre sales density estimates are set out in Section 5.

TABLE 17 - CONVENIENCE GOODS EXPENDITURE PATTERN AND CENTRE TURNOVER ESTIMATES, 2026 (£ MILLION)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)											
	Study Area								TOTAL HOUSEHOLD SURVEY AREA	Expenditure Drawn From Survey Area (Zones 1-8)	Estimated Inflow Expenditure (1)	Total Convenience Goods Turnover
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8		A	B	C = A + B
WITHIN STRATFORD ON AVON DISTRICT												
Stratford Upon Avon	7.3	4.5	36.0	28.2	3.4	16.3	0.0	4.6	**100.3**	100.3	16.5	116.8
Alcester	1.8	19.0	1.5	0.0	0.0	0.0	0.0	0.0	**22.3**	22.3	1.1	23.4
Shipston on Stour	0.0	0.0	0.0	0.0	17.3	3.6	0.0	0.4	**21.3**	21.3	0.5	21.8
Southam	0.0	0.0	0.0	0.0	0.0	3.6	24.5	0.0	**28.1**	28.1	0.7	28.8
Other Centres / Stores	6.8	2.2	0.7	0.0	0.0	6.4	0.0	0.2	**16.3**	16.3	0.0	16.3
SUB TOTAL	**15.9**	**25.7**	**38.2**	**28.2**	**20.7**	**29.9**	**24.5**	**5.2**	**188.3**	**188.3**	**18.8**	**207.1**
OUTSIDE STRATFORD ON AVON DISTRICT												
All Centres / Stores	20.5	1.4	1.4	0.5	2.4	6.3	10.5	40.6	**83.5**			
SUB TOTAL	**20.5**	**1.4**	**1.4**	**0.5**	**2.4**	**6.3**	**10.5**	**40.6**	**83.5**			
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	**36.5**	**27.1**	**39.6**	**28.7**	**23.0**	**36.1**	**34.9**	**45.8**	**271.8**			

Notes:
For each cell, the monetry figure is derived by multiplying the 2026 available convenience goods expenditure in the zone (excl. SFT) (Table 4) by the adjusted convenience goods market share of the specific centre in that zone (Table 7).
(1) Estimated by Colliers CRE (see Appendix 4).

Date of Preparation: 13/05/08

TABLE 18 - CALCULATION OF POTENTIAL CONVENIENCE GOODS HEADROOM EXPENDITURE, 2026 (£ MILLION)					
Centre	2008 Turnover	2026 Turnover Potential	Turnover Allocation for Existing Retailers 2008-2026	Residual Turnover Potential by 2026	Potential Headroom Expenditure by 2026
	A	B	C (1)	D = B - C	E = D - A
	(Table 6, C)	(Table 17, C)			
Stratford Upon Avon	98.3	116.8	11.2	105.6	7.3
Alcester	7.8	23.4	1.1	22.3	14.5
Shipston on Stour	8.5	21.8	0.7	21.1	12.6
Southam	8.3	28.8	0.8	28.0	19.7
Other Centres / Stores	13.6	16.3	1.5	14.8	1.2
TOTAL: STRATFORD ON AVON DISTRICT	**136.5**	**207.1**	**15.3**	**191.8**	**55.3**

Notes:
(1) We assume that all existing convenience goods floorspace at the base year (2008) will achieve a real sales productivity gain of 0.6% per annum. This figure is based on in-depth research carried out by Experian (see Appendix 3e). The sales productivity gains are applied to the estimated 2008 benchmark convenience goods turnovers of each centre as set out in Table 6 (Column G).

TABLE 19 - QUANTITATIVE RETAIL FLOORSPACE NEED AT 2026

Centre	Potential Headroom Expenditure by 2026 (£m)	Adjustment for Over / Under Trading in Base Year (£m)	Adjusted Headroom Expenditure by 2026 (£m)	Reduction in Expenditure due to Convenience Goods Floorspace Commitments (as at April 2008) [1]	Adjusted Residual Headroom Expenditure by 2026 (£m)	Assumed Sales Density in 2026 [2] (£ per sq.m net)	Estimated Retail Floorspace Need in 2026 (sq.m net)
	A	B	C = A + B	D	E = C - D	F	G = E / F
	(Table 18, E)	(Table 6, H)					
Stratford Upon Avon	7.3	-0.3	7.0	15.4	-8.4	8,353	-1,004
Alcester	14.5	-2.0	12.5	0.0	12.5	8,353	1,491
Shipston on Stour	12.6	2.5	15.1	0.0	15.1	8,353	1,809
Southam	19.7	1.1	20.8	0.0	20.8	8,353	2,491
Other Centres / Stores	1.2	0.0	1.2	0.0	1.2	8,353	143
TOTAL: STRATFORD ON AVON DISTRICT	**55.3**	**1.3**	**56.6**	**15.4**	**41.2**		**4,930**

SCENARIO 2 - LOW

Stratford Upon Avon	5,568	-1,506
Alcester	5,568	2,237
Shipston on Stour	5,568	2,714
Southam	5,568	3,736
Other Centres / Stores	5,568	215
		7,396

SCENARIO 3 - HIGH

Stratford Upon Avon	11,137	-753
Alcester	11,137	1,119
Shipston on Stour	11,137	1,357
Southam	11,137	1,868
Other Centres / Stores	11,137	107
		3,698

Notes:
(1) Details and estimated 2026 turnovers of convenience goods floorspace commitments and proposals are set out in Appendix 5c.
(2) The derivation of our 2026 benchmark centre sales density estimates are set out in Section 5.

APPENDIX 6C

The Need for Additional Convenience Goods Floorspace: Scenario 2

SCENARIO 2: RETAIL FLOORSPACE NEED ASSESSMENT: CONVENIENCE GOODS (INCORPORATING ESTIMATES OF (ANY) UNDER / OVER TRADING AT THE BASE YEAR, 2008)

CONTENTS

Date of Preparation: 12/05/08

TABLE 1 - POPULATION CHANGE BY ZONE							
Zone	**2008 Population (Base Year)**	**2011 Population**	**2016 Population**	**2021 Population**	**2026 Population**	**Total Increase (2008-2026)**	**Percentage Increase (2008-2026)**
Zone 1	18,038	18,258	18,593	19,001	19,405	1,367	7.6%
Zone 2	14,914	15,098	15,375	15,712	16,047	1,133	7.6%
Zone 3	19,889	20,130	20,498	20,950	21,396	1,507	7.6%
Zone 4	14,917	15,098	15,375	15,712	16,047	1,130	7.6%
Zone 5	11,331	11,471	11,680	11,936	12,190	859	7.6%
Zone 6	17,924	18,142	18,472	18,880	19,282	1,358	7.6%
Zone 7	18,618	18,844	19,187	19,611	20,028	1,410	7.6%
Zone 8	24,142	24,330	24,559	24,846	25,267	1,125	4.7%
TOTAL	**139,773**	**141,371**	**143,739**	**146,648**	**149,662**	**9,889**	**7.1%**

Notes:
Population figures for zones 1 to 7 have been provided by Stratford on Avon District Council Planning Department. They are based on ward populations for 2005 produced by Warwickshire Observatory and incorporate forecasts of the number of dwellings to be completed between 2005 and 2026 (see Appendix). Populations for zone 8 (covering Cotswold and Wychavon Districts) have been sourced from the respective County Councils.

Date of Preparation: 12/05/08

TABLE 2 - EXPENDITURE ON CONVENIENCE GOODS PER HEAD OF POPULATION BY ZONE (INCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING)								
Zone		Expenditure Per Head (£) [1]						
	2006	2008 (Base Year)	2011	2016	2021	2026	Total Increase (2008-2026)	Percentage Increase (2008-2026)
Zone 1	1,763	1,788	1,826	1,890	1,957	2,027	239	13.4%
Zone 2	1,584	1,606	1,640	1,698	1,759	1,821	215	13.4%
Zone 3	1,737	1,761	1,799	1,862	1,929	1,997	236	13.4%
Zone 4	1,681	1,705	1,741	1,802	1,866	1,933	228	13.4%
Zone 5	1,774	1,799	1,837	1,902	1,970	2,040	241	13.4%
Zone 6	1,758	1,783	1,820	1,885	1,952	2,021	238	13.4%
Zone 7	1,637	1,660	1,695	1,755	1,818	1,882	222	13.4%
Zone 8	1,699	1,723	1,759	1,822	1,886	1,953	230	13.4%

Notes:
(1) Average consumer expenditure per head on convenience goods for 2006 has been estimated by Experian for each zone. The 2006 expenditure per head figures in each zone have been projected forwards to 2008 (the base year) and the forecast years of 2011, 2016, 2021 and 2026 by using UK expenditure per head growth forecasts provided by Experian (see Appendix 3c).

TABLE 3 - EXPENDITURE ON CONVENIENCE GOODS PER HEAD OF POPULATION BY ZONE (EXCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING)							
Zone	Expenditure Per Head (£) [1]						
	2008 (Base Year)	2011	2016	2021	2026	Total Increase (2008-2026)	Percentage Increase (2008-2026)
Zone 1	1,688	1,698	1,752	1,815	1,879	191	11.3%
Zone 2	1,516	1,525	1,574	1,630	1,688	172	11.3%
Zone 3	1,663	1,673	1,727	1,788	1,851	189	11.3%
Zone 4	1,609	1,619	1,671	1,730	1,792	182	11.3%
Zone 5	1,698	1,708	1,763	1,826	1,891	193	11.3%
Zone 6	1,683	1,693	1,747	1,809	1,874	191	11.3%
Zone 7	1,567	1,576	1,627	1,685	1,745	178	11.3%
Zone 8	1,626	1,636	1,689	1,749	1,811	184	11.3%

Notes:
(1) Expenditure per head on convenience goods has been discounted by 5.6% (over the figures in Table 2) for the base year of 2008, to exclude non-store retail sales, which includes e-tailing. At 2011 and 2016, discounts of 7% and 7.3% have been assumed. For the forecast years of 2021 and 2026 we assume the same discount of 7.3%, since the level of SFT is expected to plateau.
The SFT percentages are derived from in-depth research carried out by Experian (see Appendix 3d).

TABLE 4 - TOTAL AVAILABLE CONVENIENCE GOODS EXPENDITURE ZONE (EXCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING)							
Zone	Total Available Expenditure (£m) (1)						
	2008 (Base Year)	2011	2016	2021	2026	Total Increase (2008-2026)	Percentage Increase (2008-2026)
Zone 1	30.4	31.0	32.6	34.5	36.5	6.0	19.8%
Zone 2	22.6	23.0	24.2	25.6	27.1	4.5	19.8%
Zone 3	33.1	33.7	35.4	37.5	39.6	6.5	19.8%
Zone 4	24.0	24.4	25.7	27.2	28.7	4.7	19.8%
Zone 5	19.2	19.6	20.6	21.8	23.0	3.8	19.8%
Zone 6	30.2	30.7	32.3	34.2	36.1	6.0	19.8%
Zone 7	29.2	29.7	31.2	33.0	34.9	5.8	19.8%
Zone 8	39.3	39.8	41.5	43.4	45.8	6.5	16.5%
TOTAL	**228.0**	**232.0**	**243.4**	**257.2**	**271.8**	**43.8**	**19.2%**

Notes:
(1) Total available expenditure totals for convenience goods are calculated as follows: Population (Table 1) multiplied by consumer expenditure after making appropriate reductions for SFT (Table 3).

Date of Preparation: 12/05/08

TABLE 5 - CONVENIENCE GOODS CENTRE MARKET SHARES BY ZONE IN THE BASE YEAR, 2008 (COLUMN PERCENT)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)							
	Study Area							
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
WITHIN STRATFORD ON AVON DISTRICT								
Stratford Upon Avon	12.4	38.3	90.9	98.1	28.1	30.3	0.0	10.1
Alcester	0.0	27.1	3.8	0.0	0.0	0.0	0.0	0.0
Shipston on Stour	0.0	0.0	0.0	0.0	39.2	1.4	0.0	0.9
Southam	0.0	0.0	0.0	0.0	0.0	2.1	25.6	0.0
Other Centres / Stores	18.7	8.3	1.7	0.0	0.0	17.7	0.0	0.4
SUB TOTAL	**31.1**	**73.6**	**96.4**	**98.1**	**67.3**	**51.5**	**25.6**	**11.4**
OUTSIDE STRATFORD ON AVON DISTRICT								
All Centres / Stores	68.9	26.4	3.6	1.9	32.7	48.5	74.4	88.6
SUB TOTAL	**68.9**	**26.4**	**3.6**	**1.9**	**32.7**	**48.5**	**74.4**	**88.6**
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**

Notes:
The market share percentages are derived from the household telephone survey carried out within Stratford on Avon District and its shopping hinterland during January/February 2008.

Date of Preparation: 12/05/08

TABLE 6 - ESTIMATED CONVENIENCE GOODS EXPENDITURE PATTERN AND CENTRE TURNOVER ESTIMATES IN THE BASE YEAR, 2008 (£ MILLION)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)																
	Study Area								TOTAL HOUSEHOLD SURVEY AREA	Expenditure Drawn From Survey Area (Zones 1-8)	Estimated Inflow Expenditure (1)	Total Convenience Goods Turnover	Convenience Goods Floorspace (sq.m. net) (2)	Average Sales Density (£ per sq.m. net)	Benchmark Average Sales Density (£ per sq.m net) (3)	Benchmark Convenience Goods Turnover (£m)	Extent of Any Over / Under Trading (£m)
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8		A	B	C = A + B	D	E = C / D	F	G = F x D	H = C - G
WITHIN STRATFORD ON AVON DISTRICT																	
Stratford Upon Avon	3.8	8.7	30.1	23.6	5.4	9.2	0.0	4.0	**84.6**	84.6	13.7	98.3	10,366	9481.2	9,512	98.6	-0.3
Alcester	0.0	6.1	1.2	0.0	0.0	0.0	0.0	0.0	**7.4**	7.4	0.4	7.8	1,757	4423.3	5,580	9.8	-2.0
Shipston on Stour	0.0	0.0	0.0	0.0	7.5	0.4	0.0	0.4	**8.3**	8.3	0.2	8.5	1,246	6852.0	4,840	6.0	2.5
Southam	0.0	0.0	0.0	0.0	0.0	0.6	7.5	0.0	**8.1**	8.1	0.2	8.3	1,328	6253.2	5,388	7.2	1.1
Other Centres / Stores	5.7	1.9	0.6	0.0	0.0	5.3	0.0	0.1	**13.6**	13.6	0.0	13.6	-	-	-	13.1	-
SUB TOTAL	**9.5**	**16.7**	**31.9**	**23.6**	**13.0**	**15.5**	**7.5**	**4.5**	**122.0**	**122.0**	**14.5**	**136.5**	**14,697**	**27009.7**		**134.7**	**1.3**
OUTSIDE STRATFORD UPON AVON DISTRICT																	
All Centres / Stores	21.0	6.0	1.2	0.4	6.3	14.6	21.7	34.8	**106.0**								
SUB TOTAL	**21.0**	**6.0**	**1.2**	**0.4**	**6.3**	**14.6**	**21.7**	**34.8**	**106.0**								
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	**30.4**	**22.6**	**33.1**	**24.0**	**19.2**	**30.2**	**29.2**	**39.3**	**228.0**								

Notes:
(1) Estimated by Colliers CRE - includes visit / tourist expenditure (see Appendix 4 for full details).
(2) Floorpsace estimated from a range of sources (see Appendix 5b for full details).
(3) Benchmark sales densities estimated by Colliers CRE (see Appendix 5b for full details).

Date of Preparation: 12/05/08

TABLE 7 - UNADJUSTED CONVENIENCE GOODS CENTRE MARKET SHARES BY ZONE (COLUMN PERCENT)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)							
	Study Area							
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
WITHIN STRATFORD ON AVON DISTRICT								
Stratford Upon Avon	12.4	38.3	90.9	98.1	28.1	30.3	0.0	10.1
Alcester	0.0	27.1	3.8	0.0	0.0	0.0	0.0	0.0
Shipston on Stour	0.0	0.0	0.0	0.0	39.2	1.4	0.0	0.9
Southam	0.0	0.0	0.0	0.0	0.0	2.1	25.6	0.0
Other Centres / Stores	18.7	8.3	1.7	0.0	0.0	17.7	0.0	0.4
SUB TOTAL	**31.1**	**73.6**	**96.4**	**98.1**	**67.3**	**51.5**	**25.6**	**11.4**
OUTSIDE STRATFORD ON AVON DISTRICT								
All Centres / Stores	68.9	26.4	3.6	1.9	32.7	48.5	74.4	88.6
SUB TOTAL	**68.9**	**26.4**	**3.6**	**1.9**	**32.7**	**48.5**	**74.4**	**88.6**
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**

Notes:
We assume no material changes to consumer shopping patterns for convenience goods in the futre. We therefore adopt the same pattern of market shares as set out in Table 5.

Date of Preparation: 12/05/08

TABLE 8 - CONVENIENCE GOODS EXPENDITURE PATTERN AND CENTRE TURNOVER ESTIMATES, 2011 (£ MILLION)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)											
	Study Area								TOTAL HOUSEHOLD SURVEY AREA	Expenditure Drawn From Survey Area (Zones 1-8)	Estimated Inflow Expenditure (1)	Total Convenience Goods Turnover
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8		A	B	C = A + B
WITHIN STRATFORD ON AVON DISTRICT												
Stratford Upon Avon	3.9	8.8	30.6	24.0	5.5	9.3	0.0	4.0	**86.1**	86.1	14.1	100.2
Alcester	0.0	6.2	1.3	0.0	0.0	0.0	0.0	0.0	**7.5**	7.5	0.4	7.9
Shipston on Stour	0.0	0.0	0.0	0.0	7.7	0.4	0.0	0.4	**8.5**	8.5	0.2	8.7
Southam	0.0	0.0	0.0	0.0	0.0	0.6	7.6	0.0	**8.3**	8.3	0.2	8.5
Other Centres / Stores	5.8	1.9	0.6	0.0	0.0	5.4	0.0	0.1	**13.8**	13.8	0.0	13.8
SUB TOTAL	**9.6**	**17.0**	**32.5**	**24.0**	**13.2**	**15.8**	**7.6**	**4.5**	**124.2**	**124.2**	**14.9**	**139.1**
OUTSIDE STRATFORD ON AVON DISTRICT												
All Centres / Stores	21.4	6.1	1.2	0.5	6.4	14.9	22.1	35.3	**107.8**			
SUB TOTAL	**21.4**	**6.1**	**1.2**	**0.5**	**6.4**	**14.9**	**22.1**	**35.3**	**107.8**			
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	**31.0**	**23.0**	**33.7**	**24.4**	**19.6**	**30.7**	**29.7**	**39.8**	**232.0**			

Notes:
For each cell, the monetry figure is derived by multiplying the 2011 available convenience goods expenditure in the zone (excl. SFT) (Table 4) by the adjusted convenience goods market share of the specific centre in that zone (Table 7).
(1) Estimated by Colliers CRE (see Appendix 4).

Date of Preparation: 12/05/08

TABLE 9 - CALCULATION OF POTENTIAL CONVENIENCE GOODS HEADROOM EXPENDITURE, 2011 (£ MILLION)

Centre	2008 Turnover	2011 Turnover Potential	Turnover Allocation for Existing Retailers 2008-2011	Residual Turnover Potential by 2011	Potential Headroom Expenditure by 2011
	A	B	C [1]	D = B - C	E = D - A
	(Table 6, C)	(Table 8, C)			
Stratford Upon Avon	98.3	100.2	1.8	98.4	0.1
Alcester	7.8	7.9	0.2	7.7	0.0
Shipston on Stour	8.5	8.7	0.1	8.6	0.0
Southam	8.3	8.5	0.1	8.3	0.0
Other Centres / Stores	13.6	13.8	0.2	13.6	0.0
TOTAL: STRATFORD ON AVON DISTRICT	**136.5**	**139.1**	**2.4**	**136.7**	**0.2**

Notes:
(1) We assume that all existing convenience goods floorspace at the base year (2008) will achieve a real sales productivity gain of 0.6% per annum. This figure is based on in-depth research carried out by Experian (see Appendix 3e). The sales productivity gains are applied to the estimated 2008 benchmark convenience goods turnovers of each centre as set out in Table 6 (Column G).

TABLE 10 - QUANTITATIVE RETAIL FLOORSPACE NEED AT 2011

Centre	Potential Headroom Expenditure by 2011 (£m)	Adjustment for Over / Under Trading in Base Year (£m)	Adjusted Headroom Expenditure by 2011 (£m)	Reduction in Expenditure due to Convenience Goods Floorspace Commitments (as at April 2008) [1]	Adjusted Residual Headroom Expenditure by 2011 (£m)	Assumed Sales Density in 2011 [2] (£ per sq.m net)	Estimated Retail Floorspace Need in 2011 (sq.m net)
	A	B	C = A + B	D	E = C - D	F	G = E / F
	(Table 9, E)	(Table 6, H)					
Stratford Upon Avon	0.1	-0.3	-0.2	14.0	-14.2	7,636	-1,857
Alcester	0.0	-2.0	-2.1	0.0	-2.1	7,636	-272
Shipston on Stour	0.0	2.5	2.5	0.0	2.5	7,636	334
Southam	0.0	1.1	1.2	0.0	1.2	7,636	153
Other Centres / Stores	0.0	0.0	0.0	0.0	0.0	7,636	1
TOTAL: STRATFORD ON AVON DISTRICT	**0.2**	**1.3**	**1.5**	**14.0**	**-12.5**		**-1,640**

SCENARIO 2 - LOW

Stratford Upon Avon	5,091	-2,785
Alcester	5,091	-407
Shipston on Stour	5,091	501
Southam	5,091	229
Other Centres / Stores	5,091	2
		-2,460

SCENARIO 3 - HIGH

Stratford Upon Avon	10,181	-1,393
Alcester	10,181	-204
Shipston on Stour	10,181	250
Southam	10,181	115
Other Centres / Stores	10,181	1
		-1,230

Notes:
(1) Details and estimated 2011 turnovers of convenience goods floorspace commitments and proposals are set out in Appendix 5c.
(2) The derivation of our 2011 benchmark centre sales density estimates are set out in Section 5.

TABLE 11 - CONVENIENCE GOODS EXPENDITURE PATTERN AND CENTRE TURNOVER ESTIMATES, 2016 (£ MILLION)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)											
	Study Area								TOTAL HOUSEHOLD SURVEY AREA	Expenditure Drawn From Survey Area (Zones 1-8)	Estimated Inflow Expenditure (1)	Total Convenience Goods Turnover
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8		A	B	C = A + B
WITHIN STRATFORD ON AVON DISTRICT												
Stratford Upon Avon	4.0	9.3	32.2	25.2	5.8	9.8	0.0	4.2	**90.5**	90.5	14.8	105.3
Alcester	0.0	6.6	1.3	0.0	0.0	0.0	0.0	0.0	**7.9**	7.9	0.4	8.3
Shipston on Stour	0.0	0.0	0.0	0.0	8.1	0.5	0.0	0.4	**8.9**	8.9	0.2	9.1
Southam	0.0	0.0	0.0	0.0	0.0	0.7	8.0	0.0	**8.7**	8.7	0.2	8.9
Other Centres / Stores	6.1	2.0	0.6	0.0	0.0	5.7	0.0	0.2	**14.6**	14.6	0.0	14.6
SUB TOTAL	**10.1**	**17.8**	**34.1**	**25.2**	**13.9**	**16.6**	**8.0**	**4.7**	**130.5**	**130.5**	**15.6**	**146.1**
OUTSIDE STRATFORD ON AVON DISTRICT												
All Centres / Stores	22.4	6.4	1.3	0.5	6.7	15.7	23.2	36.8	**112.9**			
SUB TOTAL	**22.4**	**6.4**	**1.3**	**0.5**	**6.7**	**15.7**	**23.2**	**36.8**	**112.9**			
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	**32.6**	**24.2**	**35.4**	**25.7**	**20.6**	**32.3**	**31.2**	**41.5**	**243.4**			

Notes:
For each cell, the monetry figure is derived by multiplying the 2016 available convenience goods expenditure in the zone (excl. SFT) (Table 4) by the adjusted convenience goods market share of the specific centre in that zone (Table 7).
(1) Estimated by Colliers CRE (see Appendix 4).

Date of Preparation: 12/05/08

TABLE 12 - CALCULATION OF POTENTIAL CONVENIENCE GOODS HEADROOM EXPENDITURE, 2016 (£ MILLION)					
Centre	2008 Turnover	2016 Turnover Potential	Turnover Allocation for Existing Retailers 2008-2016	Residual Turnover Potential by 2016	Potential Headroom Expenditure by 2016
	A	B	C (1)	D = B - C	E = D - A
	(Table 6, C)	(Table 10, C)			
Stratford Upon Avon	98.3	105.3	4.8	100.4	2.2
Alcester	7.8	8.3	0.5	7.8	0.0
Shipston on Stour	8.5	9.1	0.3	8.8	0.3
Southam	8.3	8.9	0.4	8.5	0.2
Other Centres / Stores	13.6	14.6	0.6	13.9	0.3
TOTAL: STRATFORD ON AVON DISTRICT	**136.5**	**146.1**	**6.6**	**139.5**	**3.0**

Notes:
(1) We assume that all existing convenience goods floorspace at the base year (2008) will achieve a real sales productivity gain of 0.6% per annum. This figure is based on in-depth research carried out by Experian (see Appendix 3e). The sales productivity gains are applied to the estimated 2008 benchmark convenience goods turnovers of each centre as set out in Table 6 (Column G).

TABLE 13 - QUANTITATIVE RETAIL FLOORSPACE NEED AT 2016

Centre	Potential Headroom Expenditure by 2016 (£m)	Adjustment for Over / Under Trading in Base Year (£m)	Adjusted Headroom Expenditure by 2016 (£m)	Reduction in Expenditure due to Convenience Goods Floorspace Commitments (as at April 2008) [1]	Adjusted Residual Headroom Expenditure by 2016 (£m)	Assumed Sales Density in 2016 [2] (£ per sq.m net)	Estimated Retail Floorspace Need in 2016 (sq.m net)
	A	B	C = A + B	D	E = C - D	F	G = E / F
	(Table 12, E)	(Table 6, H)					
Stratford Upon Avon	2.2	-0.3	1.8	14.5	-12.7	7,868	-1,610
Alcester	0.0	-2.0	-2.0	0.0	-2.0	7,868	-253
Shipston on Stour	0.3	2.5	2.8	0.0	2.8	7,868	355
Southam	0.2	1.1	1.4	0.0	1.4	7,868	174
Other Centres / Stores	0.3	0.0	0.3	0.0	0.3	7,868	40
TOTAL: STRATFORD ON AVON DISTRICT	**3.0**	**1.3**	**4.3**	**14.5**	**-10.2**		**-1,296**

SCENARIO 2 - LOW

Stratford Upon Avon	5,245	-2,415
Alcester	5,245	-380
Shipston on Stour	5,245	532
Southam	5,245	260
Other Centres / Stores	5,245	59
		-1,943

SCENARIO 3 - HIGH

Stratford Upon Avon	10,490	-1,208
Alcester	10,490	-190
Shipston on Stour	10,490	266
Southam	10,490	130
Other Centres / Stores	10,490	30
		-972

Notes:
(1) Details and estimated 2016 turnovers of convenience goods floorspace commitments and proposals are set out in Appendix 5c.
(2) The derivation of our 2016 benchmark centre sales density estimates are set out in Section 5.

TABLE 14 - CONVENIENCE GOODS EXPENDITURE PATTERN AND CENTRE TURNOVER ESTIMATES, 2021 (£ MILLION)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)											
	Study Area								TOTAL HOUSEHOLD SURVEY AREA	Expenditure Drawn From Survey Area (Zones 1-8)	Estimated Inflow Expenditure (1)	Total Convenience Goods Turnover
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8		A	B	C = A + B
WITHIN STRATFORD ON AVON DISTRICT												
Stratford Upon Avon	4.3	9.8	34.1	26.7	6.1	10.4	0.0	4.4	**95.7**	95.7	15.6	111.3
Alcester	0.0	6.9	1.4	0.0	0.0	0.0	0.0	0.0	**8.4**	8.4	0.4	8.8
Shipston on Stour	0.0	0.0	0.0	0.0	8.5	0.5	0.0	0.4	**9.4**	9.4	0.2	9.6
Southam	0.0	0.0	0.0	0.0	0.0	0.7	8.5	0.0	**9.2**	9.2	0.2	9.4
Other Centres / Stores	6.4	2.1	0.6	0.0	0.0	6.0	0.0	0.2	**15.4**	15.4	0.0	15.4
SUB TOTAL	**10.7**	**18.9**	**36.1**	**26.7**	**14.7**	**17.6**	**8.5**	**4.9**	**138.1**	**138.1**	**16.4**	**154.5**
OUTSIDE STRATFORD ON AVON DISTRICT												
All Centres / Stores	23.8	6.8	1.3	0.5	7.1	16.6	24.6	38.5	**119.1**			
SUB TOTAL	**23.8**	**6.8**	**1.3**	**0.5**	**7.1**	**16.6**	**24.6**	**38.5**	**119.1**			
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	**34.5**	**25.6**	**37.5**	**27.2**	**21.8**	**34.2**	**33.0**	**43.4**	**257.2**			

Notes:
For each cell, the monetry figure is derived by multiplying the 2021 available convenience goods expenditure in the zone (excl. SFT) (Table 4) by the adjusted convenience goods market share of the specific centre in that zone (Table 7).
(1) Estimated by Colliers CRE (see Appendix 4).

Date of Preparation: 12/05/08

TABLE 15 - CALCULATION OF POTENTIAL CONVENIENCE GOODS HEADROOM EXPENDITURE, 2021 (£ MILLION)					
Centre	2008 Turnover	2021 Turnover Potential	Turnover Allocation for Existing Retailers 2008-2021	Residual Turnover Potential by 2021	Potential Headroom Expenditure by 2021
	A	B	C [1]	D = B - C	E = D - A
	(Table 6, C)	(Table 14, C)			
Stratford Upon Avon	98.3	111.3	8.0	103.3	5.0
Alcester	7.8	8.8	0.8	8.0	0.2
Shipston on Stour	8.5	9.6	0.5	9.1	0.6
Southam	8.3	9.4	0.6	8.8	0.5
Other Centres / Stores	13.6	15.4	1.1	14.3	0.7
TOTAL: STRATFORD ON AVON DISTRICT	**136.5**	**154.5**	**10.9**	**143.6**	**7.1**

Notes:
(1) We assume that all existing convenience goods floorspace at the base year (2008) will achieve a real sales productivity gain of 0.6% per annum. This figure is based on in-depth research carried out by Experian (see Appendix 3e). The sales productivity gains are applied to the estimated 2008 benchmark convenience goods turnovers of each centre as set out in Table 6 (Column G).

TABLE 16 - QUANTITATIVE RETAIL FLOORSPACE NEED AT 2021

Centre	Potential Headroom Expenditure by 2021 (£m)	Adjustment for Over / Under Trading in Base Year (£m)	Adjusted Headroom Expenditure by 2021 (£m)	Reduction in Expenditure due to Convenience Goods Floorspace Commitments (as at April 2008) [1]	Adjusted Residual Headroom Expenditure by 2021 (£m)	Assumed Sales Density in 2021 [2] (£ per sq.m net)	Estimated Retail Floorspace Need in 2021 (sq.m net)
	A	B	C = A + B	D	E = C - D	F	G = E / F
	(Table 15, E)	(Table 6, H)					
Stratford Upon Avon	5.0	-0.3	4.7	14.9	-10.2	8,107	-1,256
Alcester	0.2	-2.0	-1.8	0.0	-1.8	8,107	-228
Shipston on Stour	0.6	2.5	3.1	0.0	3.1	8,107	384
Southam	0.5	1.1	1.6	0.0	1.6	8,107	203
Other Centres / Stores	0.7	0.0	0.7	0.0	0.7	8,107	91
TOTAL: STRATFORD ON AVON DISTRICT	**7.1**	**1.3**	**8.4**	**14.9**	**-6.5**		**-805**

SCENARIO 2 - LOW

Stratford Upon Avon	5,404	-1,884
Alcester	5,404	-342
Shipston on Stour	5,404	576
Southam	5,404	304
Other Centres / Stores	5,404	137
		-1,208

SCENARIO 3 - HIGH

Stratford Upon Avon	10,809	-942
Alcester	10,809	-171
Shipston on Stour	10,809	288
Southam	10,809	152
Other Centres / Stores	10,809	68
		-604

Notes:
(1) Details and estimated 2021 turnovers of convenience goods floorspace commitments and proposals are set out in Appendix 5c.
(2) The derivation of our 2021 benchmark centre sales density estimates are set out in Section 5.

TABLE 17 - CONVENIENCE GOODS EXPENDITURE PATTERN AND CENTRE TURNOVER ESTIMATES, 2026 (£ MILLION)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)											
	Study Area								TOTAL HOUSEHOLD SURVEY AREA	Expenditure Drawn From Survey Area (Zones 1-8)	Estimated Inflow Expenditure (1)	Total Convenience Goods Turnover
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8		A	B	C = A + B
WITHIN STRATFORD ON AVON DISTRICT												
Stratford Upon Avon	4.5	10.4	36.0	28.2	6.5	11.0	0.0	4.6	**101.2**	101.2	16.5	117.7
Alcester	0.0	7.3	1.5	0.0	0.0	0.0	0.0	0.0	**8.8**	8.8	0.4	9.2
Shipston on Stour	0.0	0.0	0.0	0.0	9.0	0.5	0.0	0.4	**10.0**	10.0	0.2	10.2
Southam	0.0	0.0	0.0	0.0	0.0	0.7	9.0	0.0	**9.7**	9.7	0.2	9.9
Other Centres / Stores	6.8	2.2	0.7	0.0	0.0	6.4	0.0	0.2	**16.3**	16.3	0.0	16.3
SUB TOTAL	**11.3**	**20.0**	**38.2**	**28.2**	**15.5**	**18.6**	**9.0**	**5.2**	**146.0**	**146.0**	**17.3**	**163.3**
OUTSIDE STRATFORD ON AVON DISTRICT												
All Centres / Stores	25.1	7.1	1.4	0.5	7.5	17.5	26.0	40.6	**125.8**			
SUB TOTAL	**25.1**	**7.1**	**1.4**	**0.5**	**7.5**	**17.5**	**26.0**	**40.6**	**125.8**			
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	**36.5**	**27.1**	**39.6**	**28.7**	**23.0**	**36.1**	**34.9**	**45.8**	**271.8**			

Notes:
For each cell, the monetry figure is derived by multiplying the 2026 available convenience goods expenditure in the zone (excl. SFT) (Table 4) by the adjusted convenience goods market share of the specific centre in that zone (Table 7).
(1) Estimated by Colliers CRE (see Appendix 4).

Date of Preparation: 12/05/08

TABLE 18 - CALCULATION OF POTENTIAL CONVENIENCE GOODS HEADROOM EXPENDITURE, 2026 (£ MILLION)					
Centre	2008 Turnover	2026 Turnover Potential	Turnover Allocation for Existing Retailers 2008-2026	Residual Turnover Potential by 2026	Potential Headroom Expenditure by 2026
	A	B	C (1)	D = B - C	E = D - A
	(Table 6, C)	(Table 17, C)			
Stratford Upon Avon	98.3	117.7	11.2	106.5	8.2
Alcester	7.8	9.2	1.1	8.1	0.3
Shipston on Stour	8.5	10.2	0.7	9.5	1.0
Southam	8.3	9.9	0.8	9.1	0.8
Other Centres / Stores	13.6	16.3	1.5	14.8	1.2
TOTAL: STRATFORD ON AVON DISTRICT	**136.5**	**163.3**	**15.3**	**148.0**	**11.5**

Notes:
(1) We assume that all existing convenience goods floorspace at the base year (2008) will achieve a real sales productivity gain of 0.6% per annum. This figure is based on in-depth research carried out by Experian (see Appendix 3e). The sales productivity gains are applied to the estimated 2008 benchmark convenience goods turnovers of each centre as set out in Table 6 (Column G).

TABLE 19 - QUANTITATIVE RETAIL FLOORSPACE NEED AT 2026

Centre	Potential Headroom Expenditure by 2026 (£m)	Adjustment for Over / Under Trading in Base Year (£m)	Adjusted Headroom Expenditure by 2026 (£m)	Reduction in Expenditure due to Convenience Goods Floorspace Commitments (as at April 2008) [1]	Adjusted Residual Headroom Expenditure by 2026 (£m)	Assumed Sales Density in 2026 [2] (£ per sq.m net)	Estimated Retail Floorspace Need in 2026 (sq.m net)
	A	B	C = A + B	D	E = C - D	F	G = E / F
	(Table 18, E)	(Table 6, H)					
Stratford Upon Avon	8.2	-0.3	7.9	15.4	-7.5	8,353	-902
Alcester	0.3	-2.0	-1.7	0.0	-1.7	8,353	-202
Shipston on Stour	1.0	2.5	3.5	0.0	3.5	8,353	414
Southam	0.8	1.1	1.9	0.0	1.9	8,353	232
Other Centres / Stores	1.2	0.0	1.2	0.0	1.2	8,353	143
TOTAL: STRATFORD ON AVON DISTRICT	**11.5**	**1.3**	**12.8**	**15.4**	**-2.6**		**-315**

SCENARIO 2 - LOW

Stratford Upon Avon	5,568	-1,353
Alcester	5,568	-303
Shipston on Stour	5,568	621
Southam	5,568	348
Other Centres / Stores	5,568	215
		-472

SCENARIO 3 - HIGH

Stratford Upon Avon	11,137	-676
Alcester	11,137	-152
Shipston on Stour	11,137	311
Southam	11,137	174
Other Centres / Stores	11,137	107
		-236

Notes:
(1) Details and estimated 2026 turnovers of convenience goods floorspace commitments and proposals are set out in Appendix 5c.
(2) The derivation of our 2026 benchmark centre sales density estimates are set out in Section 5.