

APPENDIX 6

Tables

TABLE 1: Population and available expenditure

	2008	2009	2014	2015
Population	4,515	4,533	4,624	4,643
Convenience Goods				
Per capita expenditure	£1,600	£1,603	£1,631	£1,639
Total expenditure (£m)	£7.22	£7.26	£7.54	£7.61
Comparison Goods				
Per capita expenditure	£3,051	£3,126	£3,641	£3,768
Total expenditure (£m)	£13.78	£14.17	£16.84	£17.49

Notes

Population and expenditure estimates are derived from Experian Business Strategies Retail Planner Reports for the local area (August 2008 and August 2009). Population growth is assumed to be 0.4% per annum (this is the rate of growth employed in the 2008 DTZ Retail Study).

Average growth in available expenditure over the Study Period is assumed to be 0.5% per annum for convenience goods and 3.5% per annum for comparison goods. These assumptions about average annual growth over the study period have regard to forecasts and trends within Experian Retail Planner Briefing Note 6.0 (October 2008) and MapInfo Information Brief 02/08 (October 2008) and also have regard to the Advisories produced by Experian and MapInfo in March and April 2009, and Experian Retail Planner Briefing Note 7.0 (August 2009). The Barnsley Retail Study adopts a growth rate of 0.9% pa for convenience goods and 3.8% pa for comparison goods.

Expenditure estimates take account of non-store retail activity ('special forms of trading'). For convenience goods it is assumed to be 2.95% of per capita expenditure at 2008; 3.25% at 2009; 3.90% at 2013; 3.95% at 2014 and 4.00% 2015. For comparison goods it is assumed to be 11.3% at 2008; 12.2% at 2009; and 13.9% at 2013, 2014 and 2015. These assumptions have regard to the assessment of non-store retail activity set out in Experian Retail Planner Report 6.1 (October 2008).

TABLE 2: Existing convenience shopping provision in the study area

	Net floorarea	Sales density	Turnover (£m)
Convenience shops:			
Co-operative, Spring Green Avenue	107	£4,000	£0.43
Birdwell News, Sheffield Road	50	£2,500	£0.13
Tankersley Post Office	25	£2,000	£0.05
Total			£0.60
Percentage of convenience expenditure from outside study area			10.0%
Value of convenience expenditure from outside the area			£0.06
Convenience expenditure in local shops arising from within the study area			£0.54
<i>Notes</i> <i>Net floorears are estimates based on site visits. The sales density estimates reflect typical turnover to floorspace ratios having regard to the scale and character of the existing shops.</i> <i>Since our initial assessment of retail capacity in October 2008, an off-licence/sandwich shop on Sheffield Road has become a ladieswear shop.</i>			

TABLE 3: Scope for additional convenience shopping 2014

Existing spending on convenience goods:

Available convenience expenditure arising within the study area 2014 (£m) (see table 1)	£7.54
Convenience expenditure in local shops arising from within the study area (£m)(see Table 2)	£0.54
Percentage currently spent within the study area	7.2%

Potential spend on top-up trips:

Potential top-up shopping spend in the study area as a percentage of total convenience expenditure	25.0%
Potential spend in the study area top-up shopping (£m)	£1.89

Potential spend on main trips:

Expenditure on main shopping trips arising in the study area (£m)	£5.66
Potential main trip expenditure within Study Area	10.0%
Potential spend in the study area main shopping trips (£m)	£0.57

Total potential spend in the study area (£m) £2.45

Total potential capacity arising within the study area (£m) (potential spend less expenditure in existing shops)	£1.91
Percentage of expenditure from outside the Study Area	20.0%
Expenditure from outside the Study Area (£m)	£0.38

Total potential convenience spend in shops in the Study Area (£m)	£2.29
Turnover to floorspace ratio (£ per sqm)	£4,500
Potential capacity convenience goods - net floorspace (sqm)	509
net to gross ratio	70.0%
Potential capacity convenience goods - gross floorspace (sqm)	727

Notes:

The Barnsley Retail Study assumes an average of 25% of expenditure on convenience goods is on top-up shopping trips.

TABLE 4: Turnover of the proposed development

	<i>Gross floorspace (sqm)</i>	<i>Net floorspace (sqm)</i>	<i>Sales Density (£ per sqm)</i>	<i>Turnover (£m)</i>
Convenience Floorspace:				
Unit 1 - convenience store	373	261	£4,500	£1.17
Unit 2	93	65	£4,000	£0.26
Unit 3	93	65	£4,000	£0.26
				£1.70
Percentage from outside the study area				20%
Convenience turnover from within the study area				£1.36
Comparison Floorspace:				
Pharmacy	179	125	£3,000	£0.38
Percentage from outside the study area				20%
Comparison turnover from within the study area				£0.30
<i>Notes</i> Additional units are to be occupied by a hot food takeaway and a restaurant. Net to gross ratio is assumed to be 70%				

TABLE 5: Convenience turnover of nearby centres and stores 2009

	<i>Gross floorspace (sqm)</i>	<i>Net floorspace (sqm)</i>	<i>Sales Density (£ per sqm)</i>	<i>Turnover (£m)</i>
<i>Hoyland town centre</i>				
Co-op	700	455	£4,500	£2.05
Other convenience	701	456	£2,500	£1.14
				£3.19
<i>Hoyland Common</i>				
Co-op	530	345	£4,000	£1.38
Other convenience	72	47	£2,500	£0.12
				£1.50
<i>Worsborough</i>				
Netto	1,560	1,014	£6,450	£6.54
Other convenience	255	166	£2,500	£0.41
				£6.95
<i>Other shops</i>				
Today Express, Cross Keys Filling Station, Hoyland Common		280	£4,500	£1.26
Tesco Express, West Street, Hoyland		280	£4,500	£1.26
Co-operative, Spring Green Avenue		107	£4,000	£0.43

Notes:

Estimates of floorspace are Alyn Nicholls & Associates estimates based of fieldwork and calculations using OS Maps.

It is assumed that the net to gross floorspace ratio is 65%.

TABLE 6: Potential trade diversion convenience goods

	<i>Turnover</i>	<i>Trade draw</i>	<i>Trade diversion</i>	<i>Impact</i>
<i>Hoyland town centre</i>				
Co-op	£2.05	3.7%	£0.05	2.4%
Other convenience	£1.14	1.1%	£0.01	1.3%
Total	£3.19		£0.06	2.0%
<i>Hoyland Common</i>				
Co-op	£1.38	4.1%	£0.06	4.0%
Other convenience	£0.12	0.1%	£0.00	1.6%
Total	£1.50		£0.06	3.8%
<i>Worsborough</i>				
Netto	£6.54	31.1%	£0.42	6.5%
Other convenience	£0.41	0.5%	£0.01	1.6%
Total	£6.95		£0.43	6.2%
<i>Other shops</i>				
Today Express, Cross Keys Filling Station, Hoyland Common	£1.26	9.0%	£0.12	9.7%
Tesco Express, West Street, Hoyland	£1.26	6.0%	£0.08	6.5%
Co-operative, Spring Green Avenue	£0.43	2.3%	£0.03	7.3%
Elsewhere	£5.24	37.4%	£0.51	
		100.0%		

Notes

Trade draw rates are based upon the current anticipated pattern of expenditure and having regard to our view of the likelihood of competition between the proposed development and existing provision.