APPENDIX EIGHT: RETAIL CAPACITY TABLES

RECAP

The Retail Capacity forecasting Model

DTZ

Project:	**Barnsley Retail Study Update**	Number:	133666
Client:	Barnsley Metropolitan Borough Council		
Date of Latest Revision:	10-Dec-07	File:	Barnsley RECAP Model 2007

Retail Locations Modelled: Barnsley Town Centre

Scenarios Modelled:

1	Baseline - Market Shares indicated by the Household Interview Survey remain unchanged despite new development.
2	Major new retail development in Barnsley Town Centre leads to increased market shares.

Catchment Area Population and Expenditure

Table: 1

CATCHMENT AREA POPULATION FORECASTS

Zone	Postcodes	Base Year	Forecasting Years		
		2007	2011	2016	2021
1	S70 1,2,3,4,5,6 S71 1,2 S75 1,2	67,735	68,822	70,296	71,802
2	S35 7 S36 6,7,8.9 S75 3,4	27,420	27,842	28,412	29,219
3	S73 0,8 S74 0,8,9	34,869	35,407	36,170	36,950
4	S71 3,4 S75 5,6 WF4 2	41,899	42,507	43,334	44,177
5	S63 0,8,9 S71 5, S72 0,7,8,9 S73 9	62,580	63,466	64,713	65,984
TOTAL		234,503	238,044	242,925	248,132

Sources:

MapInfo Report

Notes:

Table: 2

PER CAPITA EXPENDITURE

Per Capita Expenditure in (year):	2004	Price Basis (Year):	2004
Including Special Forms of Trading:			
Convenience Goods (£):	1,291.00	Comparison Goods (£):	2,344.00
Reduction to exclude Special Forms of Trading at:			
Convenience Goods:	1.7 %	Comparison Goods:	5.8 %
Excluding Special Forms of Trading:			
Convenience Goods (£):	**1,269.05**	Comparison Goods (£):	**2,208.05**

GROWTH IN PER CAPITA RETAIL EXPENDITURE:

Convenience Goods:	0.10	% 2004 to	2005	0.90	% pa	2005 to	2026
Comparison Goods:	2.90	% 2004 to	2005	3.80	% pa	2005 to	2026

	Convenience Goods (£)				Comparison Goods (£)			
PER CAPITA EXPENDITURE IN:	2007	2011	2016	2021	2007	2011	2016	2021
(Excluding SFT)	1,293.29	1,340.48	1,401.90	1,466.13	2,448.04	2,841.89	3,424.48	4,126.50

COMPARISON GOODS PER CAPITA EXPENDITURE BY GOODS TYPE

Per Capita Comparison Goods Expenditure in 2004 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 (£)	555	236	84	58	314	248	279	570	2,344
SFT Reduction (%)	7.2	3.2	9.0	5.8	11.5	4.6	0.8	5.9	5.8
Excluding SFT (£)	515.04	228.45	76.44	54.64	277.89	236.59	276.77	536.37	2,202.18

Per Capita Comparison Goods Expenditure in 2007 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 (£)	571.02	253.28	84.75	60.57	308.09	262.31	306.85	594.67	2,441.54

Sources:

MapInfo Report. MapInfo/Oxford Economic Forecasting Information Brief 06/2.

Notes:

Growth 2004 to 2005 is the actual national average growth. Growth projections 2005 to 2026 apply the 1998 to 2005 average annual trend to the actual 2005 expenditure (convenience goods); and the ultra-long term average annual trend 1964 to 2005 to the actual 2005 expenditure (comparison goods).
Apparent discrepancies in figures are due to rounding of numbers

Table: **3**

CATCHMENT AREA EXPENDITURE FORECASTS

Catchment Zone	TOTAL RETAIL EXPENDITURE							
	CONVENIENCE GOODS				COMPARISON GOODS			
	2007 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2007 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	87,601	92,255	98,548	105,271	165,818	195,585	240,727	296,291
2	35,462	37,322	39,831	42,839	67,125	79,124	97,296	120,572
3	45,096	47,462	50,707	54,174	85,361	100,623	123,863	152,474
4	54,188	56,980	60,750	64,769	102,570	120,800	148,396	182,296
5	80,934	85,075	90,721	96,741	153,198	180,364	221,608	272,283
TOTALS	303,281	319,094	340,556	363,794	574,073	676,496	831,892	1,023,916

Sources: RECAP Tables 1 and 2

Table: **4**

CATCHMENT AREA COMPARISON GOODS EXPENDITURE BY GOODS TYPE IN 2007

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	38,678	17,156	5,740	4,103	20,869	17,767	20,784	40,280	165,378
2	15,657	6,945	2,324	1,661	8,448	7,192	8,414	16,306	66,947
3	19,911	8,832	2,955	2,112	10,743	9,146	10,700	20,735	85,134
4	23,925	10,612	3,551	2,538	12,909	10,990	12,857	24,916	102,298
5	35,734	15,850	5,304	3,791	19,281	16,415	19,203	37,214	152,792
TOTALS	133,906	59,394	19,874	14,205	72,249	61,512	71,957	139,451	572,548

Sources: RECAP Tables 1 and 2

Scenario 1

Barnsley Town Centre

Table: 5

CONVENIENCE GOODS MARKET SHARES IN 2007

2007 Allocations to

Barnsley Town Centre
Indicated by household interview survey

Zones	Main Food Q1	Top-up convenience Q4	**WEIGHTED AVERAGE**
	Expenditure weighting		
	75 (%)	25 (%)	100 (%)
1	36.7	47.7	39.5
2	40.2	25.0	36.4
3	19.9	22.1	20.5
4	21.6	29.2	23.5
5	10.2	8.6	9.8

Sources: Household Interview Survey.
Expenditure weighting by DTZ
Morrisons Store on Westway included in town centre

Table: **6**

COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2007

2007 Allocations to
Barnsley Town Centre
Indicated by Household Interview Survey

Zones	Clothing & footwear Q5	Furniture/ florcvrgs etc Q6	Household Textiles Q7	Household Appliances Q8	Audio-visual equipment Q9	Hardware, DIY, garden products Q10	Chemists, medcl & beauty goods Q11	All other comparison gds Q12	**WEIGHTED AVERAGE**
	Expenditure weighting								
	571.02 (%)	253.28 (%)	84.75 (%)	60.57 (%)	308.09 (%)	262.31 (%)	306.85 (%)	594.67 (%)	2,441.54 (%)
1	60.3	61.3	65.6	65.8	64.1	54.4	87.4	73.2	67.1
2	41.5	44.5	51.6	54.7	49.4	46.4	53.8	48.0	47.1
3	44.2	45.8	44.2	41.1	34.6	25.6	44.4	43.3	40.9
4	52.5	42.4	57.4	50.7	51.8	38.3	69.8	58.6	53.6
5	43.8	34.7	44.1	33.8	35.2	25.6	46.7	50.3	41.5

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

Table: **7**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 1 Location: **Barnsley Town Centre**

Baseline - Market Shares indicated by the Household Interview Survey remain unchanged.

Market shares correction factors:			
	Convenience Goods:	85	% of survey indicated figures
	Comparison Goods:	70	% of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED							
	CONVENIENCE GOODS				COMPARISON GOODS			
	2007 (%)	2011 (%)	2016 (%)	2021 (%)	2007 (%)	2011 (%)	2016 (%)	2021 (%)
1	34	34	34	34	47	47	47	47
2	31	31	31	31	33	33	33	33
3	17	17	17	17	29	29	29	29
4	20	20	20	20	38	38	38	38
5	8	8	8	8	29	29	29	29

Sources: RECAP Model.
DTZ for market share corrections.

Table: 8

COMPARISON GOODS SALES BY GOODS TYPE IN 2007

Catchment Zones	2007 Sales in **Barnsley 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	16,326	7,362	2,636	1,890	9,364	6,766	12,716	20,639
2	4,548	2,163	839	636	2,921	2,336	3,169	5,479
3	6,160	2,831	914	608	2,602	1,639	3,325	6,285
4	8,792	3,150	1,427	901	4,681	2,947	6,282	10,221
5	10,956	3,850	1,637	897	4,751	2,942	6,277	13,103
TOTALS	46,784	19,356	7,454	4,931	24,318	16,629	31,769	55,727
MARKET SHARES	35%	33%	38%	35%	34%	27%	44%	40%

Sources: RECAP Model.

Table: **9**

FORECAST RETAIL SALES

Scenario: 1 Location: **Barnsley Town Centre**

Baseline - Market Shares indicated by the Household Interview Survey remain unchanged.

Catchment zone	RETAIL SALES BY CATCHMENT ZONE							
	CONVENIENCE GOODS				COMPARISON GOODS			
	2007 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2007 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	29,784	31,367	33,506	35,792	77,934	91,925	113,142	139,257
2	10,993	11,570	12,348	13,280	22,151	26,111	32,108	39,789
3	7,666	8,069	8,620	9,209	24,755	29,181	35,920	44,217
4	10,838	11,396	12,150	12,954	38,977	45,904	56,391	69,273
5	6,475	6,806	7,258	7,739	44,428	52,305	64,266	78,962
TOTALS	65,756	69,207	73,882	78,975	208,245	245,426	301,827	371,498

Sources: RECAP Model.

Table: **10**

SALES CAPACITY OF EXISTING
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN 2007

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	3,823	80	3,058	9,708	29,691
Iceland	500	95	475	4,743	2,253
Marks & Spencer Foodhall	600	100	600	11,392	6,835
Other convenience outlets	1,500	100	1,500	4,500	6,750
Market	1,700	100	1,700	3,000	5,100
ALL STORES	8,123		7,333	6,904	50,629

Sources: IGD, DTZ, based on Verdict Research and Retail Rankings, VO Agency website.

Notes:

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)
Market - estimated additional net space	4,000	50	2,000	3,500	7,000
Estimated new convenience space in Markets scheme	500	100	500	5,000	2,500
ALL STORES	4,500		2,500	3,800	9,500
COMPARISON GOODS					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
Debenhams in Markets Scheme	8,733	75	6,550	3,149	20,625
Other shops in Markets Scheme	30,200	75	22,650	5,000	113,250
Market - estimated additional net space	4,000	50	2,000	3,500	7,000
ALL STORES AND SCHEMES	42,933		31,200	4,515	140,875

Sources: DTZ, based on information from RMBC

Table: **12**

FORECAST RETAIL CAPACITY

Scenario: 1 Location: **Barnsley Town Centre**

Baseline - Market Shares indicated by the Household Interview Survey remain unchanged.

Growth in sales per sq m from shop floorspace existing in 2011 Comparison Goods: 1.50 % pa to 2021

	CONVENIENCE GOODS				COMPARISON GOODS			
	2007	2011	2016	2021	2007	2011	2016	2021
Residents' Spending £000	65,756	69,207	73,882	78,975	208,245	245,426	301,827	371,498
Plus visitors' spending (%)					5.0	5.0	5.0	5.0
Total spending (£000)	65,756	69,207	73,882	78,975	218,657	257,697	316,919	390,072
Existing shop floorspace (sq m net)	7,333	6,841	6,841	6,841	33,000	32,650	32,650	32,650
Sales per sq m net (£)	8,967	6,904	6,904	6,904	6,626	6,626	7,138	7,690
Sales from extg flrspce (£000)	65,756	47,230	47,230	47,230	218,657	216,338	233,057	251,069
Available spending to support new shops (£000)	0	21,977	26,652	31,745	0	41,360	83,861	139,003
Less sales capacity of committed new floorspace (£000)	0	9,500	9,500	9,500	0	140,875	151,763	163,491
Net available								

spending for new shops (£000)	0	12,477	17,152	22,245	0	(99,516)	(67,901)	(24,488)
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000	5,000	5,000	5,000	5,000
Capacity for new shop flrspc (sq m net)	**0**	**1,040**	**1,429**	**1,854**	**0**	**(19,903)**	**(13,580)**	**(4,898)**

Market Share of Catchment Area Expenditure	22%	22%	22%	22%	36%	36%	36%	36%

Sources: RECAP Model.

Notes: Excludes vacant floorspace.
Floorspace in 2011 reflects demolitions for Markets Scheme

Scenario 2

Barnsley Town Centre

Table: **13**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 2 Location: **Barnsley Town Centre**

Major new retail development in Barnsley Town Centre

Market shares adjustment factors:			
	Convenience Goods:	85	% of survey indicated figures
	Comparison Goods:	70	% of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED							
	CONVENIENCE GOODS				COMPARISON GOODS			
	2007 (%)	2011 (%)	2016 (%)	2021 (%)	2007 (%)	2011 (%)	2016 (%)	2021 (%)
1	34	33	35	35	47	45	52	52
2	31	30	32	32	33	31	38	38
3	17	16	18	18	29	27	34	34
4	20	19	21	21	38	36	43	43
5	8	7	9	9	29	27	35	35

Sources: RECAP Model.
DTZ for market share adjustments.

Table: **14**

FORECAST RETAIL SALES

Scenario: 2 Location: **Barnsley Town Centre**

Major new retail development in Barnsley Town Centre

Catchment zone	RETAIL SALES BY CATCHMENT ZONE							
	CONVENIENCE GOODS				COMPARISON GOODS			
	2007 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2007 (£000)	2011 (£000)	2016 (£000)	2021 (£000)
1	29,784	30,444	34,492	36,845	77,934	88,013	125,178	154,071
2	10,993	11,197	12,746	13,708	22,151	24,528	36,973	45,817
3	7,666	7,594	9,127	9,751	24,755	27,168	42,114	51,841
4	10,838	10,826	12,757	13,602	38,977	43,488	63,810	78,387
5	6,475	5,955	8,165	8,707	44,428	48,698	77,563	95,299
TOTALS	65,756	66,016	77,287	82,613	208,245	231,896	345,638	425,416

Sources: RECAP Model.

Table: **15**

FORECAST RETAIL CAPACITY

Scenario: 2 Location: **Barnsley Town Centre**

Major new retail development in Barnsley Town Centre

Growth in sales per sq m from shop floorspace existing in 2011 Comparison Goods: 1.50 % pa to 2021

	CONVENIENCE GOODS				COMPARISON GOODS			
	2007	2011	2016	2021	2007	2011	2016	2021
Residents' Spending £000	65,756	66,016	77,287	82,613	208,245	231,896	345,638	425,416
Plus visitors' spending (%)					5.0	5.0	5.0	5.0
Total spending (£000)	65,756	66,016	77,287	82,613	218,657	243,491	362,920	446,687
Existing shop floorspace (sq m net)	7,333	6,841	6,841	6,841	33,000	32,650	32,650	32,650
Sales per sq m net (£)	8,967	6,904	6,904	6,904	6,626	6,626	7,138	7,690
Sales from extg flrspce (£000)	65,756	47,230	47,230	47,230	218,657	216,338	233,057	251,069
Available spending to support new shops (£000)	0	18,786	30,058	35,383	0	27,153	129,862	195,618
Less sales capacity of committed new floorspace (£000)	0	9,500	9,500	9,500	0	140,875	151,763	163,491
Net available								

spending for new shops (£000)	0	9,286	20,558	25,883	0	(113,722)	(21,900)	32,127
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000	5,000	5,000	5,000	5,000
Capacity for new shop flrspc (sq m net)	**0**	**774**	**1,713**	**2,157**	**0**	**(22,744)**	**(4,380)**	**6,425**

Market Share of Catchment Area Expenditure	22%	21%	23%	23%	36%	34%	42%	42%

Sources: RECAP Model.

Notes: Excludes vacant floorspace.