



England
& Lyle

**TAMWORTH TOWN CENTRE
AND RETAIL STUDY**

SUPPLEMENTARY REPORT

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Figure 1: Study Area and Zones

1. INTRODUCTION

1.1 In July 2011 England & Lyle prepared the Tamworth Town Centre and Retail Study for Tamworth Borough Council. The Study is intended to provide the Council with evidence to develop policies in relation to retailing and town centre development. It will be an important part of the evidence base for the preparation of Tamworth Borough Council's Local Development Framework Core Strategy.

1.2 The Council has decided to re-brand the Core Strategy as the Tamworth Local Plan. The intention is to publish the Local Plan in early 2012 with a view to submitting it to the Secretary of State in Spring 2012. The examination will follow in the summer and the Local Plan will be adopted by the end of 2012.

1.3 The Council has decided to extend the timescale of the Local Plan from 2026 to 2028. The extended timescale has implications for those sections of the Town Centre and Retail Study that are concerned with retail expenditure and future retail needs. Therefore, this Supplementary Report has been prepared. The scope of the report is as follows:

- Revision of Section 6 on Expenditure Analysis and Forecasts to make comments on the longer term figures; revision of Appendix 5 on existing expenditure; and revision of Appendix 6 on population and expenditure forecasts. The expenditure forecasts have been updated using the latest Experian forecasts in Retail Planner Briefing Note 9, September 2011. The later part of Section 6 dealing with expenditure flows has not been revised.
- Revision of Section 8 on Need Assessment based on the revised expenditure forecasts. Appendix 8, the Capacity Analysis tables, has been fully revised. The later part of Section 8 on need for other town centre uses has not been revised.
- Minor amendments to Section 11 Policy Advice and Section 12 Conclusions following from the changes above.

1.4 For ease of reference between the Town Centre and Retail Study and the Supplementary Report, this report uses the same Section numbers, paragraph numbers, headings and Appendix numbers/titles as in the main study report.

6. EXPENDITURE ANALYSIS AND FORECASTS

Population and Expenditure Base Data

6.1 England & Lyle have obtained a Retail Planner Report 2009 from Experian for the Tamworth study area. The report shows the resident population and retail expenditure per head in each zone in convenience and comparison goods in 2009, in 2009 prices. The zones used in the study are shown in Figure 1 and are defined by postcode sectors. The study area extends to Lichfield in the north west, almost as far as Ashby de la Zouch in the north east, Atherstone in the south east and Sutton Coldfield in the south west. The study area had a total population of 248,116 in 2009.

6.2 The table below shows the population by zone and the amount of expenditure per head in each zone in convenience and comparison goods. The expenditure figures are compared with the UK averages shown in the Experian report in the form of percentages of the UK base. All monetary figures are in 2009 prices.

Zone	Population	Expenditure per person (2008 prices)		Percent of UK base	
		Convenience £	Comparison £	Conv %	Comp %
1 Tamworth West	18,042	1,805	2,803	97	99
2 Tamworth East	22,671	1,849	2,806	100	99
3 Tamworth South	32,406	1,873	2,917	101	103
4 Fazeley	9,285	1,945	3,102	105	109
5 Rural North	36,122	1,828	2,741	99	97
6 Atherstone	24,398	1,903	2,975	103	105
7 Sutton Coldfield	61,624	2,022	3,352	109	118
8 Lichfield	43,568	1,946	3,212	105	113
Study Area Total	248,116				
UK average		1,853	2,837		

6.3 The table shows that in convenience goods most zones have a level of expenditure per head higher than the UK average, particularly in Sutton Coldfield, Lichfield and Fazeley. Only Tamworth West has a level of convenience spending per head notably lower than the UK average. In comparison goods most zones again have a level of expenditure per head higher than the UK average, with particularly high levels in Sutton Coldfield, Lichfield and Fazeley. Only the Rural North zone has a level of comparison spending per head notably lower than the UK average

6.4 In convenience goods expenditure per person has to be adjusted to exclude spending on non-store retail sales (or special forms of trading) such as Internet shopping. The proportion of non-store retailing in convenience goods nationally in 2009 shown in Experian Retail Planner Briefing Note 9 (September 2011) is 3.2%. This is a lower figure than that used in the Town Centre and Retail Study report because

Experian have now adjusted the estimates of non-store retail sales to exclude Internet sales of goods sourced from within stores. It is considered by Experian to be a more reliable representation of retailing in physical retail outlets. Multiplying population by spending per person in each zone (excluding non-store retailing) gives total convenience goods spending by zone. The total spending by residents on convenience goods in 2009 is £459.88 million. The calculations are shown in detail in Appendix 5A.

6.5 In comparison goods expenditure per person also has to be adjusted to exclude spending on non-store retailing such as Internet shopping. The proportion of non-store retailing in comparison goods nationally in 2009 shown in the Experian Retail Planner Briefing Note 9 (September 2011) is 7.5%. Multiplying population by spending per person in each zone (excluding non-store retailing) gives total comparison goods spending by zone. The total spending by residents on comparison goods in 2009 is £698.93 million. The calculations are shown in detail in Appendix 5B.

Population and Expenditure Forecasts

6.6 Population and expenditure forecasts are shown in Appendix 6. Appendix 6A indicates the forecasts of population by zone up to 2028. For the Tamworth zones we have used the ONS 2008-based population projections for Tamworth Borough and distributed the population growth between zones based on data provided by the Council on future housing developments (commitments and allocations) within Tamworth. The proportional split between zones is Zone 1 (West) 10%, Zone 2 (East) 64% and Zone 3 (South) 26%. Population growth in the other zones in the study area is taken directly from the Experian Retail Planner reports, which use trend-based projections. The population forecasts by zone have been aggregated into the primary catchment area (Zones 1-4) and secondary catchment area (Zones 5-8).

6.7 Expenditure has been projected forward to 2028 using forecasts in Experian Retail Planner Briefing Note 9 (September 2011). The forecasts of retail expenditure per head are from the Experian business strategies model of disaggregated consumer spending. They are not just trend-based but take account of economic cycles in the UK economy. The average annual forecast growth rates are as follows.

<u>Expenditure Growth</u> <u>per person per annum</u>	<u>Convenience</u> <u>goods</u>	<u>Comparison</u> <u>goods</u>
2009-2010	+0.8%	+0.1%
2010-2011	-0.3%	+0.5%
2011-2012	-0.4%	+1.6%
2012-2013	+0.5%	+2.1%
2013-2014	+0.5%	+3.0%
2014-2018	+0.5% pa	+3.0% pa
2018-2028	+0.6% pa	+3.0% pa

6.8 The forecasts indicate a significantly higher growth in expenditure on comparison goods than on convenience goods. In convenience goods the rate of growth

is forecast to increase after 2012 to a rate which is similar to that experienced nationally over the past 20 years. In comparison goods the rate of growth is forecast to be about half of that experienced nationally over the past 20 years.

6.9 The expenditure forecasts have to be adjusted to exclude non-store retailing. Experian forecast that non-store retailing including Internet shopping will increase significantly in the next 10 years. Retail Planner Briefing Note 9 gives projected market shares for non-store retailing to 2028. The future proportions of non-store retailing are shown below, using the figures adjusted by Experian to exclude Internet sales from within stores.

<u>Proportion of spending on non-store retailing</u>	<u>2009</u>	<u>2011</u>	<u>2016</u>	<u>2021</u>	<u>2028</u>
	%	%	%	%	%
Convenience goods	3.2	4.2	5.9	6.3	7.0
Comparison goods	7.5	10.0	12.7	12.4	12.0

6.10 In convenience goods a slow, steady growth in non-store retailing is forecast throughout the period to 2028. In comparison goods the growth in non-store retailing is forecast to level out after 2016 then decrease slightly.

6.11 The population forecasts have been combined with retail expenditure per person by zone (adjusted to exclude non-store retailing) in future years to forecast total expenditure in the study area. Appendix 6B shows population and expenditure forecasts for convenience goods and Appendix 6C shows population and expenditure forecasts for comparison goods.

6.12 The expenditure forecasts for the study area excluding non-store retailing are summarised below.

<u>Expenditure Forecasts</u> (2009 prices)	<u>2009</u>	<u>2011</u>	<u>2016</u>	<u>2021</u>	<u>2028</u>
	£m	£m	£m	£m	£m
Convenience Goods	459.9	459.9	466.3	486.2	515.2
Comparison Goods	698.9	687.8	767.9	909.4	1,149.9

6.13 In convenience goods there is only a small forecast growth in expenditure up to 2016. The forecast growth from 2011 is 6% to 2021 and 12% to 2028.

6.14 In comparison goods the forecast growth in expenditure is significantly greater with a growth of 12% from 2011 to 2016. The long term growth in comparison goods from 2011 is 32% to 2021 and 67% to 2028.

6.15 These are cautious forecasts of expenditure growth taking account of expenditure growth rates which are based on economic prospects as well as past trends and which fully take account of the growth in Internet shopping in the next 10 years.

Leisure Expenditure

6.16 The Experian Retail Planner reports also provide estimates of leisure expenditure in each zone for 2009 (in 2009 prices). Data is given for 6 categories of leisure expenditure and for total leisure spending. The data are shown below in the form of leisure spending per person and with a comparison with the UK base (national average).

Zone	1	2	3	4	5	6	7	8	UK
Leisure Expenditure Per person (per annum)	£	£	£	£	£	£	£	£	£
Accommodation services	88	83	90	103	89	98	125	117	99
Cultural services	211	219	223	231	245	222	239	232	249
Games of chance	191	195	188	185	149	179	164	162	141
Hairdressing salons and personal grooming	83	77	82	95	75	83	107	99	85
Recreational and sporting services	69	70	74	83	91	77	95	88	95
Restaurants, cafes, etc	926	939	976	1033	983	976	1109	1064	1035
Total leisure spending Per person	1568	1583	1634	1731	1632	1636	1840	1763	1703
c/f UK base	92%	93%	96%	102%	96%	96%	108%	104%	-

6.17 The largest category of leisure spending in the UK is restaurants and cafes (including pubs), with 60% of spending. The next highest are cultural services (cinemas, theatres, etc); games of chance (bookmakers, bingo, etc); recreational and sporting services (horse racing, golf, swimming and other sports); and accommodation services (hotels, caravan sites, etc).

6.18 Total leisure spending per person in the study area is highest in Zone 7 Sutton Coldfield where it is 108% of the UK base followed by Lichfield at 104%. It is lowest in Zones 2 Tamworth West (92% of the UK base) and Zone 3 (93% of UK). This is a similar pattern to the analysis of retail expenditure.

6.19 Leisure expenditure per person in the study area is slightly lower than convenience goods expenditure per person but is just above half of the amount of comparison goods expenditure per person.

6.20 Experian forecast that leisure expenditure per person nationally will increase by an average of about 1% per annum in the period to 2028.

6.21 Comments are made in Section 8 of the Town Centre and Retail Study on future need for leisure and other town centre uses based on growth in demand using population and expenditure forecasts.

8. NEED ASSESSMENT

Quantitative Need

8.1 In this report the quantitative capacity for retail development is assessed based on the expenditure forecasts and the extent of trade retention within the catchment area of Tamworth, including the town centre and the superstores and retail parks. We adopt a market-share approach to the capacity analysis, based on the market shares of the town centre and other retail destinations within the defined catchment area. This is the conventional approach to assessing capacity and is the approach recommended in the PPS4 Practice Guidance on Need, Impact and the Sequential Approach. The approach is refined by using market shares for the primary and secondary catchment areas separately. The primary catchment area (PCA) comprises the three Tamworth zones plus Fazeley. Within this area, residents look principally to Tamworth for their shopping needs. The secondary catchment area (SCA) comprises the remainder of the study area, including Atherstone, Lichfield and Sutton Coldfield.

8.2 Expenditure in the base year 2009 in the PCA and SCA is compared with the turnover in centres and stores estimated from the household survey. The amount of expenditure retained in the catchment areas as turnover represents the market share or retention level. The scope for new retail floorspace in Tamworth depends on expenditure growth and on the extent to which the retention level may increase in the future. Any potential for clawback of leakage will increase the retention level. The approach assumes that the town centre and other retail destinations maintain their existing market share unless new development takes place which will increase the attractiveness of the town centre and the retail parks and so increase their market share.

8.3 Capacity is assessed in five year periods to 2011, 2016, 2021 and then 2028. The PPS4 Practice Guidance advises that the forecasts should cover the period of the development plan documents. The period to 2028 is relevant to the LDF evidence base. Expenditure forecasts are made in Experian Retail Planner Briefing Note 9 (September 2011) up to 2028. The capacity analysis is carried out for convenience and comparison goods in line with the advice in PPS4.

8.4 After assessing the potential for an increase in market shares or retention levels and the amount of expenditure retained, it is then necessary to allow for an increase in turnover in existing shops to reflect the trend towards improvement in sales productivity over time as shops become more efficient. This trend is particularly evident in comparison goods. The latest advice on these improvements from Experian is that in convenience goods sales efficiency will increase by 0.4% per annum between 2012 and 2016, then slow down to 0.2% per annum thereafter. In comparison goods sales efficiency is projected to increase at an average of 1.0% per annum to 2013, then increase to 1.7% per annum thereafter. These rates of growth are slightly below the forecast annual growth in both convenience and comparison goods expenditure. In the light of the low growth of expenditure expected in the short term we assume that there will be no increases in sales density until 2012 in convenience goods.

8.5 Subtracting the future turnover of existing shops from the amount of expenditure retained gives the surplus capacity in each forecast year. An allowance must then be made for any commitments for new retail development. There are several commitments to be taken into account, particularly for comparison goods. After allowing for commitments, the analysis shows the amount of residual capacity in the catchment area. The capacity analysis tables are contained in Appendix 8.

Convenience Goods

8.6 Appendix 8A shows the capacity analysis for convenience goods. The retention levels in 2009 are 91.4% in the PCA, 22.2% in the SCA and 44.5% overall. There is little potential for the retention level in the PCA to increase but the commitment for a new Lidl store in Bolebridge Street could result in a small increase in retention to 92%. We do not anticipate any increase in Tamworth's market share from the SCA where foodstores in other competing centres such as Lichfield, Sutton Coldfield and Atherstone exert a strong influence. If there is no new foodstore development in Tamworth (other than Lidl) it is unlikely that shoppers from the SCA would use stores in Tamworth to a greater extent than they do now. Our judgement is that the future market shares for convenience goods will be 92% in the PCA and 22% in the SCA, with an overall market share of 45% in the study area as a whole.

8.7 Applying these retention levels to the expenditure forecasts gives the amount of expenditure available to be spent in Tamworth in future years. After subtracting the projected future turnover in Tamworth, allowing for growth in sales density, there is a small expenditure capacity in 2011 and 2016, increasing to 2021 and 2028. Allowing for the estimated turnover of the new Lidl store, there is a negative expenditure capacity in 2011 and 2016. In 2021 there is a residual capacity of £3.1m, rising to £10.8m in 2026.

Comparison Goods

8.8 Appendix 8B shows the capacity analysis for comparison goods. The retention levels in 2009 are 83.2% in the PCA, 36.4% in the SCA and 51.1% overall. Compared to convenience goods, there is potential for Tamworth's market share of comparison expenditure to increase because of the significant amount of new floorspace already approved in Tamworth, both in the town centre (Gungate) and in the retail parks. Existing comparison goods trade in Tamworth is drawn fairly equally from the PCA and the SCA. Our assessment, based on an estimate of clawback to these new retail developments, is that the retention level in the PCA could increase to 92% by 2016. Clawback could also result in an increase in Tamworth's market share from the SCA to 42% by 2016. Our judgement is that the future market shares for comparison goods will be 92% in the PCA and 42% in the SCA, with an increase in overall market share of the study area as a whole from 51% to 58%.

8.9 Applying these retention levels to the expenditure forecasts gives the amount of expenditure available to be spent in Tamworth in future years. After subtracting the projected future turnover in Tamworth, allowing for growth in sales density, there is no

surplus expenditure capacity in 2011 but an increasingly large surplus expenditure capacity in 2016, 2021 and 2028.

8.10 The key factor in assessing capacity in comparison goods is the turnover of commitments. We have estimated the turnover of the new floorspace approved in Ventura Retail Park (mezzanines), on the land adjacent to the Tamworth Herald on Ventura Park Road, at Cardinal Point and in the Gungate scheme. The turnover of these commitments has been estimated based on their floorspace and assumed sales density. We have also taken account of the guidance in the Experian Retail Planner Briefing Note that further growth in sales densities can be expected in comparison goods sales densities because of the continuing trend towards more modern, higher density stores. The forecast growth rate in sales densities is 1.7% per annum. Allowing for the estimated turnover of these new retail developments, there is a small negative residual expenditure capacity in 2011 and a larger negative residual capacity in 2016. In 2021 there is still a small negative residual capacity. It is only after 2021 that the residual capacity increases because of expenditure growth. The residual capacity in 2028 is £70.8m. This is significantly greater than our estimate for 2026 in the Town Centre and Retail Study.

Conclusions on Capacity

8.11 The limited capacity for further convenience goods shopping until after 2016 implies that the Council should be cautious in allowing any further foodstore developments outside the town centre in the short term. The residual capacity by 2028 would support in the order of 1,100 sq.m. net (1,600 sq.m. gross) convenience floorspace if it was developed for one of the leading food retailers, or more if it was developed for discount food retailing. We have assumed that all of the floorspace in the Gungate scheme will be used for comparison goods shopping but some of it could provide the opportunity for food shopping.

8.12 In comparison goods the Council should also be cautious about allowing any further retail development outside the town centre in the short to medium term, until after the new developments approved in the retail parks have been built and until after the Gungate redevelopment scheme has been completed. The larger residual capacity in comparison goods in 2028 would support in the order of 14,200 sq.m. net, assuming an average sales density of £5,000 per sq.m. net. This is equivalent to approximately 20,000 sq.m. gross floorspace. This longer term capacity would provide the potential for further retail development/redevelopment within the town centre.

8.13 The West Midlands RSS Phase 2 Review (Preferred Options) recommended that the Council should plan for 25,000 sq.m. gross of additional comparison retail floorspace in the period 2006-2021 and a further 10,000 sq.m. gross in the period 2021-2026 in Tamworth Town Centre – a total of 35,000 sq.m. gross. The RSS makes it clear that these amounts of additional gross comparison retail floorspace relate to “centres” within the network of strategic town and city centres. Current commitments for comparison goods floorspace in Tamworth town centre (Gungate) represent about 18,400 sq.m. gross. The additional 20,000 sq.m. gross capacity we have identified would increase the total to

38,400 sq.m. gross, slightly more than that recommended in the RSS but for the forecast year of 2028 rather than 2026. This is in addition to the 20,400 sq.m. gross floorspace already approved in the Ventura Retail Park area and Cardinal Point which will also contribute to meeting the needs of the Tamworth catchment during the LDF period. We suggest that sites need to be found in the town centre to accommodate an additional 20,000 sq.m. gross floorspace as well as the Gungate scheme. The key requirement for the LDF will be to find the most suitable sites to accommodate the additional capacity of 20,000 sq.m. gross floorspace in the town centre. The Town Centre and Retail Study identifies a floorspace capacity of 11,000 sq.m. gross in 2026. The capacity for 20,000 sq.m. gross in 2028 reflects continued comparison expenditure growth and a lower growth of turnover of existing shops.

8.14 It is difficult to directly compare the conclusions of the 2005 Retail Study on retail capacity with the findings of the current study because the 2005 study only projected capacity to 2011 and because of the different price base used. However a broad comparison is possible. We have adjusted the figures in the 2005 study from 2001 to 2009 prices and we compare the study's estimates of capacity in 2011 with our estimates for 2016. All the figures represent surplus expenditure capacity before allowing for commitments and they all relate to Tamworth Borough as a whole.

	2005 Retail Study Capacity in 2011 (2001 prices)	2005 Retail Study Capacity in 2011 (2009 prices)	England & Lyle Capacity in 2016 (2009 prices)
Convenience goods	£38m	£48m	£1m
Comparison goods	£92m	£83m	£60m

8.15 There are significant differences between the findings of the previous study and those of the current study. These differences are due principally to the changes in expenditure growth that have occurred since 2004, the base date for the previous study. In convenience goods the previous study forecast an average growth of expenditure per head of 1.4% per annum to 2011. There has actually been no growth in convenience expenditure in real terms between 2004 and 2009 and a decline has taken place since 2009. Therefore the previous forecasts have been over-optimistic. We forecast only a small expenditure growth in convenience goods between 2011 and 2016. In comparison goods the previous study forecast an average growth of expenditure per head of about 4% per annum to 2011. The average growth in comparison expenditure in real terms between 2004 and 2011 has been 2% per annum. Therefore the previous forecasts have again been optimistic. We forecast a fairly modest growth in comparison goods expenditure between 2011 and 2016. In both convenience and comparison goods the expenditure capacity forecast in the previous study in 2011 will not be achieved by 2016.

Qualitative Need

8.16 The PPS4 Practice Guidance sets out the basis for assessing qualitative retail need. The relevant guidance is summarised in Appendix 9 of the Town Centre and Retail Study. This section provides an assessment of qualitative need in Tamworth town centre using factors advised in the Practice Guidance. The qualitative assessment has been made by site visit, by analysis of the household survey and by reference to our updated health check of the town centre. The Practice Guidance describes five factors which are frequently used to identify qualitative retail need:

- (a) Deficiencies or 'gaps' in existing provision
- (b) Consumer choice and competition
- (c) 'Overtrading' congestion and overcrowding of existing stores
- (d) Location specific needs-deprived area considerations
- (e) The quality of existing provision

Deficiencies or 'Gaps' in Existing Provision

8.17 Based on the expenditure flows analysed from the household survey, only 4% of spending on convenience goods in the catchment area takes place in Tamworth town centre and 12% of convenience spending by Tamworth residents takes place in the town centre. In contrast the proportions of spending in the three large foodstores in Tamworth (Asda, Sainsbury's and Morrisons) are 35% for the study area as a whole and 68% for Tamworth residents. Therefore, the role of the town centre for convenience goods shopping compared to the out-of-centre superstores is limited. The Tamworth primary catchment area (Zones 1-4) retains 91% of available expenditure on convenience goods. There is very little potential for additional convenience goods floorspace in the short term but the potential that does exist in the longer term should ideally be accommodated in the town centre to improve the choice and provision of food shopping for local residents and help to make the town centre more attractive to shoppers.

8.18 The household survey expenditure flows show that 18% of residents in the catchment area use Tamworth town centre as their shopping destination for comparison goods. For Tamworth residents the town centre attracts 28% of comparison goods spending. In contrast the proportions of spending in the Ventura and Jolly Sailor Retail Parks and the other retail warehouses in Tamworth are 34% for the study area as a whole and 58% for Tamworth residents. Therefore, the role of the town centre for comparison goods shopping is significantly greater than it is for convenience goods but the town centre's role for comparison goods shopping is lesser than that of the retail parks. In total the retail parks have a turnover that is almost twice as much as that of the town centre.

8.19 The Tamworth primary catchment area (Zones 1-4) retains 83% of available expenditure on comparison goods. We believe there is potential for the retention level in the PCA to increase to 92% as a result of the major new retail developments already approved in the retail parks and in the Gungate scheme. These developments will also increase Tamworth's market share of comparison spending from the SCA but that

potential will be constrained by retail development that takes place in towns in the SCA such as the Friarsgate scheme in Lichfield. In our view the retail developments already committed in Tamworth will meet the qualitative need for an improvement in comparison goods shopping for the next ten years. It is only after the completion of these developments, including the Gungate scheme, that there will be any further potential for comparison shopping in Tamworth.

8.20 In the household survey the largest individual dislike about the town centre was the 'lack of non-food stores' and the largest individual response to the need for changes or improvements in the town centre was 'more/better choice of shops'. The Gungate scheme offers the single most important opportunity to bring about these improvements. It should attract retailers who are seeking accommodation in Tamworth but are unable to find suitable premises within the town centre. The Goad Category Report shows that Tamworth has only 14 of the 30 national retailers listed as "major retailers" – Argos, Boots, Burtons, Carphone Warehouse, Clarks, Clintons, Dorothy Perkins, HMV, O2, Phones 4 U, Superdrug, Vodafone and Wilkinsons.

8.21 The household survey showed that the retail parks in Tamworth are popular because of the presence of 'chain store multiple outlets' (which are lacking in the town centre) and 'good and/or free parking' but the retail parks suffer from traffic congestion. In our view future planning policy in Tamworth should seek to shift the balance of attraction from the retail parks more towards the town centre.

Consumer Choice and Competition

8.22 Tamworth town centre has very strong potential for improvement through consolidation, redevelopment and expansion through the Gungate scheme, improvements to the Ankerside Centre and other longer term redevelopments. The PPS4 Practice Guidance notes that competition for consumer expenditure and investment between centres and out-of-centre retail development is a key challenge when planning for new development in town centres and making strategic choices about where to allocate new floorspace. We believe that in Tamworth the out-of-centre retail destinations have become too dominant compared to the town centre and the balance needs to be redressed. It is significant that the household survey shows that the retail parks are most used for shopping for clothes and footwear, goods that should be a key element of comparison shopping in the town centre. Promoting the vitality and viability of the town centre through new development and improvements should be accompanied by control of further development in the retail parks that could weaken the attraction of the town centre.

8.23 Issues of consumer choice and competition are often most relevant to the development of large foodstores. In some situations a new foodstore development can be supported because it would improve the existing limited choice and competition for food shopping. In our view there is not a limited choice and competition for food shopping in Tamworth. The town has three of the four leading national food retailers, all of which appear to be trading well – in fact, over-trading (see below). There is no evidence of qualitative need for another large foodstore to improve choice and

competition. The qualitative need that does exist in convenience goods is for some additional food shopping in the town centre. As noted above, there is potential for the Gungate scheme to provide floorspace for new food shopping.

'Overtrading', Congestion and Overcrowding of Existing Stores

8.24 Our 'survey-based' estimates of turnover show that the Asda, Sainsbury's and Morrisons superstores in Tamworth are all trading at sales densities above their company averages. This evidence of 'over-trading' is an indication of the popularity of the three stores and the strength of attraction of Tamworth for food shopping. They are dominant in meeting the food shopping needs of Tamworth residents and they draw almost half of their trade from outside the Tamworth zones. Over-trading can be an indicator of qualitative need but in our view the levels of over-trading in the three superstores in Tamworth are not excessive. They are not sufficient to justify further large-scale foodstore provision on the grounds of over-trading in a situation where there is not a quantitative capacity for a large amount of additional convenience goods floorspace.

8.25 There is evidence that the retail parks in Tamworth are over-trading. The survey-based estimates of turnover in the retail parks are significantly greater than the benchmark estimates made in the 2005 Retail Study, allowing for expenditure growth. Over-trading in the retail parks is borne out by inspection 'on the ground' and by the findings of the household survey that the retail parks suffer from traffic congestion and parking difficulties. They could be regarded as a victim of their own success. In these circumstances the solution is to relieve the pressure on the retail parks by promoting the town centre as a retail destination and restricting further growth of out-of-centre shopping.

Location-Specific Needs / Deprived Area Considerations

8.26 National policy recognises that the needs of deprived area should be taken into account in planning for town centres and retail development. Levels of convenience and comparison goods expenditure in the Tamworth zones are very similar to the UK average and in the remainder of the study area they are above the UK average. However, the Sustainable Community Strategy for Tamworth indicates that the town suffers from a number of socio-economic problems and has some of the highest levels of deprivation in Staffordshire. There are large variations between wards and within wards in the level of employment, health, economic well-being, housing and overall living standards. Some of these problems arise from the fact that Tamworth's population has grown rapidly in recent decades as an overspill town for Birmingham. Half the population are aged 30 or under but 13% of the population are of pensionable age and the number aged 65 or over is predicted to rise significantly over the next 10 years. The approach to meeting qualitative need at the local level should be to ensure that in the smaller centres there is an adequate provision of shops and services to meet the needs of the resident population in those localities.

The Quality of Existing Provision

8.27 Our observation of Tamworth town centre indicates that there are deficiencies in the quality of shopping provision. In the household survey 13% of respondents mentioned the need for better quality of shops in the town centre as one of the most important aspects of changes and improvements in Tamworth town centre, the third highest response after more/better choice of shops and cheaper/easier car parking.

8.28 The PPS4 Practice Guidance notes that there has been a shift in retail activity towards new efficient floorspace, both out-of-town and in-town, to meet modern retailer requirements. In these circumstances, the Practice Guidance comments that even if there is limited quantitative need for additional floorspace, it is important that town centres continue to provide modern, quality retail and other facilities in order to remain competitive, innovative and efficient. In our view, the retail parks in Tamworth offer a generally better quality of shopping provision than the town centre. Although this may not be to the overall disadvantage of shoppers in Tamworth, it is not in the long term best interests of the town centre for higher quality shopping provision to be concentrated in the retail parks. The overall quality of shopping in the town centre itself needs to be improved.

11. POLICY ADVICE

Plan-Making Policies

11.1 Section 2 of the report sets out the policy requirements for main town centres that local planning authorities should take into account in plan-making. In summary local planning authorities should:

- Define a network and hierarchy of centres.
- Assess the need for land or floorspace for retail uses over the plan period.
- In assessing quantitative need, have regard to relevant market information and economic data.
- Assess whether there is adequate provision and distribution of shopping and other services.
- In deprived areas which lack access to a range of services and facilities, give additional weight to meeting these qualitative deficiencies.
- Identify any deficiencies in the provision of local convenience shopping and other facilities.
- Take into account the degree to which shops may be overtrading.
- Support shops, services and other important small scale economic uses in local centres and villages.
- Assess the capacity of existing centres to accommodate new retail development, taking account of the role of centres in the hierarchy.
- Identify a range of sites to meet the identified need for development.
- Identify the appropriate scale of development, in keeping with the role and function of centres within the hierarchy of centres.
- Identify sites or buildings within existing centres suitable for development, conversion or change of use.
- Identify sites in centres, or on the edge of centres, capable of accommodating larger format developments where a need for such development has been identified.
- Identify centres in decline where change needs to be managed.
- Review existing site allocations in the development plan.
- Allocate sufficient sites in development plan documents to meet at least the first five years identified need.
- Apply the sequential approach to site selection, giving preference to sites within centres, then edge-of-centre locations then out-of-centre locations.
- Give preference to sites that best serve the needs of deprived areas.
- Assess the impact of proposed sites on existing centres.
- Consider the degree to which other considerations may be material to the choice of appropriate locations for development.
- Define the extent of the main centres and the primary shopping area, distinguishing between primary and secondary frontages.
- Consider setting floorspace thresholds for the scale of retail development outside centres which should be subject to an impact assessment under Policy EC16.

- Define any locally important impacts on centres which should be tested in impact assessments of new development proposals under Policy EC16.
- Keep under review the network and hierarchy of centres; the need for further development and the vitality and viability of centres.

11.2 In Section 8 (Need Assessment) we have assessed the need for additional floorspace for retail uses over the plan period, having regard to relevant market information and economic data. In the quantitative need assessment we have undertaken a capacity analysis for convenience and comparison goods in the Tamworth study area. We have assessed the capacity for additional floorspace in Tamworth using a market-share approach. The capacity analysis shows:

- a convenience goods capacity in 2028 that would support in the order of 1,100 sq.m. net (1,600 sq.m. gross) convenience floorspace if it was developed for one of the leading food retailers, or more if it was developed for discount food retailing.
- a larger capacity in comparison goods in 2028 that would support in the order of 14,200 sq.m. net (20,000 sq.m. gross) floorspace in addition to commitments.

11.3 Our advice is that all the available capacity should be met within Tamworth town centre. The 20,000 sq.m. gross capacity in comparison goods is in addition to the total of 18,000 sq.m. gross floorspace already approved in the Gungate scheme and the 20,000 sq.m. gross floorspace already approved in the Ventura Retail Park area and Cardinal Point which will contribute to meeting the needs of the Tamworth catchment during the LDF period. We suggest that sites need to be found in the town centre to accommodate an additional 20,000 sq.m. gross floorspace in the longer term, after the completion of the Gungate redevelopment scheme.

11.4 Section 10 (Qualitative Assessment) of the Town Centre and Retail Study assesses whether there is adequate provision and distribution of shopping and other services, identified qualitative deficiencies in provision and taken account of the extent to which shops are over-trading. We believe that concentrating new retail development in the town centre is the best way to ensure that the planning policy gives preference to sites that best serve the needs of deprived areas. The town centre is the most accessible and most sustainable location for retail development in Tamworth. It is also the location which best satisfies the sequential approach to site selection, giving preference to sites within centres. Allocating sites for retail development within the town centre has further benefits in terms of developing on previously-developed sites and maximising investment in a location that offers the greatest spin-off benefits for all town centre uses.

Sites for Development

11.12 The Town Centre and Retail Study identifies a range of sites in Tamworth town centre to meet the identified need for retail development and other town centre uses. In identifying these sites we have taken account of existing commitments (the Gungate redevelopment scheme), proposed allocations (Middle Entry redevelopment), the Town Centre Masterplan and PPS4 advice to identify an appropriate scale of development.

The key requirement for the LDF will be to find the most suitable sites to accommodate the additional capacity of 20,000 sq.m. gross floorspace for comparison goods in the town centre. The Gungate scheme will satisfy the PPS4 requirement to allocate sufficient sites in development plan documents to meet at least the first five years identified need.

11.13 The sites that we consider to be most appropriate to meet retail development needs are Gungate, Middle Entry and a partial expansion / re-configuration of the Ankerside Centre. We have not assessed the impact of retail development on these proposed sites on existing centres because they are all town centre schemes. They would not have an impact on other centres in Tamworth other than the town centre, where their development would have a positive impact. Any impacts on neighbouring centres such as Lichfield has been taken into account in the granting of planning permission for the Gungate scheme, and the overall capacity for growth in shopping floorspace in Tamworth town centre is considered acceptable in the RSS targets for future shopping floorspace across centres in the West Midlands.

11.14 In view of the potential for additional retail development in Tamworth, beyond present commitments within and outside the town centre, we do not consider it necessary or appropriate to identify further sites that could be capable of accommodating larger format developments. There is no identified need for such development (beyond commitments at Ventura Retail Park). In fact we suggest a restriction on any further large-scale retail development outside the town centre.

12. CONCLUSIONS

12.1 The appropriate level of retail and other town centre uses in the Borough

Tamworth has an important role and function in the hierarchy of town centres in the West Midlands region. Tamworth also has a good level of commercial leisure provision for a town of its size. Outside the town centre there is a considerable amount of retail and leisure floorspace in the retail parks and major leisure destinations. RSS indicates that Tamworth should provide for 35,000 sq.m. gross comparison goods floorspace and 30,000 sq.m. of office floorspace up to 2026. This scale of development should be regarded as a maximum for the purposes of the LDF.

12.2 The role of Tamworth town centre compared to the out-of-centre retail parks

Evidence is available from the household survey on existing shopping patterns and the views of local residents about the town centre and the retail parks. The survey information shows that in convenience goods the stores with the largest market shares of spending in the study area are Sainsbury's 13%, Asda 12% and Morrisons 11%. In comparison goods the largest market shares are in the Ventura and Jolly Sailor Retail Parks with 30% and in Tamworth town centre with 18%. The role of the town centre is significantly greater for comparison than convenience goods. But the town centre's role for comparison goods is lesser than that of the retail parks. The retail parks have a total turnover that is almost twice as much as that of the town centre.

12.3 The capacity for additional convenience and comparison goods shopping in Tamworth

In convenience goods there is no capacity for additional retail floorspace in 2016 and only a small capacity in 2021 and 2028. The Council should be cautious about allowing any further foodstore developments outside the town centre in the short term. However, there may be a qualitative need for additional convenience goods shopping in the town centre which could be met in the Gungate redevelopment scheme. In comparison goods, after allowing for commitments (in Ventura Retail Park and the Gungate redevelopment scheme) there is no capacity for additional retail floorspace in 2016 or 2021 but there is significant capacity in 2028. The Council should not allow any further large-scale comparison goods developments outside the town centre until after the Gungate scheme has been completed. The Gungate scheme will provide an additional 18,000 sq.m. gross floorspace. There is additional capacity for a further 20,000 sq.m. gross comparison floorspace up to 2028 and sites should be identified for this additional 20,000 sq.m. gross floorspace in the town centre.

APPENDIX 5

RETAIL EXPENDITURE, 2009

A - CONVENIENCE GOODS

B - COMPARISON GOODS

A - CONVENIENCE GOODS EXPENDITURE, 2009 (in 2009 prices)										
Zone	1	2	3	4	5	6	7	8	Total	UK base
	Tamworth West	Tamworth East	Tamworth South	Fazeley	Rural North	Atherstone	Sutton Coldfield	Lichfield		
Population	18,042	22,671	32,406	9,285	36,122	24,398	61,624	43,568	248,116	
Per capita expenditure	£1,805	£1,849	£1,873	£1,945	£1,828	£1,903	£2,022	£1,946		£1,853
per cent of UK base	97%	100%	101%	105%	99%	103%	109%	105%		
Total expenditure (£m)	32.57	41.92	60.70	18.06	66.03	46.43	124.60	84.78	475.09	
<i>Source: Experian Retail Planner Report</i>										
Total expenditure less non-store retailing (3.2%)	31.52	40.58	58.75	17.48	63.92	44.94	120.62	82.07	459.88	
<i>Source: Experian Retail Planner Briefing Note 8.1 (August 2010)</i>										
Proportion of spending on:										
main food shopping	72.5%	74.3%	72.1%	76.3%	67.7%	72.3%	76.6%	73.5%	73.3%	
top-up food shopping	27.5%	25.7%	27.9%	23.7%	32.3%	27.7%	23.4%	26.5%	26.7%	
<i>Source: Household survey 2007</i>										
Amount of spending on:										
main food shopping	22.85	30.15	42.36	13.34	43.27	32.49	92.39	60.32	337.18	
top-up food shopping	8.67	10.43	16.39	4.14	20.65	12.45	28.22	21.75	122.70	
(excluding non-store retail)									459.88	

B - COMPARISON GOODS EXPENDITURE, 2009 (in 2009 prices)									
	Zone 1 Tamworth West	Zone 2 Tamworth East	Zone 3 Tamworth South	Zone 4 Fazeley	Zone 5 Rural North	Zone 6 Atherstone	Zone 7 Sutton Coldfield	Zone 8 Lichfield	Total
Population	18,042	22,671	32,406	9,285	36,122	24,398	61,624	43,568	248,116
Expenditure per person	£2,803	£2,806	£2,917	£3,102	£2,741	£2,975	£3,352	£3,212	
c/f UK base of £2,837	99%	99%	103%	109%	97%	105%	118%	113%	
Total Expenditure (including non-store retail)	£m	£m	£m	£m	£m	£m	£m	£m	£m
Clothing & Footwear	13.03	16.82	25.29	7.55	24.39	18.31	52.16	35.68	193.23
Furniture, Carpets, etc	5.91	7.18	10.83	3.47	11.48	8.58	26.26	17.41	91.12
Electrical Goods	13.72	17.26	25.64	7.69	25.64	19.26	54.90	37.08	201.19
DIY & Hardware	4.61	5.37	8.16	2.59	10.20	6.85	19.67	13.11	70.56
Other Non-Food Goods	13.29	16.98	24.61	7.51	27.31	19.58	53.57	36.65	199.50
Total	50.56	63.61	94.53	28.81	99.02	72.58	206.56	139.93	755.60
Total Expenditure (excluding non-store retail)	7.5%	7.5%	7.5%	7.5%	7.5%	7.5%	7.5%	7.5%	7.5%
	£m	£m	£m	£m	£m	£m	£m	£m	£m
Clothing & Footwear	12.05	15.56	23.39	6.98	22.56	16.94	48.25	33.00	178.74
Furniture, Carpets, etc	5.47	6.64	10.02	3.21	10.62	7.94	24.29	16.10	84.29
Electrical Goods	12.69	15.97	23.72	7.11	23.72	17.82	50.78	34.30	186.10
DIY & Hardware	4.26	4.97	7.55	2.40	9.44	6.34	18.19	12.13	65.27
Other Non-Food Goods	12.29	15.71	22.76	6.95	25.26	18.11	49.55	33.90	184.54
Total	46.77	58.84	87.44	26.65	91.59	67.14	191.07	129.44	698.93

APPENDIX 6

POPULATION AND EXPENDITURE ESTIMATES AND FORECASTS (REVISED)

A - POPULATION FORECASTS, TAMWORTH STUDY AREA

B - POPULATION AND EXPENDITURE FORECASTS, CONVENIENCE GOODS

C - POPULATION AND EXPENDITURE FORECASTS, COMPARISON GOODS

A - POPULATION FORECASTS, TAMWORTH STUDY AREA (REVISED)					
Zones					
Zone	2009	2011	2016	2021	2028
1 Tamworth West	18,042	18,054	18,174	18,324	18,494
2 Tamworth East	22,671	22,775	23,543	24,503	25,591
3 Tamworth South	32,406	32,691	33,003	33,393	33,835
Tamworth total [1]	73,119	73,520	74,720	76,220	77,920
4 Fazeley [2]	9,285	9,387	9,612	9,932	10,335
5 Rural North [2]	36,122	36,712	38,150	39,540	41,320
6 Atherstone [2]	24,398	24,482	24,897	25,307	25,923
7 Sutton Coldfield [2]	61,624	61,456	61,246	61,274	61,452
8 Lichfield [2]	43,568	43,967	44,951	46,033	47,623
Total	248,116	249,524	253,576	258,306	264,573
[1] based on annual growth in ONS 2008-based projections for Tamworth Borough: Borough total adjusted to exclude 2380 population outside the 3 Tamworth zones Distribution between zones based on housing development: 2009-2011 based on housing completions 2011-2028 based on commitments and allocations Distribution of growth - Zone 1 = 10%; Zone 2 = 64%; Zone 3 = 26%					
[2] Source: projections from Experian Retail Planner reports for each zone					
Catchment Area					
	2009	2011	2016	2021	2028
Primary Catchment Area [3]	82,404	82,907	84,332	86,152	88,255
Secondary Catchment Area [4]	165,712	166,617	169,244	172,154	176,318
Total	248,116	249,524	253,576	258,306	264,573
[3] Total of Zones 1-4					
[4] Total of Zones 5-8					

B - POPULATION AND EXPENDITURE FORECASTS, CONVENIENCE GOODS (REVISED)						
Population Forecasts						
Zone		2009	2011	2016	2021	2028
1	Tamworth West	18,042	18,054	18,174	18,324	18,494
2	Tamworth East	22,671	22,775	23,543	24,503	25,591
3	Tamworth South	32,406	32,691	33,003	33,393	33,835
4	Fazeley	9,285	9,387	9,612	9,932	10,335
5	Rural North	36,122	36,712	38,150	39,540	41,320
6	Atherstone	24,398	24,482	24,897	25,307	25,923
7	Sutton Coldfield	61,624	61,456	61,246	61,274	61,452
8	Lichfield	43,568	43,967	44,951	46,033	47,623
Study Area total		248,116	249,524	253,576	258,306	264,573
Expenditure per person						
Zone	Expenditure per person including non-store retailing					
		2009	2011	2016	2021	2028
1	Tamworth West	£1,805	£1,814	£1,843	£1,895	£1,976
2	Tamworth East	£1,849	£1,858	£1,888	£1,942	£2,025
3	Tamworth South	£1,873	£1,882	£1,913	£1,967	£2,051
4	Fazeley	£1,945	£1,955	£1,986	£2,042	£2,130
5	Rural North	£1,828	£1,837	£1,867	£1,919	£2,002
6	Atherstone	£1,903	£1,912	£1,943	£1,998	£2,084
7	Sutton Coldfield	£2,022	£2,032	£2,065	£2,123	£2,214
8	Lichfield	£1,946	£1,956	£1,987	£2,043	£2,131
Zone	Expenditure per person excluding non-store retailing					
		2009	2011	2016	2021	2028
Non-store retailing		3.2%	4.2%	5.9%	6.3%	7.0%
1	Tamworth West	£1,747	£1,738	£1,734	£1,776	£1,838
2	Tamworth East	£1,790	£1,780	£1,777	£1,819	£1,883
3	Tamworth South	£1,813	£1,803	£1,800	£1,843	£1,907
4	Fazeley	£1,883	£1,873	£1,869	£1,914	£1,981
5	Rural North	£1,770	£1,760	£1,756	£1,799	£1,861
6	Atherstone	£1,842	£1,832	£1,829	£1,872	£1,938
7	Sutton Coldfield	£1,957	£1,947	£1,943	£1,989	£2,059
8	Lichfield	£1,884	£1,874	£1,870	£1,915	£1,982
Total Expenditure on Convenience Goods (excluding non-store retailing) - £ million						
Zone		2009	2011	2016	2021	2028
1	Tamworth West	31.52	31.37	31.52	32.54	33.99
2	Tamworth East	40.58	40.54	41.83	44.58	48.18
3	Tamworth South	58.75	58.95	59.40	61.54	64.53
4	Fazeley	17.48	17.58	17.96	19.01	20.47
5	Rural North	63.92	64.61	67.01	71.11	76.91
6	Atherstone	44.94	44.85	45.53	47.38	50.23
7	Sutton Coldfield	120.62	119.64	118.99	121.90	126.53
8	Lichfield	82.07	82.37	84.05	88.14	94.37
Study Area Total		459.88	459.92	466.29	486.20	515.23

C - POPULATION AND EXPENDITURE FORECASTS, COMPARISON GOODS (REVISED)						
Population Forecasts						
Zone		2009	2011	2016	2021	2028
1	Tamworth West	18,042	18,054	18,174	18,324	18,494
2	Tamworth East	22,671	22,775	23,543	24,503	25,591
3	Tamworth South	32,406	32,691	33,003	33,393	33,835
4	Fazeley	9,285	9,387	9,612	9,932	10,335
5	Rural North	36,122	36,712	38,150	39,540	41,320
6	Atherstone	24,398	24,482	24,897	25,307	25,923
7	Sutton Coldfield	61,624	61,456	61,246	61,274	61,452
8	Lichfield	43,568	43,967	44,951	46,033	47,623
Study Area total		248,116	249,524	253,576	258,306	264,573
Expenditure per person						
Zone	Expenditure per person including non-store retailing					
		2009	2011	2016	2021	2028
1	Tamworth West	£2,803	£2,820	£3,196	£3,705	£4,557
2	Tamworth East	£2,806	£2,823	£3,200	£3,709	£4,562
3	Tamworth South	£2,917	£2,935	£3,326	£3,856	£4,743
4	Fazeley	£3,102	£3,121	£3,537	£4,101	£5,043
5	Rural North	£2,741	£2,757	£3,126	£3,623	£4,456
6	Atherstone	£2,975	£2,993	£3,392	£3,933	£4,837
7	Sutton Coldfield	£3,352	£3,372	£3,822	£4,431	£5,450
8	Lichfield	£3,212	£3,231	£3,663	£4,246	£5,222
Zone	Expenditure per person excluding non-store retailing					
		2009	2011	2016	2021	2028
Non-store retailing		7.5%	10.0%	12.7%	12.4%	12.0%
1	Tamworth West	£2,593	£2,538	£2,790	£3,246	£4,010
2	Tamworth East	£2,596	£2,541	£2,793	£3,249	£4,015
3	Tamworth South	£2,698	£2,641	£2,904	£3,378	£4,173
4	Fazeley	£2,869	£2,809	£3,088	£3,592	£4,438
5	Rural North	£2,535	£2,482	£2,729	£3,174	£3,922
6	Atherstone	£2,752	£2,694	£2,962	£3,445	£4,256
7	Sutton Coldfield	£3,101	£3,035	£3,337	£3,882	£4,796
8	Lichfield	£2,971	£2,908	£3,198	£3,720	£4,596
Total Expenditure on Comparison Goods (excluding non-store retailing) - £ million						
Zone		2009	2011	2016	2021	2028
1	Tamworth West	46.78	45.82	50.71	59.48	74.17
2	Tamworth East	58.84	57.86	65.77	79.62	102.74
3	Tamworth South	87.44	86.34	95.84	112.80	141.21
4	Fazeley	26.64	26.36	29.68	35.68	45.87
5	Rural North	91.58	91.11	104.10	125.51	162.04
6	Atherstone	67.14	65.94	73.74	87.19	110.34
7	Sutton Coldfield	191.07	186.51	204.37	237.85	294.71
8	Lichfield	129.44	127.86	143.73	171.22	218.85
Study Area total		698.94	687.81	767.94	909.35	1,149.93

APPENDIX 8

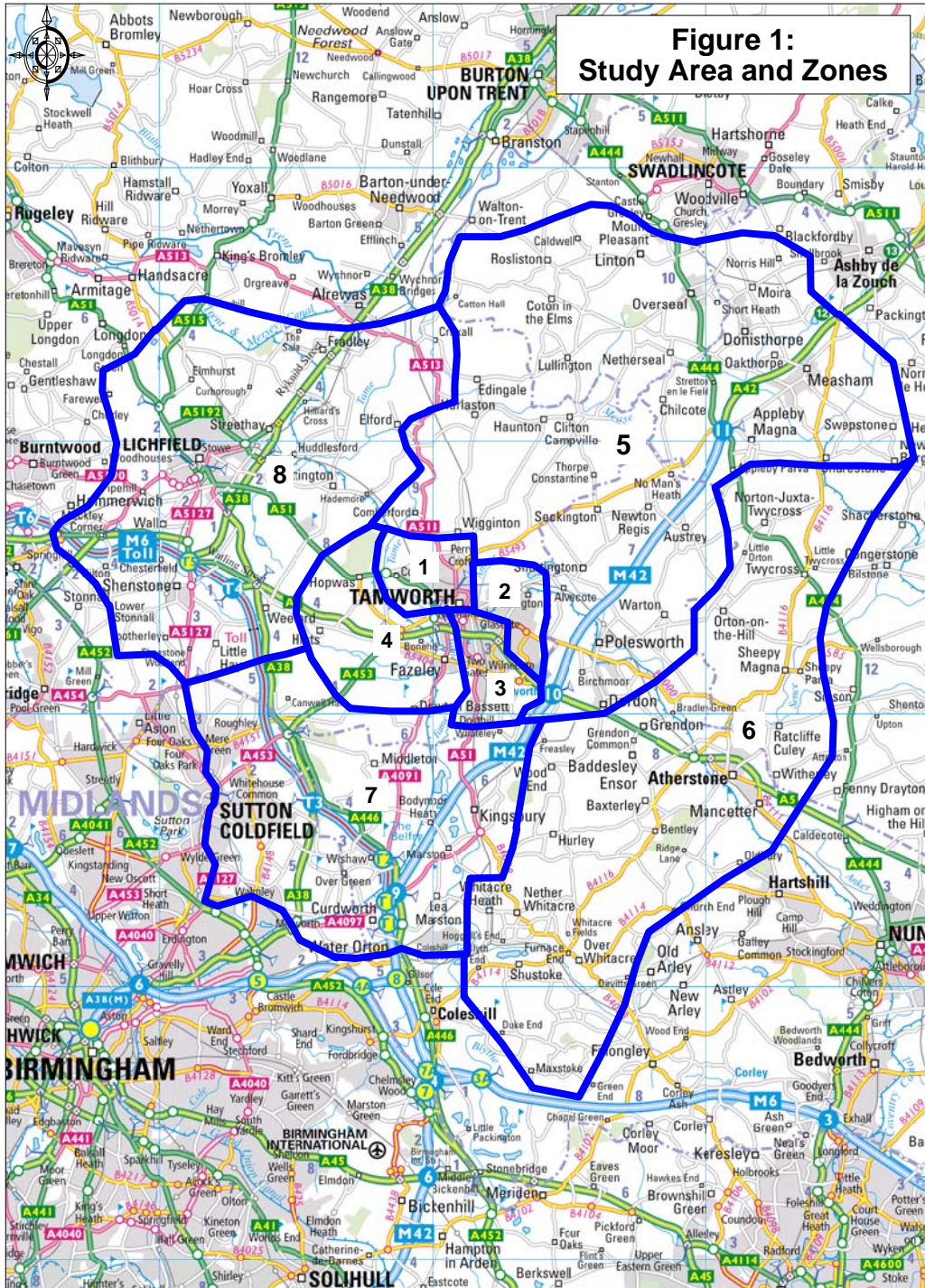
CAPACITY ANALYSIS (REVISED)

8A - CONVENIENCE GOODS

8B - COMPARISON GOODS

APPENDIX 8A: CAPACITY ANALYSIS, CONVENIENCE GOODS					
Tamworth Catchment Area (2009 prices)					
	2009	2011	2016	2021	2028
Residents' expenditure in catchment area (£m)					
Primary catchment area	148.33	148.44	150.71	157.67	167.17
Secondary catchment area	311.55	311.47	315.58	328.53	348.04
Total expenditure from catchment	459.88	459.91	466.29	486.20	515.21
Turnover in Tamworth (£m) [1]					
from primary catchment	135.57				
from secondary catchment	69.09				
total turnover from catchment area	204.66				
Retention levels [2]					
	existing	forecasts			
primary catchment	91.4%	92%	92%	92%	92%
secondary catchment	22.2%	22%	22%	22%	22%
overall retention	44.5%	45%	45%	45%	45%
Expenditure available to be spent in Tamworth (£m)					
from primary catchment		136.56	138.65	145.06	153.80
from secondary catchment		68.52	69.43	72.28	76.57
total expenditure available		205.09	208.08	217.33	230.37
Future turnover in Tamworth (£m) [3]		204.66	207.13	211.73	217.07
Surplus expenditure capacity (£m)		0.43	0.96	5.61	13.29
Turnover of commitments (£m) [4]		-	2.54	2.54	2.54
Residual capacity (£m)		0.43	-1.58	3.07	10.75
[1] Survey-based turnover 2009: figures from Appendix 7A on expenditure flows					
[2] assuming a small increase in retention based on potential for clawback of leakage					
[3] assuming growth in sales density in convenience goods of 0.4% p.a. 2012-2018 then 0.2% pa to 2028					
[4] Commitments:					
(convenience goods only)		sq.m.	sq.m.	sales	turnover
		gross	net	per sq.m.	£m
Lidl, Bolebridge Street		1,063	800	£3,180	2.54
no increase assumed in sales density in future years					

APPENDIX 8B: CAPACITY ANALYSIS, COMPARISON GOODS					
Tamworth Catchment Area (2009 prices)					
	2009	2011	2016	2021	2028
Residents' expenditure in catchment area (£m)					
Primary catchment area	219.70	216.38	242.00	287.58	363.99
Secondary catchment area	479.23	471.42	525.94	621.77	785.94
Total expenditure from catchment	698.93	687.80	767.94	909.35	1149.93
Turnover in Tamworth (£m) [1]					
from primary catchment	182.77				
from secondary catchment	174.34				
total turnover from catchment area	357.11				
Retention levels [2]					
	existing	forecasts			
primary catchment	83.2%	84%	92%	92%	92%
secondary catchment	36.4%	37%	42%	42%	42%
overall retention	51.1%	52%	58%	58%	58%
Expenditure available to be spent in Tamworth (£m)					
from primary catchment		181.76	222.64	264.57	334.87
from secondary catchment		174.43	220.89	261.14	330.09
total expenditure available		356.18	443.53	525.72	664.97
Future turnover in Tamworth (£m) [3]		357.11	383.18	416.88	469.09
Surplus expenditure capacity (£m)		-0.93	60.35	108.84	195.87
Turnover of commitments (£m) [4]		4.19	102.16	111.14	125.06
Residual capacity (£m)		-5.12	-41.81	-2.31	70.81
[1] Survey-based turnover 2009: figures from Appendix 7B on expenditure flows					
[2] assuming an increase in retention based on potential for clawback of leakage					
[3] assuming growth in sales density in comparison goods of 1.0% p.a. 2011-2013 then 1.7% pa to 2028					
[4] Commitments:	sq.m.	sq.m.	sales	turnover	turnover
(comparison goods only)	gross	net	per sq.m.	2011	2016
to 2011				£m	£m *
<u>Ventura Retail Park mezzanine floorspace</u>					
Unit D	627	500	£2,000	1.00	
Unit K	587	470	£2,000	0.94	
Unit 4 (Currys)	707	523	£4,300	2.25	
total				4.19	4.56
<u>after 2011</u>					
land adj to Tamworth Herald, Ventura Park	5,477	4,380	£3,000		13.14
<u>Cardinal Point:</u>					
Unit 1	4,180	3,550	£2,000		7.10
mezzanine	2,090	1,780	£1,000		1.78
garden centre	1,858	1,580	£1,000		1.58
Units 2-4	3,252	2,600	£3,000		7.80
mezzanine	1,626	1,300	£1,500		1.95
Gungate redevelopment scheme	18,360	12,850	£5,000		64.25
(net gain in floorspace)					
Total turnover of commitments				4.19	102.16
* Assuming growth in sales density at 1.7% per annum, continued to 2021 and 2028					



**Figure 1:
Study Area and Zones**

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