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NORTH SOMERSET COUNCIL

Addendum to North Somerset Retail and Leisure Study

Donaldsons

Report

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1 Reasons for the Addendum

1.1 Our North Somerset Retail and Leisure Study report was completed in April 2006 on behalf of North Somerset Council. Subsequently, in the course of advising the Council on a planning application for a new out-of-centre retail warehouse development, it became apparent that some of the retail warehouse floorspace data on which the report was based, supplied to us in good faith by the Council, was not fully up-to-date, and was inaccurate. The result was that the RECAP Model forecasts of the need for additional non-central comparison goods retail floorspace were somewhat unreliable. In consultation with the Council, therefore, it was agreed that we would amend the RECAP Model with the most up-to-date information on the floorspace occupied by existing retail warehouses. At the same time, we would take the opportunity to review the RECAP Model forecasts for non-central comparison goods shopping and make any necessary consequential amendments.

1.2 In the next Section, we describe the principal amendments which we have made to the RECAP Model, and comment on the revised retail capacity forecasts. The revised tables of the Model for Weston-super-Mare are included in Appendix 1. These replace the versions in Appendix 9 of our April 2006 report. There are no changes to the RECAP Model tables for Clevedon, Portishead and Nailsea in Appendix 9 of the April 2006 report.

2 Amendments to the RECAP Model

2.1 The principal amendments are to RECAP Model Table 19, which lists the retail warehouses in Weston-super-Mare, their occupancy, floorspace, sales densities at estimated company average levels, and sales on this basis. The occupancy of each retail warehouse in Table 19 has been checked by North Somerset Council (NSC). We have checked the floorspace in each against the 2005 Rating List on the Valuation Office Agency (VOA) website. Where individual stores could not be identified on the Rating List, the most up-to-date information supplied by NSC has been used. This affects a minority of the store, mainly those which have been most recently developed. In the case of the store occupied by Next, floorspace figures supplied by that company have been used. We believe that the floorspace figures in Table 19, in the revised RECAP Model in Appendix 1 attached, are now reliable.

2.2 In revising Table 19, we have adjusted the floorspace in Staples, to allow for trade sales from this store, as indicated in the footnote. We have also included only the estimated floorspace in Halfords which is used for retail sales (since expenditure on vehicle parts and accessories is not included in the definition of retail expenditure). We have made no deductions from the sales in the tiles stores to allow for trade sales. This is because we consider that such sales (and any extra trade sales in the permitted Wickes store above the allowance we have made, described below) would be approximately balanced by retail sales from the 5 builders' merchants in Weston-super-Mare, which we have not included in the RECAP Model.

2.3 We have also taken the opportunity to check and reconsider the sales densities included in Table 19. As a result, we have reduced the sales density for Tonemar Beds to an average for Dreams Beds and Bensons Beds, ie £1,853 per sq m net; and have reduced that for the Board Shop to £1,500 per sq m net. We have added VAT to the actual sales in the Cadbury Garden Centre, which had been omitted in error.

2.4 We have revised Table 20, to exclude trade sales from the permitted B&Q Warehouse and Wickes DIY goods stores; and have excluded 25% of the gross built floorspace in each store to account for such trade sales.

2.5 In Table 21, we have applied the increase of 1.5% per annum to the sales density of existing, committed and potential new retail warehouses. (We have also applied this increase to potential new town centre comparison goods floorspace in Table 12, since this was omitted in error in our April 2006 report). Applying such an increase to retail warehouses is supported by the third bullet point in paragraph 2.34 of PPS6. This states that in assessing quantitative need, account should be taken of *'forecast improvements in productivity in the use of floorspace'*. PPS6 does not limit

this to town centre shops and stores only. We are of the view that it is necessary to apply such increases to retail warehouse floorspace. This recognises the fact that overall sales densities in retail warehouses have been rising in recent years (whilst some retailers have suffered falls, other have achieved increases, and the overall trend has been up). It also recognises that retail warehouses have the potential to absorb substantial increases in sales, by virtue or their current low sales densities relative to town centre stores. Allowing for increasing sales densities in retail warehouses also accords with paragraph 2.20 of PPS6, which indicates that *'The Government is concerned to ensure that efficient use should be made of land within centres and elsewhere.'* (our emphasis). Clearly, holding sales densities down by building more low density retail warehouses would not be an efficient use of land.

2.6 The revisions to Table 19 have had the effect of increasing comparison goods sales in the existing retail warehouses and food superstores from £106.493m to £123.744m. This is a substantial increase. Had we have arrived at this figure in the original version of the RECAP Model, we would have applied a greater market share adjustment factor than the 200% which we originally applied to retail warehouses in Table 15. Having reconsidered the market share adjustment factor in the light of the more reliable information on existing stores and their sales at estimated company average levels, we have now applied a factor of 225% in revised Table 15. This restores our original assessment that the existing retail warehouses are collectively trading at slightly below the level based on estimated company averages.

2.7 Increasing the market share adjustment factor for retail warehouses increases the estimated actual sales in the retail warehouses substantially. This means that a greater amount of expenditure has been transferred to the retail warehouses from the town centre than in our original RECAP Model, and indicates that the market share adjustment factor for the town centre needs to be reduced to reflect this increased transfer. We have therefore reduced the comparison goods market share adjustment factor for the town centre from 75% to 70%. This restores the balance between the town centre and retail warehouses in the Model.

2.8 As a result of the amendments described above, the retail capacity forecasts for comparison goods floorspace have changed marginally from those summarised in Table 6.1 in the April 2006 report. The revised Table 6.1 for comparison goods in Weston-super-Mare is set out below (there being no changes to the convenience goods forecasts, or the forecasts for Clevedon, Portishead and Nailsea).

Revised Table 6.1

Summary of Retail Capacity Forecasts

Goods/Scenario/Location	2011 (sq m net)	2016 (sq m net)	2021 (sq m net)	RECAP Model Table (Appendix 1)
Comparison Goods				
Scenario 1:				
Weston-super-Mare Town Centre	8,300	19,200	32,100	12
Weston-super-Mare Non-Central	-2,200	10,550	25,750	21

Source: RECAP Model Tables in Appendix 1 as indicated, rounded to the nearest 50 sq m net.

Notes: The forecasts in Revised Table 6.1 are cumulative, ie. the forecasts for each date include the forecasts for the previous dates and are not additional to those earlier forecasts.

The forecasts are for floorspace additional to the currently permitted B&Q Warehouse and Wickes DIY goods stores.

2.9 The revised forecasts show that there is still a substantial need for additional comparison goods floorspace in Weston-super-Mare town centre. Being somewhat lower (as a result of allowing for increasing sales densities in potential new floorspace as well as existing shops and stores), we think it likely that the longer term capacity forecasts now more closely match the physical capacity of potential town centre sites. The revised forecasts still show that there is a current over-supply of non town centre retail warehouse floorspace in Weston-super-Mare, which will last until about 2012. In the longer term, there will be increasing capacity for new floorspace. However, as we indicated in paragraph 6.61 of our April 2006 report, this should be located in or on the edge of the town centre in accordance with the sequential approach, or in a new district centre (in formats appropriate to these locations rather than in the format of retail warehouses), in preference to out-of-centre locations.

Comparison Goods Retail Sector Analysis

2.10 As a result of the revised comparison goods market share adjustment factor for non-central retail warehouses and superstores, the final sentence of paragraph 6.72 is replaced with the following:

'This effect appears in Table 16, which shows the retail warehouses and non-central food stores combined to be attracting 5% of catchment area expenditure on clothing and footwear, rising to 33% for hardware and DIY goods, 40% for household appliances, and 41% for audio-visual equipment.'

In paragraph 6.73, the percentages are replaced by 38% (clothing and foorwear) and 68% (audio-visual equipment).

2.11 Replace the final two sentences of paragraph 7.28 with the following:

'The only possible exception is furniture and floorcoverings, which has the lowest combined market share amongst these categories of expenditure (48% for the town centre and retail warehouses combined, compared with 57% for household textiles and soft furnishings, 65% to 68% for domestic appliances and audio visual equipment respectively, and 61% for hardware and DIY products). As and when forecast need arises, if some of the permitted floorspace on the B&Q site was to be transferred from a DIY goods store to furniture and floorcoverings stores, therefore, it would result in a more rounded retail provision within the town as a whole.'

April 2006 Report Errata

2.12 Replace the third sentence of paragraph 6.41 with the following:

'Table 8 is the product of Tables 4 and 6, applying the comparison goods market share adjustment factor in Table 7.'

2.13 Replace the final two sentences of paragraph 6.71 with the following:

'The product of these tables with Table 4 is set out in Tables 8 and 16 (which also take account of the comparison goods market share adjustment factors in Tables 7 and 15 respectively). Tables 8 and 16 also indicate the overall market share of expenditure on each comparison goods sub-category, which is attracted by each shopping destination.'

Signed: Jonathan Baldock Date: 22 August 2006

Name: Jonathan Baldock **Position:** Partner – Head of Retail Planning

For and on behalf of Donaldsons LLP

APPENDICES

Appendix 1 – Revised RECAP Model tables for Weston-super-Mare

Appendices

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Appendices

RECAP

The Retail Capacity forecasting Model

Project:	**North Somerset Retail Study**	Number:	39130
Client:	North Somerset Council		
Date of Latest Revision:	22-Aug-06	File:	North Somerset RECAP Model August 2006

Retail Locations Modelled:

- Weston-super-Mare Town Centre
- Weston-super-Mare Non-central Food Stores and Retail Warehouses
- Clevedon
- Portishead
- Nailsea

Scenarios Modelled:

1	Baseline - No change in 1995 market shares, assuming that major prime retail development in Weston-super-Mare town centre balances the effects of new development in Bristol city centre and Bath town centre. New retail warehouses in Weston-super-Mare assumed to be balanced by new retail warehouses elsewhere.

Notes:

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Table: **1**

CATCHMENT AREA POPULATION FORECASTS

Zone	Postcodes	Base Year	Forecasting Years		
		2005	2011	2016	2021
1	BS20 0, BS8 3	9,924	10,363	10,756	11,149
2	BS20 6, BS20 7, BS20 8	19,046	25,454	30,884	36,314
3	BS48 1, BS48 2, BS48 3, BS48 4	24,424	25,533	26,530	27,527
4	BS21 5, BS21 6, BS21 7	24,383	25,538	26,609	27,680
5	BS22 6, BS22 7, BS22 8, BS22 9	39,060	40,801	42,349	43,897
6	BS23 1, BS23 2, BS23 3, BS23 4	32,199	33,870	35,537	37,204
7	BS24 7, BS24 8, BS24 9	11,454	11,983	19,385	27,180
8	BS49 4, BS49 5, BS24 6, BS29 6	15,255	15,935	16,550	17,165
9	BS25 1, BS25 5, BS40 5	10,334	10,847	11,326	11,805
10	BS24 0, BS26 2,	7,016	7,368	7,677	7,986
11	TA8 2, TA8 1, TA9 3, TA9 4	27,622	29,256	30,838	32,420
12	BS27 3, BS28 4	9,513	10,028	10,493	10,958
TOTAL		230,230	246,976	268,934	291,285

Sources:

MapInfo TargetPro Report, 8 November 2005. North Somerset Council.

Notes:

Table: 2

PER CAPITA EXPENDITURE

Per Capita Expenditure in (year):	2003	Price Basis (Year):	2003
Including Special Forms of Trading:			
Convenience Goods (£):	1,640.00	Comparison Goods (£):	2,745.00
Reduction to exclude Special Forms of Trading at:			
Convenience Goods:	1.6 %	Comparison Goods:	5.3 %
Excluding Special Forms of Trading:			
Convenience Goods (£):	**1,613.76**	Comparison Goods (£):	**2,599.52**

GROWTH IN PER CAPITA RETAIL EXPENDITURE:

Convenience Goods:	1.59	% 2003 to	2004	0.80	% pa	2004 to 2021
Comparison Goods:	9.30	% 2003 to	2004	3.80	% pa	2004 to 2021

	Convenience Goods (£)				Comparison Goods (£)			
PER CAPITA EXPENDITURE IN:	2005	2011	2016	2021	2005	2011	2016	2021
(Excluding SFT)	1,652.53	1,733.46	1,803.92	1,877.24	2,949.24	3,688.88	4,445.09	5,356.33

COMPARISON GOODS PER CAPITA EXPENDITURE BY GOODS TYPE

Per Capita Comparison Goods Expenditure in 2003 on:

	Clothing & footwear	Furniture/ florcvrgs etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden prdcts	Chemists, medcl & beauty goods	All other comprsn gds	Total comprsn gds
Including SFT (£)	628	299	91	86	332	254	396	659	2,745
SFT Reduction (%)	6.3	2.9	9	5.8	7.9	3.1	0.9	5.2	
Excluding SFT (£)	588.44	290.33	82.81	81.01	305.77	246.13	392.44	624.73	2,611.65

Per Capita Comparison Goods Expenditure in 2005 on:

	Clothing & footwear	Furniture/ florcvrgs etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden prdcts	Chemists, medcl & beauty goods	All other comprsn gds	Total comprsn gds
Excluding SFT (£)	667.60	329.39	93.95	91.91	346.91	279.24	445.23	708.78	2,963.01

Sources:

MapInfo Report. MapInfo/Oxford Economic Forecasting Information Brief 05/2.

Notes:

Growth 2001 to 2004 is the actual national average growth. Growth projections 2004 to 2016 apply the 1993 to 2004 average annual trend to the actual 2004 expenditure (convenience goods); and the ultra-long term average annual trend 1964 to 2004 to the actual 2004 expenditure (comparison goods).

The total comparison goods expenditure in 2005 derived from summing the expenditure on each comparison goods category is not quite the same as the total comparison goods expenditure in 2005, because of rounding approximations in applying differential SFT adjustments to each goods category in the former case. The difference of less than 0.5% is not significant; and the disaggregated expenditure figures have not been used in the retail capacity forecasts.

Table: **3**

CATCHMENT AREA EXPENDITURE FORECASTS

Catchment Zone	TOTAL RETAIL EXPENDITURE							
	CONVENIENCE GOODS				COMPARISON GOODS			
	2005 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2005 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	16,400	17,964	19,403	20,929	29,268	38,228	47,811	59,718
2	31,474	44,123	55,712	68,170	56,171	93,897	137,282	194,510
3	40,361	44,260	47,858	51,675	72,032	94,188	117,928	147,444
4	40,294	44,269	48,000	51,962	71,911	94,206	118,279	148,263
5	64,548	70,727	76,394	82,405	115,197	150,510	188,245	235,127
6	53,210	58,712	64,106	69,841	94,963	124,942	157,965	199,277
7	18,928	20,772	34,969	51,023	33,781	44,204	86,168	145,585
8	25,209	27,623	29,855	32,223	44,991	58,782	73,566	91,941
9	17,077	18,803	20,431	22,161	30,477	40,013	50,345	63,232
10	11,594	12,772	13,849	14,992	20,692	27,180	34,125	42,776
11	45,646	50,714	55,629	60,860	81,464	107,922	137,078	173,652
12	15,721	17,383	18,928	20,571	28,056	36,992	46,642	58,695
TOTALS	380,463	428,123	485,134	546,811	679,003	911,064	1,195,436	1,560,219

Sources: RECAP Tables 1 and 2

Table: **4**

CATCHMENT AREA COMPARISON GOODS EXPENDITURE BY GOODS TYPE IN 2005

Catchment Zone	Clothing & footwear (£000)	Furniture/ florcvrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden prdcts (£000)	Chemists, medcl & beauty goods (£000)	All other comprsn gds (£000)	Total comprsn gds (£000)
1	6,625	3,269	932	912	3,443	2,771	4,418	7,034	29,405
2	12,715	6,274	1,789	1,751	6,607	5,318	8,480	13,499	56,433
3	16,305	8,045	2,295	2,245	8,473	6,820	10,874	17,311	72,369
4	16,278	8,031	2,291	2,241	8,459	6,809	10,856	17,282	72,247
5	26,076	12,866	3,670	3,590	13,550	10,907	17,391	27,685	115,735
6	21,496	10,606	3,025	2,959	11,170	8,991	14,336	22,822	95,406
7	7,647	3,773	1,076	1,053	3,973	3,198	5,100	8,118	33,938
8	10,184	5,025	1,433	1,402	5,292	4,260	6,792	10,812	45,201
9	6,899	3,404	971	950	3,585	2,886	4,601	7,325	30,620
10	4,684	2,311	659	645	2,434	1,959	3,124	4,973	20,788
11	18,440	9,098	2,595	2,539	9,582	7,713	12,298	19,578	81,844
12	6,351	3,133	894	874	3,300	2,656	4,235	6,743	28,187
TOTALS	153,702	75,835	21,630	21,161	79,869	64,289	102,506	163,182	682,174

Sources: RECAP Tables 1 and 2

Scenario 1

Weston-super-Mare Town Centre

Table: **5**

CONVENIENCE GOODS MARKET SHARES IN 2005

2005	Allocations to **Weston-super-Mare Town Centre** Indicated by household interview survey		
Zones	Main Food Q2	Top-up convenience Q5	**WEIGHTED AVERAGE**
	Expenditure weighting		
	75 (%)	25 (%)	100 (%)
1	0.0	0.0	0.0
2	0.0	1.0	0.3
3	19.2	17.5	18.8
4	6.7	3.3	5.8
5	18.7	12.7	17.2
6	52.7	31.8	47.5
7	17.0	13.0	16.0
8	27.5	0.0	20.6
9	26.3	11.3	22.5
10	26.3	17.5	24.1
11	5.0	1.0	4.0
12	21.3	1.3	16.3

Sources: Household Interview Survey.
Expenditure weighting by Donaldsons.

Table: **6**

COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2005

	2005 Allocations to **Weston-super-Mare Town Centre** Indicated by Household Interview Survey								
	Clothing & footwear Q6	Furniture/ florcvrgs etc Q7	Household Textiles Q8	Household Appliances Q9	Audio-visual equipment Q10	Hardware, DIY, garden products Q11	Chemists, medcl & beauty goods Q12	All other comparison gds Q13	**WEIGHTED AVERAGE**
Zones	Expenditure weighting								
	667.60 (%)	329.39 (%)	93.95 (%)	91.91 (%)	346.91 (%)	279.24 (%)	445.23 (%)	708.78 (%)	2,963.01 (%)
1	2.8	0.0	3.6	1.7	7.1	2.6	0.0	0.0	1.9
2	9.9	1.6	3.0	1.8	1.9	1.7	4.8	2.1	4.1
3	3.8	8.8	6.8	9.3	4.8	2.5	0.0	0.0	3.1
4	9.6	14.3	14.1	16.2	20.9	8.6	5.8	6.2	10.3
5	76.8	60.6	73.7	66.7	64.9	78.4	86.2	85.2	76.7
6	66.7	49.3	64.3	62.1	63.0	65.2	75.3	82.3	69.0
7	59.6	50.0	63.2	54.4	62.8	55.6	84.3	72.1	65.2
8	43.8	35.9	34.9	27.4	25.8	25.4	36.0	45.3	37.5
9	64.9	36.5	36.5	27.3	14.5	31.5	69.6	44.9	46.6
10	51.6	35.7	46.7	39.0	45.0	48.9	46.7	57.1	48.8
11	58.5	31.7	47.2	21.5	27.0	24.3	28.9	55.4	41.9
12	46.5	46.8	50.8	48.3	72.4	64.6	51.4	52.9	53.7

Sources: Household Interview Survey.
RECAP Table 2 for expenditure weights.

Table: **7**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 1 Location: **Weston-super-Mare Town Centre**

Baseline - No change in 1995 market shares, assuming that major prime retail development in Weston-super-Mare town centre balances the effects of new development in Bristol city centre and Bath town centre. New retail warehouses in Weston-super-Mare assumed to be balanced by new retail warehouses elsewhere.

Market shares adjustment factors:	Convenience Goods:	100	% of survey indicated figures
	Comparison Goods:	70	% of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED							
	CONVENIENCE GOODS				COMPARISON GOODS			
	2005 (%)	2011 (%)	2016 (%)	2021 (%)	2005 (%)	2011 (%)	2016 (%)	2021 (%)
1	0	0	0	0	1	1	1	1
2	0	0	0	0	3	3	3	3
3	19	19	19	19	2	2	2	2
4	6	6	6	6	7	7	7	7
5	17	17	17	17	54	54	54	54
6	48	48	48	48	48	48	48	48
7	16	16	16	16	46	46	46	46
8	21	21	21	21	26	26	26	26
9	23	23	23	23	33	33	33	33
10	24	24	24	24	34	34	34	34
11	4	4	4	4	29	29	29	29
12	16	16	16	16	38	38	38	38

Sources: RECAP Model.
Donaldsons for market share adjustments.

Table: **8**

COMPARISON GOODS SALES BY GOODS TYPE IN 2005

Catchment Zones	2005 Sales in **Weston-super-Mare Town Centre** By Comparison Goods Type.							
	Clothing & footwear (£000)	Furniture/ florcvrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
1	131	0	23	11	172	50	0	0
2	878	70	38	22	87	64	283	197
3	430	493	110	146	282	121	0	0
4	1,096	803	227	254	1,239	410	438	749
5	14,011	5,459	1,894	1,675	6,155	5,986	10,487	16,504
6	10,032	3,660	1,361	1,286	4,927	4,104	7,554	13,145
7	3,188	1,320	476	401	1,747	1,244	3,008	4,097
8	3,125	1,261	350	269	956	757	1,712	3,427
9	3,136	871	248	181	364	636	2,243	2,304
10	1,691	578	215	176	767	671	1,020	1,989
11	7,557	2,017	858	382	1,813	1,311	2,487	7,587
12	2,066	1,026	318	295	1,673	1,202	1,525	2,499
TOTALS	47,341	17,558	6,117	5,098	20,183	16,555	30,757	52,496
MARKET SHARES	31%	23%	28%	24%	25%	26%	30%	32%

Sources: RECAP Model.

Table: **9**

FORECAST RETAIL SALES

Scenario: 1 Location: **Weston-super-Mare Town Centre**

Baseline - No change in 1995 market shares, assuming that major prime retail development in Weston-super-Mare town centre balances the effects of new development in Bristol city centre and Bath town centre. New retail warehouses in Weston-super-Mare assumed to be balanced by new retail warehouses elsewhere.

Catchment zone	RETAIL SALES BY CATCHMENT ZONE							
	CONVENIENCE GOODS				COMPARISON GOODS			
	2005 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2005 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	0	0	0	0	293	382	478	597
2	0	0	0	0	1,685	2,817	4,118	5,835
3	7,669	8,409	9,093	9,818	1,441	1,884	2,359	2,949
4	2,418	2,656	2,880	3,118	5,034	6,594	8,280	10,378
5	10,973	12,024	12,987	14,009	62,207	81,275	101,652	126,969
6	25,541	28,182	30,771	33,524	45,582	59,972	75,823	95,653
7	3,029	3,324	5,595	8,164	15,539	20,334	39,637	66,969
8	5,294	5,801	6,270	6,767	11,698	15,283	19,127	23,905
9	3,928	4,325	4,699	5,097	10,058	13,204	16,614	20,866
10	2,783	3,065	3,324	3,598	7,035	9,241	11,602	14,544
11	1,826	2,029	2,225	2,434	23,625	31,297	39,753	50,359
12	2,515	2,781	3,029	3,291	10,661	14,057	17,724	22,304
TOTALS	65,974	72,595	80,872	89,819	194,856	256,342	337,168	441,328

Sources: RECAP Model.

Table: 10

SALES CAPACITY OF EXISTING MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN 2005

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Tesco, Station Road, Weston-super-Mare	4,522	63	2,849	13,727	39,106
Marks and Spencer, High Street, Weston-super-Mare	836	96	803	10,593	8,502
Other Town Centre Convenience	1,605	90	1,445	5,000	7,223
ALL STORES	6,963		5,096	10,760	54,830

Sources: IGD, Donaldsons, Verdict Research.

Table: 11

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS

CONVENIENCE GOODS					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
ALL STORES	-		-	#DIV/0!	-

COMPARISON GOODS					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
ALL STORES AND SCHEMES	-		-	#DIV/0!	-

Sources:

Donaldsons, based on Verdict Research and Retail Rankings.

Table: **12**

FORECAST RETAIL CAPACITY

Scenario: 1 Location: **Weston-super-Mare Town Centre**

Baseline - No change in 1995 market shares, assuming that major prime retail development in Weston-super-Mare town centre balances the effects of new development in Bristol city centre and Bath town centre. New retail warehouses in Weston-super-Mare assumed to be balanced by new retail warehouses elsewhere.

Growth in sales per sq m from existing and new shop floorspace: Comparison Goods: 1.50 % pa to 2021

	CONVENIENCE GOODS				COMPARISON GOODS			
	2005	2011	2016	2021	2005	2011	2016	2021
Residents' Spending £000	65,974	72,595	80,872	89,819	194,856	256,342	337,168	441,328
Plus visitors' spending (%)	2.5	2.5	2.5	2.5	5.0	5.0	5.0	5.0
Total spending (£000)	67,624	74,410	82,894	92,065	204,599	269,159	354,026	463,395
Existing shop floorspace (sq m net)	5,096	5,096	5,096	5,096	40,757	40,757	40,757	40,757
Sales per sq m net (£)	13,270	10,760	10,760	10,760	5,020	5,489	5,913	6,370
Sales from extg flrspce (£000)	67,624	54,830	54,830	54,830	204,599	223,717	241,007	259,633
Available spending to support new shops (£000)	0	19,580	28,063	37,235	0	45,442	113,019	203,762
Less sales capacity of committed new floorspace (£000)	0	0	0	0	0	0	0	0
Net available spending for new shops (£000)	0	19,580	28,063	37,235	0	45,442	113,019	203,762
Sales per sq m net in new shops (£)	12,500	12,500	12,500	12,500	5,000	5,467	5,890	6,345
Capacity for new shop flrspc (sq m net)	**0**	**1,566**	**2,245**	**2,979**	**0**	**8,312**	**19,189**	**32,114**

Market Share of Catchment Area Expenditure	17%	17%	17%	16%	29%	28%	28%	28%

Sources: RECAP Model.
Experian Goad. Donaldsons.

Notes: Excludes vacant floorspace.

Scenario 1

Weston-super-Mare Non-central Food Stores and Retail Warehouses

Table: **13**

CONVENIENCE GOODS MARKET SHARES IN 2005

2005 Allocations to **Weston-super-Mare Non-central Food Stores and Retail Warehouses** Indicated by household interview survey			
Zones	Main Food Q2	Top-up convenience Q5	**WEIGHTED AVERAGE**
	Expenditure weighting		
	75 (%)	25 (%)	100 (%)
1	23.8	10.0	20.3
2	5.0	4.0	4.8
3	5.8	7.5	6.2
4	16.7	11.7	15.4
5	74.7	50.7	68.7
6	42.7	15.5	35.9
7	83.0	57.0	76.5
8	45.0	16.3	37.8
9	51.3	16.3	42.5
10	47.5	12.5	38.8
11	7.0	2.0	5.8
12	11.3	12.5	11.6

Sources: Household Interview Survey.
Expenditure weighting by Donaldsons.

Table: **14**

COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2005

	2005 Allocations to **Weston-super-Mare Non-central Food Stores and Retail Warehouses** Indicated by Household Interview Survey								
	Clothing & footwear Q6	Furniture/ florcvrgs etc Q7	Household Textiles Q8	Household Appliances Q9	Audio-visual equipment Q10	Hardware, DIY, garden products Q11	Chemists, medcl & beauty goods Q12	All other comparison gds Q13	**WEIGHTED AVERAGE**
Zones	Expenditure weighting								
	667.60 (%)	329.39 (%)	93.95 (%)	91.91 (%)	346.91 (%)	279.24 (%)	445.23 (%)	708.78 (%)	2,963.01 (%)
1	4.2	0.0	7.1	0.0	0.0	0.0	0.0	0.0	1.2
2	0.0	1.6	3.0	1.8	1.9	0.0	0.0	0.0	0.6
3	0.0	0.0	0.0	2.8	6.0	0.0	0.0	0.0	0.8
4	1.9	4.4	9.1	8.1	9.3	0.0	0.0	7.2	4.3
5	0.7	16.7	13.1	20.6	23.6	13.6	2.3	2.3	8.0
6	4.2	12.7	13.1	25.3	27.4	21.7	5.4	5.1	10.8
7	0.0	10.3	9.5	26.7	23.1	35.6	6.7	17.4	13.5
8	9.6	11.3	28.8	40.3	32.3	31.8	2.7	0.0	12.8
9	0.0	11.5	14.3	33.3	30.7	51.9	19.6	13.0	17.3
10	0.0	14.3	13.3	25.4	21.7	25.5	3.3	5.4	9.5
11	2.4	21.7	22.2	24.1	25.7	20.0	1.1	1.8	9.9
12	1.4	16.1	16.4	12.1	12.1	10.8	17.1	5.9	9.4

Sources: Household Interview Survey.
RECAP Table 2 for expenditure weights.

Table: **15**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 1 Location: **Weston-super-Mare Non-central Food Stores and Retail Warehouses**

Baseline - No change in 1995 market shares, assuming that major prime retail development in Weston-super-Mare town centre balances the effects of new development in Bristol city centre and Bath town centre. New retail warehouses in Weston-super-Mare assumed to be balanced by new retail warehouses elsewhere.

Market shares adjustment factors:			
	Convenience Goods:	100	% of survey indicated figures
	Comparison Goods:	225	% of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED							
	CONVENIENCE GOODS				COMPARISON GOODS			
	2005 (%)	2011 (%)	2016 (%)	2021 (%)	2005 (%)	2011 (%)	2016 (%)	2021 (%)
1	20	20	20	20	3	3	3	3
2	5	5	5	5	1	1	1	1
3	6	6	6	6	2	2	2	2
4	15	15	15	15	10	10	10	10
5	69	69	69	69	18	18	18	18
6	36	36	36	36	24	24	24	24
7	77	77	77	77	30	30	30	30
8	38	38	38	38	29	29	29	29
9	43	43	43	43	39	39	39	39
10	39	39	39	39	21	21	21	21
11	6	6	6	6	22	22	22	22
12	12	12	12	12	21	21	21	21

Sources: RECAP Model.
Donaldsons for market share adjustments.

Table: **16**

COMPARISON GOODS SALES BY GOODS TYPE IN 2005

Catchment Zones	2005 Sales in By Comparison Goods Type.							
	Weston-super-Mare Non-central Food Stores and Retail Warehouses							
	Clothing & footwear (£000)	Furniture/ florcvrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
1	631	0	150	0	0	0	0	0
2	0	226	122	71	281	0	0	0
3	0	0	0	140	1,134	0	0	0
4	703	795	469	408	1,770	0	0	2,807
5	411	4,826	1,085	1,662	7,195	3,338	904	1,458
6	2,017	3,026	892	1,684	6,886	4,398	1,735	2,598
7	0	871	229	632	2,063	2,559	773	3,186
8	2,198	1,280	928	1,272	3,841	3,043	408	0
9	0	884	312	712	2,472	3,366	2,033	2,149
10	0	743	198	369	1,187	1,125	234	600
11	1,012	4,436	1,297	1,374	5,537	3,471	307	789
12	201	1,137	330	237	896	644	1,633	892
TOTALS	7,173	18,224	6,011	8,560	33,263	21,944	8,028	14,478
MARKET SHARES	5%	24%	28%	40%	42%	34%	8%	9%

Sources: RECAP Model.

Table: **17**

FORECAST RETAIL SALES

Scenario: 1 Location: **Weston-super-Mare Non-central Food Stores and Retail Warehouses**

Baseline - No change in 1995 market shares, assuming that major prime retail development in Weston-super-Mare town centre balances the effects of new development in Bristol city centre and Bath town centre. New retail warehouses in Weston-super-Mare assumed to be balanced by new retail warehouses elsewhere.

Catchment zone	RETAIL SALES BY CATCHMENT ZONE							
	CONVENIENCE GOODS				COMPARISON GOODS			
	2005 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2005 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	3,280	3,593	3,881	4,186	878	1,147	1,434	1,792
2	1,574	2,206	2,786	3,408	562	939	1,373	1,945
3	2,422	2,656	2,871	3,100	1,441	1,884	2,359	2,949
4	6,044	6,640	7,200	7,794	7,191	9,421	11,828	14,826
5	44,538	48,802	52,712	56,859	20,736	27,092	33,884	42,323
6	19,156	21,136	23,078	25,143	22,791	29,986	37,912	47,826
7	14,575	15,994	26,926	39,288	10,134	13,261	25,850	43,676
8	9,580	10,497	11,345	12,245	13,047	17,047	21,334	26,663
9	7,343	8,085	8,785	9,529	11,886	15,605	19,635	24,660
10	4,522	4,981	5,401	5,847	4,345	5,708	7,166	8,983
11	2,739	3,043	3,338	3,652	17,922	23,743	30,157	38,204
12	1,886	2,086	2,271	2,468	5,892	7,768	9,795	12,326
TOTALS	117,658	129,719	150,594	173,520	116,825	153,600	202,727	266,172

Sources: RECAP Model.

Table: **18**

SALES CAPACITY OF EXISTING MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN 2005

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Morrisons, Worle, Weston-super-Mare	2,926	77	2,253	11,795	26,574
Somerfield, 148, High Street, Worle	506	85	430	6,214	2,673
Sainsburys, North Worle District Centre, Worle	4,228	77	3,256	9,662	31,455
Lidl, Summer Lane, Weston-super-Mare	800	80	640	4,577	2,929
Asda, Philips Road, Weston-super-Mare	3,983	56	2,230	13,747	30,662
Iceland, Philips Road, Weston-super-Mare	585	93	544	4,816	2,620
Aldi, Hildeheim Bridge, Weston-super-Mare	760	83	631	4,167	2,629
Spar, Loxton Road, Weston-super-Mare	218	90	196	5,000	981
Other convenience floorspace in Worle	850	90	765	5,000	3,825
Lidl Winterstoke Road, Weston-super-Mare	1,020	80	640	4,577	2,929
ALL STORES	15,876		11,585	9,260	107,278

Sources: IGD, Donaldsons, Verdict Research.

Table: **19**

SALES CAPACITY OF EXISTING RETAIL WAREHOUSES & SUPERSTORES*

Net to gross ratio:	85 % **		Date of sales densities:	2003
Store	Gross Flrspce (sq m)	Net Flrspce (sq m)	Sales Density 2003 (£per sqm net)	Sales 2003 (£000)
Hyper Value, Winterstoke Road	n/a	800	1,352	1,082
Fieldhouse Kitchens, Winterstoke Road	324	275	1,400	386
The Pine Factory, Winterstoke Road	383	326	1,400	456
Weston Tile Studio, Kiln Park	226	192	1,467	282
Next, Winterstoke Road	1,765	1,084	8,828	9,570
Allied Carpets, St Philips Road	1,667	1,417	1,341	1,900
Feature Fireplaces, Warne Road	274	233	1,250	291
B&Q, Winterstoke Road	2,359	2,231	2,239	4,995
Focus, Marchfield Way	4,063	3,733	1,074	4,009
Dunelm, Marchfield Way	3,913	3,326	1,407	4,680
Benson Beds, Marchfield Way	378	321	2,074	666
Comet, Marchfield Way	609	518	7,032	3,640
Carpet Right, Marchfield Way	726	617	1,454	897
MFI, Marchfield Way	726	617	2,580	1,592
Express Furniture, Marchfield Way	n/a	230	2,000	460
Furniture Warehouse, Marchfield Way	839	713	1,669	1,190
Halfords, Marchfield Way (1)	n/a	335	2,327	780
Tonemar Beds (1)	284	241	1,853	447
Currys, Marchfield Way	1,218	1,035	5,274	5,460
Powerhouse, Marchfield Way (2)	1,076	915	2,874	2,629
Staples, Marchfield Way (3)	922	784	2,011	1,576
Pets at Home, Marchfield Way	1,051	893	2,466	2,203
Topps Tiles, Marchfield Way	586	498	1,467	731
Dreams Beds, Marchfield Way	399	339	1,632	553
Right Price Tiles, Marchfield Way	583	496	1,467	727
Carpets R Us, Searle Crescent	293	249	1,454	362
Homebase, Queensway	5,264	4,922	1,619	7,969
Matalan, Locking Castle	2,080	1,768	2,757	4,874
Boots, Locking Castle	949	807	8,183	6,601
Argos Extra, Locking Castle (4)	1,981	1,684	4,380	7,375
Cadbury, Congresbury (5)	n/a	12,000	n/a	13,054
TK Maxx, Queensway	2,809	2,388	2,998	7,158
Floors to Go, Great Weston Trade Park	445	378	1,250	473
Arlington (Furniture), Great Weston Trade Park	290	247	1,500	370
Kontiki (Furniture), Great Weston Trade Park	290	247	1,500	370
Great Weston Furnishers, Great Weston Trade Pk	445	378	1,500	567
Aquastore, Great Weston Trade Park	289	246	2,000	491
Board Shop, Great Weston Trade Park	289	246	1,500	368
CC Sports, Great Weston Trade Park	289	246	2,250	553
Asda	n/a	1,753	7,223	12,658
Sainsburys	n/a	972	5,183	5,040
Morrisons	n/a	673	6,327	4,258
TOTALS Trading at the date of the Household Interview Survey of Shopping Patterns	40,084	51,371	**2,409**	123,744

Sources: Retail Rankings 2005', Mintel, with VAT added for compatibility with expenditure.
Donaldsons. Verdict Research.
VOA Rating List, North Somerset DC and Next Plc for floorspace

Notes:
* Comparison goods floorspace in Superstores
** Unless otherwise indicated from VOA or NSDC data
(1) Halfords & Tonemar share Unit 9. Split estimated by Donaldsons, and Halfords retail floorspace (ie excluding vehicle parts and accessories) only included.
(2) Was Powerhouse at time of Household Interview Survey, but subsequently closed.
(3) 1,843 sq m gross, but 50% excluded as non-retail (ie trade) sales.
(4) Sales based on average per outlet, and floorspace as conventional retail warehouse.
(5) Actual sales from Retail Rankings with VAT added.

Table: **20**

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS

CONVENIENCE GOODS					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
Farmfoods, Locking Road, Weston-super-Mare	536	90	482	4,500	2,171
ALL STORES	536		482	4,500	2,171
COMPARISON GOODS					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density 2003 (£ p sq m net)	Sales 2003 (£000)
B&Q, Aisecombe Way, Weston-super-Mare (1)	6,079	95	5,775	2,239	12,930
Wickes, Winterstoke Road (2)	1,976	85	1,680	2,936	4,931
ALL STORES AND SCHEMES	8,055		**7,455**	2,396	**17,862**

Sources: Donaldsons, based on Verdict Research and Retail Rankings.

Notes: (1) 8,105 sq m gross (excluding garden centre and builders' yard), but 25% excluded to allow for trade sales.
(1) 2,634 sq m gross (excluding garden projects area), but 25% excluded to allow for trade sales.

Table: **21**

FORECAST RETAIL CAPACITY

Scenario: 1 Location: **Weston-super-Mare Non-central Food Stores and Retail Warehouses**

Baseline - No change in 1995 market shares, assuming that major prime retail development in Weston-super-Mare town centre balances the effects of new development in Bristol city centre and Bath town centre. New retail warehouses in Weston-super-Mare assumed to be balanced by new retail warehouses elsewhere.

Growth in sales per sq m from existing and new shop floorspace: Comparison Goods: 1.50 % pa to 2021

	CONVENIENCE GOODS				COMPARISON GOODS			
	2005	2011	2016	2021	2005	2011	2016	2021
Residents' Spending £000	117,658	129,719	150,594	173,520	116,825	153,600	202,727	266,172
Plus visitors' spending (%)								
Total spending (£000)	117,658	129,719	150,594	173,520	116,825	153,600	202,727	266,172
Existing shop floorspace (sq m net)	11,585	11,585	11,585	11,585	51,371	51,371	51,371	51,371
Sales per sq m net (£)	10,156	9,260	9,260	9,260	2,274	2,714	2,923	3,149
Sales from extg flrspce (£000)	117,658	107,278	107,278	107,278	116,825	139,397	150,170	161,775
Available spending to support new shops (£000)	0	22,441	43,316	66,242	0	14,204	52,557	104,397
Less sales capacity of committed new floorspace (£000)	0	2,171	2,171	2,171	0	20,121	21,676	23,351
Net available spending for new shops (£000)	0	20,270	41,145	64,071	0	(5,917)	30,881	81,046
Sales per sq m net in new shops (£)	12,500	12,500	12,500	12,500	2,482	2,714	2,923	3,149
Capacity for new shop flrspc (sq m net)	**0**	**1,622**	**3,292**	**5,126**	**0**	**(2,181)**	**10,564**	**25,736**

Market Share of Catchment Area Expenditure	31%	30%	31%	32%	17%	17%	17%	17%

Sources: RECAP Model. Donaldsons estimates.

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