

WIRRAL RETAIL STRATEGY

1. Executive Summary

- 1.1 This report outlines the key findings and recommendations from the recently completed Borough-wide retail study carried out by Roger Tym & Partners on behalf of the Council. The study is intended to update earlier separate studies (also carried out by Roger Tym) for food retailing (in 1998) and non-food retailing (in 1996). The study includes a survey of 1500 households, 'health checks' of the main centres in the Borough and recommendations on the future strategy for retail development in the Borough.
- 1.2 The survey results indicate that while Wirral continues to be very self-contained in terms of convenience shopping, the overall retention of comparison expenditure by town centres in the Borough is disappointingly low at 55 per cent and deteriorating. The study recommends changes to the hierarchy of centres identified in the Unitary Development Plan and identifies a range of development and intervention actions for each centre. The study suggests that in order to respond to the challenges posed by new development in Liverpool and Chester, the Council needs to take a very proactive stance to the assembly of development sites for new retail development in all the Borough's town centres, but particularly in Birkenhead. In terms of the convenience sector, the need for additional floorspace is less acute, but there is none the less scope to support a major foodstore in Birkenhead. Locations for further major convenience development should be governed by regeneration considerations.
- 1.3 The report proposes two recommendations to Cabinet - the key findings and recommendations of the Roger Tym & Partners Retail Assessment should be endorsed and form the basis of the policies to be incorporated into the UDP review and secondly, that the intervention proposals identified by RTP be used to inform and assist prioritisation of area-based regeneration strategies.

2. Background to the Study

- 2.1 Roger Tym & Partners (RTP) were commissioned in August 2003 to prepare a Borough-wide retail assessment. The last retail assessment (for food retailing) was carried out in 1998 with non-food retailing being considered in 1996, both studies being prepared by RTP. The purpose of this new study was principally to inform the UDP review through a number of key tasks:
- Review developments in national retail planning policy;
 - Establish current food and non-food shopping patterns of Wirral residents;

- Assess the health of Wirral's main shopping centres;
- Assess current and future need for additional retail floorspace in the Borough;
- Provide a broad locational strategy for meeting need and assess the suitability of potential sites; and
- Consider the need to review the retail hierarchy.

3. Policy Review

- 3.1 In the national context, RTP conclude that the Government continues to have a firm preference for town centre locations for all types of new development which generate many trips, although they do recognise that some types of retailing may not be able to find suitable sites in or on the edge of town centres. They comment also on the recently published draft PPS6 (subject of a separate report to the February meeting of this Select Committee). They note that if adopted, this new guidance will require a far more proactive approach from local authorities in terms of planning for town centres and future retail development. RTP then set out the regional and local policy context in more detail, including the UDP, Regional Planning Guidance and other key documents and initiatives such as the Community Strategy, Tourism Strategy, Housing Market Renewal and Wirral Waterfront Regeneration.

4. Trends in Retail and Leisure Investment

Comparison (Non-food) retailing

- 4.1 RTP also provide a general overview of trends in expenditure and investment in the retail and leisure sector. Non-food retail sales continue to grow significantly (particularly among retailers of household goods, followed by textiles, clothing and footwear outlets) although expenditure by consumers in this sector is very sensitive to changes in the state of the economy as a whole. In the convenience sector, growth in sales volumes are much lower, reflecting minimal growth in expenditure on convenience goods. The highest levels of growth in sales in the convenience sector have been achieved through sale of non-food items and the major operators have sought to broaden their retail base by selling financial services, clothing, electrical and household goods.

Comparison (Non-food) retailing

- 4.2 Planning policies nationally have reduced the flow of out of centre developments in recent years with developers encouraged to regenerate complicated edge-of-centre and in-town sites. In 1992, town centre schemes accounted for 68 per cent of the retail development 'pipeline' – now the total is 85 per cent. Some department store operators (notably Debenhams) are investigating opportunities in smaller town centres, although new openings are generally restricted to new shopping centre developments where landlords are able to contribute to fit-out costs in order to secure an anchor tenant to enhance the profile of the rest of the development. Many retailers (both food and non-food) are developing and adapting formats to fit into town centre locations. Other high street occupiers have been acquiring out of centre units, although generally in existing retail parks given the tightening policy context. Activity

in factory outlet centre development (such as Cheshire Oaks) continues, but at a much slower pace than in the 1990s.

Convenience (food) retailing

- 4.3 The major UK supermarket operators continue to expand into the higher margin non-food markets. Many store extensions have been to enable increased sales of non-food goods. The use of mezzanine floors is now being pursued where planning or other constraints prevent physical expansion of stores. The major operators are also expanding their range of small store formats, including Tesco Metro and Sainsburys Central.

Internet

- 4.4 Internet retailing continues to expand, but limited to certain sectors such as record shops and bookshops, together with online convenience shopping by the likes of Tesco and Sainsburys. Fashion items are likely to continue to be sold mainly through the high street for the foreseeable future.

Leisure

- 4.5 Growth in the leisure sector has slowed after significant expansion in the 1990s. The development of further health and fitness clubs – the strongest performer in recent years – is starting to slow at the premium end of the market although at the budget end, demand from operators such as ‘Fitness First’ shows no sign of waning. The multiplex sector is saturated in some areas with several closures of first generation multiplexes occurring since 2000. The proposed reform of gaming legislation is likely to have implications for the gaming, casino and bingo sectors, although the new regime may not be fully implemented until 2008.

5. Current Patterns of Retail Spending

- 5.1 A key element of the RTP study was a telephone survey of 1,500 households in the Borough (divided into six survey zones, based on postcode areas). At least 200 households were surveyed in each area with all the results weighted to reflect the actual distribution of households across the Borough. The main ‘headlines’ are set out in the following paragraphs.

Convenience shopping

- 5.2 The total amount of convenience expenditure by Wirral residents in 2003 amounts to £519.09m (business based). The proportion of this expenditure which is retained by convenience businesses within the Borough has increased slightly from 96 to 97 per cent since 1998. More residents are also carrying out convenience shopping within the zone where they live. The one exception is zone 4 (postcode districts CH41/42/43 covering Birkenhead and its surrounding area). Here, the proportion of residents who carry out their convenience shopping within the same zone has dropped from 76 per cent to 64 per cent. The survey findings also show that eight stores within the Borough together account for 62.4 per cent of the convenience expenditure of Wirral’s residents. The store turnovers range from around £20m to £63.67m.

- 5.3 RTP consider that on the basis of these figures, many of these supermarkets are trading in excess of their company average turnovers – otherwise known as ‘overtrading’. In terms of the alternative measure of expenditure (goods based), the level of expenditure retained in the Borough, along with the market shares of individual stores and centres is the same as with expenditure on convenience businesses.

Comparison (non-food) shopping

- 5.4 The total comparison expenditure by Wirral residents (on a business base) in 2003 is estimated to be £737.11m. However, only 55 per cent of this is retained by comparison businesses within the Borough. Birkenhead is the most important comparison centre within the Borough with an estimated turnover of £253.56m and an overall market share of 33.6 per cent. Birkenhead attracts the highest share of comparison expenditure from residents of all the survey zones, varying between 23 per cent for zone 6 (Heswall) to around 45 per cent in zone 4 (Birkenhead). The Croft Retail Park is the second most important spend location within Wirral, followed by Liscard Town Centre, Bromborough Village and Grange Road West/Oxton Road and the junction 1 retail park. In terms of the expenditure which flows outside the Borough (otherwise known as ‘leakage’) Liverpool accounts for about 42 per cent (£139.5 m) of comparison expenditure outside the Borough with a further 20 per cent (£65.99m) and 9% (£31.02m) in Cheshire Oaks. Roger Tym consider that the main outcome of the survey of shopping patterns, is that there is a need to improve the Borough’s comparison sector retention levels through quality development or redevelopment within the Borough’s town centres.

6. Quantitative Need for Further Retail Floorspace

- 6.1 From the 2003 base position established through these surveys, Roger Tym have projected the findings forward to estimate the likely growth in convenience and comparison expenditure up to the 2006 and 2011 time frames. These in turn have been translated into estimates of the future turnover of stores and centres and potential future floorspace requirements. More detailed background on the methodology and detailed findings are set out in Appendix A to this report, including an explanation of the ‘business based’ and ‘goods based’ approaches to forecasting expenditure and turnover.
- 6.2 Because of the very high level of retention of convenience spending within the Borough, RTP assume that this overall market share will remain unchanged over the longer term. RTP also factor-in the evidence mentioned above that many of the Borough’s superstores are over-trading, which does suggest that there is a quantitative need for more competition and hence convenience floorspace within town centres. Overall, therefore, they conclude that there is a quantitative need for further convenience floorspace of at least 5,000-6,000 sq metres sales area between 2003-2011, which equates to a gross floorspace total of 8,333 to 10,000 sq m.
- 6.3 In respect of comparison goods, RTP recommend that the Council adopts a strategy of increasing the amount of expenditure retained in the Borough from the current low figure of 55 per cent. Realistic targets in their view are to increase the retention rate to 57 per cent in the period to 2006 with a further rise to 60 per cent by 2011. Although these seem modest targets, the increase to 60 per cent would require retailers to ‘claw back’ £48.5m (on the business based analysis) from retailers outside

the Borough. Achievement of this uplift in retention will require new retail development within the Borough of a quality that will boost the overall attractiveness of Wirral's retail offer in comparison with competing retail locations elsewhere in the sub-region. RTPs analysis produces a comparison floorspace requirement of 28,540 sq m (business base) or 43,720 sq m (goods base) between 2003 and 2011. They stress however that this should not be regarded as a prescriptive floorspace limit for development that takes place within town centres.

7. Assessment of the Current Health of Wirral's Shopping Centres

- 7.1 RTP's work included an assessment of the Borough's nine Key Town Centres and fourteen traditional suburban centres (as defined in the UDP). This was based on on-foot surveys, an analysis of a range of data sources and comparison with other appropriate centres (Liverpool, Chester, Warrington). They were also informed by a comprehensive consultation exercise with key stakeholders in the centre. The health checks for Wirral's centres assess indicators such as changes in shopping rents, retailer representation and change, diversity of uses, environmental quality. Their assessments were grouped under 4 headings – diversity and critical mass, accessibility, amenities and action.
- 7.2 As might be expected, the findings range from centres which are classed as reasonably 'healthy' and require little intervention, to those where more action is needed to safeguard or revive their role in the hierarchy. The report proposes 4 scales of intervention – comprehensive regeneration /redevelopment; major intervention; intermediate intervention and minor intervention. More detail is given on these in section 8 below. In addition, RTP suggest that there is potentially a fifth type of intervention – expansion and new build. This might apply to local centres which need to be promoted in the hierarchy, perhaps in response to increased residential development in the vicinity. This falls outside the remit of the current study and the likely candidate centres will only become clear once the Housing Market Renewal Pathfinder initiative has reached a more advanced stage.

8. The Retail Strategy and Key Recommendations

- 8.1 RTP pull together the findings of their research work into an overall strategy. The starting point is that Birkenhead and Liscard have lost ground in the wider regional retail hierarchy since the mid-1990s. The decline in these centres reflects the greater progress made in the competing centres of Chester and Liverpool and the competition posed by large out of centre developments such as Cheshire Oaks. However, RTP also highlight localised factors which have also frustrated development in the larger centres in Wirral, including difficulties caused by unco-operative property owners, the level of deprivation experienced in some inner areas of Wirral the need for more focussed partnership between the public sector and business groups, a dearth of quality development partners and readily available sites of any material scale.

Strategy for individual shopping centres in the Borough

- 8.2 RTP also provide strategy recommendations for the Borough's main shopping centres. They recommend that the retail hierarchy in the current UDP (which has two tiers - 'Key Town Centres' and 'Traditional Suburban Centres') should be reclassified, with Birkenhead as a standalone "sub-regional centre", Heswall, Liscard, West Kirby and Moreton classified as 'town centre', Hoylake, Bromborough Village, Prenton

(Woodchurch Road) and New Ferry classed as 'district centres' with the remaining centres all classified as 'local centres'. The new hierarchy will act as a guide for the scale of development likely to be appropriate in each of the Borough's centres. However RTP also consider that there is a need for different intervention models which reflect not only the recommended hierarchy but also the current level of vitality and viability being achieved by each centre. As highlighted earlier, four separate intervention models are identified, with the recommendations summarised below.

Centres in Need of Comprehensive Regeneration / Redevelopment: New Ferry; Grange Road West/Oxton Road; Wallasey Village; and Laird Street

- 8.3 RTP conclude that these centres have experienced significant long-term decline. The cumulative impact of decline in these centres is of such an extent that they appear fragmented, and the centres clearly need to be contracted to a more appropriate size in order to reflect their current and future role within Wirral's retail hierarchy. RTP recognise that the contraction of the centres, and consolidation of retail and service uses within a more appropriate core area, will not be an easy task – it will require a combination of site assembly; re-occupation of void premises; unit amalgamation; demolition and new build; and change of use development. Whilst proactive planning of this nature will have funding implications for the Council and its partners, RTP note that the approach is not entirely new in Wirral, where two centres – Tranmere and New Brighton (Victoria Road) – have recently been successfully scaled back recently to a more appropriate size.

Centres in Need of Major Intervention: Birkenhead, Liscard, West Kirby, Hoylake Seacombe and New Brighton (Seabank Road)

- 8.4 Whilst the decline of these centres has not been as dramatic as that experienced by centres such as New Ferry, RTP conclude that they have still declined – or have failed to keep pace with other developments in the region – and are in need of major intervention if they are to remain competitive. Again, as with the centres that are in need of wholesale regeneration, RTP consider that the achievement of the re-positioning of these centres will require co-operation between a wide range of agencies, and substantial changes to the physical make-up and configuration of the centres.

Centres in Need of Intermediate Intervention –Dacre Hill and Prenton (Borough Road)

- 8.5 RTP consider that Dacre Hill and Prenton (Borough Road) have both experienced decline and can now only be considered as local centres. Their decline is evidenced by high vacancy rates, but on the whole the centres retain some degree of vitality and viability, albeit at the localised end of the retail hierarchy. RTP recommend that the principal aim should be to get vacant units re-occupied as quickly as possible in order to augment the impression of centres that are commercially viable; this might require some degree of relaxation in respect of planning policy (on the basis that any reasonable use is more beneficial to the overall vitality of small-scale centres than are vacant units).

Centres in Need of Minor Intervention

- 8.6 RTP conclude that the remaining centres – Prenton (Woodchurch Road); Bromborough Village; Upton; Heswall; Claughton Village; New Brighton (Victoria Road); Lower Bebington; Irby Village and Moreton – are relatively healthy centres, within their respective levels of the retail hierarchy. There is no need for intervention on the scale that is necessary in some of Wirral's other centres. Nonetheless there are various measures which RTP recommend the Council should seek to implement in order to improve these centres' ability to serve the needs of the local community.

Future retail development

- 8.7 As highlighted earlier RTP identify scope to accommodate additional food and non-food retail development in the Borough. In respect of comparison floorspace, the 'increased retention' scenario is – as highlighted above – confirmed as the policy aspiration target. RTP recommend that the identified floorspace requirement (28,540 sq m (business base) or 43,720 sq m (goods base)) for the period 2003-2011 should not be regarded as a prescriptive floorspace limit for development which takes place within town centres, since quality developments will create their own capacity by reducing the outflow of expenditure to competing centres outside Wirral. However RTP caution that such developments should be appropriate in scale to the functions of the centres in which they are located. Most new floorspace should be directed to Birkenhead and Liscard. RTP also consider that there is scope for quality comparison sector development in West Kirby, Hoylake and Moreton
- 8.8 In respect of Birkenhead, RTP note that efforts to secure development on the Hind Street and Oliver Street car parks sites have been underway for some years. Their view is that the investment market will not tolerate non-delivery too much further into the future. If the Council does consider that site assembly cannot be achieved within town centres, then the only option for retaining expenditure will be to promote comparison sector development in out-of-centre locations.
- 8.9 In this context, the Hind Street/Mollington Street area should be capable of functioning as an edge of centre location in the future, subject to improved pedestrian and road access links to the town centre, satisfactory integration with the Rock Retail Park and preferably subject to the demolition of the road flyovers, which form a significant barrier between the site and Birkenhead town centre. Indeed RTP consider that the Hind Street/Mollington Street area is the type of location for which draft PPS6 calls for a proactive stance from the public sector so as to extend town centres, with use of CPO powers where appropriate, and taking an imaginative 'can do' stance in relation to infrastructure provision. Officers continue to be in discussion with the main landowners in the Hind Street about how the comprehensive regeneration of this area can be achieved.
- 8.10 If the Hind Street regeneration area cannot be delivered, the South Wirral Retail Park is considered by RTP to be the obvious first choice for large format stores (subject to securing public transport enhancements), if the Hind Street Regeneration area cannot be delivered. Another out of centre location which may be suitable for expansion is the former BT depot site adjacent to Sainsburys at Upton. Notwithstanding the comments by RTP with regard to the South Wirral Retail Park, the Council has recognised that refurbishment and reconfiguration of the retail and leisure park is an important element of sustaining and enhancing the Borough's overall retail offer.

Planning Committee resolved to approve a planning application (in early 2002) for a major redevelopment and expansion of the retail and leisure park, although the application was subsequently withdrawn following call-in by the Secretary of State. Officers will continue to work with the owners of the retail and leisure park to develop proposals which will achieve the uplift in the quality of the site, address traffic and public transport considerations while satisfying the requirements of national and local planning policy.

- 8.11 Given the enhanced role for Regional Spatial Strategies advocated in the draft PPS6, RTP suggest that Wirral will in future have to make a case to the Regional Planning Body that Birkenhead is worthy of its sub-regional status and ensure that there is concerted support to break out of the town centre's tight confines which currently restrict its development potential. If the Council is hesitant about CPO procedures and town centre expansion, it should say so and accept a lower order future for its main comparison centres.
- 8.12 In terms of convenience retailing RTP recommend that account is taken of the existing robust levels of convenience trading – particularly in out of centre locations – and that the Council should plan proactively for at least 5,000 to 6,000 sq m of new sales floorspace in the period up to 2011. The first choice for part of this sales floorspace should be the Oliver Street car parks site, with the second choice locations governed by potential regeneration benefits. Candidates for second choice locations for large convenience stores include the Hind Street Regeneration Area (but only if there is no conflict with Oliver Street) and New Brighton, the latter only because of the potential to lever substantial improvements to its leisure facilities – the notional catchment of New Brighton would not normally qualify it as a top choice location for new convenience facilities of a substantial scale. In local centres, the maximum size for any new convenience store should be around 1,000 sq m and in district centres a maximum size of convenience store should be around 2,500 sq m.

9. Conclusions

- 9.1 The Roger Tym & Partners study is the first comprehensive overview of retailing in Wirral for a number of years. RTP's conclusions are uncompromising: Wirral's centres are losing trade and the retail network is under stress as a result of competition from centres outside the Borough. There is a danger that key centres - particularly Birkenhead and Liscard – will continue to move down the hierarchy unless more positive action is taken. There is capacity for growth in retail floorspace, particularly in the non-food comparison sector, and this should be directed towards existing centres. Continued positive and proactive action is needed by the Council and others to ensure that key sites in or on the edge of Birkenhead - in particular - are able to be brought forward. Emerging policy guidance will require the Council to be far more proactive in terms of planning for town centres.
- 9.2 The health check assessments have identified in some cases potentially significant programmes of work for the Borough's shopping centres. Some work is already in hand, for example, the commissioning of a major master planning exercise for Hoylake and West Kirby.
- 9.3 The UDP review provides an early opportunity to take the key RTP recommendations forward and a further report setting out proposed alterations to the current UDP will be brought to this Committee in the near future.

10. Financial and Staffing Implications

- 10.1 There are no direct financial and staffing implications arising directly from this report, although the suggested actions for the Borough's shopping centres will in many cases require significant funding.

11. Human Rights Implications

- 11.1 There are no human rights implications arising directly from this report.

12. Local Agenda 21 Implications

- 12.1 Ensuring continued access to a range of local services, including shopping, by a choice of transport mode, including shopping, is a key element of national and local planning policy and has been reflected in the recommendations put forward by RTP.

13. Community Safety Implications

- 13.1 There are no community safety implications arising directly from this report.

14. Local Members Support Implications

- 14.1 There are no local Members support implications arising directly from this report.

15. Recommendations

- 15.1 That the Select Committee recommends to Cabinet the key findings and recommendations of the Roger Tym & Partners Retail Assessment should be used to form the basis of the retail policies to be incorporated into the UDP review.
- 15.2 That the intervention proposals identified by Roger Tym & Partners be used to inform and assist prioritisation of area-based regeneration strategies.

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APPENDIX A: CALCULATING FUTURE FLOORSPACE REQUIREMENTS

Two separate floorspace forecasts have been produced by RTP reflecting the two different approaches to forecasting the rate of future expenditure growth. The so-called “goods based” method is an estimate of the amount spent per head of population on convenience or comparison goods and is based on a survey of households. The other “business-based” approach seeks to estimate the level of retail sales or turnover of retail businesses. Expenditure per head is derived by dividing the total turnover of businesses under different categories by estimates of population.

The goods based approach suggests that the level of spending per head on convenience goods in Wirral will increase by only 0.1% per cent per year. By contrast, the turnover per head of convenience retail businesses is forecast to grow by 1.9 per cent per year. While the difference does not appear very great, in practice it leads to substantial differences in the levels of surplus expenditure which might be available to support further retail development.

Convenience floorspace requirement

Roger Tym identify the following convenience floorspace requirements:

Business Based

		2003-2006	2006-2011	2003-11
Expenditure surplus	(£m)	10.3	41.3	51.6
Floorspace Requirement	Sq.m (sales area)	1,090	4,360	5,440
Floorspace Requirement	Sq.ft (sales area)	11,700	46,900	58,600

Goods Based

		2003-2006	2006-2011	2003-11
Expenditure surplus	(£m)	-14.2	-2.4	-16.6
Floorspace Requirement	Sq.m (sales area)	-1,500	-260	-1,760
Floorspace Requirement	Sq.ft (sales area)	-16,100	-2,800	-18,900

Because of the high level of retention of convenience spending in the Borough RTP assume that this overall market share remains unchanged over the longer term. RTP also factor in the evidence that many of the Borough’s superstores are overtrading: the town centre supermarkets are over-trading by around £50m and the out of centre stores by around £15m. While the over-trading which occurs within town centre supermarkets should not be regarded as being “available” to support new convenience floorspace in out of centre locations, it does indicate that there is a quantitative need for more competition and hence convenience floorspace within town centres. Overall, therefore they conclude that there is a

quantitative need for further convenience floorspace of at least 5,000-6,000 sq metres sales area, which equates to a gross floorspace total of 8,333 to 10,000 sq m.

Comparison floorspace requirements

RTP's assessment of comparison floorspace adopts a different approach to the convenience assessment. Because of the high level of 'leakage' of comparison expenditure, RTP have prepared 3 scenarios:

Scenario A: which assumes that the level of comparison expenditure retained in the Borough remains unchanged at around 55 per cent. This produces a floorspace requirement of 14,260 sqm (business base) or 26,700sq m (goods base) between 2003 and 2011.

Scenario B: anticipates an increase in the retention rate to 57 per cent in the period to 2006 and a further rise to 60 per cent by 2011. This is the scenario which RTP recommend should be the target scenario. The uplift in retention will require new retail development within the Borough of a quality that will boost the overall attractiveness of Wirral's retail offer in comparison with competing retail locations elsewhere in the sub-region. This produces a floorspace requirement of 28,540 sq m (business base) or 43,720 sq m (goods base) between 2003 and 2011. They stress however that this should not be regarded as a prescriptive floorspace limit for development which takes place within town centres.

Scenario C: this scenario anticipates a reduction in the current level of retained expenditure from 55 to 54 per cent by 2006, falling a further 4 percentage points to 50 per cent by 2011. This scenario is included to provide an indication of the impact that may result if new development is not attracted to the Borough. This produces a floorspace requirement of -10 sqm (business base) or 9,690 sqm (goods base) between 2003 and 2011.

More detailed tables setting out these floorspace requirements are set out below.

Scenario A – Fixed Market Shares

Business Based

		2003-2006	2006-2011	2003-11
Expenditure surplus	(£m)	10.1	36.0	46.1
Floorspace Requirement	Sq.m (sales area)	3,120	11,150	14,260
Floorspace Requirement	Sq.ft (sales area)	33,600	120,000	153,500

Goods Based

		2003-2006	2006-2011	2003-11
Expenditure surplus	(£m)	23.5	62.7	86.2
Floorspace Requirement	Sq.m (sales area)	7,280	19,420	26,700
Floorspace Requirement	Sq.ft (sales area)	78,400	209,000	287,400

Scenario B – Planned Increase in Retention

Business Based

		2003-2006	2006-2011	2003-11
Expenditure surplus	(£m)	25.9	66.2	92.2
Floorspace Requirement	Sq.m (sales area)	8,030	20,510	28,540
Floorspace Requirement	Sq.ft (sales area)	86,400	220,800	307,200

Goods Based

		2003-2006	2006-2011	2003-11
Expenditure surplus	(£m)	41.8	99.4	141.2
Floorspace Requirement	Sq.m (sales area)	12,940	30,770	43,720
Floorspace Requirement	Sq.ft (sales area)	139,300	331,200	470,600

Scenario C – Decrease in retention

Business Based

		2003-2006	2006-2011	2003-11
Expenditure surplus	(£m)	2.1	-2.2	0.0
Floorspace Requirement	Sq.m (sales area)	670	-680	-10
Floorspace Requirement	Sq.ft (sales area)	7,200	-7,300	-100

Goods Based

		2003-2006	2006-2011	2003-11
Expenditure surplus	(£m)	14.4	16.9	31.3
Floorspace Requirement	Sq.m (sales area)	4,460	5,230	9,690
Floorspace Requirement	Sq.ft (sales area)	48,000	56,300	104,300

APPENDIX B: STRATEGY FOR THE BOROUGH'S MAIN SHOPPING CENTRES