

1 Quantitative Assessment (Appendix 6)

- 1.1 In the interests of clarity, we have assessed the trading effects of the proposal following a standard and recognised step-by-step methodology, which is summarised below.

Base and Design Years

- 1.2 A base year of 2013 has been adopted to reflect the current position and the date the household survey that has informed the assessment was completed. An assessment year of 2018 has been adopted to reflect guidance in the NPPF (paragraph 26) of assessing impact up to five years from the time the application is made.
- 1.3 All monetary values are expressed at 2011 prices. This reflects the most up-to-date population and expenditure data currently available.

Population and Expenditure

- 1.4 Population forecast and per capita expenditure estimates for each of the post code sectors that comprise the Study Area have been obtained from Pitney Bowes Report Data (2011 estimates). This data takes into account local socio-economic factors.
- 1.5 In terms of allowing for growth in convenience goods expenditure our assessment has utilised the ultra long-term trends identified by Pitney Bowes (Retail Expenditure Guide, December 2013). In this respect, a growth rate of +0.5% per annum for convenience goods and +4.9% per annum for comparison goods have been utilised.
- 1.6 We believe it is wholly appropriate to apply trends rather than forecasts. Forecasts provide estimates of expenditure growth at a particular point in time and are based on short-term projections. Consequently, they are updated on an annual basis. The benefit of using trends is that they are based on longer periods (1964 to 2012) and are therefore not as susceptible to short-term changes. Furthermore, it is important that, in accordance with NPPF and recent ministerial statements, we should be planning for growth and not recession. Therefore, it is inappropriate to use short-term forecasts when planning for schemes that seek to meet need over the long-term.
- 1.7 In dealing with this specific issue of utilising forecast growth rates over trend based at a recent appeal decision in Darlington (APP Ref: APP/N1350/A/10/213408) the Inspector stated (paragraph 38) that: *"...the forecast growth rates adopted by the Council are too cautious as they are based on existing short term economic difficulties which underplay the level of expenditure growth in the foreseeable future."*
- 1.8 The same Inspector's Report (paragraph 39) stated that:
- "The desirability of using long term growth trends was clearly accepted in the recent appeal decisions at Tithebarn, Preston and McMullen's Brewery, Hertford. In both of those decisions it was recognised that it was right to use long-term growth trends because they take account of recessionary periods as well as*

periods of growth. I consider the use of long term growth trend rates is robust...
(Our emphasis)

- 1.9 The growth rates adopted for our analysis compare to the Council's Retail Study utilising a growth rate of +0.8% (interpolated) per annum between 2011 and 2021 for convenience goods and +2.7% (interpolated) per annum for comparison goods. In light of the approach adopted in the Council's Retail Study it is evident that the convenience growth rates applied for our assessment (which represents the bulk of the turnover of the proposal) are lower than those applied.
- 1.10 Our assessment has also made allowance for Special Forms of Trading (SFT), such as online shopping. In order to reflect local shopping patterns within the Survey Area, this has been based on the market share identified by the household survey. This is an appropriate approach to adopt as this reflects local socio-economic characteristics rather than being based on a UK average.
- 1.11 Consequently, an overall allowance of 1.8% has been made for convenience goods and 9.6% for comparison goods (although this differs on a zone-by-zone basis).
- 1.12 We have made no allowance for growth in SFT. Such an approach is supported by recent planning appeals. For example, when dealing the issue of SFT at the Darlington appeal, the Inspector (paragraph 42, Inspector's Report) stated that:
- "...an allowance should be made for SFT but going forward, this type of spending should not simply be protected."* (Our emphasis)
- 1.13 Similar, at the call-in decision at Tithebarn, Preston (Ref: APP/N2345/V/09/2113472) the Inspector (paragraph 5.2.10, Inspector's Report) highlighted that by making no allowance for some clawback to expenditure currently directed to the internet is unrealistic.
- 1.14 The approach we have adopted reflects these appeal decisions. We do not believe it appropriate to assume that traditional retail development should not be able to compete for this type of expenditure going forward. As is the case when considering retail expenditure directed to out of centre facilities, expenditure directed to SFT should not simply be protected and not considered unavailable to support new retail floorspace.
- 1.15 Based on the above approach, from our analysis the following key points should be noted:
- The resident population within the Study Area is approximately 243,995 in 2013. This is expected to increase to 252,783 in 2018 (**Table 1**);
 - The resident population within the Study Area is anticipated to generate £386.56 million of convenience goods expenditure in 2013. This expected to increase by £24.05 million to £410.61 million by 2018 (**Table 1**); and
 - The Study Area resident population generates £627.73 million of comparison goods expenditure in 2013, increasing by £198.35 million to £826.08 million by 2018 (**Table 2**).

- 1.16 Because of rising population and expenditure per capita, the underlying position within the Study Area is one which available convenience and comparison goods expenditure is expected to increase.

Sales Densities

- 1.17 Sales densities have been derived from Verdict Grocery Retailers (2013) or Mintel Retail Rankings (2013) where available. Where information is not available the sales densities have been based on Turley Associates' estimates.

Household Survey

- 1.18 A household survey was completed in September 2013. The survey was based on 1,000 households across the Study Area.
- 1.19 The primary objective of the survey was to establish convenience shopping patterns in the overall Study Area and each specific survey zone. Each household was asked specific questions about where they undertake their main convenience shopping (i.e. weekly / bulk food shopping trips) and where respondents shop for top-up (or basket) shopping. For both types of convenience goods respondents were asked where they 'normally' undertake their main and top-up shopping and where else they shop to purchase such goods.
- 1.20 The household survey also asked questions relating to the main reasons they choose to shop at their preferred destination, what they liked and disliked about where they shop, length of journey and whether linked trips take place.
- 1.21 As part of the household survey questions were also asked with regard to comparison goods shopping for a selection of comparison goods, which will be sold from the proposal.

Establishing Patterns of Trade / Market Share

- 1.22 The market share information presented in the Retail Assessment (see **Table 3 and Table 4**) has been derived from the raw household survey results by applying the following three step methodology:

Step 1: Consolidation of survey responses into retail locations

- 1.23 Each response was reviewed and presented as a single destination (in the case of the most popular destinations) or grouped into a general retail location (e.g. Barnsley town centre).
- 1.24 Where the respondent was unable to provide a specific location based response (e.g. 'don't know' or 'varies'), these responses were grouped and removed from the dataset. This then provided responses for physical retail locations and SFT only. With regard to what 'other' destinations respondents use, respondents who indicated that they visited no other destination are also removed and the dataset rebased.

Step 2: Calculation of percentage responses by goods category

- 1.25 The numbers of responses for each general retail location were then grouped by each type of food shopping activity. This provided a percentage of respondents visiting each retail location to undertake main food shopping and for top-up shopping.

Step 3: Formulation of market shares

- 1.26 As the results of the household survey were used to provide an understanding of convenience goods shopping patterns overall, it was then necessary to group the identified shopping activity together to provide an overall indication of the popularity of each centre / retail destination.
- 1.27 As the amount spent per person as part of a main food shop and a top-up shop differs, this was undertaken by weighting the percentage results against expenditure information.
- 1.28 This was undertaken by:
- Grouping the percentage respondents for each form of convenience shopping by location and zone.
 - Applying the percentage responses for each location to the expenditure spent per capita on that form of shopping in each zone.
 - Assuming that 75% of total convenience expenditure is directed to main food shopping and 25% directed to top-up shopping. Of which 80% is directed to the respondent's 'main' destination and 20% to respondent's 'other' destination.
 - Establishing the percentage market share by dividing the total spent at each location from a certain zone with the total convenience goods per capita from that zone.
- 1.29 The above approach is considered robust and appropriate and reflects established practice.

Quantifying Impact

- 1.30 Based on applying the above baseline assumptions and approach, we set out below the methodology adopted.
- 1.31 The methodology adopted has been broadly based on that advocated in the Practice Guidance on Need, Impact and the Sequential Approach (Appendix D 'Quantifying Impact') that accompanied PPS4. Although PPS4 has now been replaced by the NPPF, the Practice Guidance has not been revoked and continues to provide guidance on assessing retail applications until the recently published replacement guidance (August 2013) is adopted. Indeed, the approach set out in the Practice Guidance is well established and has been adopted by retail planning consultants throughout the UK.
- 1.32 The step-by-step approach set out in the Practice Guidance is set out as follows:
- **Step 1:** Establish base / design years, and determine what is being assessed
 - **Step 2:** Examine 'no development' scenario (i.e. what will happen if the development does not take place?)

- **Step 3:** Assess turnover and trade draw (i.e. what turnover will the development generate and where will it come from?)
- **Step 4:** Assess impact on existing centres and facilities (i.e. quantify the effects of trade diversion)
- **Step 5:** Consider the consequences of impact, including quantitative and qualitative issues

1.33 For ease of reference, the methodology adopted is structured under the headings set out in the Practice Guidance.

Step 1: Establish the Base / Design Year

- 1.34 The base year has been identified as 2013 to reflect the current position and an assessment year of 2018 have been identified.
- 1.35 The assessment year (2018) has been used to reflect the NPPF of assessing impact up to five years from submission of the application. It is considered that the 2018 design year should be the basis for assessing the proposal against the impact test. Indeed, the emerging draft Practice Guidance advises that impact should be based on a five year period.

Step 2: Examine 'No Development Scenario'

- 1.36 **Table 4** estimates the trading performance of existing centres within the Study Area at 2013 based on existing market share.
- 1.37 The turnover of relevant floorspace in the Study Area has been estimated based on the application of the findings of the household survey to available expenditure.

Step 3: Assess Turnover and Trade Draw

Turnover of Proposal

- 1.38 The proposed development comprises a net sales area of 6,836 sq m, of which 3,997 sq m (or 58%) will be used for the sale of convenience goods. The residual 2,839 sq m (equating to 42%) of floorspace will be used for the sale of ancillary comparison goods.
- 1.39 Based on applying an average convenience sales density for Sainsbury's of £11,818 per sq m (as derived from Verdict Grocery Retailers 2012), it is calculated that the turnover of the net convenience floorspace proposed will equate to £47.24 million (at 2011 prices) (**Table 6A**).
- 1.40 With regard to the comparison goods element of the proposal, again based on applying an average comparison sales density for Sainsbury's (taken from Verdict) of £7,740 per sq m, the turnover of the proposal would be £21.79 million (at 2011 prices) (**Table 6A**).

Trade Draw Assumptions

- 1.41 In addition to identifying the likely turnover of the proposal, we have also identified the likely trade draw of the proposal on a zone-by-zone basis. This is set out at **Table 6B**.
- 1.42 The trade draw for the proposal has been initially based on the existing trade draw of comparable facilities in the local area (as identified by the household survey) but also making allowance of the strength and proximity of competing provision (both existing and proposed) and the offer of Sainsbury's when compared to competing stores.
- 1.43 In this context it is assumed that the vast majority of the proposal's turnover will be derived from Zone 1 (18%), Zone 2 (26%), Zone 3 (15%), Zone 4 (19%) and Zone 5 (12%). Accordingly, limited trade is anticipated to be derived from elsewhere in the Study Area – Zone 6 (3%), Zone 7 (5%) and Zone 8 (2%).

Inflow

- 1.44 In addition to the turnover of the proposal derived from expenditure generated within the Study Area, we have also made an allowance for expenditure derived from the wider area.
- 1.45 A number of factors are relevant in this regard, namely the findings of retail studies undertaken within the neighbouring authorities and professional judgements.
- 1.46 Against this background we have made an allowance for 5% of the proposal's turnover being derived from outside the Study Area.

Centres' and Stores' Turnover

- 1.47 Based on the above approach, the trading performance of existing centres / facilities within the Study Area has been estimated.

Step 4: Assess Impact

- 1.48 The anticipated effects of the proposal on shopping patterns on a zone-by-zone basis are set out at **Table 7**.
- 1.49 In making a judgement of the likely trade draw of the proposal, the Practice Guidance (paragraph D.30) advises that:

"...it will always be relevant to consider the character of the development, to judge its likely trading impact. There is a general assumption that 'like affects like', so, for example, in an area already served by large modern foodstores, the effects of a new large food superstore are likely to fall disproportionately on the existing competing stores. Their proportionate impact on local independent retailers, or discount foodstores for example may be less."

- 1.50 The same paragraph also goes on to state:

"...generally consumers will seek to use the closest comparable facility."

- 1.51 In light of this advice, the patterns of trade draw of the proposal has been assessed with regard the size, character, location and proximity of competing provision by the findings of the findings of the household survey. The anticipated effect of the proposal has therefore been informed by up-to-date empirical data on existing shopping patterns of residents in the local area.
- 1.52 Within the defined Study Area, the proposal will result in a large format foodstore (to be operated by Sainsbury's) that will be sufficient in size to assist in meeting the main food shopping needs of the local population and provide improved consumer choice and competition.
- 1.53 In light of the above, we set out below a summary of the approach adopted in anticipating the trade draw of the proposal within Zone 2. This provides a useful example of the judgement made as it is anticipated that the highest proportion of the proposal's turnover (26%) will be derived from this zone. In addition, the application site falls within this zone. The approach is reflected for the remaining zones within the Study Area.

Zone 2

- 1.54 The most popular retail destinations as being the Morrisons at the edge of Barnsley town centre (27.9% market share) and the out of centre Asda at Old Mill Lane (26.1%). Collectively, it is estimated (**Table 7**) that by 2018 these retail destinations attract £44 million (or 54%) of convenience retail expenditure generated in this zone. Reflecting their popularity, it is reasonable to assume that the bulk of the proposal's turnover will be drawn from these retail destinations.
- 1.55 In addition, it is important to take into account wider factors such as the comparison of the quality of range of goods available when compared to that which will be sold from the application proposal. For example, it is likely that a relatively high proportion of shoppers who currently visit the Sainsbury's stores elsewhere are likely to shop at the proposal due to brand preference.
- 1.56 In addition, an improvement in the retail offer locally is likely to reduce the number of residents within this zone travelling further afield, including facilities outside the Study Area. For example, local residents may currently shop elsewhere because the existing retail offer is not meeting their food shopping needs. Consequently, by improving the existing offer locally there is opportunity to reduce the need for local residents to travel to these destinations in the future.
- 1.57 In this context, Table 1 provides a summary of the anticipated trade draw of the proposal within Zone 2.

Table 1: Summary of Anticipated Trading Effects of the Proposal (Zone 2) – Main Destinations

Retail Destination	Existing Market Share within Zone 2	Anticipated Trade Diversion to Proposal (£m)	Trade Diversion as a proportion of expenditure to destination	Resultant Market Share within Zone 2
Morrisons, Lower Thomas Street	27.9%	4.68	20.5%	22.2%
Asda, Old Mill Lane	26.1%	4.02	18.9%	21.2%
Tesco Extra, Wombwell Lane	4.8%	0.75	19.2%	3.9%
Barnsley town centre	14.5%	0.60	5.1%	13.8%

Source: Table 7

- 1.58 Table 1 demonstrates that even after allowing for the trade diversion to the application proposal, existing facilities will continue to maintain a healthy market share within Zone 2. For example, the existing Morrisons at the edge of Barnsley town centre will continue to be a popular convenience retail destination within the zone after allowing for the anticipated trade diversion to the proposal.

Step 5: Consider the Consequences of Impact on Existing Centres and Facilities

- 1.59 Based on the assumptions and approach outlined above, **Tables 8-10** outlines the estimated trading effect on existing centres within the Study Area of the proposal.
- 1.60 Reflecting the approach advocated in the Practice Guidance, the assessment sets out the potential implications of the proposal and outstanding commitments on the turnover of existing centres. This enables comparison to be made to the change in shopping patterns following new development.
- 1.61 The identified trading effects of the proposal are examined against the current vitality and viability of existing centres, based on key health check indicators. Health checks of the key centres are contained at **Appendix 7**.

Comparison Goods

- 1.62 Whilst the comparison goods element of the scheme is very limited, in line with national planning policy and advice within the Practice Guidance an assessment of the overall impact of the proposal (and the extant permission) on the turnover of existing centres.
- 1.63 Whilst the broad approach outlined above has been applied for comparison goods, the assessment adopts the following approach:
- i. Market shares based on the findings of the household survey (**Table 5**).

- ii. The comparison goods element of the current proposal will be ancillary to the convenience offer. The range and scale of the comparison goods offer means that such goods will be purchased as part of a food shop rather than being a comparison goods destination in its own right. Accordingly, the comparison goods turnover of the proposal will largely reflect that identified for convenience goods (**Table 7**).

Summary

- 1.64 We have adopted a robust methodology that reflects established practice, including advice within the Practice Guidance. Retail impact analysis is not an exact science and judgements have been made at key stages. The outputs of the assessment are nevertheless considered to provide a reasonable and robust assessment of the implications of the proposal.
- 1.65 The identified levels of impact are not at a level that would undermine the current and future role of existing centres or adversely impact on future investment. Even after accounting for the proposal and outstanding identified to come forward, all retail destinations are identified to see a growth in expenditure from their current position.
- 1.66 Overall the assessment undertaken provides a reasonable basis to conclude that the proposal will have no adverse effect on existing centres.

TABLE 1: ESTIMATED POPULATION AND CONVENIENCE GOODS EXPENDITURE WITHIN STUDY AREA

Zone		Study Area								
		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Total
	2013									
Population		24,276	46,574	17,911	37,171	34,805	12,473	42,777	28,008	243,995
Expenditure per Head (£)		1,539	1,638	1,556	1,585	1,520	1,533	1,593	1,640	-
Total Expenditure (£m)		37.37	76.30	27.88	58.91	52.91	19.12	68.14	45.94	386.56
	2018									
Population		24,931	48,555	18,518	38,719	35,934	13,294	43,824	29,008	252,783
Expenditure per Head (£)		1,578	1,680	1,596	1,625	1,558	1,572	1,633	1,682	-
Total Expenditure (£m)		39.34	81.55	29.55	62.91	56.00	20.90	71.57	48.78	410.61
Expenditure Growth 2013-2018 (£m)		1.98	5.25	1.67	4.00	3.10	1.77	3.43	2.84	24.05

- NOTES:
1. Population and expenditure per capita derived from Pitney Bowes AnySite Report Data (2011 based estimates) for each zone
 2. Population growth based on Pitney Bowes AnySite Report Data
 3. Expenditure per capita identified to grow at 0.5% per annum, as identified by Pitney Bowes Retail Expenditure Guide (August 2013)

AT 2011 PRICES

TABLE 2: ESTIMATED POPULATION AND COMPARISON GOODS EXPENDITURE WITHIN STUDY AREA

Zone		Study Area								
		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Total
	2013									
Population		24,276	46,574	17,911	37,171	34,805	12,473	42,777	28,008	243,995
Expenditure per Head (£)		2,436	2,677	2,491	2,544	2,400	2,423	2,604	2,841	-
Total Expenditure (£m)		59.14	124.69	44.62	94.57	83.53	30.22	111.37	79.58	627.73
	2018									
Population		24,931	48,555	18,518	38,719	35,934	13,294	43,824	29,008	252,783
Expenditure per Head (£)		3,095	3,401	3,164	3,232	3,048	3,078	3,307	3,609	-
Total Expenditure (£m)		77.15	165.12	58.60	125.12	109.54	40.92	144.93	104.69	826.08
Expenditure Growth 2013-2018 (£m)		18.01	40.43	13.98	30.56	26.01	10.69	33.56	25.11	198.35

- NOTES:
1. Population and expenditure per capita derived from Pitney Bowes AnySite Report Data (2011 based estimates) for each zone
 2. Population growth based on Pitney Bowes AnySite Report Data
 3. Expenditure per capita identified to grow at 4.9% per annum, as identified by Pitney Bowes Retail Expenditure Guide (August 2013)

AT 2011 PRICES

TABLE 3: ESTIMATED MARKET SHARE OF EXISTING FACILITIES WITHIN AND OUTSIDE OF THE STUDY AREA (MAIN FOOD SHOPPING ONLY)

Destination	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		
	(£m)	(%)	(£m)	(%)	(£m)	(%)	(£m)	(%)	(£m)	(%)	(£m)	(%)	(£m)	(%)	(£m)	(%)	(£m)	(%)	
Within Study Area																			
1	<u>Stairfoot Local Centre</u>	11.64	4.0%	2.40	8.5%	1.81	3.2%	1.91	9.2%	1.96	4.4%	2.13	5.4%	0.57	4.0%	0.43	0.8%	0.42	1.2%
	Out-of-Centre																		
	Tesco Extra, Wombwell Lane	27.82	9.6%	4.74	16.9%	3.28	5.7%	4.99	23.9%	4.77	10.8%	4.53	11.4%	0.65	4.6%	2.98	5.8%	1.87	5.4%
	Asda (formerly Netto), Thomas Street, Worsbrough	3.30	1.1%	2.55	9.1%	0.47	0.8%	0.00	0.0%	0.28	0.6%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%
	Other	1.31	0.5%	0.22	0.8%	0.00	0.0%	0.12	0.6%	0.20	0.4%	0.00	0.0%	0.00	0.0%	0.37	0.7%	0.41	1.2%
	Sub-total	32.44	11.2%	7.52	26.8%	3.75	6.5%	5.11	24.4%	5.25	11.9%	4.53	11.4%	0.65	4.6%	3.36	6.6%	2.27	6.6%
	TOTAL ZONE 1	44.08	15.2%	9.91	35.4%	5.56	9.7%	7.02	33.6%	7.21	16.3%	6.67	16.8%	1.23	8.6%	3.78	7.4%	2.70	7.8%
2	<u>Barnsley Town Centre</u>																		
	Marks & Spencer Food Hall, 7 Queen Street	4.56	1.6%	0.58	2.1%	2.63	4.6%	0.19	0.9%	0.00	0.0%	0.48	1.2%	0.11	0.8%	0.27	0.5%	0.30	0.9%
	Lidl, Peel Street, Peel Centre	1.86	0.6%	0.09	0.3%	0.73	1.3%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.95	1.9%	0.08	0.2%
	Iceland, 8/9 The Alhambra Centre, Cheapside	1.44	0.5%	0.45	1.6%	0.37	0.6%	0.20	0.9%	0.40	0.9%	0.00	0.0%	0.02	0.1%	0.00	0.0%	0.00	0.0%
	Iceland, 13-17 Peel Street	2.73	0.9%	0.28	1.0%	0.09	0.2%	0.22	1.0%	0.40	0.9%	0.23	0.6%	0.14	1.0%	1.20	2.3%	0.19	0.5%
	Local shops	1.92	0.7%	0.14	0.5%	0.69	1.2%	0.12	0.6%	0.30	0.7%	0.00	0.0%	0.21	1.4%	0.47	0.9%	0.00	0.0%
	Sub-total	12.50	4.3%	1.54	5.5%	4.51	7.9%	0.73	3.5%	1.09	2.5%	0.70	1.8%	0.47	3.3%	2.88	5.6%	0.57	1.7%
	Edge-of-Centre																		
	Morrisons, Lower Thomas Street	42.69	14.7%	8.34	29.8%	19.18	33.5%	2.49	11.9%	0.20	0.4%	0.76	1.9%	0.78	5.4%	3.06	6.0%	7.88	22.9%
	Out-of-Centre																		
	Asda, Old Mill Lane	49.06	16.9%	4.16	14.9%	18.74	32.8%	4.70	22.5%	0.80	1.8%	0.48	1.2%	2.94	20.5%	13.80	27.0%	3.42	9.9%
	Aldi, Claycliffe Road, Barugh Green	9.33	3.2%	0.00	0.0%	4.97	8.7%	0.17	0.8%	0.00	0.0%	0.00	0.0%	0.00	0.0%	3.24	6.3%	0.94	2.7%
	Other	1.26	0.4%	0.00	0.0%	0.86	1.5%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.40	0.8%	0.00	0.0%
	Sub-total	59.64	20.6%	4.16	14.9%	24.58	42.9%	4.87	23.3%	0.80	1.8%	0.48	1.2%	2.94	20.5%	17.44	34.1%	4.36	12.7%
	TOTAL ZONE 2	114.84	39.6%	14.05	50.1%	48.27	84.3%	8.09	38.7%	2.10	4.7%	1.95	4.9%	4.19	29.2%	23.39	45.8%	12.81	37.2%
3	<u>Cudworth District Centre</u>	1.47	0.5%	0.00	0.0%	0.00	0.0%	1.47	7.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%
	<u>Lundwood Local Centre</u>	0.62	0.2%	0.00	0.0%	0.05	0.1%	0.27	1.3%	0.21	0.5%	0.00	0.0%	0.09	0.6%	0.00	0.0%	0.00	0.0%
	TOTAL ZONE 3	2.09	0.7%	0.00	0.0%	0.05	0.1%	1.74	8.3%	0.21	0.5%	0.00	0.0%	0.09	0.6%	0.00	0.0%	0.00	0.0%
4	<u>Wombwell District Centre</u>	0.50	0.2%	0.11	0.4%	0.00	0.0%	0.00	0.0%	0.39	0.9%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%
	<u>Hoyland District Centre</u>	1.20	0.4%	0.00	0.0%	0.00	0.0%	0.00	0.0%	1.20	2.7%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%
	<u>Hoyland Common Local Centre</u>	0.60	0.2%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.60	1.4%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%
	Out-of-Centre																		
	Morrisons, Cortonwood, Brampton	33.96	11.7%	1.66	5.9%	0.15	0.3%	1.02	4.9%	20.72	46.9%	7.40	18.6%	1.69	11.8%	1.32	2.6%	0.00	0.0%
	Other	0.10	0.0%	0.00	0.0%	0.00	0.0%	0.08	0.4%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.02	0.1%
	Sub-total	34.05	11.7%	1.66	5.9%	0.15	0.3%	1.10	5.2%	20.72	46.9%	7.40	18.6%	1.69	11.8%	1.32	2.6%	0.02	0.1%
	TOTAL ZONE 4	36.36	12.5%	1.77	6.3%	0.15	0.3%	1.10	5.2%	22.92	51.9%	7.40	18.6%	1.69	11.8%	1.32	2.6%	0.02	0.1%
5	<u>Goldthorpe District Centre</u>																		
	Asda (formerly Netto), High Street	1.59	0.5%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	1.59	4.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%
	Other	0.43	0.1%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.43	1.1%	0.00	0.0%	0.00	0.0%	0.00	0.0%
	Sub-total	2.01	0.7%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	2.01	5.1%	0.00	0.0%	0.00	0.0%	0.00	0.0%
	<u>Bolton on Dearne Local Centre</u>	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%
	<u>Darfield Local Centre</u>	0.46	0.2%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.46	1.1%	0.00	0.0%	0.00	0.0%	0.00	0.0%
	<u>Thurnscoe Shepherd Lane / Houghton Road Local Centre</u>																		
	Asda, Welfare Road	4.39	1.5%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	4.39	11.1%	0.00	0.0%	0.00	0.0%	0.00	0.0%
	Other	0.08	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.08	0.2%	0.00	0.0%	0.00	0.0%	0.00	0.0%
	Sub-total	4.47	1.5%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	4.47	11.3%	0.00	0.0%	0.00	0.0%	0.00	0.0%
	Other	0.49	0.2%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.49	1.2%	0.00	0.0%	0.00	0.0%	0.00	0.0%
	TOTAL ZONE 5	7.43	2.6%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	7.43	18.7%	0.00	0.0%	0.00	0.0%	0.00	0.0%
6	<u>Grimethorpe Local Centre</u>																		
	Asda / Netto, High Street, Grimethorpe	3.24	1.1%	0.00	0.0%	0.00	0.0%	0.51	2.4%	0.00	0.0%	1.07	2.7%	1.49	10.4%	0.00	0.0%	0.17	0.5%
	Other	0.07	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.07	0.5%	0.00	0.0%	0.00	0.0%
	Sub-total	3.31	1.1%	0.00	0.0%	0.00	0.0%	0.51	2.4%	0.00	0.0%	1.07	2.7%	1.57	10.9%	0.00	0.0%	0.17	0.5%
	Other	0.12	0.0%	0.00	0.0%	0.00	0.0%	0.04	0.2%	0.00	0.0%	0.00	0.0%	0.08	0.6%	0.00	0.0%	0.00	0.0%
	TOTAL ZONE 6	3.43	1.2%	0.00	0.0%	0.00	0.0%	0.55	2.6%	0.00	0.0%	1.07	2.7%	1.65	11.5%	0.00	0.0%	0.17	0.5%
7	<u>Royston District Centre</u>																		

TABLE 4: ESTIMATED MARKET SHARE OF EXISTING FACILITIES WITHIN AND OUTSIDE OF THE STUDY AREA (MAIN AND TOP-UP SHOPPING)

Destination	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		
	(£m)	(%)	(£m)	(%)	(£m)	(%)	(£m)	(%)	(£m)	(%)	(£m)	(%)	(£m)	(%)	(£m)	(%)	(£m)	(%)	
Within Study Area																			
1	<u>Stairfoot Local Centre</u>	13.87	3.6%	2.79	7.5%	2.34	3.1%	2.53	9.1%	2.15	3.7%	2.36	4.5%	0.57	3.0%	0.50	0.7%	0.63	1.4%
	Out-of-Centre																		
	Tesco Extra, Wombwell Lane	31.38	8.1%	5.58	14.9%	3.65	4.8%	5.89	21.1%	5.83	9.9%	4.86	9.2%	0.72	3.8%	2.98	4.4%	1.87	4.1%
	Asda (formerly Netto), Thomas Street, Worsbrough	6.16	1.6%	4.96	13.3%	0.86	1.1%	0.05	0.2%	0.28	0.5%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%
	Other	3.14	0.8%	1.19	3.2%	0.69	0.9%	0.12	0.4%	0.29	0.5%	0.00	0.0%	0.00	0.0%	0.37	0.5%	0.49	1.1%
	Sub-total	40.68	10.5%	11.74	31.4%	5.20	6.8%	6.06	21.7%	6.40	10.9%	4.86	9.2%	0.72	3.8%	3.36	4.9%	2.35	5.1%
	TOTAL ZONE 1	54.55	14.1%	14.53	38.9%	7.53	9.9%	8.59	30.8%	8.55	14.5%	7.22	13.6%	1.30	6.8%	3.86	5.7%	2.98	6.5%
2	<u>Barnsley Town Centre</u>																		
	Marks & Spencer Food Hall, 7 Queen Street	7.84	2.0%	0.98	2.6%	4.26	5.6%	0.35	1.3%	0.00	0.0%	0.48	0.9%	0.21	1.1%	0.75	1.1%	0.81	1.8%
	Lidl, Peel Street, Peel Centre	2.49	0.6%	0.22	0.6%	0.92	1.2%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	1.14	1.7%	0.21	0.4%
	Iceland, 8/9 The Alhambra Centre, Cheapside	3.03	0.8%	0.58	1.5%	1.42	1.9%	0.22	0.8%	0.40	0.7%	0.10	0.2%	0.02	0.1%	0.30	0.4%	0.00	0.0%
	Iceland, 13-17 Peel Street	4.03	1.0%	0.57	1.5%	0.67	0.9%	0.29	1.0%	0.49	0.8%	0.23	0.4%	0.18	0.9%	1.29	1.9%	0.31	0.7%
	Local shops	9.30	2.4%	1.49	4.0%	3.80	5.0%	0.51	1.8%	0.79	1.3%	0.49	0.9%	0.35	1.9%	1.77	2.6%	0.09	0.2%
	Sub-total	26.69	6.9%	3.85	10.3%	11.07	14.5%	1.37	4.9%	1.68	2.9%	1.30	2.4%	0.77	4.0%	5.25	7.7%	1.42	3.1%
	Edge-of-Centre																		
	Morrisons, Lower Thomas Street	47.60	12.3%	9.52	25.5%	21.32	27.9%	2.86	10.3%	0.40	0.7%	0.90	1.7%	0.94	4.9%	3.51	5.2%	8.15	17.7%
	Out-of-Centre																		
	Asda, Old Mill Lane	52.47	13.6%	4.52	12.1%	19.92	26.1%	4.96	17.8%	1.14	1.9%	0.62	1.2%	3.11	16.3%	14.58	21.4%	3.62	7.9%
	Aldi, Claycliffe Road, Barugh Green	11.40	2.9%	0.00	0.0%	6.14	8.0%	0.17	0.6%	0.00	0.0%	0.00	0.0%	0.00	0.0%	3.89	5.7%	1.19	2.6%
	Other	5.98	1.5%	0.00	0.0%	4.84	6.3%	0.09	0.3%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.97	1.4%	0.08	0.2%
	Sub-total	69.85	18.1%	4.52	12.1%	30.90	40.5%	5.22	18.7%	1.14	1.9%	0.62	1.2%	3.11	16.3%	19.45	28.5%	4.89	10.6%
	TOTAL ZONE 2	144.14	37.3%	17.88	47.9%	63.28	82.9%	9.45	33.9%	3.22	5.5%	2.82	5.3%	4.82	25.2%	28.21	41.4%	14.46	31.5%
3	<u>Cudworth District Centre</u>	4.20	1.1%	0.00	0.0%	0.00	0.0%	3.88	13.9%	0.00	0.0%	0.00	0.0%	0.32	1.7%	0.00	0.0%	0.00	0.0%
	Lundwood Local Centre	1.57	0.4%	0.00	0.0%	0.16	0.2%	0.97	3.5%	0.35	0.6%	0.00	0.0%	0.09	0.5%	0.00	0.0%	0.00	0.0%
	TOTAL ZONE 3	5.77	1.5%	0.00	0.0%	0.16	0.2%	4.85	17.4%	0.35	0.6%	0.00	0.0%	0.41	2.1%	0.00	0.0%	0.00	0.0%
4	<u>Wombwell District Centre</u>	3.44	0.9%	0.11	0.3%	0.15	0.2%	0.02	0.1%	2.90	4.9%	0.27	0.5%	0.00	0.0%	0.00	0.0%	0.00	0.0%
	<u>Howland District Centre</u>	3.45	0.9%	0.10	0.3%	0.00	0.0%	0.00	0.0%	3.33	5.7%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.01	0.0%
	<u>Howland Common Local Centre</u>	2.38	0.6%	0.26	0.7%	0.00	0.0%	0.00	0.0%	2.13	3.6%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%
	Out-of-Centre																		
	Morrisons, Cortonwood, Brampton	37.47	9.7%	1.75	4.7%	0.48	0.6%	1.10	3.9%	22.51	38.2%	8.36	15.8%	1.69	8.9%	1.58	2.3%	0.00	0.0%
	Other	1.82	0.5%	0.06	0.2%	0.00	0.0%	0.08	0.3%	1.63	2.8%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.04	0.1%
	Sub-total	39.28	10.2%	1.82	4.9%	0.48	0.6%	1.18	4.2%	24.15	41.0%	8.36	15.8%	1.69	8.9%	1.58	2.3%	0.04	0.1%
	TOTAL ZONE 4	48.56	12.6%	2.28	6.1%	0.63	0.8%	1.20	4.3%	32.50	55.2%	8.62	16.3%	1.69	8.9%	1.58	2.3%	0.05	0.1%
5	<u>Goldthorpe District Centre</u>																		
	Asda (formerly Netto), High Street	2.84	0.7%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	2.63	5.0%	0.20	1.1%	0.00	0.0%	0.00	0.0%
	Other	1.17	0.3%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	1.06	2.0%	0.00	0.0%	0.12	0.2%	0.00	0.0%
	Sub-total	4.01	1.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	3.69	7.0%	0.20	1.1%	0.12	0.2%	0.00	0.0%
	<u>Bolton on Dearne Local Centre</u>	0.68	0.2%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.68	1.3%	0.00	0.0%	0.00	0.0%	0.00	0.0%
	<u>Darfield Local Centre</u>	2.38	0.6%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.27	0.5%	2.11	4.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%
	<u>Thurnscoe Shepherd Lane / Houghton Road Local Centre</u>																		
	Asda, Welfare Road	6.59	1.7%	0.00	0.0%	0.00	0.0%	0.02	0.1%	0.00	0.0%	6.57	12.4%	0.00	0.0%	0.00	0.0%	0.00	0.0%
	Other	0.74	0.2%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.74	1.4%	0.00	0.0%	0.00	0.0%	0.00	0.0%
	Sub-total	7.33	1.9%	0.00	0.0%	0.00	0.0%	0.02	0.1%	0.00	0.0%	7.31	13.8%	0.00	0.0%	0.00	0.0%	0.00	0.0%
	Other	1.79	0.5%	0.00	0.0%	0.15	0.2%	0.00	0.0%	0.00	0.0%	1.64	3.1%	0.00	0.0%	0.00	0.0%	0.00	0.0%
	TOTAL ZONE 5	16.18	4.2%	0.00	0.0%	0.15	0.2%	0.02	0.1%	0.27	0.5%	15.42	29.1%	0.20	1.1%	0.12	0.2%	0.00	0.0%
6	<u>Grimethorpe Local Centre</u>																		
	Asda / Netto, High Street, Grimethorpe	5.26	1.4%	0.00	0.0%	0.00	0.0%	0.78	2.8%	0.00	0.0%	1.60	3.0%	2.72	14.2%	0.00	0.0%	0.17	0.4%
	Other	0.37	0.1%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.37	1.9%	0.00	0.0%	0.00	0.0%
	Sub-total	5.63	1.5%	0.00	0.0%	0.00	0.0%	0.78	2.8%	0.00	0.0%	1.60	3.0%	3.09	16.1%	0.00	0.0%	0.17	0.4%
	Other	0.88	0.2%	0.00	0.0%	0.00	0.0%	0.13	0.5%	0.00	0.0%	0.00	0.0%	0.74	3.9%	0.00	0.0%	0.00	0.0%
	TOTAL ZONE 6	6.51	1.7%	0.00	0.0%	0.00	0.0%	0.91	3.3%	0.00	0.0%	1.60	3.0%	3.83	20.0%	0.00	0.0%	0.17	0.4%
7	<u>Royston District Centre</u>																		
	Asda / Netto, Midland Road, Royston	5.85	1.5%	0.00	0.0%	0.42	0.6%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.08	0.4%	5.35	7.8%	0.00	0.0%
	Other	4.31	1.1%	0.00	0.0%	0.00	0.0%	0.12	0.4%	0.00	0.0%	0.00	0.0%	0.00	0.0%	3.94	5.8%	0.26	0.6%
	Sub-total	10.16	2.6%	0.00	0.0%	0.42	0.6%	0.12	0.4%	0.00	0.0%	0.00	0.0%	0.08	0.4%	9.28	13.6%	0.26	0.6%
	<u>Maplewell Local Centre</u>	3.86	1.0%	0.07	0.2%	0.44	0.6%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	3.35	4.9%	0.00	0.0%
	<u>Darton Local Centre</u>	0.53	0.1%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.53	0.8%	0.00	0.0%
	<u>Athersley Local Centre</u>	2.67	0.7%	0.00	0.0%	0.59	0.8%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	2.08	3.0%	0.00	0.0%
	Other	0.57	0.1%	0.00	0.0%	0.22	0.3%	0.00	0.0%	0.10	0.2%	0.00	0.0%	0.14	0.7%	0.12	0.2%	0.00	0.0%
	TOTAL ZONE 7	17.79	4.6%	0.07	0.2%	1.67	2.2%	0.12	0.4%	0.10	0.2%	0.00	0.0%	0.22	1.1%	15.37	22.6%	0.26	0.6%
8	<u>Penistone District Centre</u>																		
	Tesco, Market Lane	15.87	4.1%	0.08	0.2%	0.44	0.6%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	15.35	33.4%
	Other	1.77	0.5%	0.05	0.1%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	1.72	3.8%
	Sub-total	17.64	4.6%	0.13	0.3%	0.44	0.6%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	17.08	37.2%
	<u>Dodworth Local Centre</u>	2.33	0.6%	0.00	0.0%	0.15	0.2%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	2.18	4.7%
	Other	2.26	0.6%	0.24	0.6%	0.22	0.3%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.13	0.2%	1.68	3.7%
	TOTAL ZONE 8	22.23	5.8%	0.36	1.0%	0.81	1.1%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.13	0.2%	20.93	45.6%
Total within Study Area																			
Outside Study Area																			
	<u>Wath-upon-Deane</u>	15.50	4.0%	0.00	0.0%	0.00	0.0%	0.07	0.3%	6.17	10.5%	9.03	17.1%	0.00	0.0%	0.23	0.3%	0.00	0.0%
	<u>Pontefract</u>	5.90	1.5%	0.00	0.0%	0.00	0.0%	1.19	4.3%	0.00	0.0%	0.14	0.3%	3.70	19.4%	0.86	1.3%	0.00	0.0%
	<u>Wakefield</u>	16.24	4.2%	0.00	0.0%	1.56	2.0%	0.23	0.8%	0.00	0.0%	0.00	0.0%	0.74	3.9%	13.50	19.8%	0.21	0.5%
	Other	26.38	6.8%	1.30	3.5%	0.51	0.7%	0.75	2.7%	6.38	10.8%	7.04	13.3%	2.04	10.7%	2.37	3.5%	5.98	13.0%
Total Outside Study Area																			
Special Forms of Trading																			
TOTAL																			

NOTES:

1. Market shares derived from Barnsley household survey (September 2013).
2. Turnover = market share x available expenditure (Table 1).

TABLE 5: ESTIMATED SURVEY DERIVED TURNOVER OF EXISTING FACILITIES WITHIN AND OUTSIDE OF THE STUDY AREA (COMPARISON GOODS) - 2013

Zone	Destination	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
		£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%
1	Within Study Area																		
	Stairfoot Local Centre	0.33	0.1%	0.33	0.6%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%
	Out-of-Centre																		
	Tesco Extra, Wombwell Lane	9.92	1.6%	1.11	1.9%	2.25	1.8%	1.74	3.9%	0.98	1.0%	1.79	2.1%	0.75	2.5%	0.92	0.8%	0.40	0.5%
	Wombwell Lane Retail Park	0.76	0.1%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.36	0.4%	0.40	0.5%	0.00	0.0%	0.00	0.0%	0.00	0.0%
	Other	1.87	0.3%	1.87	3.2%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%
	Sub-total	12.55	2.0%	2.97	5.0%	2.25	1.8%	1.74	3.9%	1.34	1.4%	2.18	2.6%	0.75	2.5%	0.92	0.8%	0.40	0.5%
	TOTAL ZONE 1	12.88	2.1%	3.30	5.6%	2.25	1.8%	1.74	3.9%	1.34	1.4%	2.18	2.6%	0.75	2.5%	0.92	0.8%	0.40	0.5%
2	Barnsley Town Centre	193.40	30.8%	25.03	42.3%	56.28	45.1%	16.27	36.5%	17.21	18.2%	15.07	18.0%	9.69	32.1%	37.53	33.7%	16.32	20.5%
	Edge-of-Centre																		
	Morrisons, Lower Thomas Street	5.20	0.8%	1.03	1.7%	1.78	1.4%	0.35	0.8%	0.00	0.0%	0.00	0.0%	0.31	1.0%	0.32	0.3%	1.41	1.8%
	Out-of-Centre																		
	Asda, Old Mill Lane	22.76	3.6%	1.90	3.2%	6.66	5.3%	2.51	5.6%	0.08	0.1%	0.00	0.0%	1.52	5.0%	8.36	7.5%	1.73	2.2%
	The Peel Centre	0.08	0.0%	0.00	0.0%	0.05	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.03	0.1%	0.00	0.0%	0.00	0.0%
	Other	1.57	0.2%	0.00	0.0%	1.34	1.1%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.23	0.2%	0.00	0.0%
	Sub-total	24.41	3.9%	1.90	3.2%	8.05	6.5%	2.51	5.6%	0.08	0.1%	0.00	0.0%	1.56	5.2%	8.59	7.7%	1.73	2.2%
	TOTAL ZONE 2	223.01	35.5%	27.96	47.3%	66.10	53.0%	19.12	42.9%	17.29	18.3%	15.07	18.0%	11.57	38.3%	46.44	41.7%	19.46	24.5%
3	Cudworth District Centre	2.33	0.4%	0.00	0.0%	0.00	0.0%	1.76	3.9%	0.00	0.0%	0.00	0.0%	0.34	1.1%	0.23	0.2%	0.00	0.0%
	Lundwood Local Centre	0.07	0.0%	0.00	0.0%	0.00	0.0%	0.07	0.2%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%
	TOTAL ZONE 3	2.40	0.4%	0.00	0.0%	0.00	0.0%	1.83	4.1%	0.00	0.0%	0.00	0.0%	0.34	1.1%	0.23	0.2%	0.00	0.0%
4	Wombwell District Centre	3.43	0.5%	0.14	0.2%	0.44	0.4%	0.44	1.0%	2.37	2.5%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.04	0.1%
	Hoyland District Centre	3.65	0.6%	0.00	0.0%	0.00	0.0%	0.00	0.0%	3.65	3.9%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%
	Hoyland Common Local Centre	2.18	0.3%	0.11	0.2%	0.00	0.0%	0.00	0.0%	1.89	2.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.18	0.2%
	Out-of-Centre																		
	Morrisons, Cortonwood, Brampton	3.96	0.6%	0.24	0.4%	0.00	0.0%	0.09	0.2%	2.80	3.0%	0.58	0.7%	0.19	0.6%	0.06	0.1%	0.00	0.0%
	TOTAL ZONE 4	13.22	2.1%	0.48	0.8%	0.44	0.4%	0.53	1.2%	10.71	11.3%	0.58	0.7%	0.19	0.6%	0.06	0.1%	0.23	0.3%
5	Goldthorpe District Centre	1.91	0.3%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	1.91	2.3%	0.00	0.0%	0.00	0.0%	0.00	0.0%
	Bolton on Dearne Local Centre	1.48	0.2%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	1.48	1.8%	0.00	0.0%	0.00	0.0%	0.00	0.0%
	Darfield Local Centre	1.97	0.3%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.18	0.2%	1.79	2.1%	0.00	0.0%	0.00	0.0%	0.00	0.0%
	Thurnscoe Shepherd Lane / Houghton Road Local Centre	1.33	0.2%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	1.33	1.6%	0.00	0.0%	0.00	0.0%	0.00	0.0%
	Other	0.47	0.1%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.47	0.6%	0.00	0.0%	0.00	0.0%	0.00	0.0%
	TOTAL ZONE 5	7.16	1.1%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.18	0.2%	6.98	8.4%	0.00	0.0%	0.00	0.0%	0.00	0.0%
6	Grimethorpe Local Centre	2.16	0.3%	0.00	0.0%	0.00	0.0%	0.07	0.2%	0.00	0.0%	0.00	0.0%	2.09	6.9%	0.00	0.0%	0.00	0.0%
	Other	0.30	0.0%	0.00	0.0%	0.00	0.0%	0.07	0.2%	0.00	0.0%	0.00	0.0%	0.23	0.7%	0.00	0.0%	0.00	0.0%
	TOTAL ZONE 6	2.46	0.4%	0.00	0.0%	0.00	0.0%	0.14	0.3%	0.00	0.0%	0.00	0.0%	2.32	7.7%	0.00	0.0%	0.00	0.0%
7	Royston District Centre	2.39	0.4%	0.00	0.0%	0.44	0.4%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	1.94	1.7%	0.00	0.0%
	Mapplewell Local Centre	0.91	0.1%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.91	0.8%	0.00	0.0%
	Darton Local Centre	0.23	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.23	0.2%	0.00	0.0%
	TOTAL ZONE 7	3.53	0.6%	0.00	0.0%	0.44	0.4%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	3.08	2.8%	0.00	0.0%
8	Penistone District Centre	7.33	1.2%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.57	0.5%	6.76	8.5%
	Dodworth Local Centre	3.05	0.5%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	3.05	3.8%
	Other	0.25	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.25	0.3%
	TOTAL ZONE 8	10.64	1.7%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.57	0.5%	10.07	12.7%
Total within Study Area		275.30	43.9%	31.75	53.7%	69.24	55.5%	23.37	52.4%	29.52	31.2%	24.81	29.7%	15.17	50.2%	51.30	46.1%	30.15	37.9%
Outside Study Area																			
	Wath-upon-Dearne	3.26	0.5%	0.00	0.0%	0.00	0.0%	0.00	0.0%	1.85	2.0%	1.41	1.7%	0.00	0.0%	0.00	0.0%	0.00	0.0%
	Wakefield Area	20.91	3.3%	0.00	0.0%	1.29	1.0%	0.02	0.1%	0.35	0.4%	0.00	0.0%	3.31	11.0%	15.47	13.9%	0.47	0.6%
	Sheffield Area	171.28	27.3%	15.18	25.7%	36.12	29.0%	9.86	22.1%	32.94	34.8%	18.78	22.5%	2.82	9.3%	22.88	20.5%	32.70	41.1%
	Rotherham Area	9.73	1.5%	1.43	2.4%	0.00	0.0%	0.61	1.4%	3.39	3.6%	3.90	4.7%	0.00	0.0%	0.00	0.0%	0.40	0.5%
	Brampton Area	49.37	7.9%	4.88	8.3%	3.44	2.8%	3.38	7.6%	15.12	16.0%	16.63	19.9%	1.15	3.8%	1.95	1.7%	2.81	3.5%
	Other	37.65	6.0%	0.58	1.0%	4.66	3.7%	2.82	6.3%	3.22	3.4%	10.44	12.5%	4.17	13.8%	5.85	5.3%	5.91	7.4%
	Sub-total	292.19	46.5%	22.07	37.3%	45.51	36.5%	16.69	37.4%	56.87	60.1%	51.16	61.2%	11.45	37.9%	46.15	41.4%	42.29	53.1%
Total Outside Study Area		292.19	46.5%	22.07	37.3%	45.51	36.5%	16.69	37.4%	56.87	60.1%	51.16	61.2%	11.45	37.9%	46.15	41.4%	42.29	53.1%
	Special Forms of Trading	60.23	9.6%	5.32	9.0%	9.94	8.0%	4.56	10.2%	8.17	8.6%	7.56	9.0%	3.60	11.9%	13.92	12.5%	7.14	9.0%
TOTAL		627.73	100.0%	59.14	100.0%	124.69	100.0%	44.62	100.0%	94.57	100.0%	83.53	100.0%	30.22	100.0%	111.37	100.0%	79.58	100.0%

NOTES:
1. Market shares derived from Barnsley Household Survey (September 2013)
2. Turnover = expenditure (Table 2) x market share

TABLE 6A: ESTIMATED TURNOVER OF PROPOSED FOODSTORE (2018)

Proposed Development	Net Floorspace (sq m)	Sales Area (sq m)		Sales Density (£ per sq m)		Expected Turnover (£m)		Proportion of Turnover from within Study Area	Total Turnover From Study Area (£m)	
		Convenience	Comparison	Convenience	Comparison	Convenience	Comparison		Convenience	Comparison
Sainsbury's, Stairfoot Business Park	6,836	3,997	2,839	11,818	7,740	47.24	21.97	95%	44.87	20.87

- NOTES:
1. Convenience / comparison sales area based on a 58% / 42% split
 2. Sales density of proposed Sainsbury's derived from Verdict Grocery Retailers (2012)
 3. Proportion of turnover derived from Study Area based on Turley Associates' estimate

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TABLE 6B: ESTIMATED TRADE DRAW OF THE PROPOSED DEVELOPMENT BY ZONE

	Zone 1	Zone 2	Zone 3	Zone 4	Study Area Zone 5	Zone 6	Zone 7	Zone 8	Total
Proportion of Turnover	18.0%	26.0%	15.0%	19.0%	12.0%	3.0%	5.0%	2.0%	100.0%
<u>Convenience Goods</u>									
Available Expenditure	39.34	81.55	29.55	62.91	56.00	20.90	71.57	48.78	410.61
Turnover by Zone (£m)	8.08	11.67	6.73	8.53	5.38	1.35	2.24	0.90	44.87
Market Share by Zone	20.5%	14.3%	22.8%	13.6%	9.6%	6.4%	3.1%	1.8%	10.9%
<u>Comparison Goods</u>									
Available Expenditure	77.15	165.12	58.60	125.12	109.54	40.92	144.93	104.69	826.08
Turnover by Zone (£m)	3.76	5.43	3.13	3.97	2.50	0.63	1.04	0.42	20.87
Market Share by Zone	4.9%	3.3%	5.3%	3.2%	2.3%	1.5%	0.7%	0.4%	2.5%

- NOTES:
1. Turnover by zone based on Turley Associates' assumptions taking into account current shopping patterns
 2. Turnover of proposal taken from Table 6A
 3. Available expenditure taken from Table 1 (convenience) and Table 2 (comparison)
 4. Market share by zone = turnover of proposal expressed as a proportion of available expenditure

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TABLE 7: TRADE DRAW OF THE PROPOSED DEVELOPMENT (2018)

Proposed Development	Zone 1			Zone 2			Zone 3			Zone 4			Zone 5			Zone 6			Zone 7			Zone 8			Total			
	Current Market Share	Trade Diversion (€m)	Resultant Market Share	Current Market Share	Trade Diversion (€m)	Resultant Market Share	Current Market Share	Trade Diversion (€m)	Resultant Market Share	Current Market Share	Trade Diversion (€m)	Resultant Market Share	Current Market Share	Trade Diversion (€m)	Resultant Market Share	Current Market Share	Trade Diversion (€m)	Resultant Market Share	Current Market Share	Trade Diversion (€m)	Resultant Market Share	Current Market Share	Trade Diversion (€m)	Resultant Market Share				
		8.08	25.5%		11.67	14.3%		6.73	22.8%		8.53	13.6%		5.38	9.6%		1.35	6.4%		2.24	3.1%		0.90	1.8%		44.87	10.9%	
Within Study Area																												
1	Stairfoot Local Centre	7.5%	0.20	7.0%	3.1%	0.27	2.7%	9.1%	0.25	8.2%	3.7%	0.15	3.4%	4.5%	0.10	4.3%	3.0%	0.04	2.8%	0.7%	0.02	0.7%	1.4%	0.01	1.3%	3.6%	1.04	3.3%
	Out-of-Centre																											
	Tesco Extra, Wombwell Lane	14.9%	2.35	9.0%	4.8%	0.75	3.9%	21.1%	2.44	12.9%	9.9%	1.03	8.3%	9.2%	1.00	7.4%	3.8%	0.15	3.1%	4.4%	0.51	3.7%	4.1%	0.02	4.0%	8.1%	8.25	6.1%
	Asda (formerly Netto), Thomas Street, Wombrough	13.3%	0.50	12.0%	1.1%	0.08	1.0%	0.2%	0.01	0.1%	0.5%	0.04	0.4%	0.0%	0.00	0.0%	0.0%	0.00	0.0%	0.0%	0.00	0.0%	0.0%	0.00	0.0%	1.6%	0.63	1.4%
	Other	3.2%	0.02	3.1%	0.9%	0.02	0.9%	0.4%	0.03	0.3%	0.5%	0.04	0.4%	0.0%	0.00	0.0%	0.0%	0.00	0.0%	0.5%	0.01	0.5%	1.1%	0.01	1.0%	0.8%	0.13	0.8%
	Sub-total	31.4%	2.87	24.1%	6.8%	0.85	5.8%	21.7%	2.48	13.2%	10.9%	1.11	9.1%	9.2%	1.00	7.4%	3.8%	0.15	3.1%	4.9%	0.52	4.2%	5.1%	0.03	4.1%	10.5%	9.02	8.3%
	TOTAL ZONE 1	38.9%	3.07	51.6%	9.9%	1.12	22.8%	30.8%	2.73	44.3%	14.5%	1.26	26.1%	13.6%	1.10	21.3%	6.8%	0.19	12.3%	5.7%	0.54	8.0%	6.5%	0.04	8.2%	14.1%	10.06	22.6%
2	Barnsley Town Centre																											
	Marks & Spencer Food Hall, 7 Queen Street	2.6%	0.27	1.9%	5.6%	0.25	5.3%	1.3%	0.07	1.0%	0.0%	0.00	0.0%	0.9%	0.07	0.8%	1.1%	0.01	1.0%	1.1%	0.02	1.1%	1.8%	0.02	1.7%	2.0%	0.72	1.9%
	Lidl Peel Street, Peel Centre	0.6%	0.05	0.5%	1.2%	0.08	1.1%	0.0%	0.00	0.0%	0.0%	0.00	0.0%	0.0%	0.00	0.0%	0.0%	0.00	0.0%	1.7%	0.04	1.6%	0.4%	0.00	0.4%	0.6%	0.17	0.6%
	Iceland, 89 The Alhambra Centre, Cheapside	1.5%	0.05	1.4%	1.9%	0.12	1.7%	0.8%	0.05	0.6%	0.7%	0.06	0.6%	0.2%	0.01	0.2%	0.1%	0.00	0.1%	0.4%	0.01	0.4%	0.0%	0.00	0.4%	0.8%	0.30	0.7%
	Iceland, 13-17 Peel Street	1.5%	0.06	1.4%	0.9%	0.10	0.8%	1.0%	0.07	0.8%	0.8%	0.07	0.7%	0.4%	0.00	0.4%	0.9%	0.01	0.9%	1.9%	0.04	1.8%	0.7%	0.01	0.7%	1.0%	0.36	1.0%
	Local shops	4.0%	0.10	3.7%	5.0%	0.05	4.9%	1.8%	0.10	1.5%	1.3%	0.11	1.2%	0.9%	0.02	1.5%	1.9%	0.02	1.7%	2.6%	0.01	2.6%	0.2%	0.00	0.2%	2.4%	0.42	2.3%
	Sub-total	10.3%	0.53	9.0%	14.5%	0.60	12.8%	4.9%	0.29	3.9%	2.9%	0.24	2.5%	2.4%	0.10	2.3%	4.0%	0.05	3.7%	7.7%	0.12	7.6%	3.1%	0.03	3.0%	6.9%	1.97	6.4%
	Edge-of-Centre																											
	Monitors, Lower Thomas Street	25.5%	2.38	19.4%	27.9%	4.68	22.2%	10.3%	0.75	7.7%	0.7%	0.14	0.5%	1.7%	0.22	1.3%	4.9%	0.15	4.2%	5.2%	0.25	4.8%	17.7%	0.22	17.3%	12.3%	8.79	10.2%
	Out-of-Centre																											
	Asda, Old Mill Lane	12.1%	1.27	8.9%	26.1%	4.02	21.2%	17.8%	1.79	11.7%	1.9%	0.45	1.2%	1.2%	0.15	0.9%	16.3%	0.40	14.4%	21.4%	0.75	20.4%	7.9%	0.10	7.7%	13.6%	8.93	11.4%
	Aldi, Claycliffe Road, Baugh Green	0.0%	0.00	0.0%	8.0%	0.45	7.5%	0.6%	0.04	0.5%	0.0%	0.00	0.0%	0.0%	0.00	0.0%	0.0%	0.00	0.0%	5.7%	0.10	5.6%	2.6%	0.01	2.9%	2.6%	0.60	2.6%
	Other	0.0%	0.00	0.0%	6.3%	0.10	6.2%	0.3%	0.01	0.3%	0.0%	0.00	0.0%	0.0%	0.00	0.0%	0.0%	0.00	0.0%	1.4%	0.01	1.4%	0.2%	0.00	0.2%	1.5%	0.12	1.5%
	Sub-total	12.1%	1.27	8.9%	40.5%	4.57	34.9%	18.7%	1.84	12.5%	1.9%	0.45	1.2%	1.2%	0.15	0.9%	16.3%	0.40	14.4%	28.6%	0.86	27.3%	10.6%	0.11	10.4%	18.1%	9.65	15.7%
	TOTAL ZONE 2	47.9%	4.18	37.2%	82.9%	9.85	70.9%	33.9%	2.88	24.1%	5.5%	0.83	4.1%	5.3%	0.47	4.5%	25.2%	0.60	22.3%	41.4%	1.23	39.7%	31.5%	0.36	30.7%	37.3%	26.42	32.3%
3	Pudworth District Centre	0.0%	0.00	0.0%	0.0%	0.00	0.0%	13.9%	0.10	13.6%	0.0%	0.00	0.0%	0.0%	0.00	0.0%	1.7%	0.00	1.7%	0.0%	0.00	0.0%	0.0%	0.00	0.0%	1.1%	0.10	1.1%
	Lumbwood Local Centre	0.0%	0.00	0.0%	0.2%	0.01	0.2%	3.5%	0.05	3.3%	0.6%	0.01	0.5%	0.0%	0.00	0.0%	0.5%	0.00	0.5%	0.0%	0.00	0.0%	0.0%	0.00	0.0%	0.4%	0.07	0.4%
	TOTAL ZONE 3	0.0%	0.00	0.0%	0.2%	0.01	0.2%	17.4%	0.15	16.9%	0.6%	0.01	0.6%	0.0%	0.00	0.0%	2.1%	0.00	2.1%	0.0%	0.00	0.0%	0.0%	0.00	0.0%	1.5%	0.17	1.5%
4	Wombwell District Centre	0.3%	0.01	0.3%	0.2%	0.02	0.2%	0.1%	0.01	0.1%	4.9%	0.07	4.8%	0.5%	0.01	0.5%	0.0%	0.00	0.0%	0.0%	0.00	0.0%	0.0%	0.00	0.0%	0.9%	0.12	0.9%
	Howland District Centre	0.3%	0.01	0.2%	0.0%	0.00	0.0%	0.0%	0.00	0.0%	5.7%	0.06	5.6%	0.0%	0.00	0.0%	0.0%	0.00	0.0%	0.0%	0.00	0.0%	0.0%	0.00	0.0%	0.9%	0.07	0.9%
	Howland Common Local Centre	0.7%	0.02	0.6%	0.0%	0.00	0.0%	0.0%	0.00	0.0%	3.6%	0.03	3.6%	0.0%	0.00	0.0%	0.0%	0.00	0.0%	0.0%	0.00	0.0%	0.0%	0.00	0.0%	0.6%	0.05	0.6%
	Out-of-Centre																											
	Monitors, Cortonwood, Brampton	4.7%	0.55	3.3%	0.6%	0.30	0.3%	3.9%	0.45	2.4%	38.2%	4.30	31.4%	15.8%	1.47	13.2%	8.9%	0.12	8.3%	2.3%	0.01	2.3%	0.0%	0.00	0.0%	9.7%	7.20	7.9%
	Other	0.2%	0.01	0.1%	0.0%	0.00	0.0%	0.3%	0.01	0.3%	2.8%	0.03	2.7%	0.0%	0.00	0.0%	0.0%	0.00	0.0%	0.0%	0.00	0.0%	0.1%	0.00	0.1%	0.5%	0.05	0.5%
	Sub-total	4.9%	0.56	3.4%	0.6%	0.30	0.3%	4.2%	0.46	2.7%	41.0%	4.33	34.1%	15.8%	1.47	13.2%	8.9%	0.12	8.3%	2.3%	0.01	2.3%	0.1%	0.00	0.1%	10.2%	7.25	8.4%
	TOTAL ZONE 4	6.1%	0.60	4.6%	0.8%	0.32	0.4%	4.3%	0.47	2.7%	55.2%	4.49	48.0%	16.3%	1.48	13.7%	8.9%	0.12	8.3%	2.3%	0.01	2.3%	0.1%	0.00	0.1%	12.6%	7.49	10.7%
5	Goldthorpe District Centre																											
	Asda (formerly Netto), High Street	0.0%	0.00	0.0%	0.0%	0.00	0.0%	0.0%	0.00	0.0%	0.0%	0.00	0.0%	5.0%	0.10	4.8%	1.1%	0.01	1.0%	0.0%	0.00	0.0%	0.0%	0.00	0.0%	0.7%	0.11	0.7%
	Other	0.0%	0.00	0.0%	0.0%	0.00	0.0%	0.0%	0.00	0.0%	2.																	

TABLE 8: ANTICIPATED TRADING EFFECTS OF PROPOSED DEVELOPMENT (CONVENIENCE GOODS)

Zone	Destination	2013	Estimated Turnover (Pre-development) (£m)	2018	(%)	Diversion to Proposed Development	(£m)	Resultant Turnover	(£m)	Impact
Within Study Area										
1	<u>Stairfoot Local Centre</u>	13.87		14.73	2.3%		1.04	13.69		-7.1%
	<i>Out-of-Centre</i>									
	Tesco Extra, Wombwell Lane	31.38		33.33	18.4%		8.25	25.08		-24.7%
	<u>Proposed Sainsbury's</u>							44.87		
	Asda (formerly Netto), Thomas Street, Worsbrough	6.16		6.54	1.4%		0.63	5.90		-9.7%
	Other	3.14		3.34	0.3%		0.13	3.21		-3.9%
	Sub-total	40.68		43.21	20.1%		9.02	79.07		83.0%
	TOTAL ZONE 1	54.55		57.94	22.4%		10.05	92.76		60.1%
2	<u>Barnsley Town Centre</u>									
	Marks & Spencer Food Hall, 7 Queen Street	7.84		8.33	1.6%		0.72	7.62		-8.6%
	Lidl, Peel Street, Peel Centre	2.49		2.64	0.4%		0.17	2.47		-6.4%
	Iceland, 8/9 The Alhambra Centre, Cheapside	3.03		3.22	0.7%		0.30	2.92		-9.4%
	Iceland, 13-17 Peel Street	4.03		4.28	0.8%		0.36	3.92		-8.5%
	Local shops	9.30		9.88	0.9%		0.42	9.46		-4.3%
	Sub-total	26.69		28.35	4.4%		1.97	26.38		-7.0%
	<i>Edge-of-Centre</i>									
	Morrisons, Lower Thomas Street	47.60		50.56	19.6%		8.79	41.77		-17.4%
	<i>Out-of-Centre</i>									
	Asda, Old Mill Lane, Barnsley	52.47		55.73	19.9%		8.93	46.80		-16.0%
	Aldi, Claycliffe Road, Barugh Green, Barnsley	11.40		12.11	1.3%		0.60	11.51		-5.0%
	Other	5.98		6.35	0.3%		0.12	6.23		-1.9%
	Sub-total	69.85		74.19	21.5%		9.65	64.54		-13.0%
	TOTAL ZONE 2	144.14		153.11	45.5%		20.42	132.69		-13.3%
3	<u>Cudworth District Centre</u>	4.20		4.46	0.2%		0.10	4.36		-2.2%
	<u>Lundwood Local Centre</u>	1.57		1.67	0.2%		0.07	1.60		-4.2%
	TOTAL ZONE 3	5.77		6.13	0.4%		0.17	5.96		-2.8%
4	<u>Wombwell District Centre</u>	3.44		3.66	0.3%		0.12	3.54		-3.2%
	<u>Hoyland District Centre</u>	3.45		3.66	0.2%		0.07	3.59		-1.9%
	<u>Hoyland Common Local Centre</u>	2.38		2.53	0.1%		0.05	2.48		-2.0%
	<i>Out-of-Centre</i>									
	Morrisons, Cortonwood, Brampton	37.47		39.80	16.0%		7.20	32.60		-18.1%
	Other	1.82		1.93	0.1%		0.05	1.88		-2.6%
	Sub-total	39.28		41.73	16.2%		7.25	34.48		-17.4%
	TOTAL ZONE 4	48.56		51.58	16.7%		7.49	44.09		-14.5%
5	<u>Goldthorpe District Centre</u>									
	Asda (formerly Netto), High Street	2.84		3.01	0.3%		0.11	2.90		-3.8%
	Other	1.17		1.25	0.1%		0.02	1.22		-1.9%
	Sub-total	4.01		4.26	0.3%		0.14	4.12		-3.2%
	<u>Bolton on Dearne Local Centre</u>	0.68		0.72	0.0%		0.02	0.70		-2.8%
	<u>Darfield Local Centre</u>	2.38		2.53	0.1%		0.06	2.47		-2.3%
	<u>Thurnscoe Shepherd Lane / Houghton Road Local Centre</u>									
	Asda, Welfare Road, Thurnscoe	6.59		7.00	1.1%		0.51	6.50		-7.2%
	Other	0.74		0.79	0.0%		0.02	0.77		-2.5%
	Sub-total	7.33		7.79	1.2%		0.53	7.26		-6.8%
	Other	1.79		1.90	0.1%		0.03	1.87		-1.7%
	TOTAL ZONE 5	16.18		17.19	1.7%		0.78	16.42		-4.5%
6	<u>Grimethorpe Local Centre</u>									
	Asda / Netto, High Street, Grimethorpe	5.26		5.59	0.6%		0.27	5.32		-4.9%
	Other	0.37		0.39	0.0%		0.01	0.38		-2.6%
	Sub-total	5.63		5.98	0.6%		0.28	5.70		-4.7%
	Other	0.88		0.93	0.1%		0.03	0.90		-3.4%
	TOTAL ZONE 6	6.51		6.91	0.7%		0.32	6.60		-4.6%
7	<u>Royston District Centre</u>									
	Asda / Netto, Midland Road, Royston	5.85		6.22	0.2%		0.08	6.14		-1.2%
	Other	4.31		4.58	0.1%		0.04	4.54		-0.8%
	Sub-total	10.16		10.79	0.2%		0.11	10.68		-1.0%
	<u>Mappledwell Local Centre</u>	3.86		4.10	0.2%		0.08	4.02		-2.0%
	<u>Darlon Local Centre</u>	0.53		0.56	0.0%		0.01	0.55		-1.8%
	<u>Athersley Local Centre</u>	2.67		2.84	0.1%		0.03	2.81		-1.1%
	Other	0.57		0.61	0.0%		0.01	0.60		-2.2%
	TOTAL ZONE 7	17.79		18.90	0.5%		0.24	18.65		-1.3%
8	<u>Penistone District Centre</u>									
	Tesco, Market Lane	15.87		16.86	0.3%		0.13	16.72		-0.8%
	Other	1.77		1.89	0.1%		0.03	1.85		-1.8%
	Sub-total	17.64		18.74	0.4%		0.17	18.57		-0.9%
	<u>Dodworth Local Centre</u>	2.33		2.47	0.1%		0.04	2.43		-1.7%
	Other	2.26		2.41	0.2%		0.09	2.32		-3.5%
	TOTAL ZONE 8	22.23		23.62	0.7%		0.30	23.32		-1.3%
Total within Study Area		315.73		335.38	88.6%		39.76	340.49		1.5%
Trade Retention within Study Area		81.7%		81.7%	-		-	82.6%		-
Outflow of Expenditure (excluding online)		64.02		68.01	11.4%		5.11	62.90		-7.5%
Special Forms of Trading		6.80		7.22	0.0%		0.00	7.22		0.0%
TOTAL		386.56		410.61	100.0%		44.87	410.61		0.0%

NOTES:

1. Turnover no development in 2013 taken from Table 4 and rolled forward current market share of existing facilities (as per Table 4). The turnover of existing facilities is based only the expenditure generated in the Study Area (i.e. does not allow for expenditure generated outside the Study Area).

2. Anticipated trade draw of the proposal based on existing shopping patterns and geographic location of existing provision (as identified by the household survey)

3. Resultant turnover = Turnover no development minus expected trade diversion

4. Impact based on the proportional change in turnover expressed as a percentage

5. Turnover of the proposed development derived from Table 6A

TABLE 9: ANTICIPATED TRADING EFFECTS OF PROPOSED DEVELOPMENT (COMPARISON GOODS)

Destination	2013	Estimate's Turnover (Pre-development) (£m)	2018	(%)	Diversion to Proposed Development	(£m)	Resultant Turnover (£m)	Impact
Within Study Area								
1 <u>Stairfoot Local Centre</u>	0.33		0.43	0.3%		0.05	0.38	-12.0%
Out-of-Centre								
Tesco Extra, Wombwell Lane	9.92		13.06	15.0%		3.13	9.93	-24.0%
<u>Proposed Sainsbury's</u>							20.87	
Wombwell Lane Retail Park	0.76		1.00	0.0%		0.00	1.00	0.0%
Other	1.87		2.46	0.0%		0.00	2.46	0.0%
Sub-total	12.55		16.52	15.0%		3.13	34.26	107.4%
TOTAL ZONE 1	12.88		16.95	15.3%		3.18	34.64	104.4%
2 <u>Barnsley Town Centre</u>	193.40		254.51	35.0%		7.31	247.20	-2.9%
Edge-of-Centre								
Morrisons, Lower Thomas Street	5.20		6.84	5.0%		1.04	5.80	-15.3%
Out-of-Centre								
Asda, Old Mill Lane	22.76		29.95	20.0%		4.17	25.77	-13.9%
The Peel Centre	0.08		0.11	0.0%		0.00	0.11	0.0%
Other	1.57		2.06	0.3%		0.05	2.01	-2.5%
Sub-total	24.41		32.12	20.3%		4.23	27.90	-13.2%
TOTAL ZONE 2	223.01		293.48	60.3%		12.58	280.90	-4.3%
3 <u>Cudworth District Centre</u>	2.33		3.07	0.3%		0.05	3.02	-1.7%
<u>Lundwood Local Centre</u>	0.07		0.09	0.0%		0.00	0.09	0.0%
TOTAL ZONE 3	2.40		3.16	0.3%		0.05	3.11	-1.7%
4 <u>Wombwell District Centre</u>	3.43		4.52	0.3%		0.05	4.46	-1.2%
<u>Hayland District Centre</u>	3.65		4.80	0.3%		0.05	4.75	-1.1%
<u>Hayland Common Local Centre</u>	2.18		2.87	0.3%		0.05	2.82	-1.8%
Out-of-Centre								
Morrisons, Cortonwood, Brampton	3.96		5.21	3.5%		0.73	4.48	-14.0%
TOTAL ZONE 4	13.22		17.40	4.3%		0.89	16.51	-5.1%
5 <u>Goldthorpe District Centre</u>	1.91		2.51	0.3%		0.05	2.46	-2.1%
<u>Bolton on Dearne Local Centre</u>	1.48		1.95	0.3%		0.05	1.90	-2.7%
<u>Darfield Local Centre</u>	1.97		2.60	0.3%		0.05	2.55	-2.0%
<u>Thurnscoe/Shepherd Lane / Houghton Road Local Centre</u>	1.33		1.75	0.3%		0.05	1.70	-3.0%
Other	0.47		0.61	0.0%		0.00	0.61	0.0%
TOTAL ZONE 5	7.16		9.42	1.0%		0.21	9.21	-2.2%
6 <u>Grimesthorpe Local Centre</u>	2.16		2.85	0.3%		0.05	2.80	-1.8%
Other	0.30		0.39	0.0%		0.00	0.39	0.0%
TOTAL ZONE 6	2.46		3.24	0.3%		0.05	3.19	-1.6%
7 <u>Royston District Centre</u>	2.39		3.14	0.3%		0.05	3.09	-1.7%
<u>Maplewell Local Centre</u>	0.91		1.20	0.0%		0.00	1.20	0.0%
<u>Darton Local Centre</u>	0.23		0.30	0.0%		0.00	0.30	0.0%
TOTAL ZONE 7	3.53		4.64	0.3%		0.05	4.59	-1.1%
8 <u>Penistone District Centre</u>	7.33		9.65	0.0%		0.00	9.65	0.0%
<u>Dodworth Local Centre</u>	3.05		4.02	0.0%		0.00	4.02	0.0%
Other	0.25		0.33	0.0%		0.00	0.33	0.0%
TOTAL ZONE 8	10.64		14.00	0.0%		0.00	14.00	0.0%
Total within Study Area	275.30		362.29	81.5%		17.01	366.16	1.1%
Trade Retention within Study Area	43.9%		43.9%	-		-	44.3%	-
Outflow of Expenditure (excluding online)	292.19		384.52	18.5%		3.86	380.66	-1.0%
Special Forms of Trading	60.23		79.26	0.0%		0.00	79.26	0.0%
TOTAL	627.73		826.08	100.0%		20.87	826.08	0.0%

NOTES:

1. Turnover no development in 2013 taken from Table 4 and rolled forward current market share of existing facilities (as per Table 4). The turnover of existing facilities is based only the expenditure generated in the Study Area (i.e. does not allow for expenditure generated outside the Study Area).

2. Anticipated trade draw of the proposal based on existing shopping patterns and geographic location of existing provision (as identified by the household survey)

3. Resultant turnover = Turnover no development minus expected trade diversion

4. Impact based on the proportional change in turnover expressed as a percentage

5. Turnover of the proposed development derived from Table 6A

TABLE 10: ANTICIPATED TRADING EFFECTS OF PROPOSED DEVELOPMENT (CONVENIENCE AND COMPARISON GOODS)

Destination	2013	Estimate's Turnover (Pre-development) (£m)	2018	(%)	Diversion to Proposed Development (£m)	Resultant Turnover (£m)	Impact
Within Study Area							
1 <u>Stairfoot Local Centre</u>	14.20	15.16	1.7%	1.09	14.07	-7.2%	
Out-of-Centre							
Tesco Extra, Wombwell Lane	41.30	46.39	17.3%	11.38	35.01	-24.5%	
Proposed Sainsbury's					65.75		
Asda (formerly Netto), Thomas Street, Worsbrough	6.16	6.54	1.0%	0.63	5.90	-9.7%	
Wombwell Lane Retail Park	0.76	1.00	0.0%	0.00	1.00		
Other	5.01	5.80	0.2%	0.13	5.67	-2.3%	
Sub-total	53.23	59.73	18.5%	12.15	113.33	89.7%	
TOTAL ZONE 1	67.43	74.89	20.1%	13.24	127.40	70.1%	
2 <u>Barnsley Town Centre</u>	220.09	282.86	14.1%	9.28	273.58	-3.3%	
Edge-of-Centre							
Morrisons, Lower Thomas Street	52.80	57.41	15.0%	9.83	47.57	-17.1%	
Out-of-Centre							
Asda, Old Mill Lane, Barnsley	75.22	85.68	19.9%	13.10	72.57	-15.3%	
Aldi, Claycliffe Road, Barugh Green, Barnsley	11.40	12.11	0.9%	0.60	11.51	-5.0%	
The Peel Centre	0.08	0.11	0.0%	0.00	0.11	0.0%	
Other	7.55	8.42	0.3%	0.17	8.24	-2.1%	
Sub-total	94.26	106.32	21.1%	13.88	92.44	-13.1%	
TOTAL ZONE 2	367.15	446.58	50.2%	32.99	413.59	-7.4%	
3 <u>Cudworth District Centre</u>	6.53	7.53	0.2%	0.15	7.38	-2.0%	
<u>Lundwood Local Centre</u>	1.64	1.76	0.1%	0.07	1.69	-4.0%	
TOTAL ZONE 3	8.17	9.29	0.3%	0.22	9.07	-2.4%	
4 <u>Wombwell District Centre</u>	6.88	8.17	0.3%	0.17	8.00	-2.1%	
<u>Hoyland District Centre</u>	7.10	8.46	0.2%	0.12	8.34	-1.4%	
<u>Hoyland Common Local Centre</u>	4.57	5.41	0.2%	0.10	5.30	-1.9%	
Out-of-Centre							
Morrisons, Cortonwood, Brampton	41.42	45.00	12.1%	7.93	37.07	-17.6%	
Other	1.82	1.93	0.1%	0.05	1.88	-2.6%	
Sub-total	43.24	46.93	12.1%	7.98	38.95	-17.0%	
TOTAL ZONE 4	61.78	68.98	12.7%	8.38	60.60	-12.1%	
5 <u>Goldthorpe District Centre</u>	5.92	6.77	0.3%	0.19	6.58	-2.8%	
<u>Bolton on Dearne Local Centre</u>	2.16	2.67	0.1%	0.07	2.60	-2.7%	
<u>Darfield Local Centre</u>	4.35	5.12	0.2%	0.11	5.01	-2.2%	
<u>Thurnscoe Shepherd Lane / Houghton Road Local Centre</u>	8.66	9.54	0.9%	0.58	8.96	-6.1%	
Other	2.25	2.51	0.1%	0.03	2.48	-1.3%	
TOTAL ZONE 5	23.35	26.61	1.5%	0.98	25.63	-3.7%	
6 <u>Grimehorpe Local Centre</u>	7.80	8.83	0.5%	0.34	8.50	-3.8%	
Other	1.17	1.32	0.0%	0.03	1.29	-2.4%	
TOTAL ZONE 6	8.97	10.15	0.6%	0.37	9.78	-3.6%	
7 <u>Royston District Centre</u>	12.55	13.93	0.2%	0.16	13.77	-1.2%	
<u>Mapplewell Local Centre</u>	4.77	5.30	0.1%	0.08	5.22	-1.5%	
<u>Darton Local Centre</u>	0.76	0.87	0.0%	0.01	0.86	-1.2%	
<u>Althensley Local Centre</u>	2.67	2.84	0.0%	0.03	2.81	-1.1%	
Other	0.57	0.61	0.0%	0.01	0.60	-2.2%	
TOTAL ZONE 7	21.32	23.54	0.5%	0.30	23.25	-1.3%	
8 <u>Penistone District Centre</u>	24.98	28.39	0.3%	0.17	28.23		
<u>Dodworth Local Centre</u>	5.38	6.49	0.1%	0.04	6.45	-0.7%	
Other	2.52	2.74	0.1%	0.09	2.65	-3.1%	
TOTAL ZONE 8	32.87	37.62	0.4%	0.30	37.32	-0.8%	
Total within Study Area	591.04	697.67	86.4%	56.77	706.64	1.3%	
Total Outside Study Area	356.22	452.53	13.6%	8.97	443.56	-2.0%	
Special Forms of Trading	67.03	86.48	0.0%	0.00	86.48	0.0%	
TOTAL	1,014.29	1,236.68	100.0%	65.75	1,236.68	0.0%	

NOTES:
1. Turnover of existing facilities taken from Table 8 and Table 9
2. Anticipated trade draw of the proposal based on existing shopping patterns and geographic location of existing provision (as identified by the household survey)
3. Resultant turnover = Turnover no development minus expected trade diversion
4. Impact based on the proportional change in turnover expressed as a percentage
5. Turnover of the proposed development derived from Table 6A