

WIRRAL RETAIL STUDY UPDATE - CONVENIENCE [SCENARIO 1]

TABLE 1 - SURVEY AREA POPULATION FORECASTS

SURVEY ZONE	POPULATION PROJECTIONS								POPULATION GROWTH (%)			
	2010	2011	2012	2014	2018	2019	2021	2030	2010 - 2011	2011-2014	2011-2018	2011-2030
Zone 1 - West Kirby / Hoylake	25,606	25,481	25,331	25,016	24,602	24,546	24,344	23,655	-0.5%	-1.8%	-3.4%	-7.2%
Zone 2a - Moreton / Leasowe	25,444	25,451	25,405	25,370	25,368	25,396	25,405	25,537	0.0%	-0.3%	-0.3%	0.3%
Zone 2b - Upton	28,608	28,455	28,388	28,205	27,942	27,885	27,772	27,408	-0.5%	-0.9%	-1.8%	-3.7%
Zone 3a - Wallasey	28,788	28,800	28,854	28,979	29,340	29,395	29,646	30,360	0.0%	0.6%	1.9%	5.4%
Zone 3b - New Brighton	29,198	29,177	29,081	29,021	29,004	28,990	28,989	28,921	-0.1%	-0.5%	-0.6%	-0.9%
Zone 4a - Birkenhead North	21,535	21,631	21,710	21,915	22,256	22,416	22,625	23,302	0.4%	1.3%	2.9%	7.7%
Zone 4b - Birkenhead South	29,491	29,565	29,558	29,761	30,098	30,177	30,415	31,075	0.3%	0.7%	1.8%	5.1%
Zone 4c - Birkenhead West	37,606	37,671	37,668	37,716	37,778	37,833	37,881	38,041	0.2%	0.1%	0.3%	1.0%
Zone 5a - Bromborough	27,222	27,083	27,083	27,041	26,937	26,942	26,952	26,718	-0.5%	-0.2%	-0.5%	-1.3%
Zone 5b - Bebington	27,378	27,251	27,164	26,971	26,831	26,735	26,638	26,145	-0.5%	-1.0%	-1.5%	-4.1%
Zone 6 - Heswall	27,844	27,656	27,471	27,016	26,330	26,166	25,912	24,641	-0.7%	-2.3%	-4.8%	-10.9%
TOTAL	308,720	308,221	307,713	307,011	306,486	306,481	306,579	305,803				

Source: Experian Retail Planner Report (Summary Demographics - 2010 Base)

Notes

1. All Survey Zones as per 2009 Borough Retail Study (RTP)

TABLE 2 - CONVENIENCE EXPENDITURE PER CAPITA FORECASTS, 2010 - 2030

SURVEY ZONE	2010	2010	2011	2011	2012	2012	2014	2014	2018	2018	2021	2021	2030	2030
	(£)	Minus SFT (£)	(£)	Minus SFT (£)	(£)	Minus SFT (£)	(£)	Minus SFT (£)	(£)	Minus SFT (£)	(£)	Minus SFT (£)	(£)	Minus SFT (£)
Zone 1 - West Kirby / Hoylake	£2,194	£2,113	£2,187	£2,096	£2,179	£2,078	£2,201	£2,082	£2,245	£2,110	£2,286	£2,142	£2,412	£2,243
Zone 2a - Moreton / Leasowe	£1,892	£1,822	£1,886	£1,807	£1,879	£1,792	£1,898	£1,795	£1,936	£1,820	£1,971	£1,847	£2,080	£1,934
Zone 2b - Upton	£1,978	£1,905	£1,972	£1,889	£1,964	£1,874	£1,984	£1,877	£2,024	£1,902	£2,060	£1,931	£2,174	£2,022
Zone 3a - Wallasey	£1,846	£1,778	£1,840	£1,763	£1,833	£1,749	£1,851	£1,751	£1,889	£1,775	£1,923	£1,802	£2,029	£1,887
Zone 3b - New Brighton	£2,074	£1,997	£2,068	£1,981	£2,060	£1,965	£2,080	£1,968	£2,122	£1,995	£2,160	£2,024	£2,280	£2,120
Zone 4a - Birkenhead North	£1,732	£1,668	£1,727	£1,654	£1,720	£1,641	£1,737	£1,643	£1,772	£1,666	£1,804	£1,691	£1,904	£1,771
Zone 4b - Birkenhead South	£1,938	£1,866	£1,932	£1,851	£1,924	£1,836	£1,944	£1,839	£1,983	£1,864	£2,019	£1,892	£2,130	£1,981
Zone 4c - Birkenhead West	£1,958	£1,886	£1,952	£1,870	£1,944	£1,855	£1,964	£1,858	£2,003	£1,883	£2,040	£1,911	£2,152	£2,002
Zone 5a - Bromborough	£2,019	£1,944	£2,013	£1,928	£2,005	£1,913	£2,025	£1,916	£2,066	£1,942	£2,103	£1,971	£2,220	£2,064
Zone 5b - Bebington	£2,162	£2,082	£2,156	£2,065	£2,147	£2,048	£2,168	£2,051	£2,212	£2,079	£2,252	£2,110	£2,377	£2,210
Zone 6 - Heswall	£2,403	£2,314	£2,396	£2,295	£2,386	£2,276	£2,410	£2,280	£2,459	£2,311	£2,503	£2,346	£2,642	£2,457

Notes

1. Expenditure per Capita Forecasts derived from Experian Retail Planner (Fine Expenditure) Report; All Expenditure Figures given in 2010 Prices
2. Growth in per capita retail expenditure for Convenience Goods (Source: - Experian Retail Planner Briefing Note 9 (September 2011))

	2011	2012	2012-18	2019-30
Growth	-0.3%	-0.4%	0.5%	0.6%

3. Deductions for Special Forms of Trading (SFT) (Source: - Experian Retail Planner Briefing Note 9 (September 2011))

	2010	2011	2012	2014	2018	2021	2030
SFT	3.7%	4.2%	4.6%	5.4%	6.0%	6.3%	7.0%

TABLE 3 - Convenience Expenditure Growth, 2010 - 2030

SURVEY ZONE	2010	2011	2012	2014	2018	2021	2030	EXPENDITURE GROWTH (£)			
	(£)	(£)	(£)	(£)	(£)	(£)	(£)	2011-2012	2011-2018	2011-2021	2011-2030
Zone 1 - West Kirby / Hoylake	£54,100,920	£53,396,619	£52,649,206	£52,075,356	£51,914,151	£52,133,029	£53,060,234	-£747,413	-£1,482,468	-£1,263,589	-£336,385
Zone 2a - Moreton / Leasowe	£46,358,866	£45,992,461	£45,534,776	£45,542,761	£46,162,156	£46,916,406	£49,397,002	-£457,685	£169,695	£923,944	£3,404,541
Zone 2b - Upton	£54,492,919	£53,758,302	£53,194,160	£52,933,444	£53,157,249	£53,618,893	£55,425,959	-£564,142	-£601,053	-£139,409	£1,667,657
Zone 3a - Wallasey	£51,176,370	£50,779,083	£50,459,227	£50,756,638	£52,091,939	£53,417,333	£57,298,473	-£319,855	£1,312,857	£2,638,250	£6,519,390
Zone 3b - New Brighton	£58,316,056	£57,797,633	£57,137,464	£57,108,254	£57,855,596	£58,684,902	£61,324,165	-£660,169	£57,962	£887,269	£3,526,532
Zone 4a - Birkenhead North	£35,918,571	£35,783,692	£35,621,367	£36,013,648	£37,074,365	£38,249,070	£41,262,038	-£162,325	£1,290,673	£2,465,377	£5,478,345
Zone 4b - Birkenhead South	£55,038,876	£54,725,826	£54,266,485	£54,724,153	£56,100,939	£57,534,189	£61,570,757	-£459,341	£1,375,113	£2,808,363	£6,844,931
Zone 4c - Birkenhead West	£70,908,144	£70,449,920	£69,869,578	£70,067,411	£71,142,704	£72,396,659	£76,150,752	-£580,342	£692,785	£1,946,739	£5,700,832
Zone 5a - Bromborough	£52,927,653	£52,226,841	£51,800,740	£51,800,843	£52,307,536	£53,114,331	£55,150,550	-£426,101	£80,696	£887,490	£2,923,709
Zone 5b - Bebington	£57,001,160	£56,272,836	£55,635,537	£55,326,156	£55,791,915	£56,213,640	£57,790,163	-£637,299	-£480,921	-£59,196	£1,517,327
Zone 6 - Heswall	£64,433,494	£63,475,160	£62,536,146	£61,596,009	£60,853,190	£60,776,979	£60,537,110	-£939,014	-£2,621,970	-£2,698,181	-£2,938,050
TOTAL	£600,673,030	£594,658,373	£588,704,685	£587,944,673	£594,451,741	£603,055,430	£628,967,203	-£5,953,688	-£206,632	£8,397,057	£34,308,830

Notes

1. Expenditure Growth derived from Population Projections (Table 1) * Expenditure per Capita figures (less SFT deduction) (Table 2)

TABLE 4a - MAIN FOOD SHOPPING EXPENDITURE (75%)

SURVEY ZONE	2010 (£)	2011 (£)	2012 (£)	2014 (£)	2018 (£)	2021 (£)	2030 (£)
Zone 1 - West Kirby / Hoylake	£40,575,690	£40,047,464	£39,486,905	£39,056,517	£38,935,613	£39,099,772	£39,795,175
Zone 2a - Moreton / Leasowe	£34,769,150	£34,494,346	£34,151,082	£34,157,071	£34,621,617	£35,187,304	£37,047,752
Zone 2b - Upton	£40,869,689	£40,318,727	£39,895,620	£39,700,083	£39,867,937	£40,214,170	£41,569,469
Zone 3a - Wallasey	£38,382,278	£38,084,312	£37,844,420	£38,067,479	£39,068,955	£40,063,000	£42,973,855
Zone 3b - New Brighton	£43,737,042	£43,348,225	£42,853,098	£42,831,190	£43,391,697	£44,013,677	£45,993,124
Zone 4a - Birkenhead North	£26,938,928	£26,837,769	£26,716,025	£27,010,236	£27,805,774	£28,686,802	£30,946,528
Zone 4b - Birkenhead South	£41,279,157	£41,044,369	£40,699,863	£41,043,115	£42,075,704	£43,150,642	£46,178,068
Zone 4c - Birkenhead West	£53,181,108	£52,837,440	£52,402,184	£52,550,558	£53,357,028	£54,297,494	£57,113,064
Zone 5a - Bromborough	£39,695,740	£39,170,131	£38,850,555	£38,850,632	£39,230,652	£39,835,748	£41,362,913
Zone 5b - Bebington	£42,750,870	£42,204,627	£41,726,653	£41,494,617	£41,843,936	£42,160,230	£43,342,622
Zone 6 - Heswall	£48,325,121	£47,606,370	£46,902,109	£46,197,007	£45,639,893	£45,582,734	£45,402,832
TOTAL	£450,504,772	£445,993,780	£441,528,514	£440,958,505	£445,838,806	£452,291,573	£471,725,402

TABLE 4B - TOP-UP FOOD SHOPPING EXPENDITURE (25%)

SURVEY ZONE	2010 (£)	2011 (£)	2012 (£)	2014 (£)	2018 (£)	2021 (£)	2030 (£)
Zone 1 - West Kirby / Haylake	£13,525,230	£13,349,155	£13,162,302	£13,018,839	£12,978,538	£13,033,257	£13,265,058
Zone 2a - Moreton / Leasowe	£11,589,717	£11,498,115	£11,383,694	£11,385,690	£11,540,539	£11,729,101	£12,349,251
Zone 2b - Upton	£13,623,230	£13,439,576	£13,298,540	£13,233,361	£13,289,312	£13,404,723	£13,856,490
Zone 3a - Wallasey	£12,794,093	£12,694,771	£12,614,807	£12,689,160	£13,022,985	£13,354,333	£14,324,618
Zone 3b - New Brighton	£14,579,014	£14,449,408	£14,284,366	£14,277,063	£14,463,899	£14,671,226	£15,331,041
Zone 4a - Birkenhead North	£8,979,643	£8,945,923	£8,905,342	£9,003,412	£9,268,591	£9,562,267	£10,315,509
Zone 4b - Birkenhead South	£13,759,719	£13,681,456	£13,566,621	£13,681,038	£14,025,235	£14,383,547	£15,392,689
Zone 4c - Birkenhead West	£17,727,036	£17,612,480	£17,467,395	£17,516,853	£17,785,676	£18,099,165	£19,037,688
Zone 5a - Bromborough	£13,231,913	£13,056,710	£12,950,185	£12,950,211	£13,076,884	£13,278,583	£13,787,638
Zone 5b - Bebington	£14,250,290	£14,068,209	£13,908,884	£13,831,539	£13,947,979	£14,053,410	£14,447,541
Zone 6 - Heswall	£16,108,374	£15,868,790	£15,634,036	£15,399,002	£15,213,298	£15,194,245	£15,134,277
TOTAL	£150,168,257	£148,664,593	£147,176,171	£146,986,168	£148,612,935	£150,763,858	£157,241,801

TABLE 6 - Floorspace Turnover Performance (2011)

Existing Stores	Net Convenience Floorspace (sq. m)	Company 'Benchmark' Sales Density (£ / m ²)	'Benchmark' Store Turnover (£)	Survey-derived Turnover (£)	Trading Performance against Company 'Benchmark'
Morrison's (West Kirby)	1,672	£11,988	£20,043,936	£32,157,368	£12,113,432
Sainsbury's (Upton)	3,366	£12,526	£42,162,516	£49,959,469	£7,796,953
Asda (Arrowe Park)	2,817	£14,933	£42,066,261	£46,220,737	£4,154,476
Asda (Liscard)	2,716	£14,933	£40,558,028	£70,604,442	£30,046,414
Sainsbury's (Prenton)	1,472	£12,526	£18,438,272	£28,823,738	£10,385,466
Tesco Metro (Rock Ferry)	788	£12,842	£10,119,496	£17,427,301	£7,307,805
Tesco Extra (Bidston)	5,829	£12,842	£74,856,018	£52,916,782	-£21,939,236
Asda (Croft Business Park)	2,544	£14,933	£37,989,552	£67,900,131	£29,910,579
Tesco (Heswall)	2,580	£12,842	£33,132,360	£36,094,089	£2,961,729
Wirral - Main Stores Total	2,580		£33,132,360	£36,094,089	£2,961,729

Notes

1. Floorspace and Net Convenience Ratio based on IGD / GOAD and GVA Site Visits
2. Company Benchmark Sales Density (£/ sq. m) based on Verdict Data (2010-11)

TABLE 7 - Convenience Retail Commitments

Commitment	Convenience Floorspace (sq. m)	Benchmark' Sales Density (£ / sq. m)	'Benchmark' Store Turnover 2011 (£)
Morrison's New Brighton	2,246	£11,988	£26,925,048
Asda Birkenhead	2,555	£14,933	£38,153,815

Notes

1. Floorspace Split derived from Planning Permission Decision Notices / Applicants RIA

Table 8 - (Baseline + Growth) Capacity

CONVENIENCE GOODS							
	2011	2012	2013	2014	2018	2021	2030
Catchment Expenditure (£)	£594,658,373	£588,704,685	£588,277,068	£587,944,673	£594,451,741	£603,055,430	£628,967,203
Current Retention Level (%)	95.4%	95.4%	95.4%	95.4%	95.4%	95.4%	95.4%
Retained Expenditure (£)	£567,169,670	£561,491,198	£561,083,348	£560,766,318	£566,972,591	£575,178,565	£599,892,539
Current Turnover	£567,612,461	£567,612,461	£569,882,911	£572,162,442	£581,372,116	£584,867,329	£595,479,556
RESIDUAL CAPACITY (£)	-£442,790	-£6,121,263	-£8,799,562	-£11,396,124	-£14,399,525	-£9,688,765	£4,412,983
Commitments	£65,078,863	£65,078,863	£65,339,178	£65,600,535	£66,656,458	£67,057,197	£68,273,928
OVERALL CAPACITY (£)	-£65,521,653	-£71,200,126	-£74,138,741	-£76,996,660	-£81,055,983	-£76,745,962	-£63,860,946
Sales per m ² net in new shops (£)	£11,500	£11,500	£11,546	£11,592	£11,779	£11,850	£12,065
Capacity for new floorspace (m ² net)	-5,698	-6,191	-6,421	-6,642	-6,882	-6,477	-5,293
Capacity for new floorspace (m ² gross)	-8,139	-8,845	-9,173	-9,489	-9,831	-9,252	-7,562

Notes

1. Sales Efficiency Growth; 0% p.a. (2011-2012); 0.4% p.a. (2013-2018); 0.2% p.a. (2018-2030); Source Experian Retail Planner Note 9 (September 2011)

2. Gross to Net ratio for new floorspace is 70%

3. New Shop Sales Density based on GVA professional judgement

4. Current Retention Level based on Overall Wirral Convenience Market Share (Table 5c)

5. Retention Level assumed to remain static