Table 1
Population Forecasts

Zone	Zone Name	2008	2011	2016	2021	2026
1.	Barnsley Central	70,853	72,856	76,542	80,547	84,280
2.	Penistone/West	26,772	27,047	27,554	28,105	28,618
3.	Wombwell/Hoyland	36,223	37,053	38,578	40,236	41,780
4.	Royston/North	40,545	40,801	41,276	41,791	42,271
5.	Goldthorpe/Cudworth	61,427	62,463	64,370	66,441	68,371
Study Area Total		**235,820**	**240,220**	**248,320**	**257,120**	**265,320**

1. Sourced from Volume 2, Appendix 6, Table A - Barnsley MBC Smaller Centres Study November 2010
2. Includes E&L assumptions regarding housing allocations
3. Slight differences to Barnsley MBC Smaller Centre Study due to rounding

Table 2
Convenience Goods Expenditure per person (£) excluding non-store retailing

Zone	Zone Name	2008	2011	2016	2021	2026
1.	Barnsley Central	1,648	1,553	1,583	1,645	1,709
2.	Penistone/West	1,852	1,719	1,753	1,821	1,892
3.	Wombwell/Hoyland	1,653	1,535	1,565	1,626	1,689
4.	Royston/North	1,711	1,589	1,620	1,683	1,748
5.	Goldthorpe/Cudworth	1,664	1,545	1,575	1,637	1,700

Notes:

1. Sourced from Volume 2, Appendix 6, Table A - Barnsley MBC Smaller Centres Study November 2010

2. E&L Assume SFT deduction for convenience goods at 2008 of 5.0% increasing to 9.6% by 2016

2. 2008 prices

Table 3
Convenience Goods Expenditure (£m)

Zone	Zone Name	2008	2011	2016	2021	2026
1.	Barnsley Central	116.78	113.14	121.19	132.50	144.03
2.	Penistone/West	49.58	46.50	48.30	51.19	54.15
3.	Wombwell/Hoyland	59.89	56.88	60.38	65.43	70.58
4.	Royston/North	69.38	64.82	66.86	70.33	73.90
5.	Goldthorpe/Cudworth	102.21	96.49	101.39	108.73	116.24
Study Area Total		**397.84**	**377.83**	**398.12**	**428.18**	**458.90**

Notes:

1. Sourced from Volume 2, Appendix 6, Table A - Barnsley MBC Smaller Centres Study November 2010

2. 2008 prices

3. Slight differences to Barnsley MBC Smaller Centre Study due to rounding

Table 4
Comparison Goods Expenditure per person (£) excluding non-store retailing

Zone	Zone Name	2008	2011	2016	2021	2026
1.	Barnsley Central	2,467	2,372	2,662	3,075	3,560
2.	Penistone/West	2,949	2,835	3,182	3,676	4,256
3.	Wombwell/Hoyland	2,372	2,281	2,560	2,957	3,424
4.	Royston/North	2,524	2,427	2,723	3,146	3,642
5.	Goldthorpe/Cudworth	2,378	2,286	2,566	2,964	3,432

Notes:

1. Sourced from Volume 2, Appendix 6, Table B - Barnsley MBC Smaller Centres Study November 2010

2. E&L Assume SFT deduction for comparison goods at 2008 of 8.2% increasing to 13.9% by 2016

2. 2008 prices

Table 5
Comparison Goods Expenditure (£m)

Zone	Zone Name	2008	2011	2016	2021	2026
1.	Barnsley Central	174.77	172.80	203.73	247.71	300.06
2.	Penistone/West	78.94	76.68	87.67	103.32	121.79
3.	Wombwell/Hoyland	85.93	84.51	98.75	119.00	143.04
4.	Royston/North	102.32	99.01	112.40	131.49	153.97
5.	Goldthorpe/Cudworth	146.05	142.80	165.15	196.95	234.63
Study Area Total		**588.01**	**575.80**	**667.70**	**798.47**	**953.49**

Notes:

1. Sourced from Volume 2, Appendix 6, Table B - Barnsley MBC Smaller Centres Study November 2010

2. 2008 prices

3. Slight differences to Barnsley MBC Smaller Centre Study due to rounding

Table 6

Proposed Superstore, New Street Turnover at 2016 (£m) (2008 Prices)

	Net Floorspace (sqm)	Sales Density (£/sqm)	Total Turnover (£m)
Convenience Goods (£m)	3,607	11,653	42.03
Comparison Goods (£m)	2,989	7,680	22.96
TOTAL	**6,596**		**64.99**

Notes:

1. Turnover based on 90% of Company Average Sales Density of top four food retailers at 2016 with floorspace efficiency
2. Floorspace efficiency of 0.4% p.a. for convenience goods and 2.2% for comparison goods as used by E&L (Experian assumptions).
3. Sales densities of top four grocers based on Verdict data

Table 7 - Capacity Assessment - Convenience Goods

Barnsley Town Centre Catchment Area- E&L Zones 1-5

	2008	2011	2016
Expenditure (£m)	**397.84**	**377.83**	**398.12**
Existing Turnover (£m) (1)	302.69	287.90	331.70
			(2)
Trade Retention with Commitments (%) (3)	76%	76%	83%
Residual Capacity (£m)		**89.93**	**66.42**
Tesco, Hoyland Commitment (£m)			15.46
Capacity post Commitments (£m)			**50.96**
Trade Retention with all Commitments (%) (4)			87%
Capacity post Commitments (£m)			50.96
Overtrading in Morrisons/Asda (£m) (5)			69.83
Capacity (including overtrading Morrisons/Asda) (£m)			**120.79**
Proposed Superstore, New Street (£m)			39.93
Remaining Capacity (£m) (post development)			**80.86**

Notes:

1. Turnover based on household survey including overtrading in Asda/Morrisons, Barnsley
2. Turnover at 2016 based on household survey adjusted for commitments including allowance for an uplift in Markets Scheme and Peel Street Commitment (Table 3, E&L RIA of Potential Superstore Developments, Barnsley - May 2011 as starting point)
3. Retained expenditure as proportion of total expenditure including main commitments at 2016
4. Retained expenditure as porportion of total expenditure with Tesco, Hoyland at 2016
5. Overtrading in Morrisons/Asda post commitments
6. Catchment area based on E&L RIA for Protential Superstore Developments in Barnsley (May 2011)
7. 2008 Prices

Table 7a

Convenience Goods Commitments

Commitment from E&L Study (1)	Turnover (£m)
Tesco, Penistone (convenience goods)	26.9
Netto, Lunwood (net increase)	1.8
Netto extension, Goldthorpe	0.9
Supermarket, Thurnscoe	4.4
Aldi extension, Doncaster Road	0.7
Harborough Hill Road	4.9
New supermarket, Goldthorpe	6.5
Markets Project (convenience goods)	4.6
Sub-Total	**50.7**
Additional Commitments (2)	Turnover (£m)
Peel Street, Barnsley town centre (see Table 7b)	3.6
Tesco, Hoyland (3)	15.5
Markets Project Uplift above E&L Assumptions (4)	2.3
Sub-Total	**21.4**
TOTAL	72.1

Notes:

1. Turnovers for E&L Study Commitments taken from Table 3, E&L RIA of Potential Superstore Developments in Barnsley (May 2011)
2. Floorspace on additional commitments provided by Barnsley MBC. See Table 7b for turnover estimates
3. Taken from DPP Retail Impact Assessment
4. Uplift assumed for Markets project to reflect most recent scheme (adopting E&L assumptions)
5. E&L Turnover estimates at 2016 (2008 prices)

Table 7b

Estimated Turnover of Discounter, Peel Street, Barnsley

Gross (sqm)	Net (sqm)	Net Convenience (sqm)	£ per sqm	£m
1,617	1,286	1,003	3,599	3.61

Notes:

1. Net floorspace based on information provided by Barnsley MBC
2. Convenience goods floorspace based on Lidl company average
3. Sales density based on Lidl company average
4. Company average figures based on Verdict

Table 8 - Capacity Assessment - Comparison Goods

Barnsley Town Centre Catchment Area - E&L Zones 1-5

	2008	2011	2016
Expenditure (£m)	**588.01**	**575.80**	**667.70**
Existing Turnover (£m) (1)	355.99	348.83	481.04
			(2)
Trade Retention with Commitments (%) (3)	61%	61%	72%
Initial Capacity (£m)		226.97	186.66
Visitor Expenditure (£m)		17.90	23.40
Residual Capacity (£m)		**244.87**	**210.06**
Tesco, Hoyland Commitment (£m)			1.42
Capacity post Commitments (£m)			**208.64**
Trade Retention with all Commitments (%) (4)			72%
Capacity post Commitments (£m)			**208.64**
Proposed Superstore, New Street (£m)			21.81
Remaining Capacity (£m) (post development)			**186.83**
Trade Retention with Commitments and Proposal (%) (5)			76%

Notes:

1. Turnover based on household survey
2. Turnover at 2016 based on household survey adjusted for commitments
   (Table 4, E&L RIA of Potential Superstore Developments, Barnsley - May 2011 and additional commitments)
3. Retained expenditure as proportion of total expenditure with main commitments at 2016
4. Retained expenditure as porportion of total expenditure with Tesco, Hoyland at 2016
5. Retained expenditure as porportion of total expenditure with all commitments and Superstore on New Street at 2016
6. Catchment area based on E&L RIA for Protential Superstore Developments in Barnsley (May 2011)

Table 8a

Comparison Goods Commitments

Commitment from E&L Study (1)	Turnover (£m)
Tesco Extension, Wombwell Lane	10.5
Tesco, Penistone (comparison goods)	1.6
Peel Street Barnsley	5.7
Markets Project (comparison goods)	57.4
Sub-Total	**75.2**
Additional Commitments	Turnover (£m)
Peel Street, Barnsley town centre, Uplift from E&L Assumptions (2)	3.73
Tesco, Hoyland (3)	1.42
Markets Project Uplift above E&L Assumptions (4)	13.36
Harborough Hill Road - comparison element (5)	11.12
Sub-Total	**29.63**
TOTAL	104.8

Notes:

1. Turnovers for E&L Study Commitments taken from Table 4, E&L RIA of Potential Superstore Developments in Barnsley (May 2011)
2. Floorspace based on information provided by BMBC and turnover estimate in Table 8b
3. Taken from DPP Retail Impact Assessment
4. Floorspace based on information provided by BMBC
5. Floorspace provided by BMBC and turnover estimate in Table 8b

Table 8b

Comparison Goods Commitments (In Addition to E&L assumed commitments) Turnover at 2016

	Gross (sqm)	Net (sqm)	Sales Density £ per sqm	Turnover £m	E&L Turnover Estimate £m	Difference £m
Peel Street	2,694	1,886	5,000	9.43	5.7	3.73
Harborough Hill Road	5,295	3,707	3,000	11.12		

Notes:

1. Assumed net to gross ratio of 70%

2. Sales density based on E&L Assumption for Peel Street. Sales density for Harborough Hill Road based on typical bulky goods retail traders

Table 9

Convenience Goods Impact at 2016 - Proposed Superstore, New Street, Barnsley

Store/Centre	Turnover at 2011 (£m)	Turnover at 2016 (£m) Pre-Commitments	Diversion to Commitments Excl Lidl, Peel Street (£m)	Turnover at 2016 (£m) Post Commitments (Excl Lidl, Peel Street)	Diversion to Lidl, Peel Street (£m)	Turnover 2016 Post Commitments (£m)	Diversion to Tesco, Hoyland and Markets Commitment Uplift (£m)	Turnover 2016 Post Tesco Hoyland and Markets Uplift (£m)	Proportion of Trade Attracted to Proposed Superstore (%)	Diversion to Superstore at 2016 (£m) (6)	Turnover Post Diversion to Superstore at 2016 (£m)	Impact of Superstore on Design Year Post Commitments (%)
CATCHMENT AREA												
Barnsley Town Centre												
Town Centre Shops	26.74	28.18	-2.19	25.99	-0.36	25.63	-0.70	24.93	2.0%	-0.84	24.09	-3.4%
Markets Scheme, Barnsley				4.60	0.00	4.60	0.00	6.93	0.5%	-0.21	6.72	-3.0%
Peel Street Commitment						3.61	-0.23	3.38	0.5%	-0.21	3.17	-6.2%
Total Town Centre (5)	**26.74**	**28.18**	**-2.19**	**30.59**	**-0.36**	**33.84**	**-0.93**	**35.24**	**3.0%**	**-1.26**	**33.98**	**-3.6%**
Outside Central Shopping Area												
Morrisons, Barnsley	72.04	76.15	-5.98	70.17	-1.99	68.18	-2.72	65.46	30.0%	-12.61	52.85	-19.3%
Harborough Hill Road Commitment				4.90	-0.72	4.18	0.00	4.18	0.5%	-0.21	3.97	-5.0%
Proposed Superstore New Street											42.03	
District Centres												
Cudworth	1.59	1.67	-0.13	1.54	0.00	1.54	0.00	1.54	0.0%	0.00	1.54	0.0%
Goldthorpe	5.39	5.66	-0.44	12.62	0.00	12.62	0.00	12.62	0.0%	0.00	12.62	0.0%
Hoyland	5.26	5.58	-0.44	5.14	0.00	5.14	-0.63	4.51	0.0%	0.00	4.51	0.0%
Penistone	6.51	6.79	-0.53	33.16	0.00	33.16	0.00	33.16	0.0%	0.00	33.16	0.0%
Royston	4.69	4.87	-0.39	4.48	0.00	4.48	0.00	4.48	0.0%	0.00	4.48	0.0%
Wombwell	1.18	1.25	-0.09	1.16	0.00	1.16	-0.02	1.14	0.0%	0.00	1.14	0.0%
Total District Centres	**24.62**	**25.83**	**-2.03**	**58.10**	**0.00**	**58.10**	**-0.66**	**57.44**	**0.0%**	**0.00**	**57.44**	
Total Local Shops	**36.64**	**38.55**	**-3.04**	**42.41**	**0.00**	**42.41**	**-0.04**	**42.37**	**0.0%**	**0.00**	**42.37**	**0.00**
Out of Centre Foodstores												
Asda, Old Mill Lane, Barnsley	83.87	88.28	-6.91	81.37	-0.36	81.01	-1.05	79.96	20.0%	-8.41	71.56	-10.5%
Tesco, Wombwell Lane	43.99	46.59	-3.66	42.93	0.00	42.93	-3.55	39.38	16.0%	-6.73	32.65	-17.1%
Tesco, Hoyland								15.46	2.0%	-0.84	14.62	-5.4%
Total Out of Centre	**127.86**	**134.87**	**-10.57**	**124.30**	**-0.36**	**123.94**	**-4.60**	**134.80**	**38.0%**	**-15.97**	**118.83**	
Total from E&L Study Area	***287.90***	***303.58***	***-23.81***	***330.47***	***-3.43***	***330.65***	***-8.95***	***339.49***	***71.5%***	***-30.05***	***309.43***	
Leakage from E&L Study Area												
Morrisons, Cortonwood	37.38	39.50	-11.40	28.10	0.00	28.10	-5.61	22.49	12.0%	-5.04	17.45	
Tesco, Wath Upon Dearne	18.20	19.14	-5.30	13.84	0.00	13.84	-1.82	12.02	10.0%	-4.20	7.82	
Other Stores	34.37	35.92	-10.23	25.69	-0.18	25.51	-1.42	24.09	1.5%	-0.63	23.46	
Total Leakage	**89.95**	**94.56**	**-26.93**	**67.63**	**-0.18**	**67.45**	**-8.84**	**58.61**	**23.5%**	**-9.88**	**48.73**	
Inflow									5.0%	-2.10		
TOTAL	**377.85**	**398.14**	**-50.74**	**398.10**	**-3.61**	**398.10**	**-17.79**	**398.10**	**100.0%**	**-42.03**	**400.20**	

Notes:

1. turnovers for 2011 & 2016 based on figures from Volume 2, Appendix 3, Barnsley MBC Smaller Centres Study November 2010
2. Impacts arising from Commitments based on E&L Retail Impact Analysis of Potential Superstore Develoments in Barnsley (May 2011)
3. Impact of Peel Street Convenience Commitment taken into account in addition to other E&L Commitments
4. Diversion to Tesco Hoyland Proposal (£15.46m) based on DPP Retail Impact Assessment. Inflow of £0.62m not accounted for above.
5. Diversion of uplift in approved Markets scheme of £2.33m compared to E&L Assessment based on judgements
6. Trade Diversion pattern for proposed Superstore on New Street used E&L Assumptions as a starting point (Table 7C - E&L Study: RIA of Potential Superstore Developments in Barnsley May 2011)
7. Figures may not add precisely due to rounding
8. 2008 Prices

Table 10

Comparison Goods Impact at 2016 - Proposed Superstore, New Street, Barnsley

Store/Centre	Turnover at 2011 (£m)	Turnover at 2016 (£m) Pre-Commitments	Diversion to Commitments (£m) Including Markets Uplift (2)	Turnover 2016 Post Commitments (£m)	Diversion to Peel Street Additional Turnover at 2016 (£m)	Turnover Post Peel Street Diversion 2016	Diversion to Harborough Hill Road, 2016 (£m)	Turnover Post Harborough Hill Diversion 2016	Proportion of Trade Attracted to Proposed Superstore (%)	Diversion to Superstore at 2016 (£m) (6)	Turnover Post Diversion to Superstore at 2016 (£m)	Impact on Design Year Post Commitments (%)
CATCHMENT AREA												
Barnsley Town Centre Main Comparison	314.64	365.37	-13.45	357.62	-2.42	355.20	-4.45	350.75	52%	-11.94	338.81	-3.4%
Markets Scheme				70.76	-0.75	70.01		70.01	4%	-0.92	69.10	-1.3%
Peel Street Commitment (Additional turnover)						3.73		3.73			3.73	
Town Centre Sub-Total	**314.64**	**365.37**	**-13.45**	**428.38**	**-3.17**	**428.94**	**-4.45**	**424.49**	**56.0%**	**-12.85**	**411.64**	**-3.0%**
Outside Central Shopping Area												
Proposed Superstore New Street											22.96	
Harborough Hill Road Commitment								11.12	1.0%	-0.23	10.89	
Peel Centre Retail Park	5.31	6.14	-0.23	5.92	-0.19	5.73	-0.56	5.17	2.0%	-0.46	4.71	-8.9%
Wombwell Lane Retail Park	15.33	17.82	-0.65	27.66	-0.19	27.47	-3.89	23.58	11.0%	-2.53	21.06	-10.7%
Cudworth	1.61	1.86	-0.07	1.79		1.79		1.79			1.79	
Goldthorpe	2.79	3.22	-0.12	3.10		3.10		3.10			3.10	
Hoyland	1.92	2.24	-0.08	2.16		2.16		2.16			2.16	
Penistone	4.47	5.11	-0.19	6.52		6.52		6.52			6.52	
Royston	0.00	0.00	0.00	0.00		0.00		0.00			0.00	
Wombwell	2.77	3.22	-0.12	3.10		3.10		3.10			3.10	
Rest of Catchment Area Total	**34.19**	**39.61**	**-1.46**	**50.25**	**-0.37**	**49.88**	**-4.45**	**56.55**	**14.0%**	**-3.21**	**76.29**	
LEAKAGE												
Cortonwood Retail Park	44.85	52.09	-14.84	37.25		37.25	-1.67	35.58	10.0%	-2.30	33.29	
Meadowhall	63.64	73.84	-20.94	52.90		52.90		52.90	5.0%	-1.15	51.75	
Sheffield	23.24	26.84	-7.43	19.41		19.41		19.41	5.0%	-1.15	18.26	
Wakefield	18.73	21.34	-5.51	15.83		15.83		15.83	1.0%	-0.23	15.60	
Rotherham	17.82	20.69	-5.89	14.80		14.80		14.80	1.0%	-0.23	14.57	
Doncaster	17.35	20.07	-5.61	14.46		14.46		14.46	1.0%	-0.23	14.23	
Leeds	7.19	8.30	-2.28	6.02		6.02		6.02	1.0%	-0.23	5.79	
Other Centres	34.13	39.52	-11.12	28.40	-0.19	28.22		28.22	1.0%	-0.23	27.99	
Leakage Total	**226.95**	**262.70**	**-73.63**	**189.07**	**-0.19**	**188.88**	**-1.67**	**187.22**	**25.0%**	**-5.74**	**181.48**	
Inflow from beyond catchment							-0.56		5%	-1.15		
TOTAL	**575.78**	**667.68**	**-88.54**	**667.70**	**-3.73**	**667.70**	**-11.12**	**668.26**	**100%**	**-22.96**	**669.40**	

Notes:

1. turnovers for 2011 & 2016 based on figures from Volume 2, Appendix 3, Barnsley MBC Smaller Centres Study November 2010
2. Diversion to Commitments based on E&L RIA of Potential Superstore Developments in Barnsley (May 2011) and IDP judgement for uplift in Markets scheme having regard to E&L Assessment
3. Diversion to Tesco, Hoyland comparison not included in E&L Commitments diversion in Column 3
4. Town centre comparison turnover at 2016 post commitments takes account of diversion to commitments and location of Peel Street scheme in central shopping area
5. Impacts for proposed Superstore on New Street has regard to E&L Assumptions (Table 8C - E&L Study: RIA of Potential Superstore Developments in Barnsley May 2011)
6. Town Centre Shops turnover in 2016 Post Commitments takes account of Peel Street and Harborough Hill Road commitments
7. Figures may not add precisely due to rounding
8. 2008 Prices

Table 11

Retail Impact Assessment - Combined Convenience and Comparison Impact of Proposed Superstore, New Street at 2016

Store/Centre	Convenience Goods Turnover (£m)	Comparison Goods Turnover (£m)	Total Turnover (£m)	Convenience Goods Trade Diversion (£m)	Comparison Goods Trade Diversion (£m)	Total Diversion (£m)	Turnover Post Diversion (£m)	Impact on 2016 Turnover Post Commitments
CATCHMENT AREA								
Town Centre Shops	24.93	350.75	**375.68**	-0.84	-11.94	**-12.78**	362.90	-3.4%
Markets Scheme (2)	6.93	70.01	**76.94**	-0.21	-0.92	**-1.13**	75.82	-1.5%
Peel Street Commitment - Convenience	3.38	0.00	**3.38**	-0.21	0.00	**-0.21**	3.17	-6.2%
Peel Street Commitment - Comparison	0.00	3.73	**3.73**	0.00	0.00	**0.00**	3.73	0.0%
Town Centre Sub-Total	**35.24**	**424.49**	**459.73**	**-1.26**	**-12.85**	**-14.12**	**445.61**	**-3.1%**
Morrisons, Barnsley	65.46	0.00	**65.46**	-12.61	0.00	**-12.61**	52.85	-19.3%
Harborough Hill Road Commitment	4.18	11.12	**15.30**	-0.21	-0.23	**-0.44**	14.86	-2.9%
Proposed Superstore New Street							64.99	
Peel Centre Retail Park	0.00	5.17	**5.17**	0.00	-0.46	**-0.46**	4.71	-8.9%
Tesco/Wombwell Lane Retail Park	39.38	23.58	**62.96**	-6.73	-2.53	**-9.25**	53.71	-14.7%
Asda, Old Mill Lane	79.96	0.00	**79.96**	-8.41	0.00	**-8.41**	71.56	-10.5%
Other centres/shops				-12.82	-6.89	**-19.71**		
Total				**-42.03**	**-22.96**	**-64.99**		

Notes:

1. Sourced from Table 9 and Table 10 and based on E&L Tables in terms of nothing included to take account of comparison turnover of Asda and Morrisons
2. 2008 Prices