

Appendix [4]

Table 1

APPENDIX 8: TURNOVER ESTIMATES, BARNSELEY TOWN CENTRE, 2012						
CONVENIENCE TURNOVER ESTIMATE, BARNSELEY TOWN CENTRE, 2012						
Main Food Shopping						
	1	2	3	4	5	Total
Main Food Market Shares	Barnsley Central	Penistone / Rural West	Hoyland / Wombwell	Royston / Barnsley North	Cudworth / Goldthorpe	
Barnsley town centre:						
Iceland, Peel Street	0.4%					
Iceland, Alhambra Centre	1.1%		0.8%	0.6%	0.3%	
Lidl, Peel Street	1.1%					
Marks & Spencer	2.3%	7.9%		0.6%	0.3%	
Other shops, Barnsley town centre		1.0%			0.3%	
Town Centre Total	4.9%	8.9%	0.8%	1.1%	1.0%	
Total Main Food Spending by zone excluding non-store retail sales (£m)	101.30	45.42	51.68	66.03	108.43	372.86
Main food spending in town centre (£m)	4.99	4.05	0.40	0.76	1.07	11.27
Top-Up Food Shopping	1	2	3	4	5	Total
Top-up Food Market Shares	Barnsley Central	Penistone / Rural West	Hoyland / Wombwell	Royston / Barnsley North	Cudworth / Goldthorpe	
Barnsley town centre:						
Iceland, Peel Street	1.0%					
Iceland, Alhambra Centre	4.7%	1.6%			1.5%	
Lidl, Peel Street	2.6%					
Marks & Spencer	1.0%	4.8%		1.6%	0.7%	
Other shops, Barnsley town centre	17.3%	1.6%	5.5%	4.0%	10.9%	
Town Centre Total	26.7%	7.9%	5.5%	5.6%	13.1%	
Total Top-up Food Spending by zone excluding non-store retail sales (£m)	23.45	12.44	13.00	16.82	27.79	93.50
Top-up food spending in town centre (£m)	6.26	0.99	0.71	0.93	3.65	12.55
Total Convenience Expenditure	124.75	57.86	64.68	82.85	136.22	466.36
Total Convenience Spending in Barnsley town centre (£m)	11.25	5.03	1.12	1.69	4.72	23.82
Market share of Barnsley town centre	9.0%	8.7%	1.7%	2.0%	3.5%	5.1%

Table 2

COMPARISON TURNOVER ESTIMATE, BARNSELEY TOWN CENTRE, 2012						
	1	2	3	4	5	Total
Comparison Goods, Barnsley Town Centre excluding non-store retail sales	Barnsley Central	Penistone / Rural West	Hoyland / Wombwell	Royston / Barnsley North	Cudworth / Goldthorpe	
<u>Clothes and footwear</u>						
Market shares	39.7%	26.8%	21.6%	39.1%	27.3%	
Total spending by zone	43.81	21.80	22.42	29.25	45.99	163.27
Spending in town centre	17.38	5.84	4.85	11.42	12.54	52.04
<u>Furniture and carpets</u>						
Market shares	39.5%	29.4%	13.4%	34.7%	27.6%	
Total spending by zone	14.45	8.12	7.35	9.65	14.97	54.54
Spending in town centre	5.71	2.39	0.99	3.35	4.13	16.57
<u>DIY and hardware</u>						
Market shares	35.3%	7.1%	5.5%	27.7%	14.2%	
Total spending by zone	6.54	3.97	3.32	4.41	6.68	24.92
Spending in town centre	2.31	0.28	0.18	1.22	0.95	4.94
<u>Electrical goods</u>						
Market shares	45.2%	21.9%	13.0%	39.8%	22.6%	
Total spending by zone	28.19	15.55	13.65	19.01	29.57	105.97
Spending in town centre	12.75	3.41	1.78	7.57	6.70	32.20
<u>Other non-food goods</u>						
Market shares	50.3%	30.8%	19.4%	55.7%	28.2%	
Total spending by zone	67.00	36.50	34.54	45.11	70.11	253.26
Spending in town centre	33.68	11.23	6.72	25.13	19.75	96.50
Total Comparison Expenditure	159.99	85.94	81.28	107.43	167.32	601.96
Total Comparison Spending in Barnsley town centre (£m)	71.82	23.15	14.51	48.70	44.07	202.26
Market share of Barnsley town centre	44.9%	26.9%	17.9%	45.3%	26.3%	33.6%

Table 3

A. CAPACITY ANALYSIS, CONVENIENCE GOODS, BARNSELEY TOWN CENTRE				
Scenario 1: Constant market share of Barnsley town centre				
(based on expenditure growth and assuming no new development)				
Barnsley Catchment Area (2012 prices)				
	2012	2018	2023	2033
Residents' Expenditure (£m) [1]	466.36	495.94	530.98	595.68
Existing Turnover in Town Centre (£m) [2]	75.37	-	-	-
Retention level [3]	16.2%	16.2%	16.2%	16.2%
Future Expenditure Retained (£m)	75.37	80.34	86.02	96.50
less Future Turnover of Existing Shops (£m) [4]	75.37	75.37	75.37	75.37
Surplus Capacity (£m)	0.00	4.97	10.65	21.13
less Commitments (£m) [5]	-	-	-	-
Residual Capacity (£m)	0.00	4.97	10.65	21.13
Sales per sq.m. net in new shops (£) [6]	12,000	12,000	12,000	12,000
Floorspace Capacity for new shops (sq.m. net):				
net floorspace	nil	414	887	1,761
gross floorspace [7]	nil	592	1,268	2,515
[1] Expenditure excludes non-store retailing (see Appendix 7)				
[2] Survey-based turnover 2012 including Morrisons, Westway (see Appendix 8)				
[3] assuming constant market share (no increase in retention level)				
[4] assuming no increase in sales density (Experian Retail Planner Briefing Note 11, October 2013)				
[5] No commitments in convenience goods in Barnsley town centre				
[6] typical net sales density for new foodstore developments				
[7] assuming net/gross floorspace ratio of 70%				

Table 4

B. CAPACITY ANALYSIS, COMPARISON GOODS, BARNSELEY TOWN CENTRE				
Scenario 1: Constant market share of Barnsley town centre				
(based on expenditure growth and assuming no new development)				
Barnsley Catchment Area (2012 prices)				
	2012	2018	2023	2033
Residents' Expenditure (£m) [1]	601.96	712.24	837.28	1165.94
Existing Turnover in Town Centre (£m) [2]	200.58	-	-	-
Retention level [3]	33.3%	33.3%	33.3%	33.3%
Future Expenditure Retained (£m)	200.58	237.18	278.81	388.26
Visitor Expenditure (£m) [4]	10.03	11.86	13.94	19.41
Total Available Expenditure	210.61	249.03	292.75	407.67
less Future Turnover of Existing Shops (£m) [5]	200.58	225.89	249.40	304.01
Surplus Capacity (£m)	10.03	23.15	43.36	103.66
less Commitments (£m) [6]	-	-	-	-
Residual Capacity (£m)	10.03	23.15	43.36	103.66
Sales per sq.m. net in new shops (£) [7]	5,000	5,000	5,000	5,000
Floorspace Capacity for new shops (sq.m. net):				
net floorspace	2,006	4,630	8,672	20,732
gross floorspace [8]	2,865	6,614	12,388	29,617
[1] Expenditure excludes non-store retailing (see Appendix 7)				
[2] Survey-based turnover 2012 including Morrisons, Westway (see Appendix 8)				
[3] assuming constant market share (no increase in retention level)				
[4] visitor spending is estimated to be an additional 5% of residents' spending				
[5] assuming increase in sales density of 2% per annum (Experian Retail Planner Briefing Note 11, October 2013)				
[6] No commitments in convenience goods in Barnsley town centre				
[7] typical net sales density for new town centre retail floorspace				
[8] assuming net/gross floorspace ratio of 70%				