

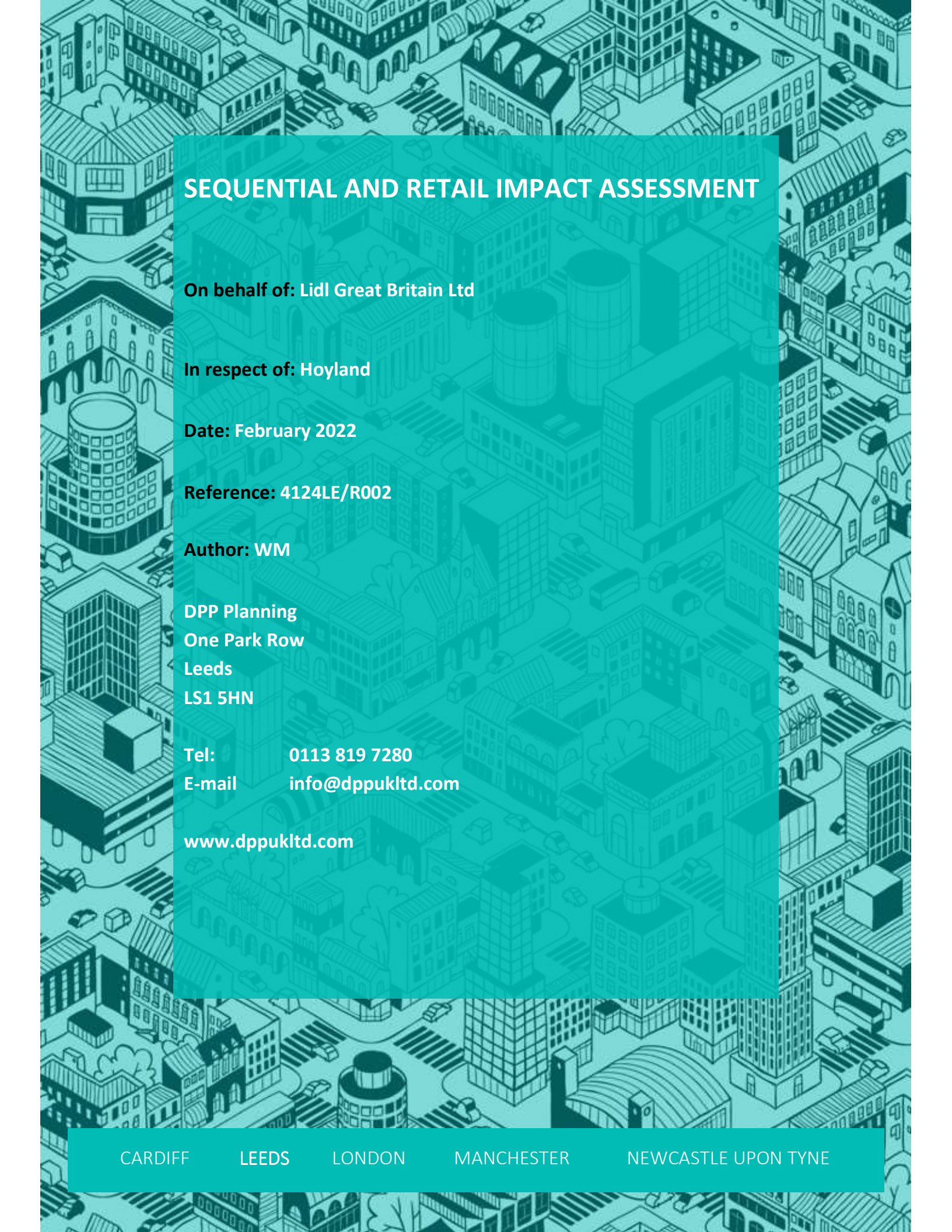


SEQUENTIAL AND RETAIL IMPACT ASSESSMENT

LIDL GREAT BRITAIN LTD

HOYLAND



An isometric illustration of a cityscape with various buildings, streets, and vehicles, rendered in a teal and white color scheme. The illustration is dense and detailed, showing a mix of modern and traditional architecture.

SEQUENTIAL AND RETAIL IMPACT ASSESSMENT

On behalf of: Lidl Great Britain Ltd

In respect of: Hoyland

Date: February 2022

Reference: 4124LE/R002

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Contents

1.0 INTRODUCTION	4
2.0 SITE DESCRIPTION AND PROPOSED DEVELOPMENT	5
3.0 PLANNING POLICY CONTEXT	6
4.0 SEQUENTIAL ASSESSMENT	8
5.0 RETAIL IMPACT ASSESSMENT	13
6.0 CONCLUSIONS	29
APPENDIX 1 – RETAIL TABLES	30
APPENDIX 2 – HOUSEHOLD SURVEY QUESTIONNAIRE	39

1.0 Introduction

- 1.1 This Retail Statement has been prepared on behalf of Lidl Great Britain Limited in support of a full planning application for the erection of a Lidl foodstore with associated access, car parking and landscaping on land to the north of Sheffield Road, Hoyland.
- 1.2 This Retail Statement provides a brief overview of the site and the development proposed. The Statement then considers the proposed development in relation to national and local retail planning policy in line with guidance set out in Section 7 of the NPPF entitled 'ensuring the vitality of town centres' and provides both a Sequential Assessment and a Retail Impact Assessment of the impact of the proposed development on the vitality and viability of nearby centres.
- 1.3 The statement is set out as follows:
- Chapter 1 – Introduction
 - Chapter 2 – Site Description and Proposed Development
 - Chapter 3 – Planning Policy
 - Chapter 4 – Retail Impact Assessment
 - Chapter 5 – Sequential Assessment
 - Chapter 6 – Conclusions
- 1.4 In addition, the statement is supported by the following appendices:
- Appendix 1 – Retail Tables
 - Appendix 2 – Household Survey Questionnaire

2.0 Site Description and Proposed Development

The Site

- 1.1 The site lies to the west of Hoyland and is approximately 6km South of Barnsley. In total, the site is approximately 0.86 hectares in size and was previously part of a large area of agricultural land. However, the construction of the Sheffield Road roundabout has isolated the land and forms the south and west boundaries of the site.
- 1.2 Immediately to the east, is Cross Keys Lane which provides access to an industrial site, which is currently home to GB Truck Services and Riverside Truck Rental. There are also a couple of dwellings present to the north.
- 1.3 In terms of access, there is currently no direct vehicle access onto the site. However, the site is well served by public transport with the closest bus stop located approximately 70m south east of the site. This provides a number of regular services Wombwell, Elsecar and Broomhill. Approximately 136m from the site on the opposite side of the road is a bus stop that provides services to Barnsley Town Centre. The closest railway station is located approximately 2.85km from the site in Elsecar.

Proposed Development

- 2.1 The proposed development involves the erection of a 1,900sqm (1,267sqm net sales) Lidl food store along with associated access, parking and landscaping.
- 2.2 Lidl GB Ltd is the identified occupier for and have specific requirements for 1,200sqm net sales area with 700sqm devoted to back of house.
- 2.3 Full details of the proposed development can be found on the suite of plans prepared by SMR and within the Planning Statement prepared by DPP Planning.

3.0 Planning Policy Context

National Planning Policy Framework (the 'NPPF')

- 3.1 The NPPF was updated in August 2021 and sets out the Government's proposed economic, environmental and social planning policies for England. This is an iteration of the earlier Framework which was published in February 2019. The NPPF carries forward the Government's commitment to supporting sustainable economic growth and indicates that significant weight should be placed on the need to support economic recovery through the planning system.
- 3.2 The NPPF confirms in Paragraph 2 that applications for planning permission will be determined in accordance with the Development Plan unless material considerations indicate otherwise.
- 3.3 It confirms that the NPPF must be taken into account as a material consideration in planning decisions.

Ensuring the vitality of town centres

- 3.4 Section 7 of the NPPF ensures the vitality of town centres. Paragraph 86 states that *"planning policies and decisions should support the role that town centres play at the heart of local communities, by taking a positive approach to their growth, management and adaptation."* It further refers, at part (e), that sites within town centres should be suitable and viable for town centre uses.
- 3.5 Paragraph 87 states that local planning authorities should apply a sequential test to planning applications for main town centre uses which are not in an existing centre nor in accordance with an up-to-date plan; it indicates that sites should be assessed sequentially, i.e., located within centres first, otherwise in edge of centre locations (within 300m), and only then should out of centre sites be considered.
- 3.6 Paragraph 90 states that when assessing proposed town centre uses outside town centres, which are not in accordance with an up-to-date plan, local planning authorities should require an impact assessment if the development is over proportionate, locally set floorspace threshold. *"This should include assessment of:*
 - a. The impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and*
 - b. The impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and the wider retail catchment (as applicable to the scale and nature of the scheme)."*

Relevant Local Plan Policies

Barnsley Local Plan – January 2019

- 3.7 The site lies within Barnsley Metropolitan Borough Council's jurisdiction. The development plan consists of the Local Plan which was adopted in January 2019 and the Joint Waste Plan adopted in March 2012.
- 3.8 Policy SD1 Presumption in favour of sustainable development - states "When considering development proposals we will take a positive approach that reflects the presumption in favour of sustainable development contained in the National Planning Policy Framework. We will work proactively with applicants jointly to find solutions which mean that proposals can be approved wherever possible, and to secure development that improves the economic, social and environmental conditions in the area."
- 3.9 Policy GD1 General Development – Outlines how proposed developments will be approved if there will be no significant adverse effect on the living conditions and residential amenity of existing and future residents; they are compatible with neighbouring land and will not significantly prejudice the current or future use of the neighbouring land; adequate access and internal road layouts are provided to allow the complete development of the entire site for residential purposes, and to provide appropriate vehicular and pedestrian links throughout the site and into adjacent areas.
- 3.10 LG2 The location of growth – Gives priority to development in the following locations: Urban Barnsley; Principal towns (which Hoyland is identified as); and villages.
- 3.11 Policy TC1 Town Centres – Requires a sequential approach to assess proposals for new retail and town centre development. This will help to achieve the spatial strategy for the Borough and will focus development on identified centres in the first instance. Edge of centre and out of centre development will only be allowed where it meets the requirements of NPPF.
- 3.12 Policy TC3 Thresholds for Impact Assessments outlines how proposals for retail and leisure uses will be required to provide an impact assessment if they are of a scale, role or function where they could have a negative impact on the vitality and viability of the centre and are:
- i) Located outside the Primary Shopping Area of a District Centre and are:
 - (a) Within the catchment of a District Centre, and
 - (b) Have a floorspace in excess of 1,000 square metres gross

4.0 Sequential Assessment

- 4.1 In accordance with Paragraph 87 of the NPPF and policies TC1 and TC3 of the Barnsley Local Plan a Sequential Assessment of sites has been prepared to support the application.
- 4.2 The following section addresses the sequential assessment, first dealing with the scope of the assessment and defining its interpretation through case law; followed by an assessment of any sequentially preferable sites.

The Requirement for the Sequential Assessment

- 4.3 The application seeks the development of a new Lidl store with associated plant, delivery bay, parking, and landscaping. As the site is located 250m away from the nearest defined centre for retail purposes, which is Hoyland Common Local Centre, it is necessary to demonstrate compliance with the sequential approach outlined in paragraphs 87 and 88 of the NPPF. Consequently, it is necessary to demonstrate that there are no suitable, available and viable sequentially preferable sites that could accommodate the proposed development in accordance with the relevant provisions of both local and national planning policy.
- 4.4 In undertaking the sequential assessment, it is important to establish an appropriate area of search. Following the establishment of the proposed development's PCA, it is considered appropriate and proportionate (in line with the guidance of the PPG) to use the Primary Catchment Area (PCA) as the outer edge of the sequential search area. It is also necessary to consider existing Lidl stores within the locality which include one within Barnsley Town Centre and one at Wombwell. Lidl would have no desire to establish a new store too close to their existing provision within the area. In light of the above Hoyland District Centre, Hoyland Common Local Centre, and Stairfoot Local Centre have been assessed in sequential terms.

Case Law

- 4.5 It is important at the outset to correctly interpret and apply the sequential test, considering best practice and relevant appeal decisions. The NPPF has removed the specific need to address disaggregation and is supported by the absence of any reference to disaggregation in the updated Planning Policy Guidance Notice issued in 2020.
- 4.6 Case law on the issue of disaggregation and the sequential approach can be summarised as follows:
- The Supreme Court Decision in 2012 re Dundee established as a matter of law, that a site has to be suitable for the commercial needs of the operator and that provided that flexibility has been shown in terms of format and scale then a proposed development should not have to be altered or reduced to fit a site.

- The English application of Dundee was established in 2012 through High Court case of North Lincs. The decision maker is 'bound' to take the Applicant's assessment that a site is neither commercially viable nor suitable for their commercial requirements.
- A 2014 High Court Decision at Moreton-in-Marsh applied Dundee to guidance now set out in the NPPF and concluded no material difference between NPPF and Scottish policy statement.
- 2014 Rushden Lakes High Court Decision establishes that the Secretary of State agrees that the sequential assessment relates to the accommodation of the proposal.

4.7 As such, in considering the requirements of the sequential test, we have considered the application proposals as a whole, whilst applying a reasonable degree of flexibility in terms of scale and format, as required by national policy.

The Scheme to be Assessed

- 4.8 The context for the sequential assessment is that the proposed convenience store would have a floorspace and net sales area of 1,267sqm. In addition, the store is to be served by a car park (107 spaces) and associated land required for servicing/deliveries. In total, the functional land required to deliver the proposed development (excluding grassed areas and landscaping) amounts to approximately 0.8 hectares. It is acknowledged however that where units are identified within or on the edge of local centres which benefit from existing on-street parking or good public transport access; as a result, the sequential search exercise has also assessed smaller sites in such locations rather than dismissing them in the initial site sift exercise.
- 4.9 Lidl have an immediate need for the store and therefore any potential site needs to be available prior to the end of 2022. Lidl also require a site that provides good visibility from main highways in order to attract passing trade and provide easy and legible access into the store and associated car park.

Methodology

- 4.10 As the operator, Lidl GB Ltd have advised of site parameters which would enable them to occupy a site, having regard to the need to demonstrate flexibility. These are set out below.

Size Requirements	
Minimum suitable site area	0.6ha (1.5 acres) for a stand-alone store. Up to 1.6a (4 acres) for a mixed-use development
Unit Size	Between 1,672 sq.m. to 2,461 sq.m.
Vacant Units (for conversion/occupation)	Units at least 90% of the proposed unit size
Other Requirements	
A site that can allow for the safe manoeuvring of customer vehicles	
A prominent site with the ability to attract passing trade	
A site that is able to offer adjacent surface level car parking, so that customers can easily transfer food to their vehicles	
A site that can accommodate a dedicated service area to the rear of the store and associated	

HGV deliveries and manoeuvres

A single storey, open and unrestricted sales floor area which benefits from a generally level/flat topography, or which has the ability to be developed as such

4.11 Vacant sites were identified through online marketing databases such as Rightmove, Property link, Zoopla, PrimeLocation and OnTheMarket; through the online websites of commercial agents such as JLL, Carter Towler, Ryden and Knight Frank; and based on local knowledge of the district and the availability and history of a number of potential sites. DPP also looked for potentially vacant units as part of the physical health checks undertaken in November 2021.

4.12 Thus, in accordance with the retail hierarchy, the following centres were assessed:

- District Centres:
 - Hoyland
- Local Centres:
 - Hoyland Common
 - Stairfoot
- Edge of Centre Boundaries

4.13 Any identified sites were then assessed based on their capacity to accommodate the proposed development as a whole in accordance with the 'Dundee' approach cited above. Any site that is not capable of accommodating the proposed development, in terms of physical size, cannot be considered suitable.

4.14 Should any sites be found to be suitable, they will also need to be sufficiently available and viable for development. For example, sites must be actively marketed as available for development/occupation.

Sequential Sites

Hoyland Common Local Centre

4.15 Whilst our health check visit to Hoyland Common Local Centre discovered three vacant units, none of these have been found advertised online or with local agents. No further sites were discovered and therefore there are no sequentially preferable sites identified.

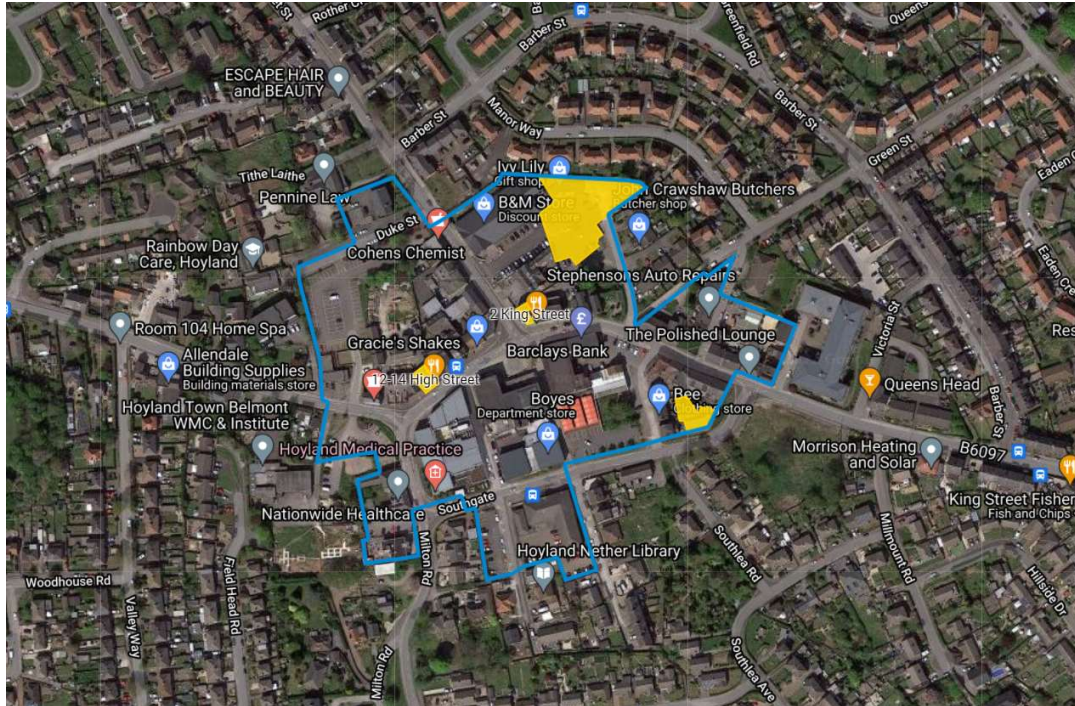
Hoyland District Centre

4.16 Our survey of Hoyland District Centre identified the following vacant sites:

1. 2 King Street, S74 9JP
2. 12-14 High Street, S74 9AB
3. 12A & 12B Hall Street, S74 9JR
4. Kiosks 1-9, Mallin Croft, S74 9QR

- 4.17 The location of the above sites and their relationship to the District Centre are shown on the below map:

Figure One: Map of advertised sites within Hoyland District Centre



Site 1 – 2 King Street, S74 9JP

- 4.18 2 King Street is located at the heart of District Centre at the junction of King Street, High Street and Market Street. It is currently occupied by Bargain Booze and advertised with the existing tenant in situ. The size of the unit is 124.1sqm and therefore inadequate for the purposes of a retail foodstore similar to that proposed. It is therefore considered that this site is not sequentially preferable.

Site 2 – 12-14 High Street, S74 9AB

- 4.19 The site consists of two units and is currently operating as a takeaway and restaurant and a hot-food takeaway and therefore tenanted. There is also a 2-bed self-contained flat on the first floor. Ground floor retail floorspace totals 121sqm and therefore the size of the site precludes it being sequentially preferable.

Site 3 – 12A & 12B Hall Street, S74 9JR

- 4.20 Located in the south of the District Centre, the site is currently occupied with five tenancies in place. In total, the units comprise 120sqm of space and therefore the site is not sequentially preferable.

Site 4 – Kiosks 1-9, Mallin Croft, S74 9QR

- 4.21 Site 4 consists of nine smaller retail spaces located behind the B&M Store on Market Street, but also access from Mallin Croft to the east. Total floorspace is 368sqm and tenants are in place. The site is therefore not considered sequentially preferable.

Stairfoot Local Centre

- 4.22 Our survey of Stairfoot Local Centre did not identify any suitable vacant sites that were within the centre and were being promoted for sale. As such, there are no sequentially preferable sites identified.

Conclusion

- 4.23 There are no sites identified in the sequential search which fulfil the criteria to accommodate the application proposals, even when demonstrating a reasonable degree of flexibility in the format and size of the proposed development.
- 4.24 There were no suitable vacant units being marketed within Hoyland Common Local Centre, Hoyland District Centre or Stairfoot Local Centre and therefore we consider, given the above, this gives a suitable interpretation and application of the sequential approach towards the site selection. As a result, it is considered that the sequential test is passed.

5.0 Retail Impact Assessment

- 5.1 In accordance with paragraph 87 of the NPPF and Policy TC1 of the Local Plan, as the development is in an out-of-centre location this section assesses the impact of the proposed development on defined town centres. This should be read in conjunction with the economic tables at **Appendix 1** which are referred to throughout this section.
- 5.2 The NPPF requires an assessment of the impact on existing, committed and planned public and private investment in a centre or centres, and the impact of the proposal on town centre vitality and viability, including local consumer choice and trade.
- 5.3 The RIA should also be read in conjunction with the NEMS Market Research Household Survey Questionnaire in Appendix 2 and has been informed by existing health checks carried out by DPP in November 2021.

Methodology

- 5.4 This sub-section provides details on the methodology adopted in the preparation of the retail impact assessment having regard to the guidance set out within the Planning Practice Guidance (PPG).
- 5.5 As set out previously, Paragraph 17 of the PPG sets out a step-by-step approach in the preparation of Retail Impact Assessments, as follows:
1. Establish the state of existing centres at the base year;
 2. Establish the nature of current shopping patterns at the base year;
 3. Determine the appropriate time frame for assessing impact, focussing on impact in the first five years, as this is when most impact is likely to occur;
 4. Examine the 'no development' scenario;
 5. Assess the proposal's turnover and trade draw;
 6. Consider a range of plausible scenarios in assessing the impact of the proposal on existing centres and facilities (which may require breaking the PCA down into a series of zones to gain a finer-grain analysis);
 7. Set out the likely impact of that proposal clearly, along with any associated assumptions and reasoning, including in respect of quantitative and qualitative issues; and
 8. A judgement as to whether the likely adverse impacts are significant can only be reached in light of local circumstances.

Primary Catchment Area (PCA)

- 5.6 Defining the PCA seeks to establish the areas of population from which the majority of the proposal's trade would be drawn from.
- 5.7 There is no firm guidance on the extent of a catchment area for a proposed development, however it is reasonable to establish a catchment area based on the type of development

proposed, the context of the surrounding area (including existing shopping provision) and the scale of the development. In this context, the proposed development is for a Lidl food store to serve a localised population on a frequent basis; it is likely that the majority of customers of the proposed development would arrive by car from nearby areas within a 5-10 minute drive time.

5.8 As such, the first step in establishing the PCA is to establish an isochrone area around the site which represents a 5-minute off peak drive time catchment of the site. However, in order to be robust, the catchment has been expanded to include adjacent suburbs such as Elsecar, Worsbrough and all of Hoyland. This is considered to be a robust and appropriate driving catchment for a proposal of this scale. The area is shown in the image below:

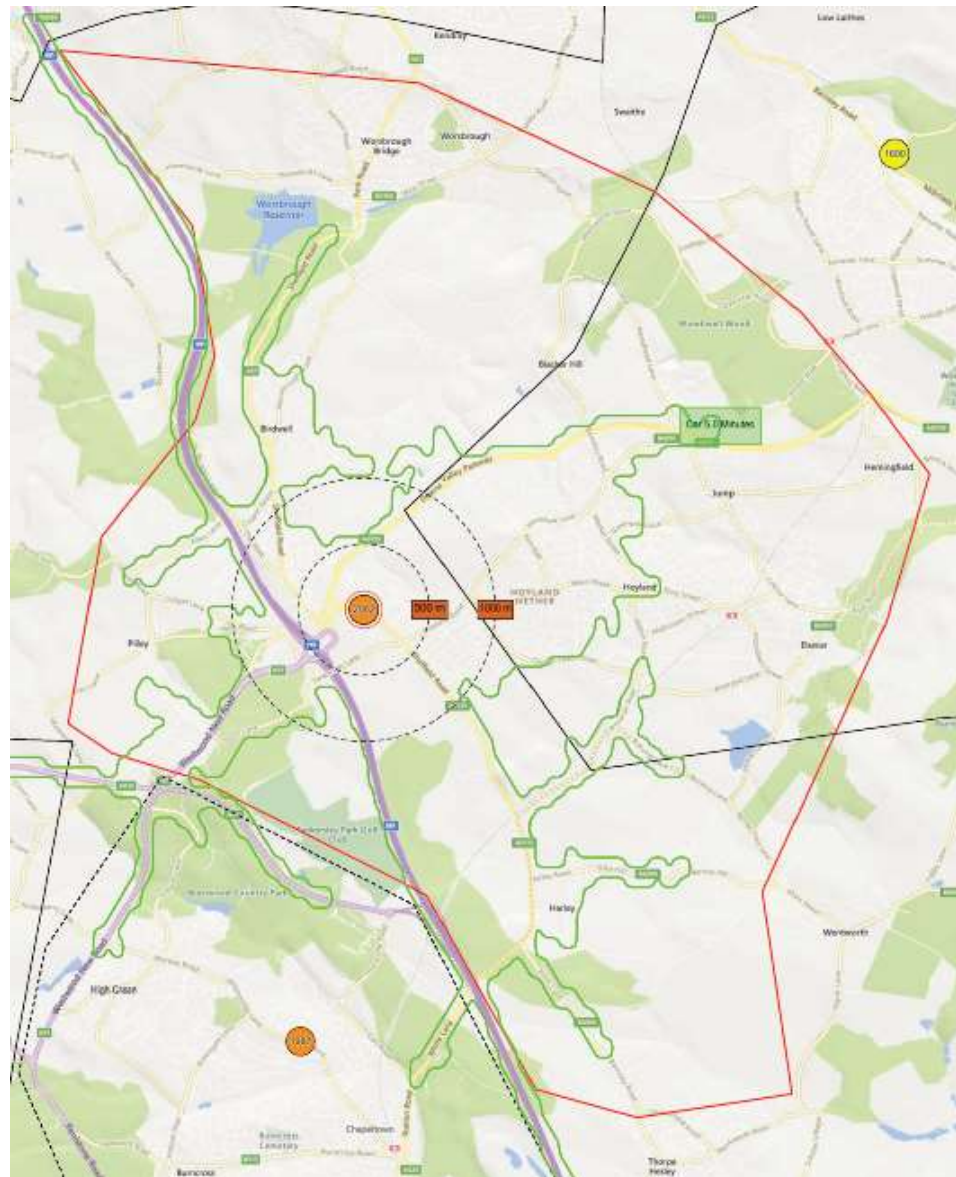


Figure 1: Map showing 5-min off peak drive time isochrone (green) and the wider established catchment (red) alongside the site (2082) and adjacent suburbs.

- 5.9 In terms of nearby existing convenience provision there are a small number of major retailers within the area, mainly to the east and north in Hoyland and Birdwell. Further afield there are additional retailers within or near to their respective centres such as Wombwell, Chapeltown, Stocksbridge and the periphery of Barnsley Town Centre itself. These shopping destinations will restrict the PCA to the east, south, west and north respectively as residents will shop closer to home. In addition, major retailers such as Tesco Hoyland, Asda Chapeltown, Asda Worsbrough and Morrisons Corton Wood are likely to remain the main food shopping destinations within their own catchment areas as evidenced by the HHS results. In light of this existing provision, it is unlikely that residents from beyond the PCA will drive past these existing destinations to access the proposed development. In addition, areas to the west where there is a lack of stores due to the rural nature of the area are expected to use destinations at Penistone and Stocksbridge rather than that proposed due to the increased travel distance and better offer in those centres.
- 5.10 As a result of the above, the PCA does not extend beyond the M1 and Tankersley to the west, Hoyland to the east, and Worsbrough to the north.

Household Survey Area

- 5.11 In determining a PCA it is also relevant to assess the existing shopping provision and patterns within the area. However, due to the age of the evidence base used to inform the Local Plan, which comes in the form of the Town Centre Retail Study 2014 (TCRS) and the Smaller Centres Study Report 2010 (SCSR), it was decided that an updated household survey is required to accurately depict these patterns. As such, NEMS Market Research were commissioned to carry out a household survey of 500 local residents. A copy of the questionnaire is attached at Appendix 2.
- 5.12 Due to the response rate of telephone surveys and the need to get a reliable sample size, the area surveyed was beyond the catchment outlined above. The expanded survey area included Thorpe Hesley, Barnsley Town Centre, and Stairfoot, and is partially based on postcode sectors in the local area.



Figure 2: Map showing household survey (HHS) area (green).

Population and Expenditure

- 5.13 The population and projected growth within the HHS area are shown in Table 1 of the Retail Tables in Appendix 1, and are taken from an Experian Retail Planner Report commissioned specifically for this purpose. This report uses Experian's latest data for the region dating to 2019 and indicates that the total population for the HHS area is expected to remain relatively static with a population of 66,745 in 2019 rising to 68,990 in 2025.
- 5.14 In considering the available convenience and comparison 'per capita' expenditure, we have again used the Experian report for the specific HHS area. Base data is provided for 2019 with special forms of trading (SFT) stripped out at this base year using Appendix 3: Figure 5 of the Experian Retail Planner Briefing Note (RPBN) 19 (January 2022). We have then applied expenditure growth in line with the Briefing Note to our design year of 2025. The per capita convenience and comparison expenditure figures are provided at Tables 2B and 3B respectively. All prices are expressed in a 2019 price base.
- 5.15 Based on the above population and per capita expenditure figures, our assessment shows that in 2022, total convenience goods expenditure within the HHS area stands at £134.8m (Table 4A), while total comparison goods expenditure stands at £163m (Table 4B). After population and expenditure growth is taken into account, it is estimated that in 2025 convenience expenditure will increase slightly to £135m whilst 2025 comparison expenditure will increase to £169.7m.

Turnover of the Proposed Development

5.16 The proposal is for a Class E(a) convenience retail unit with a net sales area of 1,267sqm, proposed to be occupied by Lidl. In order to calculate the likely turnover of the proposed development, the following methodology has been relied upon:

- The Lidl unit (1,267sqm net floorspace) has been assessed as 80% convenience retailing based on information provided by Lidl.
- The convenience goods sales density figure for Lidl has been taken from the Global Data Foodstores Densities December 2021, expressed in 2019 prices.
- The sales density figure has been multiplied by the floorspace of the proposal to provide a turnover figure for 2022.
- The turnover figure has then been multiplied by the growth rates for sales densities provided by the RPNB 19 to allow for growth up to the 2025 design year.

5.17 Table 1 below sets out the calculation of the proposed retail unit's likely turnover at the design year of 2025.

Table 1 – Turnover of Proposal

Lidl Store	Net Sales Area (sqm)	Sales Density (£ p.sq.m.)	Turnover at 2022 (£m)	Turnover at 2025 (£m)
Convenience	1,014	8883	9.00	9.22
Comparison	253	4,789	1.21	1.30
Totals	1,267		10.22	10.52

5.18 As can be seen from the above table, the proposed development would turnover at approximately **£10.22m** in 2022 rising slightly to **£10.52m** in 2025.

Existing Centres

5.19 There are two Local Centres and one District Centre located within the Study Area in the form of Hoyland Common and Stairfoot, and Hoyland respectively. As such, these centres will be assessed as part of the retail assessment. For robustness, health checks have also been carried out for Barnsley Town Centre, however this centre has not been included within the Sequential Test.

5.20 All health checks were carried out by DPP on 23rd November 2021 and there were no national or local lockdown measures in place. Weather was dry and the visits were also before the omicron coronavirus variant was identified in the UK and, as such, the conditions are considered to be normal with no reduced footfall. Hoyland Common Local Centre

- 5.21 Hoyland Common Local Centre is located at the junction of Sheffield Road and Hoyland Road, extending approximately 190m north and east respectively along these roads. The 2010 SCSR describes Hoyland Common as one of the largest local centres in the Borough with a 'fair' diversity of main town centre uses and 'fair' number of shops. The amount of floorspace, leisure offer, and supply of offices was also considered to be 'fair', however there was a 'poor' provision of pubs, restaurants and cafes within the centre. The SCSR also determined that there was a higher than UK average proportion of retail units however a lower than average convenience offer. In total there was also a 15% vacancy rate.
- 5.22 The SCSR describes Hoyland Common's role as supplementary to the retail offer in Hoyland District Centre to the east and identified an opportunity to expand or consolidate through vacant units and redevelop the site on the corner of Sheffield Road and Tankersley Road. Evidence of recent investment was also evidenced by an 'excellent standard' of shop front maintenance and the fact that only one charity shop was present.
- 5.23 Accessibility was considered to be mixed with poor car parking facilities but good public transport options to Hoyland and Barnsley Town Centre. In addition, ease of movement for pedestrians and cyclists and ease of access to main attractions was rated as poor due to the busy main road junction with infrequent pedestrian crossings and narrow pavements. However, the environmental quality and safety and security conditions were judged to be 'fair' and 'good' respectively.
- 5.24 Due to the age of the SCSR, Hoyland Common was visited to re-assess the conditions and centre health in November 2021. The health check included looking at the diversity of uses within the centre, the number of national retailers represented, pedestrian flows, the number of vacant units, overall accessibility, the quality of the environment, whether the centre feels safe for visitors/shoppers and the presence of any redevelopment sites.
- 5.25 In terms of existing convenience provision, DPP found that the centre includes a Co-op Food store and a butcher shop. In terms of wider provision, there is a range of services on offer including beauticians/salons, takeaways, offices, and a range of specialist retail including a fishing shop, auto part shops. Also present was a pharmacy which represented one of two national retailers, the other being Co-op.
- 5.26 Figure 4 below details the number and type of units within the centre, and their respective percentages, alongside the SCSR data. Types of occupiers have been taken from the SCSR survey which utilised the Experian Goad Classification of Retail and Service Uses, for clarity examples of these are as follows:
- Convenience:
 - Bakers
 - Butcher
 - Confectionery, Tobacco & News
 - Greengrocers
 - Off Licences

- Comparison
 - Antiques
 - Carpets & Flooring
 - Charity Shops
 - Furniture Stores
 - Crafts & Gifts
 - Toiletries, Cosmetics & Beauty Products
 - Toys, Games & Hobbies
 - DIY & Home Improvements
 - Clothing Store
- Retail Services
 - Dry Cleaners & Laundrettes
 - Health & Beauty Salons
 - Opticians
 - Post Offices
 - Travel Agents
- Leisure
 - Public Houses, Bars, Cafes, & Restaurants
 - Takeaways
 - Sports & Leisure Facilities
 - Hotels
- Finance & Business Services
 - Building Societies & Banks
 - Building Supplies
 - Financial Services
 - Legal Services
 - Property Services
 - Printing & Copying

	SCSR 2010		November 2021 Health Check		Difference	
	Number	Percentage	Number	Percentage	Number	Percentage
Convenience	2	6%	2	5%	±0	-1%
Comparison	15	44%	5	13%	-10	-31%
Total Retail	17	50%	7	18%	-10	-32%
Vacant Units	5	15%	3	8%	-2	-7%

	SCSR 2010		November 2021 Health Check		Difference	
Services						
Financial & Business	0	0%	6	16%	+6	+16%
Leisure Services	7	21%	10	26%	+3	+5%
Retail Services	5	15%	12	32%	+7	+17%
Total Services	12	35%	28	74%	+16	+39%
Total Retail and Service	34	100%	38	100%	+4	

Figure Four: Hoyland Common Health Check Statistics comparing the 2010 and 2021 health checks and the differences.

- 5.27 The table above shows that since 2010 there has been a significant increase in leisure services and retail services within the centre which broadly reflects national trends as the high street evolves. Financial and business units have also increased to help create a more diverse centre where no sector dominates. Previously, the centre was heavily reliant on convenience retail. The number of vacant units has also reduced to three, representing 8% of the total units.
- 5.28 However, of these vacant units identified only one was advertised by way of signage on the building itself, the former Wesleyan Chapel, 41 Hoyland Road; though this was advertised for residential development subject to planning. No online advertisements have been found for any of the three vacant units.
- 5.29 Pedestrian flows in the area were fairly quiet when the health check was carried out, with footfall becoming busier nearest the Co-op which appeared to be the main destination for many shoppers. Car parking was found to still be limited with the car park adjacent Co-op being the only off-road parking facility in the area. This has a 30 minute limit for all but a few spaces which had parking restrictions for a stay of up to two hours. Pavements remain narrow as assessed in the SCSR however were considered adequate for the footfall and not congested. Only one pedestrian crossing is present on Hoyland Road and the road remains busy. Pavements were also well lit, and the area felt safe with some CCTV coverage near the Co-op area.
- 5.30 Areas to expand and facilitate growth are considered limited given the redevelopment of the site on the corner of Sheffield Road and Tankersley Lane for an assisted living residential home and the close relationship with residential units.

- 5.31 Overall, Hoyland Common Local Centre is considered to be healthy with a more diverse offering and an increased number of units since the SCSR was carried out in 2010. Vacant units have also reduced and there is good footfall for a centre of its size.

Hoyland District Centre

- 5.32 Hoyland District Centre is located to the east of Hoyland Common Local Centre and is concentrated around the junction of High Street, Market Street, and King Street. The SCSR describes Hoyland as the main settlement in the south of the Borough with a 'fair' diversity of town centre uses and a 'good' number and type of shops available. Provision of offices, pubs, cafes, leisure and cultural uses was also considered 'fair'.
- 5.33 As the main shopping district in the area, the SCSR stated that there was very little retail, leisure and office floorspace outside of the centre that could compete with it. However, the main leisure centre is located outside of it. Hoyland was also described as having limited potential for growth, with development of the Hoyland Centre and residential land on King Street already underway in 2010.
- 5.34 Retailer representation was also considered 'fair' with only one non-food multiple in the form of the Co-op Pharmacy present. Types of independent/specialist shops included a butcher, greengrocers, ladies fashion boutique, DIY store and florist. Hoyland Street Market also takes place every Tuesday and Saturday, with a further secondhand market on Thursday mornings. Products for sale include fruit and vegetables, plants, pet supplies, clothes, shoes, jewellery, cards, stationary, household goods, and small electrical goods. The Co-op supermarket was considered the anchor store when it comes to food shopping, with additional stores being Fulton Foods, a butcher, three bakers, two greengrocers and two sandwich shops. Evidence of recent investment by retailers at the time was considered poor with no new major stores opening and a number of shop fronts in need of repair.
- 5.35 There were three vacant units present in 2010 which represents just 5% of the total; significantly below the national average at the time of 11%. There were also no long term undeveloped sites present at the time.
- 5.36 The SCSR determined that footfall was 'good', in part due to the visit taking part on one of the market days. Car parking was considered to be 'fair' with parking available to the rear of the Council offices and market places; parking was also free. Hoyland centre also had a high frequency bus route to Barnsley and additional routes to other nearby settlements such as Birdwell, Elsecar, Brampton, and Worsbrough.
- 5.37 As with Hoyland Common, DPP visited Hoyland in November 2021 to re-assess the health of the centre and shopping conditions. The health check included looking at the diversity of uses within the centre, the number of national retailers represented, pedestrian flows, the number of vacant units, overall accessibility, the quality of the environment, whether the centre feels safe for visitors/shoppers and the presence of any redevelopment sites.

- 5.38 In terms of existing convenience provision, Heron Foods was the main national retailer, complimented by a fruit and veg shop, Bargain Booze, and a butcher. Wider provision included a diverse range including B&M, Boyes department store, gift shops, home furnishings shops, medical centre, Well pharmacy, animal care, beauticians/salons, takeaways, travel agent, and sport therapy. In addition to this was Hoyland Street Market which continues to run on Tuesdays, Thursdays and Saturdays and includes a wide range of changing products.
- 5.39 Figure 5 below details the number and type of units within the centre, and their respective percentages, alongside the SCSR data.

	SCSR 2010		November 2021 Health Check		Difference	
	Number	Percentage	Number	Percentage	Number	Percentage
Convenience	12	20%	4	7%	-8	-13%
Comparison	19	32%	8	15%	-11	-17%
Total Retail	31	52%	12	22%	-19	-30%
Vacant Units	3	5%	2	4%	-1	-1%
Services						
Financial & Business	4	7%	3	6%	-1	-1%
Leisure Services	12	20%	15	28%	+3	+8%
Retail Services	10	17%	22	41%	+12	+24%
Total Services	26	43%	40	74%	+14	+31%
Total Retail and Service	60	100%	54	100%	-6	

Figure Five: Hoyland Health Check Statistics comparing the 2010 and 2021 health checks and the differences.

- 5.40 Similar to Hoyland Common, leisure services and retail services have increased, with the latter increasing by 120%. These have replaced traditional retailing in both convenience and comparison goods whilst the overall number of units has reduced by six since 2010.
- 5.41 Within this centre there were two vacant units identified: the first was part of the former Town Hall which consisted of 9,000sqft retail/leisure unit, the second was a kiosk to the rear of the B&M store which forms part of a wider group of kiosks. In addition to this, a 'multi-let investment opportunity' is advertised by Brownhill Vickers on Hall Street.
- 5.42 Pedestrian footfall during the site visit was high, in part due to it being a market day with this area seeing the bulk of pedestrian flows, alongside Boyes and Heron Foods. There were numerous parking options present during the centre visit with both free and pay and display options available. Buses are still present with frequent routes to Barnsley, Wombwell, and Worsbrough. The environmental quality of the centre was considered to be good with ample space for pedestrians and the one way system limiting traffic. The centre also felt safe due to the high footfall and CCTV around the centre. No development sites or areas for growth were found, although there is space immediately outside the centre boundary.
- 5.43 Overall, despite the reduction in units since 2010 and the loss of retail, the health of Hoyland Centre is considered to be good due to the increased diversification of the retail services and leisure offer. Vacant units are also few despite the Fulton Foods unit remaining unoccupied.

Appropriate Timeframe

- 5.44 Subject to planning approval it is estimated that that construction of the proposed development will start in late 2022. Upon completion and opening of the store it is also anticipated that there will be a period of 'settling in' before the store is considered to be trading at full capacity. As such, 2025 has been used as the 'design year' for the purposes of this assessment, which is within the 5-year period suggested by the PPG.

Turnover of Existing Stores and Centres

- 5.45 In accordance with the NPPG, the existing turnover figures have been established by calculating the benchmark turnover of existing stores and centres using the Global Data Foodstore Sales Densities December 2021 (for Tesco, Sainsbury's, Asda, Morrisons, M&S, Co-op, Iceland, Aldi, and Lidl) and Mintel Foodstore Densities August 2021 (for Farmfoods, Spar, Heron Foods, One Stop, McColls, Premier, Costcutter, B&M, and Home Bargains). Floorspace for stores has been calculated through review of planning applications, business rates figures, and previous listings combined with floor space mix outlined in the Global Data and Mintel reports. The benchmark turnover provides a baseline position which can be utilised to determine if stores are over- or under-trading.
- 5.46 The HHS then provides a more accurate position of local shopping patterns within the HHS area to determine the most popular convenience shopping destinations. For those stores within Hoyland and Hoyland Common centres, the HHS is considered to be an accurate representation

of existing turnover other than where no response was given. Turnover figures derived from the HHS have been calculated using the 2022 convenience expenditure for the area and assumes a 70/30 split between main food shopping and top-up shopping respectively. This results in £94.37m of expenditure for main food shops and £40.44m for top-up shopping. These figures have then been multiplied by the percentage of respondents who said that they shop at that store for both main and top-up shopping. For example, 42 respondents stated that they do their main food shopping at Aldi, Birdwell which, as a percentage, is 10.42% and therefore £9.83m of HHS main food shop expenditure. Similarly, 23 respondents stated that they do their top-up food shopping at the same store which, as a percentage, is 5.10% and therefore £2.49m of HHS top-up food shopping. Therefore the expenditure attributed to that store from the HHS is the total of these amounts, equating to £12.33m in this example.

5.47 The results of this show that Co-op Food within Hoyland Common and Heron Foods within Hoyland are both under-trading when compared to the benchmark figures. Other instances where the HHS turnover has been used rather than the benchmark include B&M Hoyland, 'Other Convenience' in Stairfoot, and M&S Queen Street in Barnsley.

5.48 On this basis, the following are the most popular convenience shopping destinations within the HHS:

- Morrisons, Lower Thomas Street, Barnsley (9.45% of main and top-up shopping)
- Aldi, Sheffield Road, Birdwell (8.82% of main and top-up shopping)
- Tesco Superstore, Wombwell Road, Hoyland (9.89% of main and top-up shopping)
- Tesco Extra, Wombwell Lane, Stairfoot (7.47% of main and top-up shopping)

5.49 In terms of the centres within the HHS area, the following table summarises the existing benchmark convenience and comparison turnovers in 2022 and 2025:

Centre	2022			2025		
	Conv	Comp	Total	Conv	Comp	Total
Hoyland Common Local Centre	£2.65m	£0.08m	£2.73m	£2.65m	£0.08m	£2.73m
Hoyland District Centre	£3.28m	£7.20m	£10.49m	£3.28m	£7.57m	£10.83m
Stairfoot Local Centre	£19.27m	£0.42m	£19.70m	£19.30m	£0.45m	£19.75m
Barnsley Town Centre	£153.38m	£53.34m	£206.72m	£153.07m	£56.20m	£209.27m

- 5.50 As can be seen from the above, and as expected, Barnsley Town Centre has the highest turnover within the HHS Area with Stairfoot Local Centre being second largest, primarily due to the presence of Aldi. Hoyland District and Hoyland Common Local centres then follow the hierarchy within the area.
- 5.51 Those stores that are on the edge of the HHS area are not correctly represented by the survey results due to the fact that they receive a significant of their turnover from outside of the HHS area. For example, Lidl Peel Street in Barnsley Town Centre receives just 23% of its benchmark turnover from the HHS area based on the HHS results. For these stores the benchmark turnover has been used. What this demonstrates is that there is a need for residents within the HHS area to travel outside of their immediate neighbourhood in order to conduct food shopping.
- 5.52 In addition, due to the PCA being smaller than the HHS area, there are a number of stores which fall outside of the PCA but draw trade from within it and will therefore be impacted by the proposed store.
- 5.53 Full details of the existing turnovers for all stores and centres within the HHS area can be found within Table 5 of the Retail Tables under Appendix 1.

Impact on Vitality and Viability

- 5.54 Lidl is a food retailer which predominantly sells convenience goods, such as grocery items, chilled and frozen food, and toiletries, with a small comparison offer that sells seasonal items which will vary throughout the year. Lidl's business model is to provide quality ingredients at low cost, often under-pricing the bigger chain stores such as Tesco, Asda, Morrisons, and Sainsbury's. However, this pricing structure is achieved through limited use of warehousing and therefore stock levels and items can vary from week to week and store to store.
- 5.55 In this regard, the retail unit will principally compete against other supermarkets and similarly priced retailers being a main food shopping destination. However, the changing stock levels and the size of the store will likely mean that the store is used for top-up shopping or that further top-up shopping is required following the main food shop at the store.
- 5.56 In order to undertake the impact workings, we have used the following methodology:
- Existing convenience turnover for stores in 2022 calculated using household data survey results or benchmark figures where appropriate
 - Convenience turnover has been grown to 2025 using Experian Retail Planner Briefing Note 2022
- 5.57 In undertaking our assessment, we have followed Planning Practice Guidance in largely relying on the existing trading patterns and trends within the study area and then to apportion the trade diverted based upon the character of development, geographic location and brand loyalty factors.

- 5.58 As a result of this, Table 2 in Appendix 1 sets out the expected convenience trade diversion of the proposed development and the impact on the existing shopping destinations within the area. The total impact on a designated centre (accounting for any stores within that centre, listed above the total) is shown in **bold**.
- 5.59 As reflected in Table 8, it is anticipated that the majority of the proposal's turnover will be diverted from the most popular main food convenience destinations both within and outside of the PCA.
- 5.60 The majority of trade in monetary terms will be diverted from the nearby Aldi on Sheffield Road, Birdwell approximately 450 metres west of the proposed store (**£1.6m**), the Tesco Superstore on Wombwell Road, Hoyland (**£1m**), and Asda Thomas Street, Worsbrough (**£0.9m**). This reflects the shopping patterns found in the Household Survey and the fact these are the main retailers within the area. Additional stores that are anticipated to see trade diversions of over £0.5m are Lidl Wombwell (**£0.8m**), Asda Chapeltown (**£0.8m**), Aldi Stairfoot (**£0.7m**), Jack's Stairfoot (**£0.7m**), Tesco Extra Stairfoot (**£0.6m**), and Lidl Peel Street, Barnsley (**£0.6m**). All of these were popular destinations within the Household Survey.
- 5.61 We have not anticipated any trade draw from beyond the Household Survey Study Area due to the high number of retailers and offer available within and on the boundaries of this zone which are unlikely to warrant trips beyond it.
- 5.62 With regards to Hoyland Common Local Centre, we anticipate all trade diversion to be from the Co-op (**£184k**) due to loss of top-up shopping. However, it is expected that the Co-op will continue its role as a local convenience store for top-up shopping as opposed to the main shopping offer of the proposed store. For the other local convenience and comparison stores within the centre, we do not anticipate any overall impact due to the fact that these are specialist independents whose offer is different to that of the proposed store. Such stores include a fishing tackle shop, auto-part shop, charity shop, clothes shop, interiors shop, and pharmacy. It is therefore anticipated that the overall impact on Hoyland Common Local Centre will be **6.75% (£184k)**. As all of this impact will be on the Co-op Food unit and mainly for convenience goods, the proposed development is not considered to be a threat to the health of the centre which are independent stores that specialise in areas which the proposed store does not. As such, there will be not be a significant adverse impact to the health of Hoyland Common Local Centre.
- 5.63 With regards to Hoyland District Centre, we anticipate trade draw from Heron Foods (**£1784k**) due to the similarities in convenience offer and B&M (**£31k**) due to the similar comparison offer. Similarly to Hoyland Common, the remaining stores are considered to be specialist independents which will be largely unaffected by the proposed store due to the goods on offer. The Boyes department store, furniture shops, clothes shops, gift shops, and flower shop all sell items that will not be present in the proposed store other than occasional seasonal items. Hoyland Market will also continue to be a major draw for footfall and visitors to the area and again offers goods that cannot be replicated in the proposed store. It is therefore anticipated that the overall impact

on Hoyland District Centre will be **2.13% (£232k)**. This is sufficiently low enough to have no adverse impacts on the health of the centre nor impact its viability and vitality. Hoyland District Centre will continue to be the main location for comparison shopping in the area, complimented by the retail services offer available.

- 5.64 With regards to Stairfoot Local Centre, we anticipate trade draw of **£737k** from the only major retailer within the centre which is that of Aldi. This is due to the similarities to the discount retailer intended at the proposed store and similarities in both offer and business model. Due to the distance between the proposed site and Stairfoot this results in a reduced trade draw when compared to the Aldi on Sheffield Road, Birdwell. A similar rhetoric is used for the smaller independent convenience and comparison stores within the Local Centre which consist of a bakery, vape shop, McColl's, and newsagents. The nature of these as 'true' convenience stores means that shoppers are unlikely to deviate to the proposed store for small items when Stairfoot is closer. It is therefore anticipated that the overall impact on Stairfoot Local Centre will be **3.76%**. This represents a low impact on the centre thus protecting its vitality and viability.
- 5.65 Regarding Barnsley Town Centre, we do not anticipate a large amount of trade diversion to the new store due to the distance of the centre from the site. In addition, the more comprehensive offer available within the centre, which includes a large range of comparison goods as well as leisure and services not present in other centres, increases the attractiveness to shoppers and therefore means they are unlikely to travel to the proposed store for comparison goods unless nearby. Those stores that are anticipated to be impacted upon most are Lidl, Peel Street (**£631k**), Morrisons, Lower Thomas Street (**£316k**), M&S, Queen Street (**£210k**), and the two Iceland stores on Peel Street and within the Alhambra (both (**£105k**)). It is therefore anticipated that the overall impact on Barnsley Town Centre will be **0.67%**. This represents a negligible impact on Barnsley Town Centre due to the distance from the proposed store and the variety of goods on offer. The appeal of Barnsley Town Centre is also boosted by the unrivalled leisure offer in the Borough which boasts a wide range of cafes, restaurants, pubs, and Barnsley Metrodome. The proposed development will therefore not adversely impact the centre as a whole.

Impact on Planned Investment

- 5.66 There are no committed developments of an appropriate scale or proximity to the site to be impacted upon by the proposed development. A new Lidl within the suburb of Chapeltown gained approval in 2021 and is currently planned to be opened early 2022, however as it is outside of both the HHS area and PCA it is not considered that there will be any conflict or cumulative impact. In addition, there are no allocations or proposed future expansions or renovations of retail centres within the Local Plan and within the PCA.
- 5.67 It is noted that there are significant allocations to the north, west, and south of Hoyland for both employment and residential uses and therefore the future need for retail in the area will subsequently increase once these are built.

Conclusion

- 5.68 The RIA has provided a robust and thorough assessment of the impact of the proposed development on designated centres within the PCA, and it is concluded that the impact on Hoyland District Centre, Hoyland Common Local Centre, Stairfoot Local Centre, and Barnsley Town Centre would be minimal and not of a level which would harm the vitality and viability of the centre.

6.0 Conclusions

- 6.1 This Retail Statement has been prepared on behalf of Lidl GB Ltd for a full application for the erection of a Lidl foodstore store, with associated plant, delivery bay, parking and landscaping on land to the north of Sheffield Road, Hoyland.
- 6.2 The Retail Impact Assessment has provided a robust and thorough assessment of the impact of the proposed development on designated centres within the primacy catchment of the proposed development, in accordance with paragraph 90 of the NPPF and policies TC1 and TC3 of the Barnsley Local Plan.
- 6.3 The assessment has confirmed that the impact on the designated centres within the PCA would be negligible and would not harm the vitality and viability of those centres. We are also unaware of any impact on existing, planned or committed private or public sector investment in any of these centres that would be impacted. Conversely the proposed development constitutes a major investment and will increase consumer choice within the area.
- 6.4 The Sequential Assessment has examined a number of sites within the PCA for their suitability for the proposed development, however no sequentially preferable sites have been identified either within or on the edge of any designated centres.
- 6.5 Overall, it is considered that both the sequential test and the Retail Impact Assessments as set out within the NPPF have been passed.

Appendix 1 – Retail Tables

TABLE 1 - POPULATION

	2019	2020	2021	2022	2023	2024	2025
TOTAL	66,745	67,084	67,528	67,934	68,311	68,684	68,990

Table 1 Notes

Source: Experian Retail Planner Report for Catchment Area. November 2021.

TABLE 2A- PER CAPITA CONVENIENCE EXPENDITURE (£)

	2019	2020	2021	2022	2023	2024	2025
	2,087	2,237	2,134	2,104	2,100	2,096	2,094
Growth Rate		1.072	0.954	0.986	0.998	0.998	0.999
Total Per Capita Expenditure		2,237	2,134	2,104	2,100	2,096	2,094

Table 2A Notes

Source: 2019 figure from Experian Retail Planner Report for Catchment Area. 2020-2024 figures based on growth rates taken from Experian Retail Planner Briefing Note 19 (January 2022) Appendix 3: Figure 6 'Growth in sales volumes (retail spend) per head 2010-40 (% per annum) total'.

TABLE 2B - PER CAPITA CONVENIENCE EXPENDITURE (£) ADJUSTED FOR SFT

	2019	2020	2021	2022	2023	2024	2025
	2,001	2,116	2,000	1,985	1,974	1,964	1,958
Annual Deduction	4.10%	5.40%	6.30%	5.70%	6.00%	6.30%	6.50%
Multiplier	0.959	0.946	0.937	0.943	0.940	0.937	0.935
Expenditure	2,001	2,116	2,000	1,985	1,974	1,964	1,958

Table 2B Notes

Source: Reduction for Non Retail Forms of Trading taken from yearly rates contained in Experian Retail Planner Briefing Note 19 (January 2022), Appendix 3, Figure 5: 'Estimated and projected market share of non-store retail sales', 'Adjusted for SFT sales from stores' column.

TABLE 3A - PER CAPITA COMPARISON EXPENDITURE (£)

	2019	2020	2021	2022	2023	2024	2025
All	3,206	2,962	2,977	3,153	3,210	3,267	3,329
Growth Rate		0.924	1.005	1.059	1.018	1.018	1.019

Table 3A Notes

Source: 2019 figure from Experian Retail Planner Report for Catchment Area. 2020-2024 figures based on growth rates taken from Experian Retail Planner Briefing Note 19 (January 2022) Appendix 3: Figure 6 'Growth in sales volumes (retail spend) per head 2010-2040 (% per annum) total'

TABLE 3B - PER CAPITA COMPARISON EXPENDITURE (£) ADJUSTED FOR SFT

	2019	2020	2021	2022	2023	2024	2025
All	2,623	2,204	2,185	2,399	2,417	2,437	2,460
Annual Deduction	18.20%	25.60%	26.60%	23.90%	24.70%	25.40%	26.10%
Multiplier	0.818	0.744	0.734	0.761	0.753	0.746	0.739
Total Per Capita	2,623	2,204	2,185	2,399	2,417	2,437	2,460

Table 3B Notes

Source: Reduction for Non Retail Forms of Trading taken from yearly rates contained in Experian Retail Planner Briefing Note 18 (October 2020), Appendix 3, Figure 5: 'Estimated and projected market share of non-store retail sales', 'Adjusted for SFT sales from stores' column.

TABLE 4A TOTAL AVAILABLE CONVENIENCE EXPENDITURE (£)

	2019	2020	2021	2022	2023	2024	2025
All	£ 133,585,646	£ 141,980,049	£ 135,048,289	£ 134,815,990	£ 134,862,610	£ 134,895,908	£ 135,072,473
TOTAL	£ 133,585,646	£ 141,980,049	£ 135,048,289	£ 134,815,990	£ 134,862,610	£ 134,895,908	£ 135,072,473

TABLE 4B TOTAL AVAILABLE COMPARISON EXPENDITURE (£)

	2019	2020	2021	2022	2023	2024	2025
All	£ 175,039,296	£ 147,852,058	£ 147,564,367	£ 162,993,151	£ 165,093,855	£ 167,412,343	£ 169,745,330
TOTAL	£ 175,039,296	£ 147,852,058	£ 147,564,367	£ 162,993,151	£ 165,093,855	£ 167,412,343	£ 169,745,330

Tables 4A and 4B Notes

Source: Experian Comparison Report for Catchment Area November 2021.

TABLE 5 - TURNOVER OF THE PROPOSAL

Lidl Store	Net Sales Area (sqm)	Sales Density (£ p.sq.m.)	Turnover at 2022 (£m)	Turnover at 2025 (£m)
Convenience	1,014	8,883	9.00	9.22
Comparison	253	4,789	1.21	1.30
Totals	1,267		10.22	10.52

Notes:

2019 Prices

Convenience/comparison floorspace split informed by Lidl at 80/20%

Sales Densities taken from Global Data Foodstore Sales Densities - December 2021

Convenience Turnover 2019-2025 grown using Retail Planner Briefing Note 19 January 2022

Comparison Turnover 2019-2025 grown using Retail Planner Briefing Note 19 January 2022

TABLE 6 - TURNOVER OF EXISTING STORES
AND CENTRES

	Net Floorspace (sq.m.)	Floorspace Split		Convenience							Comparison						Total		
		Convenience	Comparison	Net Sales Area (sqm)	Sales Density (£/sqm)	Benchmark Turnover @ 2022 (£m)	Benchmark Turnover @ 2025 (£m)	HHS Turnover 2022	HHS Turnover at 2025		Net Sales Area (sqm)	Sales Density (£/sqm)	Turnover @ 2022 (£m)	Benchmark Turnover @ 2025 (£m)	HHS Turnover 2022	HHS Turnover at 2025	Total Turnover @ 2022 (£m)	Total Turnover @ 2025 (£m)	
Growth Rate							1.000		1.000				1.029	1.019		1.014			
Allocated Centres within the Study Area																			
Hoyland Common Local Centre																			
Co-op Food, Hoyland Road	321	299	22	299	11,169	£ 3,340,388	£ 3,333,707	£ 2,594,746	£ 2,589,556		22	9,043	£ 204,653	£ 218,456	£ -	£ -	£ 2,594,746	£ 2,589,556	
Other Convenience				19	3,000	£ 56,400	£ 56,287									£ -	£ 56,400	£ 56,287	
Other Comparison											20	4,000	£ 80,674	£ 86,114		£ -	£ 80,674	£ 86,114	
Total						£ 3,396,788	£ 3,389,994	£ 3,020,868	£ 3,014,826				£ 285,327	£ 304,570		£ -	£ 2,731,819	£ 2,731,958	
Hoyland District Centre																			
B&M, Market Street, Hoyland					3,544		£ -	£ 426,122	£ 425,270		0	3,575			£ -	£ -	£ 426,122	£ 425,270	
Heron Foods	267	267	0	267	9,735	£ 2,603,139	£ 2,597,933	£ 1,921,140	£ 1,917,298		0	9,821	£ -	£ -	£ -	£ -	£ 1,921,140	£ 1,917,298	
Other Convenience				269	3,500	£ 941,360	£ 939,477						£ -	£ -		£ -	£ 941,360	£ 939,477	
Other Comparison											693	4,500	£ 3,210,388	£ 3,426,907	£ 7,198,265	£ 7,571,514	£ 7,198,265	£ 7,571,514	
Total						£ 3,544,499	£ 3,537,410	£ 1,921,140	£ 1,917,298				£ 3,210,388	£ 3,426,907		£ -	£ 10,486,887	£ 10,853,559	
Stairfoot Local Centre																			
Aldi, Doncaster Road	1,688	1,600	89	1,600	11,199	£ 17,914,341	£ 17,878,512	£ 3,270,114	£ 3,263,573		89	7,876	£ 719,772	£ 768,316	£ -	£ -	£ 18,613,828	£ 18,646,828	
Other Convenience				219	3,000	£ 657,900	£ 656,584						£ -	£ -		£ -	£ 657,900	£ 656,584	
Other Comparison											43	4,000	£ 177,770	£ 189,759	£ 423,315	£ 445,265	£ 423,315	£ 445,265	
Total						£ 18,572,241	£ 18,535,096	£ 3,270,114	£ 3,263,573				£ 897,542	£ 958,075	£ 423,315	£ 445,265	£ 19,695,043	£ 19,748,677	
Barnsley Town Centre																			
Morrisons, Lower Thomas Street	6,076	5,287	789	5,287	13,154	£ 69,549,607	£ 69,410,508	£ 12,903,578	£ 12,877,771		789	6,369	£ 5,168,673	£ 5,517,265	£ 564,632	£ 593,910	£ 74,718,281	£ 74,927,773	
Lidl, Peel Street	1,596	1,497	98	1,497	8,883	£ 13,299,863	£ 13,273,264	£ 3,044,949	£ 3,038,859		98	4,789	£ 485,167	£ 517,888	£ -	£ -	£ 13,785,030	£ 13,791,152	
M&S, Queen Street	3,927	3,849	79	3,849	11,275	£ 43,393,596	£ 43,306,809	£ 2,533,992	£ 2,528,924		79	9,033	£ 730,063	£ 779,301	£ 1,693,897	£ 1,781,730	£ 4,227,889	£ 4,310,654	
Iceland, Alhambra Centre	802	730	72	730	7,568	£ 5,523,278	£ 5,512,231	£ 526,618	£ 525,565		72	2,651	£ 196,898	£ 210,178	£ -	£ -	£ 5,720,176	£ 5,722,409	
Iceland, Peel Street	459	434	25	434	7,568	£ 3,283,373	£ 3,276,806	£ 1,263,194	£ 1,260,668		25	2,651	£ 68,880	£ 73,526	£ -	£ -	£ 3,352,253	£ 3,350,332	
Other Convenience						£ 59,188,331	£ 59,069,954	£ -	£ -				£ -			£ -	£ 59,188,331	£ 59,069,954	
Other Comparison												5,500	£ 164,255,745	£ 175,333,688	£ 45,731,392	£ 48,102,684	£ 45,731,392	£ 48,102,684	
Total						£ 194,238,048	£ 193,849,572	£ 20,272,331	£ 20,231,786				£ 170,905,427	£ 182,431,847	£ 47,989,921	£ 50,478,324	£ 206,723,352	£ 209,274,959	
Totals		13,963	1,174	14,470		£ 245,265,103	£ 244,774,573	£ 56,968,905	£ 56,854,967		1,174	9,230	£ 175,298,684	£ 187,121,399	£ 56,034,816	£ 58,940,368	£ 239,637,101	£ 242,609,152	
Totals							£ -					0	£ -	£ -	£ -	£ -	£ 6,825,000	£ 6,811,350	
Company Shop, Tankersley	1,365	1,365	0	1,365	5,000	£ 6,825,000	£ 6,811,350	£ -	£ -										
Aldi, Sheffield Road, Birdwell	1,688	1,600	89	1,600	11,199	£ 17,914,341	£ 17,878,512	£ 12,328,217	£ 12,303,561		89	7,876	£ 719,772	£ 768,316	£ -	£ -	£ 18,634,113	£ 18,646,828	
One Stop, Hoyland	348	348	0	348	10,612	£ 3,693,126	£ 3,685,740	£ 216,618	£ 216,185		0	10,623	£ -	£ -	£ -	£ -	£ 3,693,126	£ 3,685,740	
Tesco Superstore, Wombwell Road, Hoyland	2,637	2,161	476	2,161	14,304	£ 30,910,175	£ 30,848,355	£ 13,931,300	£ 13,903,437		476	8,722	£ 4,274,617	£ 4,562,911	£ -	£ -	£ 35,184,792	£ 35,411,266	
McColl's, Birdwell	107	107	0	107	5,515	£ 589,567	£ 588,387	£ -	£ -		0	5,677	£ -	£ -	£ -	£ -	£ 589,567	£ 588,387	
McColl's, High Street, Worsbrough	68	68	0	68	5,515	£ 376,131	£ 375,379	£ 108,553	£ 108,336		0	5,677	£ -	£ -	£ -	£ -	£ 376,131	£ 375,379	
Asda, Thomas Street, Worsbrough	919	681	238	681	14,480	£ 9,859,674	£ 9,839,955	£ 5,205,970	£ 5,195,558		238	5,959	£ 1,460,127	£ 1,558,603	£ 282,634	£ 297,289	£ 11,319,801	£ 11,398,558	
Premier, Worsbrough	57	57	0	57	6,265	£ 357,105	£ 356,391	£ -	£ -		0	6,320	£ -	£ -	£ -	£ -	£ 357,105	£ 356,391	
Tesco Extra, Wombwell Lane, Stairfoot	10,548	8,643	1,905	8,643	14,304	£ 123,635,075	£ 123,387,805	£ 10,298,524	£ 10,277,927		1,905	8,722	£ 17,097,690	£ 18,250,814	£ 3,528,474	£ 3,711,435	£ 140,732,765	£ 141,638,619	
Jack's Stairfoot	1,149	977	172	977	8,128	£ 7,941,056	£ 7,925,174	£ -	£ -		172	6,920	£ 1,224,757	£ 1,307,359	£ -	£ -	£ 9,165,813	£ 9,232,532	
Co-op, Keresforth Hill Road, Kingstone	280	261	19	261	11,169	£ 2,913,099	£ 2,907,272	£ 2,594,746	£ 2,589,556		19	9,043	£ 178,475	£ 190,512	£ -	£ -	£ 3,091,573	£ 3,097,784	
Village Store, Thorpe Hesley	39	39	0	39	3,000	£ 115,800	£ 115,568	£ -	£ -		0	3,000	£ -	£ -	£ -	£ -	£ 115,800	£ 115,568	
Premier, Doncaster Road	57	57	0	57	6,265	£ 359,736	£ 359,017	£ 108,553	£ 108,336		0	6,320	£ -	£ -	£ -	£ -	£ 359,736	£ 359,017	
Birdwell						£ -	£ -	£ 426,122	£ 425,270		0	3,000	£ -		£ 423,952	£ 445,935	£ -	£ -	
Totals		30,327	4,073	30,834		£ 450,754,989	£ 449,853,479	£ 102,187,508	£ 158,838,100		4,073		£ 550,851,490	£ 588,002,710	£ 164,294,613	£ 172,813,719	£ 230,445,323	£ 231,717,420	
Commitments within the Study Area																£ -	£ -	£ -	
None																£ -	£ -	£ -	
Other Locations outside the Study Area																£ -	£ -	£ -	
Aldi, The Common, Ecclesfield	1,435	1,360	75	1,360	11,199	£ 15,232,646	£ 15,202,180	£ 1,363,690	£ 1,360,963		75	7,876	£ 606,379	£ 647,275	£ -	£ -	£ 1,363,690	£ 1,360,963	
Aldi, Old Mill Lane, Barnsley	1,108	1,050	58	1,050	11,199	£ 11,761,513	£ 11,737,990	£ 844,186	£ 842,498		58	7,876	£ 468,200	£ 463,650	£ -	£ -	£ 844,186	£ 842,498	
Aldi, Great Eastern Way, Parkgate, Rotherham	1,527	1,447	80	1,447	11,199	£ 16,210,083	£ 16,177,663	£ 418,064	£ 417,228		80	7,876	£ 645,288	£ 639,017	£ -	£ -	£ 418,064	£ 417,228	
Aldi, Park Street, Masbrough	1,324	1,255	69	1,255	11,199	£ 14,058,511	£ 14,030,394	£ 851,789	£ 850,086		69	7,876	£ 559,639	£ 554,200		£ -	£ 851,789	£ 850,086	
Aldi, Claycliffe Road, Barnsley	1,783	1,690	93	1,690	11,199	£ 18,926,695	£ 18,888,842	£ 1,046,577	£ 1,044,483		93	7,876	£ 753,431	£ 746,109	£ -	£ -	£ 1,046,577	£ 1,044,483	
Asda, Market Street, Chapeltown	5,798	4,295	1,502	4,295	14,480	£ 62,196,925	£ 62,072,531	£ 6,292,288	£ 6,279,704		1,502	5,959	£ 9,210,791	£ 9,121,279	£ 847,267	£ 891,200	£ 7,139,555	£ 7,170,904	
Asda, High Street, Wath Upon Dearne	1,099	814	285	814	14,480	£ 11,793,116	£ 11,769,530	£ 209,504	£ 209,085		285	5,959	£ 1,746,452	£ 1,729,479	£ -	£ -	£ 209,504	£ 209,085	
Asda, Old Mill Lane, Barnsley	8,446	6,258	2,188	6,258	14,480	£ 90,609,575	£ 90,428,355	£ 4,928,598	£ 4,918,741		2,188	5,959	£ 13,418,442	£ 13,288,040	£ 1,270,582	£ 1,336,465	£ 6,199,180	£ 6,255,206	

TABLE 7 TRADE DRAW

		Convenience			Comparison			Total
Study Area Zone		Total Convenience Expenditure at 2025	Trade Draw (%) of Store Turnover	Trade Draw £m	Total Comparison Expenditure at 2025	Trade Draw (%) of Store Turnover	Trade Draw £m	
Study Area		135,072,473	100%	9,220,107	169,745,330	100%	1,301,743	10,521,851
Beyond			0%	0		0%	0	0
TOTALS		135,072,473	100%	9,220,107	169,745,330	100%	1,301,743	10,521,851

TABLE 8 - TRADE DIVERSION AND IMPACT

	Estimated 2025 Convenience Turnover	Estimated 2025 Comparison Turnover	Total 2025 Turnover	Convenience Trade Diversion (£)	Comparison trade Diversion (£)	Total Trade Diversion (£)	Total Turnover Post Construction (£)	Impact (%)
				£ 9,220,107	£ 1,301,743			
Allocated Centres within the Study Area								
Hoyland Common Local Centre								
Co-op Food, Hoyland Road	£2,589,556	£0	£2,589,556	£184,402	£0	£184,402	2,405,154	7.12%
Other Convenience	£56,287	£0	£56,287	£0	£0	£0	56,287	0.00%
Other Comparison	£0	£86,114	£86,114	£0	£0	£0	86,114	0.00%
Total	£2,645,844	£86,114	£2,731,958	£184,402	£0	£184,402	2,547,556	6.75%
Hoyland District Centre								
B&M, Market Street, Hoyland	£425,270	£0	£425,270	£18,440	£13,017	£31,458	393,812	7.40%
Heron Foods	£1,917,298	£0	£1,917,298	£184,402	£0	£184,402	1,732,895	9.62%
Other Convenience	£939,477	£0	£939,477	£9,220	£0	£9,220	930,257	0.98%
Other Comparison	£0	£7,571,514	£7,571,514	£0	£6,509	£6,509	7,565,005	0.09%
Total	£3,282,045	£7,571,514	£10,853,559	£212,062	£19,526	£231,589	10,621,970	2.13%
Stairfoot Local Centre								
Aldi, Doncaster Road	£17,878,512	£768,316	£18,646,828	£645,408	£91,122	£736,530	17,910,298	3.95%
Other Convenience	£656,584	£0	£656,584	£4,610	£0	£4,610	651,974	0.70%
Other Comparison	£0	£445,265	£445,265	£0	£651	£651	444,614	0.15%
Total	£18,535,096	£1,213,581	£19,748,677	£650,018	£91,773	£741,790	19,006,887	3.76%
Barnsley Town Centre								
Morrisons, Lower Thomas Street	£69,410,508	£5,517,265	£74,927,773	£276,603	£39,052	£315,656	74,612,118	0.42%
Lidl, Peel Street	£13,273,264	£517,888	£13,791,152	£553,206	£78,105	£631,311	13,159,841	4.58%
M&S, Queen Street	£2,528,924	£1,781,730	£4,310,654	£184,402	£26,035	£210,437	4,100,217	4.88%
Iceland, Alhambra Centre	£5,512,231	£210,178	£5,722,409	£92,201	£13,017	£105,219	5,617,190	1.84%
Iceland, Peel Street	£3,276,806	£73,526	£3,350,332	£92,201	£13,017	£105,219	3,245,114	3.14%
Other Convenience	£59,069,954	£0	£59,069,954	£9,220	£0	£9,220	59,060,734	0.02%
Other Comparison	£0	£48,102,684	£48,102,684	£0	£26,035	£26,035	48,076,650	0.05%
Total	£153,071,687	£56,203,272	£209,274,959	£1,207,834	£195,261	£1,403,096	207,871,863	0.67%
Out of centre locations within the Study Area								
Company Shop, Tankersley	£6,811,350	£0	£6,811,350	£184,402	£0	£184,402	6,626,948	2.71%
Aldi, Sheffield Road, Birdwell	£17,878,512	£768,316	£18,646,828	£1,383,016	£195,261	£1,578,278	17,068,550	8.46%
One Stop, Hoyland	£3,685,740	£0	£3,685,740	£36,880	£0	£36,880	3,648,859	1.00%
Tesco Superstore, Wombwell Road, Hoyland	£30,848,355	£4,562,911	£35,411,266	£922,011	£130,174	£1,052,185	34,359,081	2.97%
McColl's, Birdwell	£588,387	£0	£588,387	£36,880	£0	£36,880	551,507	6.27%
McColl's, High Street, Worsbrough	£375,379	£0	£375,379	£36,880	£0	£36,880	338,499	9.82%
Asda, Thomas Street, Worsbrough	£9,839,955	£1,558,603	£11,398,558	£783,709	£130,174	£913,883	10,484,674	8.02%
Premier, Worsbrough	£356,391	£0	£356,391	£36,880	£0	£36,880	319,510	10.35%
Tesco Extra, Wombwell Lane, Stairfoot	£123,387,805	£18,250,814	£141,638,619	£553,206	£104,139	£657,346	140,981,273	0.46%

Jack's Stairfoot	£7,925,174	£1,307,359	£9,232,532	£645,408	£52,070	£697,477	8,535,055	7.55%
Co-op, Keresforth Hill Road, Kingstone	£2,907,272	£190,512	£3,097,784	£36,880	£0	£36,880	3,060,904	1.19%
Village Store, Thorpe Hesley	£115,568	£0	£115,568	£9,220	£0	£9,220	106,348	7.98%
Premier, Doncaster Road	£359,017	£0	£359,017	£36,880	£0	£36,880	322,136	10.27%
Birdwell	£0	£0	£0	£0	£0	£0	0	
Total	£205,078,906	£26,638,514	£231,717,420	£4,702,255	£611,819	£5,314,074	226,403,346	2.29%
Totals	£382,613,577	£91,712,995	£474,326,572	£6,956,571	£918,380	£7,874,951	466,451,621	1.66%
Commitments within the PCA								
Other Locations outside the PCA								
Aldi, The Common, Ecclesfield	£15,202,180	£647,275	£15,849,455	£46,101	£6,509	£52,609	15,796,846	0.33%
Aldi, Old Mill Lane, Barnsley	£11,737,990	£463,650	£12,201,641	£46,101	£6,509	£52,609	12,149,031	0.43%
Aldi, Great Eastern Way, Parkgate, Rotherham	£16,177,663	£639,017	£16,816,680	£0	£0	£0	16,816,680	0.00%
Aldi, Park Street, Masbrough	£14,030,394	£554,200	£14,584,595	£0	£0	£0	14,584,595	0.00%
Aldi, Claycliffe Road, Barnsley	£18,888,842	£746,109	£19,634,951	£0	£0	£0	19,634,951	0.00%
Asda, Market Street, Chapeltown	£62,072,531	£9,121,279	£71,193,810	£737,609	£104,139	£841,748	70,352,062	1.18%
Asda, High Street, Wath Upon Dearne	£11,769,530	£1,729,479	£13,499,010	£0	£0	£0	13,499,010	0.00%
Asda, Old Mill Lane, Barnsley	£90,428,355	£13,288,040	£103,716,395	£0	£0	£0	103,716,395	0.00%
Asda, Chaucer Road, Parson Cross, Sheffield	£83,832,982	£12,318,879	£96,151,861	£0	£0	£0	96,151,861	0.00%
Asda, High Street, Grimethorpe, Barnsley	£9,508,687	£1,397,259	£10,905,946	£0	£0	£0	10,905,946	0.00%
Farmfoods, Rotherham Road, Barnsley	£3,889,599	£0	£3,889,599	£0	£0	£0	3,889,599	0.00%
Iceland, Peel Centre Retail Park, Barnsley	£7,298,781	£203,145	£7,501,926	£0	£0	£0	7,501,926	0.00%
Lidl, Mitchell's Way, Wombwell	£11,845,187	£428,760	£12,273,947	£737,609	£104,139	£841,748	11,432,199	6.86%
Marks & Spencer, Cortonwood, Brampton	£11,454,994	£0	£11,454,994	£184,402	£26,035	£210,437	11,244,557	1.84%
Morrisons, Corton Wood, Brampton	£68,329,530	£13,006,879	£81,336,409	£368,804	£52,070	£420,874	80,915,535	0.52%
Morrisons, Stadium Way, Parkgate, Rotherham	£75,745,932	£14,418,629	£90,164,561	£0	£0	£0	90,164,561	0.00%
Sainsbury's Local, Helens Way, Barnsley	£2,835,757	£0	£2,835,757	£0	£0	£0	2,835,757	0.00%
Tesco Extra, Biscay Way, Wath-upon-Dearne	£45,925,413	£33,700,774	£79,626,187	£46,101	£6,509	£52,609	79,573,578	0.07%
Morrisons, The Common, Ecclesfield, Sheffield	£60,711,148	£11,556,680	£72,267,828	£92,201	£13,017	£105,219	72,162,609	0.15%
Aldi, Colliery Avenue, Wath upon Dearne S63 7EX	£14,878,269	£1,401,936	£16,280,206	£0	£0	£0	16,280,206	0.00%
Asda, Dewsbury Road, Wakefield, WF2 9BL	£16,265,869	£449,437	£16,715,307	£0	£0	£0	16,715,307	0.00%
Asda, Handsworth Road, Handsworth, Sheffield, S13 9LR	£83,196,785	£35,380,715	£118,577,500	£0	£0	£0	118,577,500	0.00%
Costco, The Parkway, Parkway Drive, Sheffield, S9 4WU	£209,085	£593,910	£802,995	£0	£0	£0	802,995	0.00%
Lidl, Catley Rd, Darnall, Sheffield S9 5JA	£13,223,108	£728,685	£13,951,793	£0	£0	£0	13,951,793	0.00%
M&S, Meadowhall Shopping Centre, Sheffield	£627,568	£0	£627,568	£0	£0	£0	627,568	0.00%
Sainsbury's, Clay Wheels Ln, Sheffield S6 1LZ	£61,077,957	£21,928,941	£83,006,897	£0	£0	£0	83,006,897	0.00%
Tesco Extra, Drummond St, Rotherham S65 1HY	£65,007,312	£40,961,517	£105,968,829	£0	£0	£0	105,968,829	0.00%
Lidl Chapeltown [Under Construction]	£8,989,347	£1,234,638	£10,223,985	£4,610	£651	£5,261	10,218,724	0.05%
Other	£21,841,863	£67,456,328	£89,298,190	£0	£63,785	£63,785	89,234,405	0.07%
Outside PCA Total	£907,002,659	£284,356,161	£1,191,358,820	£2,263,536	£383,363	£2,646,900	1,188,711,920	0.22%
Overall Totals	£1,289,616,236	£376,069,156	£1,665,685,392	£9,220,107	£1,301,743	£10,521,851	1,655,163,541	0.63%

Appendix 2 – Household Survey Questionnaire

Job No: 131121
Hoyland Household Survey

Good morning / afternoon / evening, I am from NEMS market research and we are conducting a short survey in your area about shopping. Do you have time to answer some questions? It will take about 6-7 minutes.

QA Are you the main shopper, or joint main shopper in your household?

- 1 Yes - start questionnaire
2 No - ask if main shopper is available, if not - Close

PC Could you please provide your post code?
RECORD POSTCODE - CHECK POSTCODE IS WITHIN STUDY CATCHMENT

READ OUT: We now have a few questions about where you go food shopping. In answering these questions the location may be a store, a centre, a specific road or area, or the internet.

Q01 Where do you usually undertake your household's main food shopping?
DO NOT READ OUT. ONE ANSWER ONLY. IF THEY SAY VARIES ASK IF THERE'S SOMEWHERE THEY USE MORE OFTEN, EVEN IF SLIGHTLY.

#Food Food Shopping List
Internet / delivered
(Don't know / varies)
(Don't do this type of shopping)

GO TO Q03
GO TO Q02
CLOSE
CLOSE

Those who do their main food shopping via the Internet at Q01

Q02 Which internet / home delivery retailer do you usually use for your main food shopping?
DO NOT READ OUT. ONE ANSWER ONLY

- 1 Amazon
2 Asda
3 Co-op
4 Iceland
5 Morrisons
6 Ocado
7 Riverford
8 Sainsbury's
9 Tesco
A Waitrose
B Other (PLEASE WRITE IN)
C (Don't know / varies)

Q03 What is the MAIN reason you choose (LOCATION MENTIONED AT Q01) for your main food shopping?
DO NOT READ OUT. ONE ANSWER ONLY

#FReasons Food Shopping Reasons List

Excluding those who do their main food shopping via the Internet at Q01

Q04 How do you normally travel when you do your main food shopping at (LOCATION MENTIONED AT Q01)?
DO NOT READ OUT. ONE ANSWER ONLY

- 1 Car - driver
2 Car - passenger
3 Bicycle
4 Bus
5 Disability vehicle (e.g. mobility scooter, wheelchair)
6 Motorbike / moped
7 Park & Ride
8 Taxi
9 Train
A Walk
B Other (PLEASE WRITE IN)
C (Don't know / varies)

Excluding those who do their main food shopping via the Internet at Q01

Q05 How long does it normally take to travel to (LOCATION MENTIONED AT Q01)?
DO NOT READ OUT. ONE ANSWER ONLY

- X Amount of time taken to nearest whole minute (PLEASE WRITE IN)
Y (Don't know / can't remember)
Z (Refused)

Q06 How often do you normally do your main food shopping at (LOCATION MENTIONED AT Q01)?
DO NOT READ OUT. ONE ANSWER ONLY

- 1 7 times a week
2 5 - 6 times a week
3 3 - 4 times a week
4 Twice a week
5 Once a week
6 Once every two weeks
7 Once a month
8 Once every two months
9 Less often
A (Don't know / varies)

Q07 How much do you normally spend on your main food shopping trip to (LOCATION MENTIONED AT Q01)?
PLEASE WRITE IN TO THE NEAREST £

- X To the nearest £: (PLEASE WRITE IN)
Y (Don't know / varies)
Z (Refused)

Excluding those who do their main food shopping via the Internet at Q01

Q08 When you undertake your main food and grocery shopping at (LOCATION MENTIONED AT Q01), do you or other members of your household usually visit other shops, services, or leisure facilities on the same shopping trip?
DO NOT READ OUT. CAN BE MULTICODED. PROBE FULLY. Anything else?

- 1 Yes - NON-FOOD shopping
2 Yes - other FOOD shopping
3 Yes - visiting the market
4 Yes - visiting service such as post office / bank / financial institutions etc.
5 Yes - visiting health service such as doctor, dentist, hospital
6 Yes - visiting other service such as laundrette, hairdresser, recycling
7 Yes - leisure activity (e.g. leisure centre, gym, cinema, park, etc)
8 Yes - buy fuel
9 Yes - travelling to or from work / education
A Yes - visiting bars / cafés / restaurants
B Yes - visiting church / place of worship
C Yes - visiting friends or family
D Yes - visiting library
E Yes - window shopping / browsing
F Yes - Other (PLEASE WRITE IN)
G (No)
H (Don't know)

Q09 Apart from (LOCATION MENTIONED AT Q01), where else do you do your household's main food shopping?
DO NOT READ OUT. ONE ANSWER ONLY. IF THEY SAY VARIES ASK IF THERE'S SOMEWHERE THEY USE MORE OFTEN, EVEN IF SLIGHTLY.

#Food Food Shopping List

Q10 Where do you do most of your household's small scale 'top-up' food shopping?
DO NOT READ OUT. ONE ANSWER ONLY. IF THEY SAY VARIES ASK IF THERE'S SOMEWHERE THEY USE MORE OFTEN, EVEN IF SLIGHTLY.

#Food Food Shopping List GO TO Q12
Internet / delivered GO TO Q11
(Don't know / varies) GO TO Q18
(Don't do this type of shopping) GO TO Q18

Those who do their main food shopping via the Internet at Q10

Q11 Which internet / home delivery retailer do you use for your 'top-up' food shopping?
DO NOT READ OUT. ONE ANSWER ONLY

- 1 Amazon
2 Asda
3 Co-op
4 Iceland
5 Morrisons
6 Ocado
7 Riverford
8 Sainsbury's
9 Tesco
A Waitrose
B Other (PLEASE WRITE IN)
C (Don't know / varies)

Q12 What is the MAIN reason you choose (LOCATION MENTIONED AT Q10) for your 'top-up' food shopping?
DO NOT READ OUT. ONE ANSWER ONLY

#FReasons Food Shopping Reasons List

Excluding those who do their top-up food shopping via the Internet at Q10

Q13 How do you normally travel when you do your 'top-up' food shopping at (LOCATION MENTIONED AT Q10)?
DO NOT READ OUT. ONE ANSWER ONLY

- 1 Car - driver
2 Car - passenger
3 Bicycle
4 Bus
5 Disability vehicle (e.g. mobility scooter, wheelchair)
6 Motorbike / moped
7 Park & Ride
8 Taxi
9 Train
A Walk
B Other (PLEASE WRITE IN)
C (Don't know / varies)

Excluding those who do their main food shopping via the Internet at Q10

Q14 How long does it normally take to travel to (LOCATION MENTIONED AT Q10)?
DO NOT READ OUT. ONE ANSWER ONLY

X Amount of time taken to nearest whole minute (PLEASE WRITE IN)
Y (Don't know / can't remember)
Z (Refused)

Q15 How often do you normally do your 'top-up' food shopping at (LOCATION MENTIONED AT Q10)?
DO NOT READ OUT. ONE ANSWER ONLY

1 7 times a week
2 5 - 6 times a week
3 3 - 4 times a week
4 Twice a week
5 Once a week
6 Once every two weeks
7 Once a month
8 Once every two months
9 Less often
A (Don't know / varies)

Q16 How much do you normally spend on your 'top-up' food shopping trip to (LOCATION MENTIONED AT Q10)?
PLEASE WRITE IN TO THE NEAREST £

X To the nearest £: (PLEASE WRITE IN)
Y (Don't know / varies)
Z (Refused)

Q17 Apart from (LOCATION MENTIONED AT Q10), where else do you do your household's 'top-up' food shopping?
DO NOT READ OUT. ONE ANSWER ONLY. IF THEY SAY VARIES ASK IF THERE'S SOMEWHERE THEY USE MORE OFTEN, EVEN IF SLIGHTLY.

#Food Food Shopping List
Internet / delivered

READ OUT: We now have a few questions about where you go for non-food shopping. In answering these questions, the location may be a town centre, a retail park, a free-standing store, or it could be facilities such as the internet, TV shopping or catalogue.

Q18 Where do you normally undertake most of your non-food shopping (e.g clothes, household items, DIY goods etc.)?
DO NOT READ OUT. ONE ANSWER ONLY. IF THEY SAY VARIES ASK IF THERE'S SOMEWHERE THEY USE MORE OFTEN, EVEN IF SLIGHTLY.

#NFood Non-food Shopping List
(Don't know / varies) GO TO Q21

Q19 How often do you normally visit (LOCATION MENTIONED AT Q18) for your non-food shopping?
DO NOT PROMPT. ONE ANSWER ONLY.

1 7 times a week
2 5 - 6 times a week
3 3 - 4 times a week
4 Twice a week
5 Once a week
6 Once every two weeks
7 Once a month
8 Once every 2 months
9 Once every 3 months
A Less often
B (Don't know / varies)

Q20 How much do you normally spend on your non-food shopping at (LOCATION MENTIONED AT Q18)?
DO NOT PROMPT. ONE ANSWER ONLY. IF RESPONDENT SAYS IT VARIES ASK HOW MUCH ON AVERAGE. IF THEY STILL CAN'T STATE A FIGURE - ASK HOW MUCH THEY SPENT LAST TIME.

X To the nearest £: (PLEASE WRITE IN)
Y (Don't know / varies)
Z (Refused)

READ OUT: Now thinking more about more specific non-food shopping...

Q21 Where do you normally do most of your household's shopping for clothes, footwear and other fashion goods?
DO NOT PROMPT. ONE ANSWER ONLY.

#NFood Non-food Shopping List

Q22 Where do you normally do most of your household's shopping for furniture, floor coverings and household textiles?
DO NOT PROMPT. ONE ANSWER ONLY.

#NFood Non-food Shopping List

Q23 Where do you normally do most of your household's shopping for DIY and decorating goods?
DO NOT PROMPT. ONE ANSWER ONLY.

#NFood Non-food Shopping List

Q24 **Where do you normally do most of your household's shopping for domestic appliances such as washing machines, fridges, cookers and kettles?**
DO NOT PROMPT. ONE ANSWER ONLY.

#NFood Non-food Shopping List

Q25 **Where do you normally do most of your household's shopping for TV, Hi Fi, Radio, Photographic and Computer equipment?**
DO NOT PROMPT. ONE ANSWER ONLY.

#NFood Non-food Shopping List

Q26 **Where do you normally do most of your household's shopping on personal / luxury goods including books, jewellery, china, glass, cosmetics and medical goods?**
DO NOT PROMPT. ONE ANSWER ONLY.

#NFood Non-food Shopping List

Q27 **Where do you normally do most of your household's shopping on recreational goods including bicycles, games, toys, sports and camping equipment?**
DO NOT PROMPT. ONE ANSWER ONLY.

#NFood Non-food Shopping List

GEN **Gender of respondent:**
CODE FROM OBSERVATION

1 Male
2 Female

AGE **Could I ask how old you are please?**
DO NOT READ OUT. ONE ANSWER ONLY

1 18 to 24
2 25 to 34
3 35 to 44
4 45 to 54
5 55 to 64
6 65 +
7 (Refused)

Thank & close