

Wrexham Local Development Plan 2013 - 2028

Report - July 2014

Wrexham Retail Assessment

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EXECUTIVE SUMMARY

In February 2014 Wrexham County Borough Council commissioned Peter Brett Associates LLP to undertake the Wrexham Retail Assessment. A previous Wrexham Retail Study was published in 2001 and was updated in 2004. This report provides a review of the performance of Wrexham Town Centre and existing shopping patterns, a full assessment of retail needs within Wrexham, and a review of existing town centre boundaries to inform the preparation of the revised Local Development Plan.

The Performance of Wrexham Town Centre

Wrexham Town Centre's recent performance is very closely related to the opening of the Eagles Meadow scheme and subsequent changes to the composition of the town centre. Eagles Meadow has provided a significant increase in the amount of comparison goods floorspace within Wrexham Town Centre and has attracted new retailers to the town. The effects of this have been to dramatically improve Wrexham's position in the national retail rankings where it has, narrowed the gap with the nearby centre of Chester and overtaken other competing destinations such as Shrewsbury Town Centre.

Within the town centre the diversity of uses is good and, in quantitative terms, Wrexham has a strong comparison retail offer. This includes in key areas such as fashion and electrical goods. The convenience retail offer of the town centre is also considered to be adequate with a particularly good provision of independent retailers. The proportion of vacant street level property is broadly in-line with the UK national average.

However, the improvement in the town centre's offer delivered by Eagles Meadow masks some areas of weakness. Service uses within the town centre fall below the national average and this is particularly true of the restaurant, café and coffee bar sub-category. Such food and drink uses are increasingly important in attracting visitors to retail destinations.

There are also qualitative weaknesses within the comparison retail offer of the town centre. One impact of the Eagles Meadow scheme has been to concentrate major national multiples within a largely self-contained development on the edges of the town centre. Whilst footfall on streets elsewhere within this town centre has remained resilient, the retail offer is now strongly focused on the value sector. There is also a notable lack of high quality comparison retailers within the town centre.

Existing Shopping Patterns

Overall, 71 per cent of the comparison goods expenditure available to residents of the study area is retained by town centres, retail parks and freestanding stores located in the study area. The main comparison retail destination within the study area is Wrexham Town Centre, which secures over £200 million of residents' comparison

goods expenditure. Around a third of the total comparison goods expenditure available therefore 'leaks' to destinations beyond the study area. Short-distance leakage to the Chester, Oswestry and Shrewsbury accounts for 18 per cent of residents' comparison goods expenditure.

Wrexham Town Centre achieves a comparison goods market share of 40 per cent and above in four of the ten survey zones. It also achieves a market share of at least 20 per cent in four other zones. This demonstrates that Wrexham is the dominant comparison shopping destination in terms of comparison retailing across the study area.

Overall, 86 per cent of the convenience goods expenditure available to residents of the study area is retained within the study area. Foodstores on the edges of Wrexham Town Centre attract significant market share from six of the ten survey zones. There are no parts of the study area where there is an acute localised deficiency in convenience goods provision. Most zones with lower retention levels are well served by nearby stores in adjacent zones, though there is scope to improve local provision around Coedpoeth. The majority of Wrexham's residents' convenience expenditure is spread amongst a number of convenience stores providing good consumer choice.

Retail Floorspace Requirements

We suggest that the Council should work towards a requirement for up to 15,600 sq. m of additional comparison retail sales area floorspace over the plan period to 2028. A relatively modest requirement for approximately 1,000 sq. m. of net floorspace in the period to 2018 increases to more significant requirements for approximately 5,500 sq. m between 2018 and 2023, and approximately 8,500 sq. m between 2023 and 2028. We recommend that the Council's policy objectives should focus on maintaining the current retention rate whilst delivering appropriate improvements to address qualitative deficiencies in Wrexham Town Centre.

Requirements for additional convenience retail sales floorspace are estimated to be between 7,200 sq. m and 7,800 sq. m of additional sales floorspace. Floorspace requirements are at their highest in the short-term period to 2018 as a result of significant levels of overtrading from existing foodstores. However, if existing floorspace commitments are brought forward more slowly and existing levels of overtrading are reduced less rapidly, then the overall requirement could be spread more evenly over the study period.

Town Centre Development and Management

Our recommended strategy is to concentrate the provision of additional comparison retail floorspace within the shopping area of Wrexham Town Centre, in accordance with the approach advocated by Planning Policy Wales. We would highlight two potential 'areas of change' within the shopping area; the Island Green Retail Park and the area around St Giles Church.

We consider that the Island Green site provides opportunities for higher density retail development being well connected to the rest of the town centre and being served by the Wrexham Central railway station. The area around St Giles Church provides opportunities to deliver qualitative improvements to the town centre's retail offer by encouraging higher quality retail operators and creating better connections between Eagles Meadow, the Island Green site and the rest of the town centre.

In terms of convenience floorspace, our recommended strategy would be to ensure that appropriate local provision is provided throughout the County Borough, especially in more deprived areas where local provision is weak. Additional floorspace should be concentrated in existing local and district centres. In the town centre there may be opportunities to provide additional top-up food shopping facilities to support qualitative improvements to the town centre offer.

We recommend that specific policies and proposals for quantitative and qualitative improvements to the retail offer of Wrexham Town Centre are developed through the production of a masterplan, town centre strategy and/or supplementary planning documents.

In terms of town centre management, we recommend that the existing boundary of the Wrexham Town Centre's shopping area should be amended to include Eagles Meadow and adjoining commercial units on Smithfield Road and Mount Street. Future retail floorspace development within the County should be directed to locations within the boundaries of the expanded town centre shopping area. We also recommend some changes to the principal shopping streets identified by the UDP. The key change is to include the linking sections of High Street, Yorke Street and Chester Street to connect Eagles Meadow with Hope Street, Bank Street and Henblas Square. This is intended to strengthen the town centre retail circuit and ensure that Eagles Meadow strengthens the town centre as a whole.

1 INTRODUCTION

Purpose of the Study

- 1.1 In February 2014 Wrexham County Borough Council commissioned Peter Brett Associates LLP to undertake the Wrexham Retail Assessment on its behalf. The Council wishes to update its evidence base to support the preparation of the Wrexham Local Development Plan which is intended to cover the period 2013 to 2028. A previous Wrexham Retail Study was published in 2001 and was updated in 2004. This report provides a full assessment of retail needs within Wrexham, including a new household survey, to inform the preparation of the revised Local Development Plan.
- 1.2 In accordance with the Study Brief this assessment provides:
- a comprehensive summary of existing shopping patterns within the County Borough based on the findings of a new household survey;
 - an up-to-date assessment of future retail floorspace requirements across Wrexham County Borough over the Local Plan Period, taking account of: existing shopping patterns as revealed by the household survey; up-to-date population forecasts; the most recent per capita expenditure and sales efficiency growth data; up-to-date forecasts of growth in special forms of trading; existing planning commitments for retail floorspace; and over/under-trading at existing stores;
 - sensitivity tests of key assumptions to provide a range of alternative convenience and comparison retail floorspace scenario forecasts;
 - identification of indicators that can be used to monitor local retail and economic changes, and enable the Council to identify the most realistic of the scenarios tested unfolding over the forthcoming years, and the associated retail floorspace forecasts;
 - a 'health-check' of Wrexham Town Centre to assess its vitality and viability. This includes an analysis of the centre against vitality and viability indicators, identification of the key strengths and weaknesses in the performance of the centre, and a review of its ability to accommodate any identified retail needs;
 - a review of the existing boundary of Wrexham Town Centre and identification of primary shopping areas, including their location and approaches to maintaining an appropriate balance of retail and non-retail uses; and
 - a range of recommendations for the management of any identified retail floorspace needs over the plan period under the various forecast scenarios, taking into account the need to support the future growth and development of Wrexham Town Centre, and any wider retail needs identified in the County Borough.

Structure of the Report

1.3 The remainder of our report is structured as follows:

- Section 2 summarises national planning policy requirements in respect of main town centre uses and plan-making, together with the provisions of local planning policy in Wrexham;
- Section 3 provides an outline of national trends in the retail sector;
- Section 4 provides our performance analysis of Wrexham Town Centre which includes a healthcheck of the town centre's vitality and viability;
- Section 5 summarises current patterns of retail spending within the study area based on our household survey;
- Section 6 contains our assessment of quantitative requirements for additional retail floorspace;
- Section 7 reviews the boundaries of Wrexham Town Centre; and
- Section 8 provides a summary of our findings and our recommendations, including indicators for monitoring.

2 PLANNING POLICY REVIEW

Planning Policy Wales

- 2.1 Edition 6 of Planning Policy Wales (PPW) was published in February 2014 and sets out the land use planning policies of the Welsh Government. It is supplemented by a series of Technical Advice Notes (TANs).
- 2.2 Chapter 10 of PPW addresses '*Planning for Retail and Town Centres*' and paragraph 10.1.1 sets out the key objectives of the Welsh Government. These are to:
- secure accessible, efficient, competitive and innovative retail provision for all the communities of Wales, in both urban and rural areas;
 - promote established town, district, local and village centres as the most appropriate locations for retailing, leisure and other complementary functions;
 - enhance the vitality, attractiveness and viability of town, district, local and village centres; and to
 - promote access to these centres by public transport, walking and cycling.
- 2.3 Section 10.2 of PPW addresses retail and town centre policy issues in respect of plan-making. It requires local planning authorities to develop a clear strategy and policies for retail development which seek to achieve vital, attractive and viable centres. Development plans should establish the existing hierarchy of centres, identify those which fulfil specialist functions and be clear about their future roles. Development plans should also identify changing pressures and opportunities and devise appropriate responses to them.
- 2.4 In supporting existing centres PPW states that the policies of local planning authorities should:
- encourage a diversity of uses in centres;
 - encourage the provision of good access to town and other centres for walkers and cyclists and for public transport;
 - distinguish between primary and secondary frontages in town centres; and
 - support the management of town centres.
- 2.5 Paragraph 10.2.10 of PPW states that in deciding whether to identify sites for retail and leisure developments, local planning authorities should in the first instance consider whether there is a need for additional provision for these uses. Such need may be quantitative so as to address a provable unmet demand for the provision concerned. Precedence should be given to establishing quantitative need for both convenience and comparison retail floorspace, particularly as a basis for development plan allocations, before qualitative factors are brought into play.
- 2.6 Where a need is identified for such new development, local planning authorities should adopt a sequential approach to the selection of sites, giving first preference to town centre locations. If suitable sites are not available in town centres then consideration should be given to amending existing boundaries so that appropriate

edge-of-centre sites are included. Where this is not practical then district and local centres might be considered and, only then, out-of-centre sites in locations that are accessible by a choice of means of transport.

- 2.7 Paragraph 10.2.12 states that in allocating sites for different types of retail developments, local planning authorities should take account of such factors as floorspace, quality, convenience, attractiveness and traffic. They should not however prescribe rigid floorspace limits, whether for town centres or other development, that would unreasonably inhibit the retail industry from responding to changing demand and opportunity.
- 2.8 TAN 4 'Retailing and Town Centres' was published in November 1996. It sets out the types of information about the retail industry and the functioning of town centres that will assist local planning authorities with the preparation of their development plans. This includes information on population change, the amount and distribution of different forms of retailing, and retail expenditure data. It also sets out possible indicators for measuring town centre vitality and viability.

Wales Spatial Plan

- 2.9 The Wales Spatial Plan is prepared by the Welsh Government and was last updated in 2008. Wrexham is located within the 'North East Borders and Coast' sub-region and the town is recognised as a key settlement of national importance. One of the key objectives for North East Wales is to strengthen key hubs, including through future investment in retail.

Wrexham Unitary Development Plan

- 2.10 The Wrexham Unitary Development Plan (UDP) was adopted in February 2005. Strategic Policy PS7 states that the priority areas for new shopping and office development will be the defined Wrexham Town Centre and the district centre shopping areas.
- 2.11 Specific shopping policies are contained at Chapter 8 of the UDP. Policies S1 and S2 seek to control uses within the principal shopping streets and elsewhere within Wrexham Town Centre in order to preserve the dominance of retail uses. Policy S3 states that the town centre will be the preferred location for non-retail uses such as offices serving the public and major leisure uses. The policy states that a sequential approach to site selection will be applied.
- 2.12 Development will be firstly permitted within the town centre, followed by edge-of-centre locations provided they are of a scale appropriate to the size and function of the town centre and would help to sustain the vitality and viability of the centre as a whole. As with retail proposals, only where there is a clearly defined need which cannot be accommodated on a site or sites in preferred locations, should out-of-centre sites accessible by a choice of means of transport be considered.
- 2.13 Policy S4 of the UDP states that large-scale retail development will be located within the shopping area of Wrexham Town Centre and within district shopping centres. It goes on to say that wherever possible development should use vacant, underused or

derelict land, or buildings that are suitable for conversion, in order to sustain and enhance the attractiveness, vitality and viability of Wrexham Town Centre. New development should integrate well with existing shopping areas.

3 NATIONAL RETAIL TRENDS

Introduction

- 3.1 In this section we consider the key factors in the national retail and leisure landscape which are serving to shape people's shopping patterns, and in turn are having an impact on the future demand for different types of retail floorspace.
- 3.2 Town and city centres in the UK are in the midst of a period of significant structural change. Technological advances, changing shopping patterns, and evolutions in retail practices all mean that the role and function of the 'high street' is different now to what it has been at any time in the past. In brief, we consider the key factors which are underpinning the current and future trends in the retail and leisure sector to be:
- the prolonged **downturn in the UK economy**, which resulted in the growth of 'value' retail, a greater reluctance to spend amongst consumers, and investors being more cautious in their financial decisions;
 - the '**polarisation trend**', which has resulted in many retailers concentrating their activity in larger, higher-order shopping destinations;
 - changes in the **convenience goods sector**, with a move by retailers away from larger, 'hypermarket'-format developments, towards smaller stores with a greater emphasis on convenience goods, as well as heavy investment in 'local' / 'express'-format stores; and
 - the continued growth of **internet retailing**, which acts as a 'claim' on the total amount of expenditure available to support new retail floorspace within town and city centres - although the increasing popularity of 'click & collect' services suggests potential for synergy between the two retailing formats.
- 3.3 We discuss each of these major trends in greater detail below.

The Downturn in the Economy

- 3.4 Although there are indications of consumer and investor confidence returning, the sustained downturn in the economy between 2008 and 2013 has resulted in a number of clear changes to the retail landscape in the UK, with many high-profile retailers entering administration, and a general trend towards discount retailers increasing their representation – both in the comparison goods sector (for example, Poundland, 99p Stores and Wilkinson) and the convenience goods sector (for example, the continued expansion, and strong trading performance of, 'deep discount' retailers such as Aldi and Lidl). The downturn has also affected consumer spending, with a greater reluctance to spend amongst consumers on non-essential goods. As a result, forecast levels of growth in consumer spending remain generally subdued, particularly in the short term.
- 3.5 The economic downturn has also resulted in investors being more cautious. Nationally, many large retail developments have been put on hold until the economy returns to stability, with schemes in Nottingham, Sheffield and Guildford remaining on

hold. However, 2013 saw the completion of a major new scheme in Leeds, and the restarting of a retail-led scheme in Bradford, suggesting that investor confidence is beginning to return, especially in larger centres.

- 3.6 Some retailers have continued to perform strongly throughout the economic downturn, particularly in the convenience goods sector. Overall, it is clear that operators are being significantly more selective in which schemes they progress with: in recent months, both Sainsbury's and Tesco have indicated that their expansion plans for larger-format supermarkets have been scaled back.

Key Trend 1: The Polarisation Trend

- 3.7 The 'polarisation trend' is a significant and long-term trend which has been taking place in UK retail in recent years, and is expected to continue in the short to medium term. It refers to the preference of retailers to concentrate trading activities in larger schemes, within larger centres. Retailers recognise that greater efficiency can be achieved by having a strategic network of large stores offering a full range of their products, rather than a network of smaller-format stores which are only able to offer a limited range of products. Increasingly, therefore, retailers are seeking to serve larger population catchments from larger stores – and this explains why demand for space at recent major shopping centre openings (for example Westfield Stratford City and Trinity Leeds) has been high, whilst demand for premises in small and medium-sized locations has been weak.
- 3.8 The 'polarisation trend' is also driven by customers, who have become more discerning and are increasingly prepared to travel further afield. There is therefore a concentration of comparison goods expenditure in a smaller number of larger centres. This concentration of retailing activity poses challenges for the medium and smaller centres, in many cases requiring them to potentially refocus their role and function away from solely being shopping destinations to incorporate a much broader retail, leisure, culture and residential offer.
- 3.9 The polarisation trend is intrinsically linked with the other key changes described in this section, in particular the economic downturn and the growth in online shopping. The implications of this for town centres is that many retailers will, in the medium to longer term, continue to seek to downsize their portfolios, particularly in smaller centres. The impacts of this trend on the retail property market are summarised as follows:
- firstly, **increased availability** of property as vacancy rates increase;
 - secondly, **decreasing prime retail rents** (with the exception of central London); and
 - thirdly, **increased flexibility in rental terms**, with retailers demanding better terms, including shorter leases, rent-free periods, earlier break clauses, and monthly rental arrangements.

Key Trend 2: The Continued Growth of Online Retail

- 3.10 There is extensive evidence which suggests that online shopping has increased at a rapid pace in recent years, particularly in the comparison goods sector. Online shopping is perceived to offer a number of significant advantages over 'traditional', high street-format shopping, including lower prices (as there are lower operating 'overheads' for online retailers compared with those in a town centre), a wider variety of choice, and the ability for customers to easily search out bargains, including second hand goods. While unfavourable economic conditions are forcing many retailers to scale back on physical retail space, their online operations allow them to reach a much wider customer base.
- 3.11 Internet sales have been rising much more rapidly than general retail sales in recent years. The proportion of retail sales made online has increased year-on-year for every month since 2007, although the rate of increase slowed in 2009, and has subsequently remained erratic¹.
- 3.12 The ONS forecast that online sales accounted for 9.4 per cent of all retail sales in October 2012, which increased to 10.5 per cent in October 2013 (equivalent to a year-on-year increase of 1.1 percentage points). Experian considers that this pattern is likely to remain the case for the foreseeable future, commenting in its Retail Planner Briefing Note (October 2013) that:
- 'We retain our assumption that non-store retailing will increase at a faster pace than total retail sales well into the long term. There were 52.7 million internet users in the UK (representing 84.1% of the population) in mid-year 2012... growth momentum will be sustained as new technology such as browsing and purchasing through mobile phones and the development of interactive TV shopping boost internet retailing'.*
- 3.13 However, Experian considers that at the turn of the next decade, growth in online shopping is expected to begin to plateau:
- 'We expect that the SFT² market share will continue to increase over the forecast period³ although the pace of e-commerce growth will moderate markedly after about 2020'.*
- 3.14 The outputs of this study specifically take into account this anticipated growth in online shopping, based on the most up-to-date Experian guidance we remove the proportion of total expenditure which is expected to be diverted towards online shopping, before presenting the final updated quantitative floorspace requirements for Wrexham.
- 3.15 In Figure 3.1 we show the projected growth in online comparison and convenience goods shopping over the course of the study period to 2028, based on the forecasts provided by Experian. For reference, both the 'unadjusted' and the 'adjusted' figures

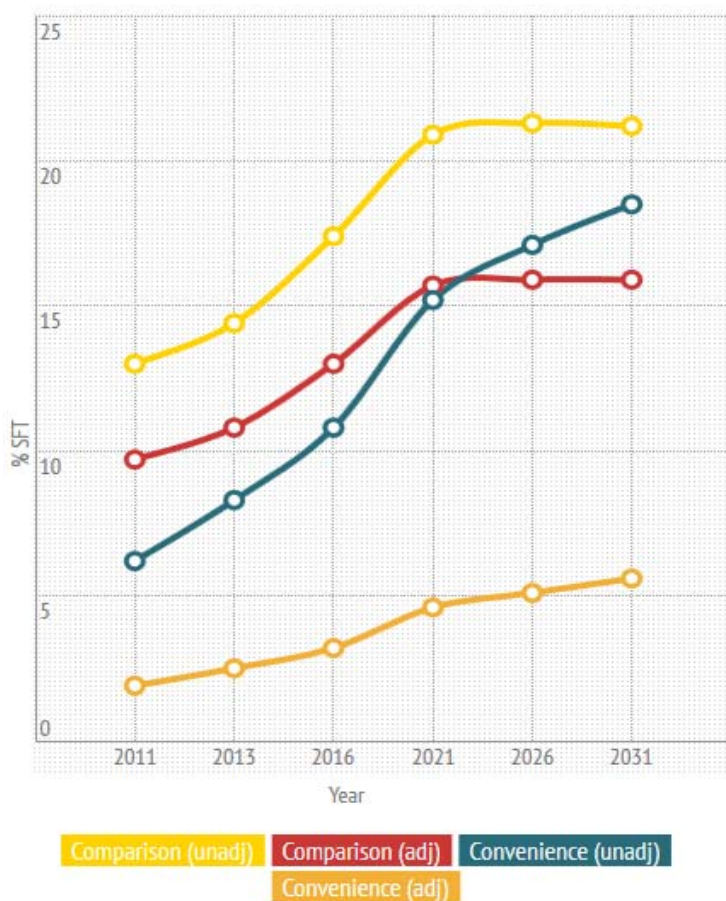
¹ ONS, Retail Sales, October 2013

² 'Special Forms of Trading', which includes online shopping as well as sales from markets and mail order.

³ Experian currently projects up to 2030

are shown. However, given the continued rapid growth in the online shopping sector, it is recommended that updated forecasts of internet spending should be taken into account in any further update to the findings of this report which the Council may wish to undertake over its development plan period.

Figure 3.1 Forecast of non-store retailing market share to 2030



Create infographics infogr.am

Source: Experian Retail Planner Briefing Note 11, October 2013, Appendix 3. SFT includes spending on online shopping, mail order / catalogue shopping, and markets. 'Adjusted' figures include a reduction for store-picked online transactions.

- 3.16 The growth in online retail does not equate to a redundant future for 'bricks and mortar' stores. There is a role for physical outlets to act as 'showrooms' for online retailers. A physical presence on the high street improves the visibility of businesses, and it is noteworthy that 12 out of the top 20 e-commerce businesses in the UK have a physical presence on the high street (Figure 3.2). However, it does mean that the role and function of high streets - particularly those outside the higher-order shopping centres - are likely to need to consider uses beyond that of traditional retail activity in order to remain vital and viable.

Figure 3.2 Top 20 e-commerce websites in the UK, 2013

Source: IMRG Experian Hitwise Hot Shops List, 2013

- 3.17 There has been considerable discussion of the concept of high street retail stores increasingly acting as 'showrooms' where customers visit 'bricks and mortar' stores to look at / try on a product, before using technology such as smartphones to check whether the product is available elsewhere (in another store, or online) for a cheaper price. Research undertaken by design agency Foolproof⁴ over Christmas 2012 found that 24% of all shoppers 'showroomed', and 40% of these 'showroomers' subsequently bought items from a competitor (either instore or online) having compared prices. The proportion of people who undertake 'showrooming' increases significantly in the 18-39 age range. At least 20% of respondents to Foolproof's survey indicated that they visited a store solely to look at something they planned to buy online.
- 3.18 'Showrooming' has, until relatively recently, been seen as a threat to traditional high street retailers, and when considered as part of the wider move towards internet shopping it can arguably be considered as such. However recent trends indicate that major retailers are becoming more willing to embrace the challenge, putting into place technology such as better mobile websites, offering free instore wi-fi, or in-store technology points where a customer can order a product online which may be sold out or not available within the store. This may be particularly applicable for centres such as Wrexham, where many retailers' stores are quite small and may not carry the full range of products available.
- 3.19 The growth in the 'Click & Collect' method of online shopping is a further relatively new trend, but one which looks set to play an increasing role over future years. Like 'showrooming', it is also one where the physical outlet of the store can still be used to drive footfall. The 'click & collect' concept is such that a customer orders and pays for the desired product online, and then collects the product from the nearest large branch of the retailer in question. This approach is being rolled out by an increasing

⁴ <http://www.foolproof.co.uk/insight/blog/the-true-impact-of-showrooming/>

number of retailers. For example, it is used by supermarket operators such as Sainsbury's and Tesco to allow customers to order an extensive range of non-food products, and collect from local convenience store branches which may be close to a customer's home or place of work. In many cases, the size of such stores where the item is collected from prevents a comparable range of products being stocked within the store itself.

- 3.20 Another example of a retailer making efficient use of 'Click & Collect' is John Lewis which improved its service in 2013 to allow customers to pick up products from their nearest branch of Waitrose, bringing the service within reach of a much wider range of customers (there are over 300 Waitrose stores in the UK, compared to 40 John Lewis stores). John Lewis' 'Click & Collect' sales increased by 60% between 2012 and 2013⁵. Other retailers which have embraced the 'Click & Collect' model include Arcadia Group, Next, House of Fraser, Currys/PC World and Argos.
- 3.21 Experian considers that 'Click & Collect' will be *'the key driver of current and future internet growth'*, but notes that *'since this requires a bricks-and-mortar presence in easily accessible locations, this is largely space demand neutral'*.

What this means for the demand for retail floorspace

- 3.22 Experian considers that *'whilst it is understandable that the challenge to traditional store-based shopping will continue to grow strongly, a number of crucial factors temper this threat'*, which can be summarised as follows:
- many stores sell online but source these sales from regular stores, rather than warehouses, implying an increased requirement for store floorspace to cater for increasing online sales;
 - store-based shopping is still expected to expand at an annual average of 1.9% per annum in per capita terms to 2030;
 - sales via online shopping will - as shown in Figure 3.1 - begin to grow less rapidly as the market becomes more 'mature', particularly in sectors such as music, DVD and e-books;
 - 'Click & Collect' will be the main driver of current and future internet growth - this also requires a 'bricks and mortar' presence in easily accessible locations (such as town centres), however;
 - home delivery — with goods sourced from warehouses rather than stores - acts as a threat to future demand for retail floorspace, particularly in the convenience goods sector; and
 - 'bricks and mortar' stores are increasingly acting as 'showrooms' for products, service locations, and collection / drop-off points for online shopping orders. Stores therefore form part of a retailer's 'multi-channel' strategy, and can actually drive demand for traditional outlets.

⁵ John Lewis Partnership press release, January 2014

Key Trend 3: The Convenience Goods Sector

- 3.23 Large foodstores (those typically with a retail sales area of at least 25,000 sq.ft / 2,300 sq.m) have been the primary driver of growth in the convenience goods sector for much of the past decade and beyond. Growth in floorspace of these large foodstores continued throughout the economic downturn, with a typical 3-4 per cent increase in floorspace per year. Floorspace in smaller stores (smaller-format supermarkets, Co-Ops and convenience stores) has historically declined, whilst floorspace in food specialists has typically also reduced.
- 3.24 Tesco has for some time been the largest foodstore operator in the UK by market share, followed by Asda and then Sainsbury's - the latter two of which have very similar market shares, albeit these are significantly smaller market shares in comparison to Tesco.
- 3.25 For the most part, the convenience goods sector has been unaffected by the economic downturn, indeed it has often been the beneficiary of floorspace becoming available in town and city centres as a result of comparison goods retailers entering administration. For example, Iceland acquired 57 former Woolworths stores in early 2009, and recently Morrisons acquired a number of stores formerly operated by Blockbuster as part of their 'M Local' network of smaller-format stores.
- 3.26 These acquisitions are reflective of a recent move by convenience goods operators away from opening larger-format stores towards smaller supermarkets and establishing a network of 'top up' convenience goods shopping facilities.
- 3.27 Verdict Research⁶ comments that:
- 'The second dip of the double-dip recession in 2012 has knocked consumer confidence and shoppers are sticking more tightly than ever to their budgets. They are shopping little and often and sticking more tightly than ever to their budgets... increasing fuel prices, deterring out-of-town trips, and the move towards online food shopping each feed into this trend towards top-up shopping. Out-of-town space is increasingly difficult for grocers to make profitable'.*
- 3.28 Verdict adds that:
- 'The convenience sector is growing ahead of the overall food & grocery market, and small stores are benefiting. The trend towards local shopping is keeping shoppers closer to home and in smaller stores for their food & grocery spend. Multiples have responded by rolling out further c-stores in the case of Tesco, Sainsbury's and Waitrose, or by introducing new formats in Morrisons' case'.*
- 3.29 Verdict considers that the proportion of convenience goods floorspace which will be accounted for by 'smaller stores' will increase from 37.6 per cent in 2007 to 41.6 per cent by 2017. The majority of floorspace will continue to be accounted for by 'superstores' (53 per cent of floorspace by 2017), with 'food specialists' and off-licences continuing to have their market share reduced.

⁶ Verdict Research 'Food & Grocery Retailing in the UK' Market Report

- 3.30 Industry body IGD predicts that the convenience goods market will grow by 29% between 2012 and 2017, from £33.9bn to £43.6bn, and the main retail operators are responding quickly by opening new stores. The discount retail operators - led by Aldi and Lidl - also have substantial expansion plans over the next few years, and we expect these retailers to continue to take market share from the 'big four' supermarket operators.

Summary of Current and Future Trends

- 3.31 In this section we have identified the key factors which are influencing current and future trends in the retail and leisure sector. They can broadly be summarised as:
- The recent **economic downturn** and continued subdued retail sector - this has resulted in the growth of 'value' retail, a greater reluctance to spend amongst consumers, and investors being more cautious in their financial decisions.
 - The '**polarisation trend**', which has resulted in many retailers concentrating their activity in larger, higher-order shopping destinations.
 - The continued **growth of internet retailing**, which acts as a 'claim' on the total amount of expenditure available to support new retail floorspace within town and city centres. Experian predicts that online sales growth will increase over the next 20 years, but will begin to plateau beyond 2020. The legacy of lots of small shops in diverse ownerships will act as a drag on the ability of physical shopping to adapt to changes, however the growth in online retail does not equate to a redundant future for 'bricks and mortar' stores.
 - The continued growth of **multi-channel retailing** opportunities such as 'click and collect' offers both an opportunity and a threat for town centres. Because it is reliant on a 'bricks and mortar' presence, there are opportunities for high streets to take advantage of this growing trend.
 - Changes in the **convenience goods sector**, with a move by retailers away from larger, 'hypermarket'-format developments, towards smaller stores with a greater emphasis on convenience goods, as well heavy investment in 'local' / 'express'-format stores, are also affecting demand for new floorspace.

4 TOWN CENTRE PERFORMANCE ANALYSIS

Introduction

- 4.1 We have undertaken a performance analysis (commonly referred to as a 'health check') of Wrexham Town Centre, looking at a range of key indicators of vitality and viability. Our appraisal has involved on-foot surveys of the town centre, together with desk-based research which draws on published data from national data-providers.
- 4.2 As well as providing the base position for the future monitoring of town centre vitality and viability, this exercise identifies the key strengths of the town centre, as well as deficiencies, and areas that would benefit from improvement. We then use this information to inform the recommendations provided in subsequent sections of our report.

Performance Analysis of Wrexham Town Centre

- 4.3 Wrexham is the County Borough's principal town centre and by far its largest in terms of its retail offer. Where relevant, we compare the performance of Wrexham with Chester City Centre and Shrewsbury Town Centre, both of which have catchments that overlap with Wrexham's.

Movement in the National Retail Rankings

- 4.4 The movement in national retail rankings of Wrexham and comparator centres can be tracked using time-series data from Javelin Group's Venuescore. Venuescore ranks the UK's retail centres on the basis of a weighted count of multiple retailers comprising fashion retailers, non-fashion multiples and anchor stores. Javelin's Venuescore index was first published in 2006 and has since been updated in 2010 and again in April 2013.
- 4.5 In 2006 Wrexham ranked in 181st position in the Venuescore Index. Between 2006 and 2010, and coinciding with the opening of the Eagles Meadow development, Wrexham experienced a very considerable improvement in its ranking to 82nd position. It has since fallen back slightly to 90th place in 2013. The performance of Wrexham and competing centres is summarised in Table 4.1 below.
- 4.6 In terms of the Venuescore rankings Wrexham has performed better than competing centres, with a marked improvement in its position since 2006. Chester City Centre is a higher ranking centre than Wrexham but has fallen from 22nd to 32nd between 2006 and 2013. Wrexham has leapfrogged Shrewsbury Town Centre whose position has declined from 96th to 107th.

Table 4.1 Rankings for Wrexham & Competing Centres (2006-2013)

Centre	Javelin Venuescore Ranking		
	2006	2010	2013
Chester	22	35	32
Wrexham	181	82	90
Shrewsbury	96	134	107

Source: Javelin Group Venuescore 2006 and 2013/14.

Diversity of Main Town Centre Uses

- 4.7 Experian GOAD data⁷ indicate that Wrexham Town Centre contains approximately 436 units of which 38 are convenience retail outlets. This equates to 8.7 per cent of the total units in the town centre which is in line with the UK national average of 8.8 per cent, as shown by Table 1 of Appendix A. There is good representation in most convenience sub-categories, and particularly in the '*greengrocers and fishmongers*' and '*butchers*' categories. Indeed the independent convenience offer of the town centre is considered to be good for a town of Wrexham's size.

Figure 4.1 Wrexham GOAD Survey Area

⁷ Publication date of March 2013. All references to UK averages refer to figures published by Experian in February 2014.

- 4.8 Whilst the representation of convenience goods operators within the town centre is in line with the national average in terms of the number of units, it is considerably lower in terms of retail floorpace. Approximately 6.9 per cent of town centre floorpace is occupied by convenience retailers, whereas the national average stands at 17.9 per cent. However, the GOAD surveys do not take into account the Tesco Extra and Asda superstores that are located on the edges of the town centre (see Figure 4.1 above). Given that these stores are well connected to the town centre we do not consider that Wrexham has any notable deficiencies in terms of its convenience retail offer.
- 4.9 There are approximately 180 comparison retail units within Wrexham Town Centre, representing 41.3 per cent of the total and very close to the UK average of 40.9 per cent. In terms of floorpace, the percentage of town centre floorpace used for the sale of comparison goods stands at 62.5 per cent which is well above the national average of 45.9 per cent. Nevertheless, we do not consider this to be a concern as we would expect higher order town centres such as Wrexham to have greater representation from comparison retailers and, for the reasons set out above, we consider convenience goods floorpace within the town centre to be underestimated, therefore inflating the proportion of comparison goods floorpace.
- 4.10 In terms of the sub-categories of comparison goods, Wrexham enjoys above average representation, both in terms of unit numbers and floorpace, in most of the important fashion categories. These include footwear, women's and childrenswear, and mixed and general clothing retailers. Representation of electrical retailers is significantly above the national average, as is the '*variety, department and catalogue showrooms*' category of retailers. These are both positive indicators with electrical goods a key expenditure category and variety/department stores acting as important town centre anchors.
- 4.11 The town centre has average representation in terms of chemists, florists, furniture and carpet shops, and jewellers. It also has an average number of outlets within the charity shop category. However, there are a number of comparison goods sub-categories where town centre representation falls below the UK average including sports and toys, booksellers and stationers, and gift shops.
- 4.12 The town centre contains a good array of national comparison sector multiples including Debenhams, Next, River Island, Topshop, Marks & Spencer, H&M, Primark, TK Maxx, Dorothy Perkins, Waterstones, WH Smith, Argos and Boots. These operators are concentrated in Eagles Meadow and at Island Green Retail Park. Other parts of the town centre, including Hope Street and Queen Street, are dominated by discount retailers. Whilst Wrexham has reasonably good representation from middle market and discount comparison retailers, it has very limited representation from higher end multiples and quality independent retailers.
- 4.13 The town centre contains three indoor markets comprising the Butcher's Market, General Market (see Figure 4.2) and People's Market. Both the Butcher's Market and General Market are held within attractive historic market hall buildings, whilst the People's Market is located beneath the Market Street multi-storey car park. The

markets are all located in close proximity and are reasonably well occupied, although we did note some vacant stalls within the People's Market.

Figure 4.2 Wrexham General Market



- 4.14 On the edges of the traditional retail core, including Lord Street, King Street and Charles Street, there is a greater mix of retail and non-retail uses. However, in terms of service uses, the town centre has below average representation both in terms of the number of units and proportion of floorspace. The GOAD survey results at Appendix A show that whilst Wrexham has good representation from banks and building societies, hairdressers and beauty parlours, travel agents and estate agents, it has below average representation in the important restaurants and cafes category.

Operator Demand

- 4.15 CoStar Focus' most recent Town Report for Wrexham (which we accessed in April 2014) only provides time-series data on operator requirements up to January 2010. This shows that the number of published operator requirements for Wrexham declined from a peak of 44 in October 2007 to just 9 requirements in January 2010.
- 4.16 Further interrogation of the Focus database reveals that operator requirements for Wrexham have declined further since 2010. There are currently only 6 requirements, just 3 of which relate to retailers (as opposed to leisure operators). Premises are currently being sought by Famous Footwear, Bargain Booktime and The Fragrance Shop.
- 4.17 As Table 4.2 below shows, operator requirements for competing centres also fell between 2005 and 2010 due the effects of the recession. However, Chester has not experienced any further decline since 2010 and still benefits from reasonably robust operator demand (a total of 75 outstanding requirements). Demand for property in Shrewsbury has continued to decline but is still much greater than in Wrexham.
- 4.18 Whilst the very low number of operator requirements for Wrexham is a concern, the decline since 2005 can be partly explained by the opening of the Eagles Meadow

development which has provided a range of modern new units in the town centre and which will have satisfied much of the outstanding requirements that existed prior to 2008 and the economic downturn.

Table 4.2 Operator Requirements in Wrexham & Competing Centres

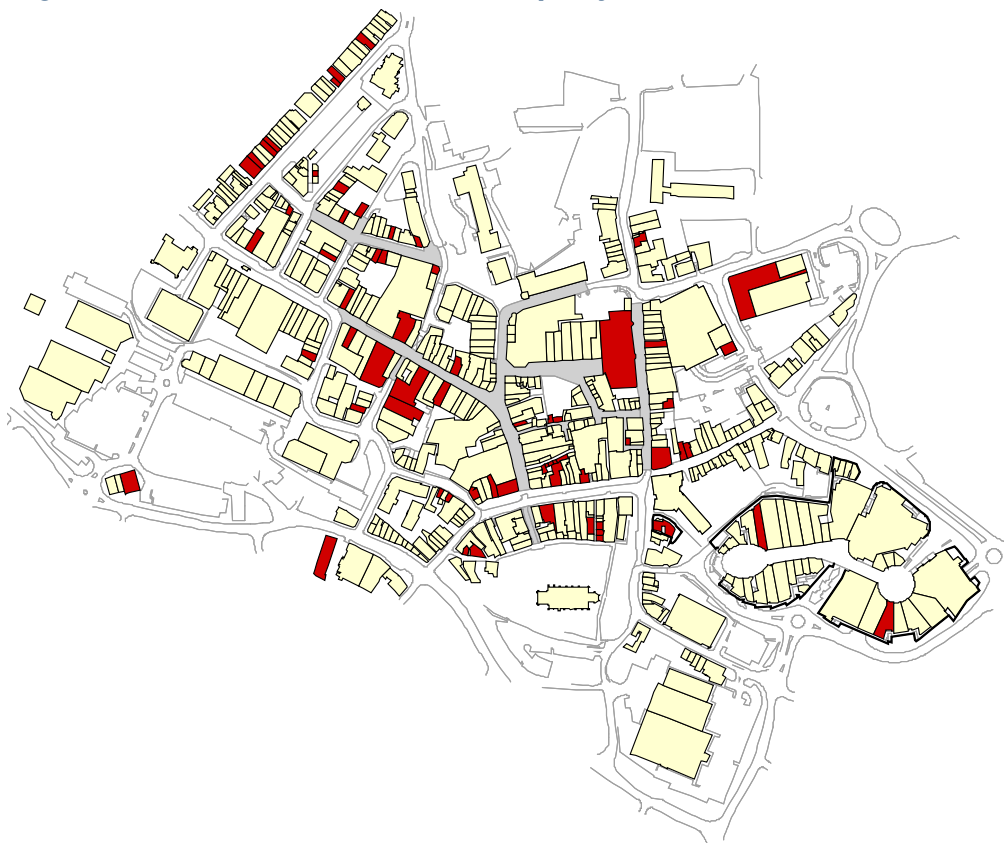
Centre	Operator Requirements		
	<i>October 2005</i>	<i>January 2010</i>	<i>April 2014</i>
Chester	131	73	75
Shrewsbury	76	36	27
Wrexham	44	9	6

Source: CoStar Focus

Proportion of Vacant Street Level Property

- 4.19 Wrexham Town Centre contained 68 vacant units in July 2013, equating to 15.6 per cent of all town centre units, which is higher than the UK average of 12.6 per cent. The pattern of vacant town centre property identified by GOAD is shown in Figure 4.3 below.

Figure 4.3 Vacant Town Centre Property



Source: Experian GOAD

- 4.20 Our own observations confirm that vacant properties continue to be spread throughout the town centre, although small concentrations of empty units were observed to the north of the bus station on King Street, along the central section of Hope Street and within Eagles Meadow. The former TJ Hughes store at Henblas Square continues to be the largest vacant property within the town centre.
- 4.21 Of the areas with higher levels of vacancy, King Street is very much a secondary town centre location where a higher turnover of units might be expected. Prior to the opening of Eagles Meadow, Hope Street was prime retail frontage and it has subsequently suffered from the relocation of some national multiples into Eagles Meadow. Whilst some of the vacant units shown in Figure 4.3 have now been re-let, some prominent unoccupied properties remain. There has also been an increase in vacant premises within the Eagles Meadow development, partly as a result of national multiples going into administration.

Pedestrian Flows

- 4.22 We observed relatively good levels of footfall throughout the town centre at the time of our visits. The heaviest pedestrian traffic appears to be concentrated on Queens Street and the southern section of Hope Street. The presence of the Primark store at the western end of the town centre helps to drive footfall along Hope Street and into Regent Street. Despite its limited retail offer Lord Street was also busy.
- 4.23 More peripheral areas of the town centre were generally quieter and this included King Street and Chester Street. There were reasonable volumes of footfall at the Island Green Retail Park where the surface level car park was very busy. The availability of this parking may also support retail activity on Regent Street and Hope Street which are located a short distance from Island Green. There is, nevertheless, scope to improve the existing pedestrian links between Island Green and the rest of the town centre, including via Hill Street and St Marks Road.

Figure 4.4 Hope Street and Lord Street



- 4.24 At the time of our visit the Eagles Meadow development was somewhat quieter than the rest of the town centre which was surprising given the concentration of major national multiples here. The pedestrian links between Eagles Meadow and the traditional retail core are important in terms of the town centre's ability to operate as a single destination and for the creation of a retail circuit that drives footfall around the centre.
- 4.25 The Eagles Meadow development is laid out in a linear form and terminates in a plaza at the western end which gives access to a cantilevered pedestrian bridge (see Figure 4.5 below). This bridge provides access to Yorke Street and the rest of the town centre.

Figure 4.5 Pedestrian Links to Eagles Meadow



- 4.26 From Yorke Street the access to Eagles Meadow is much less visible comprising a passage formed through traditional buildings which leads to a narrow pathway that wraps around a retail unit before giving access to the pedestrian bridge. The entrance is marked by relatively discreet signage and a piece of public art on Yorke Street.

State of the Town Centre Environment

- 4.27 Wrexham Town Centre is generally well maintained and provides a pleasant and clean environment for visitors. There are significant pedestrianised areas within the centre and street furniture, including seating, lighting and waste disposal facilities, is generally adequate. No parts of the centre appear to suffer any particular problems with litter or graffiti.
- 4.28 The main public space within the town centre is to the south of Rhosddu Road, comprising a square and landscaped areas adjacent to the Guildhall. St Giles and its churchyard also provide a prominent green space within the heart of the town centre. Parciau Bellevue is also located a short distance to the south of the town centre, though pedestrian links with the Island Green Retail Park could be strengthened.
- 4.29 Despite being a largely inward facing development, the Eagles Meadow development features some attractive public realm, most notably the water feature that leads down to Salop Road and acts as a key landmark on the southern approach to the town centre.

Figure 4.6 Town Centre Public Realm

- 4.30 Wrexham Town Centre contains some attractive architecture, particularly in the area surrounding St Giles. Notable buildings include the church itself, Wynnstay Arms Hotel, Alliance Assurance Company building, Butcher's Market and Nags Head public house. There are few buildings of particularly poor architectural quality within the town centre or any notable buildings that, due to their build quality or poor maintenance, give rise to significant blight.
- 4.31 In terms of accessibility, we consider that the town centre is well served by various modes of transport. The town centre has good access from the A483 and the inner ring road circulates traffic around the centre (although further opportunities should be taken to improve pedestrian links across the ring road, particularly to edge-of-centre retail facilities). There were no notable problems with congestion at the time of our visit.
- 4.32 Town centre car parking is mainly provided at Island Green, Eagles Meadow and the multi-storey car parks at Market Street and St Marks Street. There is also additional surface level car parking at Waterworld and at the supermarkets and retail parks on

the edges of the town centre. Parking facilities appeared to be adequate at the time of our visits, although we note that parking at the Island Green Retail Park was very busy and almost at capacity. This may be due to the relatively good accessibility of this site and the reasonably low parking charges.

- 4.33 Wrexham is particularly well served by rail with Wrexham General Station located a short distance to the west of the town centre and Wrexham Central Station actually forming part of the Island Green Retail Park. Rail services serve suburban and rural stations in the rest of the County Borough and more distant destinations such as Liverpool. The bus station on King Street has been redeveloped in recent years to provide a busy, modern facility. The location of the bus station to the north west of the town centre helps to drive footfall through the centre.

Summary

- 4.34 Wrexham Town Centre's recent performance is very closely related to the opening of the Eagles Meadow development and subsequent changes to the composition of the town centre. Eagles Meadow opened in 2008 at the start of the economic downturn and has, to some extent, cushioned Wrexham against the effects of the recession and the continued growth in online retailing.
- 4.35 Eagles Meadow has provided a significant increase in the amount of comparison goods floorspace within Wrexham Town Centre and has attracted new retailers to the town. Existing retailers have also been encouraged to relocate into larger premises. The effects of this have been to dramatically improve Wrexham's position in the national retail rankings where it has, on the basis of rankings provided by Javelin's Venuescore, significantly narrowed the gap in the rankings with the nearby centre of Chester and overtaken other competing destinations such as Shrewsbury Town Centre.
- 4.36 Within the town centre the diversity of uses is good and, in quantitative terms, Wrexham has a good comparison retail offer. This includes key areas such as fashion and electrical goods. The convenience retail offer of the town centre is also considered to be adequate with a particularly good provision of independent retailers. The proportion of vacant street level property is broadly in-line with the UK national average.
- 4.37 However, the improvement in the town centre's offer delivered by Eagles Meadow masks some areas of weakness. Service uses within the town centre fall below the national average and this is particularly true of the restaurant, café and coffee bar sub-category. Such food and drink uses are increasingly important in attracting visitors to retail destinations.
- 4.38 There are also qualitative weaknesses within the comparison retail offer of the town centre. One impact of the Eagles Meadow scheme has been to concentrate major national multiples within a largely self-contained development on the edges of the town centre. Whilst footfall on streets such as Hope Street, Queen Street, Lord Street and Regent Street has remained resilient, the retail offer is now strongly

focused on the value sector. There is also a notable lack of high quality comparison retailers within the town centre.

- 4.39 Nevertheless, there are also areas of potential within the town centre that provide opportunities to address its existing weaknesses. The area around St Giles Church links the traditional centre of Wrexham with Eagles Meadow and the Island Green Retail Park. This area includes High Street, Bank Street, Yorke Street, Town Hill and Charles Street. It contains the town centre's most attractive architecture and public spaces, including the Butcher's Market, Overton Arcade and Central Arcade (see Figure 4.7 below).

Figure 4.7 St Giles Area



- 4.40 Whilst there is limited potential for new development within this area, there is potential for existing assets to be exploited to attract higher end, independent comparison retailers (noting that it is unlikely that the town would attract the high end multiples present in Chester). There is also potential within this area to provide new food and drink uses and enhance linkages between Eagles Meadow and the rest of the town centre to help drive footfall between its constituent parts.

5 CURRENT PATTERNS OF RETAIL SPENDING

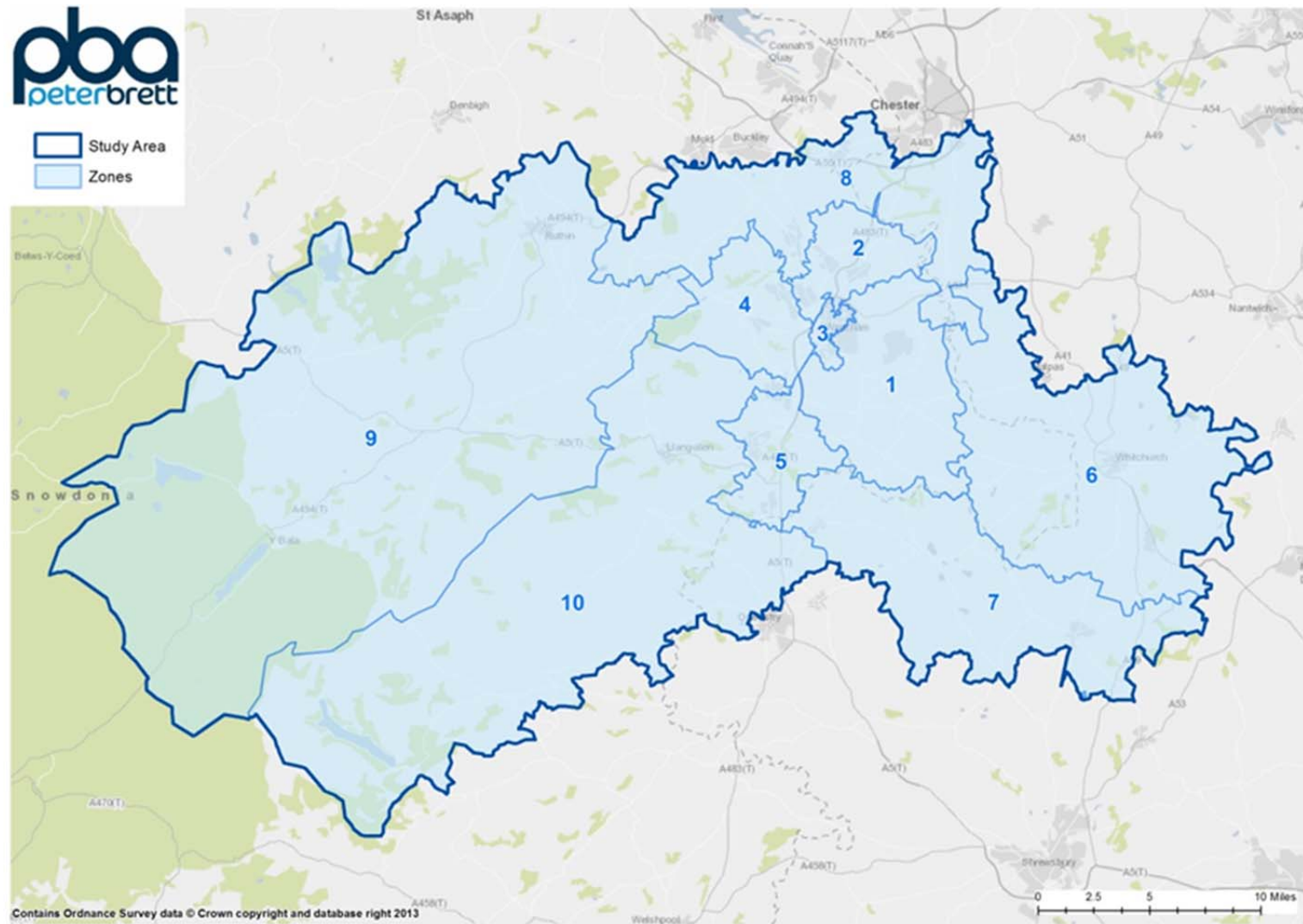
Household Survey Methodology

- 5.1 The last comprehensive county-wide survey of shopping patterns was undertaken in 2004, and so the Council has commissioned a new household survey to provide up-to-date evidence of current shopping patterns and inform the both this study and emerging planning policy. Accordingly, our assessment of local patterns of retail spending, as set out in this section of our report, is based on a new telephone survey of 1,005 households undertaken by NEMS Market Research in March 2014.

Survey Area

- 5.2 The survey area is based on the postcode sectors set out in Figure 5.1 below. The survey area covers the administrative area of Wrexham, but also includes parts of Cheshire, Denbighshire, Flintshire, Gwynedd and Shropshire. It has been defined on the basis of the household survey results of previous studies.
- 5.3 Survey zones were based on areas of approximately equal population. We ensured that there was a minimum of 100 completed interviews in each zone and the results of the survey were weighted according to the actual population in each area.

Figure 5.1 Household Survey Area and Zones



Survey Questionnaire

5.4 The survey questionnaire, which is reproduced in Appendix B, sought to establish:

- i patterns of convenience goods spending, based on the location of:
 - the store where the household last undertook a main food and grocery shop, the store visited the time before that, the amount spent per week and frequency of main shop (questions 1 to 4);
 - the shop where the household last undertook a 'top-up' food and grocery shop, the shop visited the time before that, the amount spent per week and frequency of top-up shop (questions 5 to 8); and
 - spending on food and groceries in small shops (questions 9 to 12).
- ii patterns of comparison goods spending, based on the locations of the last two purchases of:
 - clothes and shoes (questions 13 and 14);
 - furniture, carpets or soft household furnishings (questions 15 and 16);
 - DIY and decorating goods (questions 17 and 18);
 - electrical items such as TVs, DVD players, digital cameras, MP3 players, mobile phones, computers or domestic appliances, such as washing machines, fridges or cookers (questions 19 and 20);
 - health, beauty and chemist items (questions 21 and 22);
 - recreational goods, such as sports equipment, bicycles, musical instruments and toys (questions 23 and 24); and
 - other non-food items, such as books, CDs, jewellery, glass and china items (questions 25 and 26).

Composite Patterns of Spend on Comparison and Convenience Goods

5.5 The composite pattern of spending for comparison goods across the survey area, as shown in Appendix C Table 4a, was achieved on the basis of expenditure data supplied by Experian in relation to the seven aforementioned categories of spend, as shown in Table 5.1. The composite pattern of spending on convenience goods, as shown in Appendix C Table 4b, was achieved on the basis of the mean weekly household spend findings, as shown in Table 5.2.

Table 5.1 Composite Patterns of Comparison Goods Spend

	Percentage Weighting
Clothing and footwear	29.90%
Furniture, floorcoverings, household textiles	10.78%
Audio-visual equipment	27.74%
Hardware, DIY	4.72%
Chemist goods	2.07%
Recreational goods	10.76%
Other non-food	14.03%
All Comparison Goods	100.0%

Table 5.2 Composite Patterns of Convenience Goods Spend

	Mean Weekly Household Spend	Percentage Weighting
Main food and groceries	£77.99	81.99%
Top-up food and groceries	£16.81	17.67%
Small local shops	£0.32	0.34%
All Convenience Goods	£95.12	100.00%

Current Patterns of Spending on Comparison Goods

- 5.6 The resident population of the study area in 2014, disaggregated by zone, is shown in the second row of figures in Appendix C Table 1. This population dataset is based upon population figures produced by the Welsh Government and revised ONS Based Population and Household Projections to the 2011 Mid-Year Population Estimates supplied by the ONS. The Welsh Government population projection figures are taken from its principal population projection figures.
- 5.7 However, due to the potential uncertainty of the population projections the Welsh Government has also produced alternative population projections. One set of projections is based upon a higher population variant, with higher fertility rates and lower mortality rates. The other is a lower population variant based upon lower fertility rates and higher mortality rates. For the purposes of this section of the report, we only report the population figures based upon the principal population projections. However, when it comes to looking at potential comparison and convenience retail capacity we will carry out sensitivity testing factoring in the higher and lower population variants.
- 5.8 The overall population of the survey area in 2014 amounts to approximately 245,592 persons. The per capita spend on comparison goods in 2014 (Appendix C Table 2a) varies from a low of £2,500 in Zone 5 to a high of £3,548 in Zone 8. The total amount of comparison goods spending for residents of the whole of the study area in 2014 is £726.16m (Appendix C Table 3a), of which £133.87m, is spent on special forms of

trading (catalogue, TV and internet shopping, which we subsequently abbreviate as SFT), based on the results of the Household Survey and Experian data.

- 5.9 Appendix C Table 4a shows the market shares that each zone of the study area achieves of the total spend on comparison goods by residents of each zone within the study area, and Appendix C Table 4b sets out the pattern of expenditure flows for the comparison goods sector as a whole, as revealed by the survey results.
- 5.10 Table 5. below, which is derived from the final column of Appendix C Table 4b, summarises the main destinations for comparison goods expenditure within, and outside, the study area. Wrexham Town Centre (including Eagles Meadow) is the main destination for comparison retailing within the study area, attracting some £204.8 million (34.6 per cent) of available spend. Of this expenditure, Eagles Meadow attracts £67.3 million and other town centre destinations attract £137.5 million.
- 5.11 Plas Coch Retail Park is the next most significant destination for comparison shopping within the study area, and attracts a total spend of £68.1 million (11.5 per cent), followed by Broughton Shopping Park which attracts £32.7 million (5.5 per cent). Other centres, retail parks and freestanding stores located within the study area account for a further £114.8m (19.4 per cent) of the comparison goods expenditure available to residents of the study area. Thus, overall, some 71.0 per cent of expenditure on comparison goods available to the study area's residents is spent in centres, retail parks and freestanding stores that are located within the study area. This is known as the aggregate retention rate.

Table 5.3 Broad Destinations for Comparison Goods Expenditure

Broad Destinations for Comparison Goods Expenditure	£m	%
Wrexham Town Centre (including Eagles Meadow)	204.8	34.6%
Plas Coch Retail Park, Wrexham	68.1	11.5%
Broughton Shopping Park	32.7	5.5%
Other destinations within the study area	114.8	19.4%
Total Retained Expenditure	420.4	71.0%
Chester area	78.5	13.2%
Oswestry area	24.2	4.1%
Shrewsbury area	26.8	4.5%
Other locations outside the study area	42.3	7.1%
Expenditure outside study area	171.8	29.0%
TOTAL	592.3	100.0%

- 5.12 We consider that 71 per cent is a good level of expenditure retention for the Wrexham study area given its proximity to other higher-order centres, principally Chester to the north.

- 5.13 Table 5.3 confirms that just under a third (29 per cent) of the comparison retail expenditure available within the study area leaks to destinations beyond the study area. A significant proportion of comparison goods expenditure flows to town centres, retail parks and freestanding stores located just outside the study area (namely Chester, Shrewsbury and Oswestry).
- 5.14 The market shares and estimated comparison goods turnovers of the town centres and retail parks/freestanding stores within the study area, prior to making any allowance for any expenditure inflow from those who are resident beyond the study area, are set out in the last column of Appendix C Table 4b and are summarised in Table 5.4.

Table 5.4 Comparison Goods Expenditure Retained in the Study Area

Town Centres Within the Study Area	£m	%
Wrexham Town Centre (including Eagles Meadow)	204.8	34.6%
Whitchurch Town Centre	19.8	3.3%
Ruthin Town Centre	5.7	1.0%
Ellesmere Town Centre	3.6	0.6%
Wem Town Centre	3.0	0.5%
Retail Parks and Freestanding Stores Within the Study Area	£m	%
Plas Coch Retail Park, Wrexham	68.1	11.5%
Broughton Shopping Park	32.7	5.5%

- 5.15 Table 5.4 confirms that Wrexham is, by a significant margin, the main comparison shopping destination in the study area, achieving an overall market share of 34.6 per cent. Whitchurch Town Centre achieves the second-highest town centre comparison retail turnover, of £19.8m, and a market share of 3.3 per cent, followed by Ruthin Town Centre, with a comparison retail turnover of £5.7m and a market share of 1.0 per cent. This analysis highlights the dominance of Wrexham Town Centre compared to other town centre destinations within the study area.
- 5.16 The main destinations for comparison goods expenditure leakage, again as shown in the last column of Appendix C Table 4b, are summarised in Table 5.5. The principal destination for comparison goods expenditure leakage is Chester City Centre, which attracts £61.7m of the study area's comparison goods expenditure, equating to 10.4 per cent of the available comparison expenditure of study area residents.
- 5.17 Other principal shopping destinations drawing expenditure away from the catchment area include Oswestry Town Centre, Shrewsbury Town Centre and the Greyhound Retail Park in Chester. Together, these destinations account for some 10.0 per cent of expenditure.

Table 5.5 Main Destinations for Comparison Goods Expenditure Leakage

Town/City Centres Outside the Study Area	£m	%
Chester City Centre	61.7	10.4%
Oswestry Town Centre	23.5	4.0%
Shrewsbury Town Centre	21.0	3.5%
Retail Parks and Freestanding Stores Outside the Study Area		
Greyhound Retail Park	15.1	2.5%

- 5.18 The study area's retention level by zone (see Appendix C Table 4a, 'Sub-total for study area' row) varies from a low of 48.9 per cent in Zone 7 to a high of 88.0 per cent in Zone 4. This reflects the influence of Wrexham Town Centre and competing centres.
- 5.19 The localised retention rate – which is the proportion of expenditure on comparison goods available to residents in a specific zone that is spent in centres and stores located within that zone – is highest for Zone 3, which contains Wrexham Town Centre (see Appendix C Table 4a, 'Zone 3' column and 'Sub-total, survey zone 3' row) and Zone 6, which includes Whitchurch Town Centre, at 78.6 per cent and 37.1 per cent respectively. This indicates that residents of these zones have relatively narrow comparison shopping patterns. The retention level in Zone 9, which contains Ruthin Town Centre, is lower at 15.7 per cent. For the remaining zones, the localised retention rates are below 8 per cent, although a number of these zones encompass largely rural areas and contain no defined town centres.

Comparison Goods Market Shares

- 5.20 Below, we provide an analysis of the comparison goods market shares achieved by Wrexham Town Centre. References made here to the town centre include Eagles Meadow, although we note that the data presented in Appendix C presents separate figures for the shopping centre. For the purposes of this analysis we consider Eagles Meadow and the rest of the town centre as a single destination. We also briefly examine a number of other significant centres which are outside the Wrexham County Borough area but within the study area.

Centres within Wrexham

Wrexham Town Centre

- 5.21 Wrexham Town Centre achieves a comparison goods market share of 47.8 per cent in its own zone (Zone 3). It also has a very strong influence on other zones within the wider Wrexham urban area, with healthy market shares of 53.9 per cent in Zone 1, 49.3 per cent in Zone 4 and 48.9 per cent in Zone 5.
- 5.22 Wrexham Town Centre is also able to secure reasonable market shares in Zone 2 (38.3 per cent), Zone 7 (25.1 per cent), Zone 9 (27.1 per cent) and Zone 10 (31.2 per cent). Zones 9 and 10 are large rural zones located to the west of Wrexham but whose residents look to the town centre as the nearest higher order shopping destination. Its market share is lower in the remaining zones (Zone 6 and Zone 8),

reflecting the influence of Whitchurch and Shrewsbury Town Centres over Zone 6, and the influence of Broughton Shopping Park and Chester City Centre over Zone 8.

Other Centres within the study area

- 5.23 Whitchurch Town Centre achieves a maximum comparison goods market share of 33.9 per cent in its own zone (Zone 6) and does not achieve a market share of over 3 per cent in any of the other nine survey zones. This evidence confirms that Whitchurch is serving a localised role and is not a particularly significant centre of comparison goods retailing.
- 5.24 Ruthin Town Centre achieves a comparison retail market share of 9.7 per cent in its own zone (Zone 9) but it attracts very little comparison trade from the other zones. This confirms that Ruthin also has a fairly limited comparison retail shopping role. Ellesmere Town Centre achieves a market share of 5.4 per cent in its own Zone (Zone 7) and like Ruthin has limited market share in any other zone.

Centres Outside the Study Area

- 5.25 Chester City Centre achieves a comparison goods market share of 18.0 per cent and 17.7 per cent in Zones 8 and 9 respectively. These zones comprise parts of Denbighshire, Flintshire and Cheshire which have reasonably good access to Chester. However, its appeal is fairly limited across the remaining eight zones, including zones within Wrexham itself and rural areas to the south and west.
- 5.26 Oswestry Town Centre secures a market share of 15.5 per cent and 22.6 per cent in Zones 7 and 10, which are closest to the town. Elsewhere within the study area, Oswestry Town Centre does not achieve a market share above 10 per cent, confirming that its influence is limited to the southern part of the study area. Shrewsbury Town Centre is able to achieve a market share of 15.8 per cent and 20.5 per cent in the two zones closest to it (Zones 6 and 7), that largely comprise areas of Shropshire. Its influence over other zones is fairly limited.

Overlapping Comparison Goods Catchments

- 5.27 Table 5.6 presents an analysis of dominant retail destinations – defined for this exercise as instances where the comparison goods market share exceeds 25 per cent – and destinations of subsidiary influence, which are defined on the basis of having comparison goods market shares of between 10 per cent and 25 per cent.
- 5.28 Table 5.6 reveals that:
- in nine of the ten zones, there is at least one dominant centre, and at least one centre of subsidiary influence;
 - Wrexham Town Centre is the dominant centre in eight out of the ten zones and has subsidiary influence in two others;
 - Plas Coch Retail Park has subsidiary influence in six zones;
 - Whitchurch Town Centre is the dominant centre in its own zone but has no significant influence in any other zone;
 - Chester City Centre has subsidiary influence in three zones; and that

- both Oswestry and Shrewsbury Town Centres exert a subsidiary influence in the two zones closest to them geographically.

5.29 The influence of Wrexham Town Centre extends across the study area and it is clearly the dominant destination for comparison shopping. The influence of Whitchurch Town Centre is important within its own zone (including the rural southeast of Wrexham), but its wider influence is limited. Other centres outside of the study area, including Chester, Oswestry and Shrewsbury, exert subsidiary influence in five of the ten survey zones. Broughton Retail Park also has subsidiary influence in Zone 8.

Table 5.6 Dominant and Subsidiary Comparison Goods Destinations

Zone	Dominant Destinations (Market Share 25%+)	Other Destinations of Subsidiary Influence (Market Share 10% to 24%)
1	Wrexham Town Centre	Plas Coch Retail Park
2	Wrexham Town Centre	Plas Coch Retail Park
3	Wrexham Town Centre	Plas Coch Retail Park
4	Wrexham Town Centre	Plas Coch Retail Park
5	Wrexham Town Centre	Plas Coch Retail Park
6	Whitchurch Town Centre	Wrexham Town Centre Chester City Centre Shrewsbury Town Centre
7	Wrexham Town Centre	Oswestry Town Centre Shrewsbury Town Centre
8	-	Wrexham Town Centre Broughton Shopping Park Chester City Centre
9	Wrexham Town Centre	Chester City Centre
10	Wrexham Town Centre	Plas Coch Retail Park Oswestry Town Centre

Comparison Goods Sub-Sectors

5.30 We now turn to the patterns of shopping for various comparison goods sub-sectors, as revealed by the household survey. The findings are set out in Appendix C Tables 5a and 5b, and are summarised below for each of the comparison goods sub-sectors as follows:

- clothes and shoes, which account for £177.3m of the comparison goods spending of the study area's residents;
- furniture, carpets, and soft household furnishings, which account for £63.7m;
- electrical items and domestic appliances, which account for £164.6m;
- DIY and decorating goods, which account for £27.9m;
- health, beauty and chemist items, which account for £12.3m;

- recreational goods (for example, sports equipment and musical instruments), which account for £63.6m; and
- specialist and other comparison retail items (for example, books, CDs, jewellery, glass and china items), which account for £82.9m of the comparison goods expenditure available to residents of the study area.

5.31 Below, we provide an analysis of the two primary comparison sub-sectors, '*clothes and shoes*' and '*electrical and domestic appliances*', highlighting the patterns of expenditure for both. There is also a brief overview of the other sub-sectors.

Clothes and Shoes

- 5.32 Overall, 67 per cent of the expenditure on clothes and shoes available to the study area's residents is spent in centres, retail parks and freestanding stores which are located within the study area (see final column of Appendix C Table 5c). This is a reasonable retention level for clothes and shoes, given the competition presented by centres outside the study area such as Chester.
- 5.33 As shown in Table 5.7, Wrexham Town Centre attracts £84.9m of the £177.3m of clothes and shoes expenditure available to the study area's residents, which equates to a market share of 47.9 per cent. The only other notable destinations for clothes and shoes shopping within the study area are Broughton Shopping Park and the Asda at Holt Road, Wrexham. It is clear that Wrexham Town Centre is the primary location for clothes and shoes shopping in the study area, accounting for 71.6 per cent of the expenditure on clothes and shoes that is retained within the study area.

Table 5.7 Main Destinations for Clothes and Shoes within the Study Area

Destination	Expenditure on Clothes & Shoes (£m)	Market Share (%)
Wrexham Town Centre	84.9	47.9
Broughton Shopping Park	16.1	9.1
Asda, Holt Road, Wrexham	5.0	2.8

- 5.34 The main individual leakage destination for clothes and shoes is Chester City Centre, which attracts £26.1m, or 14.7 per cent, of study area residents' spending on clothes and shoes, as shown in Table 5.8. Cheshire Oaks (a more distant but very large outlet centre and retail park) attracts £8.8m of expenditure. Shrewsbury Town Centre accounts for £6.8m or 3.9 per cent of residents spend.

Table 5.8 Main Leakage Destinations for Clothes and Shoes

Destination	Expenditure on Clothes & Shoes (£m)	Market Share (%)
Chester City Centre	26.1	14.7
Cheshire Oaks	8.8	5.0
Shrewsbury Town Centre	6.8	3.9

- 5.35 We consider Wrexham's Town Centre's market share for clothing and shoes to be good and that the town centre is performing well in this respect. A strong clothes and

shoes offer serves as the foundation for an attractive comparison retail destination, and is vital in attracting the expenditure of residents.

Electrical Items and Domestic Appliances

- 5.36 Overall, 79.0 per cent of the expenditure on electrical items and domestic appliances available to the study area's residents is spent at destinations within the study area (see final column of Appendix C Table 5d). In our assessment this is a reasonable retention level for this category of comparison goods.
- 5.37 As shown in Table 5.9, the main destinations for expenditure on electrical items and domestic appliances within the study area are Plas Coch Retail Park (£48.7m, equating to a market share of 29.6 per cent), Wrexham Town Centre (£38.8m, or 23.6 per cent) and Whitchurch Town Centre (£7.3m, or 4.4 per cent).

Table 5.9 Main Destinations for Electrical Items & Domestic Appliances within the Study Area

Destination	Expenditure on Electrical Items and Domestic Appliances (£m)	Market Share (%)
Plas Coch Retail Park	48.7	29.6
Wrexham Town Centre	38.8	23.6
Whitchurch Town Centre	7.3	4.4

- 5.38 The main destination for the leakage of expenditure on electrical items and domestic appliances is Chester City Centre, which attracts £8.0 m of expenditure on such goods, equating to a market share of 5.1 per cent, as shown in Table 5.11. Chester's Greyhound Retail Park achieves a market share of 3.3 per cent whilst to the south of the study area Oswestry Town Centre, Shrewsbury Town Centre and Meole Brace Retail Park in Shrewsbury, collectively attract £12.1 million of expenditure, equating to a market share of 7.4 per cent.

Table 5.10 Main Leakage Destinations for Electrical Items & Domestic Appliances

Destination	Expenditure on Electrical Items and Domestic Appliances (£m)	Market Share (%)
Chester City Centre	8.0	5.1
Oswestry Town Centre	6.6	4.0
Greyhound Retail Park	5.5	3.3

Summary of Expenditure Retention and Leakage for Each of the Comparison Goods Sub-Sectors

- 5.39 Table 5.11 presents a summary of expenditure retention and leakage for each of the seven comparison goods sub-sectors.
- 5.40 Wrexham Town Centre is the primary destination within the study area for six of the seven comparison retail sub-sectors within the catchment area. Wrexham's highest

market shares are within the clothing/shoes and other/specialist sub-sectors, at 47.9 per cent and 41.0 per cent, respectively. Conversely, other destinations within the study area have fairly low market shares across the different comparison sub-sectors, with the exception being the Plas Coch Retail Park, which achieves a high market share in the electrical, DIY and recreational goods sub-sectors. The overall retention rate achieved by the study area (*'Total Retained Expenditure'* row in Table 5.11) is highest for the health, beauty and chemist items; electrical; and specialist/other sub-sectors, and is lowest for the furniture sub-sector.

- 5.41 Chester City Centre has a relatively high market share in a number of the sub-sectors, including the important 'clothes and shoes' sub-sector where it achieves a market share of 14.7 per cent, furniture where it achieves 13.7 per cent, and specialist goods where it achieves 12.2 per cent. Other destinations outside of the study area (excluding Chester, Oswestry and Shrewsbury) attract a total of 11.1 per cent of all comparison goods expenditure, with highest aggregate market shares in the furniture and recreational goods sub-categories.

Table 5.11 Summary of Expenditure Retention and Leakage by Comparison Goods Sub-Sectors

	Clothes & Shoes	Furniture	DIY	Electrical	Health (etc)	Recreation	Specialist/ Other	All Comparison Goods
Wrexham Town Centre	47.9%	17.6%	14.3%	19.7%	29.7%	32.2%	41.0%	34.6%
Plas Coch Retail Park, Wrexham	1.4%	3.8%	12.6%	29.6%	9.6%	13.2%	1.8%	11.5%
Other centres/destinations within the Study Area	17.6%	27.2%	46.2%	29.8%	42.1%	21.9%	35.5%	17.6%
Total Retained Expenditure	66.9%	58.7%	73.0%	79.0%	81.4%	64.8%	75.9%	71.0%
Chester City Centre	14.7%	13.7%	1.2%	5.1%	5.9%	11.7%	12.2%	10.4%
Oswestry Town Centre	2.6%	3.8%	6.3%	4.0%	5.2%	6.5%	4.0%	4.0%
Shrewsbury Town Centre	3.9%	8.0%	2.5%	2.1%	1.8%	3.4%	3.0%	3.5%
Other locations outside the study area	12.0%	15.9%	17.0%	9.7%	5.7%	13.6%	5.0%	11.1%
Total Leakage	33.1%	41.3%	27.0%	21.0%	18.6%	35.2%	24.1%	29.0%
TOTAL	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%

Current Patterns of Spending on Convenience Goods

- 5.42 Across the study area the per capita spend on convenience goods in 2014 (Appendix C Table 2b) varies from a low of £1,868 in Zone 5 to a high of £2,288 in Zone 9.
- 5.43 The total amount of convenience goods spending for residents of the whole study area in 2014 is £506.7m (Appendix C Table 3b), of which £21.5m, is spent on SFT. The pattern of expenditure flows for the convenience goods sector as a whole, as revealed by the survey of households, is set out in Appendix C Table 8a.
- 5.44 Table 5.1 **Error! Reference source not found.**2– which is derived from the final column of Appendix C Table 8b – reveals that, overall, some £414.8m, or 85.5 per cent, of the expenditure on convenience goods available to residents of the study area is spent in town and village centres and in freestanding stores which are located within the study area; this is known as the aggregate retention rate (see Appendix C Table 8b, final column, 'Overall sub-total for study area' row). A total of 14.5 per cent of convenience retail expenditure (equating to £70.4m) currently flows to stores outside the study area.

Table 5.12 Broad Destinations for Convenience Goods Expenditure

Broad Destination for Convenience Goods Expenditure	£m	%
Destinations within the study area	414.8	85.5
Total Retained Expenditure	414.8	85.5
Destinations outside the study area	70.4	14.5
Total Leakage	70.4	14.5
TOTAL	485.2	100.0

- 5.45 Overall, we consider that the current level of convenience expenditure retention (85.5 per cent) is reasonably good, given the fact that there are a number of foodstores outside of, but close to, the study area boundary.

Main destinations for food and grocery shopping

- 5.46 The estimated convenience goods turnovers of the main foodstores located within the study area, prior to making any allowance for expenditure inflow from those residents beyond the study area, are set out in the final column of Appendix C Table 8b, and is summarised in Table 5.13 below.
- 5.47 Table 5.13 shows that the most popular destination for food and grocery shopping within the study area is the Asda store in Wrexham, which has a convenience goods turnover of around £61.8m, and a market share of 12.7 per cent. The next most popular destinations for convenience shopping within the study area are the Sainsbury's and Tesco Extra stores in Wrexham with convenience turnovers of £51.8m and £48.9m, respectively, equating to market shares of 10.7 per cent and 10.1 per cent. The other facilities in the study area which achieve a convenience retail turnover in excess of £10m are the Morrisons and Aldi in Wrexham, the Sainsbury's in Whitchurch and the Tesco stores at Broughton Shopping Park,

Wrexham, Ruthin, Whitchurch and Ellesmere. These eleven foodstores within the study area collectively account for around two thirds of the convenience goods expenditure available to study area residents.

Table 5.13 Main Destinations for Convenience Goods Expenditure Retained within the Study Area

Foodstores within the Study Area	Convenience Goods Expenditure Retained within the Study Area (£m)	Market Share (%)
Asda, Holt Road, Wrexham	61.8	12.7
Sainsbury's, Plas Coch Road, Wrexham	51.8	10.7
Tesco Extra, Crescent Road, Wrexham	48.9	10.1
Morrisons, Ruthin Road, Wrexham	36.4	7.5
Aldi, Plas Coch, Retail Park, Wrexham	30.1	6.2
Tesco Extra, Broughton Shopping Park	20.6	4.2
Tesco, Plas Kynaston Lane, Cefn- Mawr	18.6	3.8
Tesco, Lon Parcwr, Ruthin	17.9	3.7
Tesco, White Lion Meadow, Whitchurch	15.5	3.2
Tesco, Wharf Road, Ellesmere	13.9	2.9
Sainsbury's, London Road, Whitchurch	11.7	2.4

- 5.48 The main leakage destinations for convenience goods expenditure are to the stores in Oswestry, Chester and Denbigh, which accounts for £30.6m of the study area residents' convenience expenditure.
- 5.49 The study area's retention level by zone – that is, the proportion of expenditure on convenience goods available to residents in a specific zone which is spent in town centres and stores located within the study area (see Appendix C Table 8a, 'Overall sub-total for study area' row) – is highest in Zone 3 (Wrexham) at 99.6 per cent, and is also very high in Zone 4 (Wrexham, 99.5 per cent), Zone 2 (Wrexham, 99.0 per cent), Zone 1 (Wrexham, 99.0 per cent), Zone 5 (92.3 per cent), Zone 6 (Whitchurch, 88.8 per cent) and Zone 9 (Ruthin, 85.5 per cent). The retention level by zone is a more modest 71.7 per cent for Zone 10 and 65.7 per cent for Zone 7 (Ellesmere). It is lowest in Zone 8 at 59.2 per cent.
- 5.50 The localised convenience goods retention rate – the proportion of expenditure on convenience goods available to residents in a specific zone which is spent in centres and stores located within that zone – is highest for Zone 6, which encompasses Whitchurch Town Centre, and has a localised retention rate of 73.3 per cent (see Appendix C Table 8a, 'Zone 6' column and 'Sub-total, survey zone 6' row, and Table 4.14). The localised retention rate of Zone 3, which takes in Wrexham Town Centre, is also high at 71.0 per cent.

- 5.51 The localised retention rates in Zones 9, 7, 1, 5 and 8 are a more modest 55.5 per cent, 45.9 per cent, 35.5 per cent, 33.8 per cent and 31.2 per cent, respectively. A number of residents in these zones shop in neighbouring zones. For example many of the residents of Zone 1 undertake their food and grocery shopping in nearby Wrexham Town Centre.
- 5.52 The localised retention rate in Zones 2, 10 and 4 are low at 18.9 per cent, 7.6 per cent and 4.4 per cent respectively. In these zones a high proportion of their expenditure is contained within the study area, predominantly in the Wrexham area.

Table 5.14 Localised Convenience Goods Retention Rates

Zone	Zonal Retention Rate (%)
1	35.5
2	18.9
3	71.0
4	4.4
5	33.8
6	73.3
7	45.9
8	31.2
9	55.5
10	7.6

- 5.53 Overall, we consider that there are no zones with an acute deficiency in convenience retail provision. Whilst the convenience retail provision in Zones 2 limited, there are no main town centres located within this zone and residents are well served by existing stores in Wrexham. Parts of Zone 4 are also well served by stores in other zones, though there may be scope for some improvements in local provision in areas such as Coedpoeth, which are more distant from facilities in Wrexham. Zone 10 is a very rural zone but provision here is expected to be improved by the proposed development of a new foodstore in Llangollen.

Convenience Goods Market Shares

- 5.54 Table 5.15 below shows, for each zone, 'dominant' stores with a zonal market share of over 25 per cent, and stores with shares between 8 and 25 per cent, which have a 'subsidiary' influence.

Table 5.15 Dominant and Subsidiary Convenience Goods Stores

Zone	Dominant Stores (Market Share of 25%+)	Subsidiary Stores (Market Share 8% to 25%)
1	Tesco Extra, Crescent Road, Wrexham Asda, Holt Road, Wrexham	Sainsbury's, Plas Coch Road, Wrexham
2		Tesco Extra, Crescent Road, Wrexham Tesco, Dodds Lane, Wrexham Asda, Holt Road Wrexham Sainsburys, Plas Coch Road, Wrexham Aldi, Plas Coch, Retail Park, Wrexham
3		Tesco Extra, Crescent Road, Wrexham Morrisons, Ruthin Road, Wrexham Asda, Holt Road, Wrexham Sainsbury's, Plas Coch Road, Wrexham Aldi, Plas Coch, Retail Park, Wrexham
4	Morrisons, Ruthin Road, Wrexham	Asda, Holt Road, Wrexham Sainsbury's, Plas Coch Road, Wrexham Aldi, Plas Coch, Retail Park, Wrexham
5	Tesco, Plas Kynaston Lane, Cefn-Mawr	Tesco Extra, Crescent Road, Wrexham Morrisons, Ruthin Road, Wrexham Asda, Holt Road, Wrexham Sainsbury's, Plas Coch Road, Wrexham
6	Tesco, White Lion Meadow, Whitchurch Sainsbury's, London Road, Whitchurch	
7	Tesco, Wharf Road, Ellesmere	
8	Tesco Extra, Broughton Shopping Park	Sainsbury's, Plas Coch Road, Wrexham
9	Tesco, Lon Parcwr, Ruthin	
10		Asda, Holt Road, Wrexham Sainsbury's, Plas Coch Road, Wrexham Aldi, Plas Coch, Retail Park, Wrexham Tesco, Plas Kynaston Lane, , Cefn-Mawr

5.55 Table 5.15 shows that:

- No zone has three dominant stores.
- Zone 1 has two dominant stores and one store which have a subsidiary influence, all of which are located in Wrexham.
- In Zone 2 has no dominant store and five stores which have subsidiary influence, all of which are located in Wrexham.
- Zone 3 has no dominant store and five stores which have subsidiary influence, all of which are located in Wrexham.
- The Morrisons in Wrexham is the dominant store in Zone 4, with three stores which have a subsidiary influence within the zone (the Asda, Sainsbury's and Aldi stores in Wrexham).

- The Tesco store in Cefn-Mawr is the dominant store in Zone 5, with four stores having subsidiary influence in nearby Wrexham.
- In Zone 6 there is are two dominant store (Tesco and Sainsbury's in Whitchurch) with no stores with subsidiary influence.
- In Zone 7 the Tesco in Ellesmere is the dominant store with no stores with subsidiary influence.
- In Zone 8 there is one dominant store (the Tesco Extra in Broughton Shopping Park) and one store with subsidiary influence (Sainsbury's, Wrexham).
- In Zone 9 the Tesco in Ruthin is the dominant store with no stores with subsidiary influence.
- In Zone 10 there is also no dominant store with the three stores in Wrexham and the Tesco store at Cefn-Mawr having subsidiary influence.

5.56 The highest individual zonal market shares are enjoyed by:

- Tesco in Ruthin, which accounts for 37.2 per cent of the convenience goods expenditure of Zone 9 residents;
- Tesco in Whitchurch, which accounts for 33.0 per cent of the convenience goods expenditure of Zone 6 residents;
- Tesco Extra on Crescent Road Wrexham, which accounts for 28.7 per cent of the convenience goods expenditure of residents of Zone 1; and
- Morrisons on Ruthin Road in Wrexham, which accounts for 28.7 per cent of the convenience goods expenditure of residents of Zone 4.

5.57 The survey findings confirm that most convenience shopping is undertaken on a fairly localised basis. Indeed, Appendix C Table 8a reveals that only three stores within the study area has a market share of over 10 per cent in three or more zones (Sainsbury's Plas Coch Road, Asda Holt Road and Tesco Extra on Crescent Road all in Wrexham). Wrexham is able to retain the majority of residents' convenience retail expenditure.

Conclusions in Relation to Retail Spending Patterns

Comparison Goods Spending

- 5.58 Overall, 71 per cent of the comparison goods expenditure available to residents of the study area is retained by town centres, retail parks and freestanding stores located in the study area. The main comparison retail destination within the study area is Wrexham Town Centre, which secures £204.8m of the residents' comparison goods expenditure.
- 5.59 Around a third of the total comparison goods expenditure available within the study area therefore 'leaks' to destinations beyond the study area. Short-distance leakage to the Chester, Oswestry and Shrewsbury accounts for 17.9 per cent of residents' comparison goods expenditure.
- 5.60 Wrexham Town Centre achieves a comparison goods market share of 40 per cent and above in four of the ten survey zones. It also achieves a market share of at least

20 per cent in four other zones. This demonstrates that Wrexham is the dominant comparison shopping destination in terms of comparison retailing across the study area.

Convenience Goods Spending

- 5.61 Overall, 85.5 per cent of the convenience goods expenditure available to residents of the study area is retained by town, village and other centres, retail parks and freestanding stores located in the study area. Thus, as might be expected, there is less leakage than in the comparison sector, because convenience shopping is generally undertaken on a more localised basis.
- 5.62 The highest individual convenience market shares within the study area are achieved by the Tesco in Ruthin, the Tesco in Whitchurch and the Tesco Extra and the Morrison's stores in Wrexham. Foodstores on the edges of Wrexham Town Centre attract significant market share from six of the ten survey zones.
- 5.63 There are no parts of the study area where there is an acute localised deficiency in convenience goods provision. Most zones with lower retention levels are well served by nearby stores in adjacent zones, although there is scope to improve local provision in the western parts of Zone 4 around Coedpoeth. It is to be expected that retention levels will be lower in more rural zones. The majority of Wrexham residents' convenience expenditure is spread amongst a number of convenience stores providing good consumer choice.

6 ASSESSMENT OF RETAIL EXPENDITURE CAPACITY

Introduction

- 6.1 In this section we present our quantitative assessment of retail expenditure capacity within the study area based on the findings of the household survey, together with published data from recognised sources. Our assessment should be read in conjunction with the tables contained at Appendix C.

Methodology for Assessing Quantitative Retail Need

- 6.2 Our methodology for determining quantitative need for retail floorspace well established and is based on best practice. Our method follows eight steps, which we describe as follows:
- i. Establish the appropriate catchment area for the highest order centre being considered, in this case Wrexham Town Centre.
 - ii. Assess the existing level of population and existing volume of retail expenditure for residents within the defined catchment area.
 - iii. Establish where the expenditure of the catchment area's residents is currently spent, through the use of an empirical survey of households in the catchment area, and thereby establish the proportion of expenditure which is currently retained by town centres and freestanding stores located within the catchment – that is, the current retention rate.
 - iv. Apply forecasts of population change and per capita expenditure growth, so as to establish the overall level of projected growth in expenditure for residents of the catchment area and an assessment of growth in retained expenditure.
 - v. Allow for 'claims' on the growth in retained expenditure as a result of:
 - a. floorspace efficiency change (that is, the growth in turnover of existing retailers within existing floorspace);
 - b. growth over time in special forms of trading (SFT), mainly online sales; and
 - c. planning commitments.
 - vi. Calculate the initial residual expenditure pot which is potentially available for new retail floorspace, based on steps iv) and v) above.
 - vii. Make an allowance for under-trading or over-trading in the base year, if this is justified.
 - viii. Develop alternative scenarios for calculating growth in residual expenditure, based on:
 - a. increases or decreases in the projected retention level; or
 - b. sensitivity testing of key assumptions.
- 6.3 Below, we describe each stage of our assessment of retail need and provide a summary of our findings.

Step i. Definition of the Overall Catchment Area

- 6.4 The study area is as described at the beginning of Section 5 of our report and is split into ten zones based on postcode boundaries, as shown in Figure 5.1. As was shown in Table 5.3, Wrexham Town Centre attracts a significant proportion of expenditure from a number of the zones and so the entire study area can be regarded as the overall catchment area ('OCA') of the County Borough's highest-order centre.

Step ii. Existing Level of Population and Expenditure

- 6.5 The population by zone in 2014 is set out in the second row of Appendix C Table 1. The overall population in 2014 amounts to approximately 245,592 persons, which is calculated on the basis of data supplied by Experian which is derived from Office for National Statistics (ONS) figures.
- 6.6 The zonal per capita expenditure data for comparison and convenience goods were supplied by Experian for the year 2011, as set out in the top row of Appendix C Tables 2a and 2b, respectively. These data were then rolled forward to 2014 using the forecasts for expenditure growth provided Experian⁸ in October 2013.
- 6.7 The total expenditure pot in 2014 is derived from the product of Appendix C Tables 1 and 2a for comparison goods and from the product of Appendix C Tables 1 and 2b for convenience goods, and is as set out in the second row of figures in Appendix C Tables 3a and 3b, respectively. In total, £726.16m of comparison expenditure and £506.7m of convenience expenditure is available to residents of the catchment area in 2014.

Step iii. Establish Existing Retail Spending Patterns

- 6.8 Next we use the household survey findings to establish current patterns of expenditure and the current retention rate, as described in Section 5 of our report. The current pattern of expenditure and the current retention rate for comparison goods is as set out in Appendix C Table 4b, with the overall retention rate for comparison goods being 71.0 per cent. For convenience goods, the pattern of expenditure and the current retention rate is as set out in Appendix C Table 8b, which reveals an overall convenience goods retention rate of 85.5 per cent.

Step iv. Forecast Growth in Expenditure and Forecast Growth in Retained Expenditure

- 6.9 The next steps are to apply forecasts of population change and per capita expenditure growth, so as to establish the overall level of projected growth in expenditure for all residents of the catchment area, and then assess growth in retained expenditure. Our assessment is carried out over the period 2014 to 2028.

⁸ Figure 1a, Retail Planner Briefing Note 11, Experian, October 2013.

Population Growth

- 6.10 Population growth for zones within the Wrexham urban area (Zones 1-5) are based on projections produced by Welsh Government in December 2013⁹. For the remaining zones, which cross boundaries between a number of different local authority areas and the border between England and Wales, population growth is based on the mid-2011 Population Projections, from the ONS. As set out in Appendix C Table 1, using this method the resident population across the OCA is forecast to increase from 245,592 persons in 2014, to around 267,765 persons in 2028. This equates to a total population increase of approximately 22,173 persons, or 9 per cent, over the entire study period.

Expenditure Growth

- 6.11 The per capita comparison and convenience goods expenditure growth rates that we have adopted are provided by Experian, and are set out in full for each forecast year in the footnotes at Appendix C Table 2a (for comparison goods) and Appendix C Table 2b (for convenience goods). For comparison goods, the annual growth rate is 2.3 per cent between 2014-15, 2.8 per cent between 2015-16, 3.0 per cent between 2016-20 and 2.9 per cent thereafter. For convenience goods the annual growth rate equates to -0.3 per cent between 2014-15, 0.1 per cent between 2015-19 and 0.8 per cent thereafter.
- 6.12 The data on growth in per capita expenditure are as set out in Appendix C Tables 2a and 2b, which utilise the growth rates as described above, are summarised for each of the forecast periods in Table 6.1 below.

Table 6.1 Expenditure Growth Per Capita 2014-2028

Period	Rate per Annum	
	Comparison Goods	Convenience Goods
2014-2015	2.3%	-0.3%
2015-2016	2.8%	0.1%
2016-2020	3.0%	0.8%
2021+	2.9%	0.8%

Total Expenditure Pot

- 6.13 The available expenditure for all residents of the study area in 2014 is set out in the final column of Appendix C Table 3a for comparison goods (£726.16 million), and in Appendix C Table 3b for convenience goods (£506.7million). This is expected to rise to £1175.4 million of comparison goods expenditure and £605.7 million of convenience goods expenditure in 2028.

Step v. 'Claims' on Growth in Retained Expenditure

- 6.14 The next stage is to make an allowance for further 'claims' on the growth in retained expenditure, which are:

⁹ Local authority population projections for Wales, 2011-based: Variant projections revised (2013)

- growth in floorspace efficiency (growth in the turnover of existing retailers within their existing floorspace);
- growth over time in SFT; and
- an allowance for the predicted turnover of planning commitments.

Growth in Floorspace Efficiency

- 6.15 In making an allowance for growth in existing retailers' floorspace efficiency we adopted the rates of floorspace efficiency change set out in Table 6.2 below.
- 6.16 Sales density growth (also known as floorspace productivity growth) is the amount of expenditure which is 'ring fenced' for existing floorspace to improve its turnover each year. Allowances for sales density growth are linked to expenditure growth. The level of comparison and convenience sales density growth that we have allowed for in the study area is summarised in Table 6.2. Owing to the low levels of retail expenditure growth presently being forecast for the short term period, we do not make any allowance for sales density growth for convenience goods until after 2016 and only small increase in sales density growth for comparison goods.

Table 6.2 Rates of Floorspace Efficiency Change

Period	Rate per Annum	
	Comparison Goods	Convenience Goods
2013-2016	1.5%	0.0%
2016+	1.5%	0.3%

- 6.17 This is a blanket sales density growth for all floorspace in the study area. Inevitably, different types of floorspace have different abilities to absorb expenditure growth, with modern floorspace better equipped than older stock. However, since this is a County-wide study and we are aware that the centres have both modern and older floorspace, we consider that this uniform approach is robust.

Allowance for Growth in Special Forms of Trading (SFT)

- 6.18 The total spending on SFT in each of the forecast years is set out in the final column of Appendix C Table 3a for comparison goods and in Appendix C Table 3b for convenience goods. Spending on special forms for each zone of the study area has been calculated on the basis of the household survey results. Current rates of SFT within the study area range from 14.2 per cent (Zone 8) to 22.7 per cent (Zone 4) for comparison goods expenditure and 0.7 per cent (Zone 8) to 7.8 per cent (Zone 5) for convenience goods expenditure. These compare to Experian's national averages of 15.5 per cent for comparison goods and 9.2 per cent for convenience goods in 2014.
- 6.19 We have applied the SFT rates derived from the household survey to the 2014 base expenditure figures in Tables 3a and 3b. We have then allowed for increases in expenditure claimed by SFT over the study period on the basis of the forecasts set out in Appendix 3 of Experian's Retail Planner Briefing Note 11 (October 2013).
- 6.20 In the comparison goods sector, Experian estimates that 'non-store retail sales' will account for 15.5 per cent of total comparison expenditure at 2014, rising to 20.9 per

cent at 2021, and increasing further to 21.3 per cent thereafter. On this basis, we have applied the growth rates for SFT market shares predicted by Experian to the local SFT rates identified by the HHS (see workings below Tables 3a and 3b of Appendix C).

- 6.21 For convenience goods, we have also adopted Experian estimates for growth in non-store convenience goods sales. Growth in SFT is predicted to rise steadily from 9.2 per cent in 2014 to 17.8 per cent in 2028, as show in Table 6.3 below.

Table 6.3 Projected Rates of SFT

Year	Comparison Goods	Convenience Goods
2014	15.5%	9.20%
2018	19.3%	12.5%
2023	21.3%	16.1%
2028	21.3%	17.8%

Allowance for Planning Commitments

- 6.22 The next step is to allow for the future turnover requirements of commitments for new comparison and convenience retail floorspace, having made an assessment of how much of the commitments' turnovers will be derived from residents of the study area.
- 6.23 As of May 2014, various extant planning permissions need to be taken into account, as follows:
- an extension at Border Retail Park, Wrexham (P/2009/0213);
 - erection of a new commercial unit for A1, A2 and/or A3 uses at Dodds Lane, Wrexham (P/2012/0653);
 - change of use from B1 (Office) to A1 (Retail) at Regent Street, Wrexham (P/2013/0654);
 - a new supermarket and smaller retail units, Phoenix Drive, Wrexham (P/2012/0816);
 - erection of a foodstore at Vauxhall Industrial Estate, Wrexham (P/2012/0210);
 - student accommodation with ancillary retail floorspace at Brook Street, Wrexham (P/2013/0419);
 - change of use from B1 (Office) to a A1 (Convenience Retail) at Gutterhill. Wrexham (P/2010/0745);
 - extension to a retail unit at Brynteg, Wrexham (P/2011/0160); and
 - variation of conditions relating to planning permission P/2007/0685 for a Community Centre (D1), Retail (A1) and Café (A3), Wrexham Road, Wrexham (P/2013/0002).
- 6.24 Our assessment of the comparison and convenience goods turnover of these permitted developments is set out in Appendix C Table 6. We have assumed that all elements of these schemes will be open and trading by 2018.

Table 6.4 Comparison Retail Commitments in the Wrexham OCA (as at April 2014)

Application Ref.	Date Approved	Details of Proposal	Address	Gross Floorspace (sq.m)	Sales Area Floorspace (sq.m)	Comparison Sales Density at 2018 (£ per sq.m)	Comparison Turnover from OCA at 2018 (£m)
P/2009/0213	08/05/2009	Extension to rear of retail terrace	Unit 2, Border Retail Park, Wrexham	553	387	£3,000 ¹⁰	£1.2
P/2012/0653	14/12/2012	Outline Application For Erection Of New Commercial Unit For A1, A2 And / Or A3 Uses	Former site of The Croft, Off Dodds Lane, Wrexham	350	245	£3,000 ¹¹	£0.7
P/2013/0654	31/10/2013	Change Of Use From B1 (Office) To A1 (Retail)	The Stables, Regent Street, Wrexham	78	66	£3,000 ¹²	£0.2
P/2012/0816	Resolved to approve	Outline Application For Erection Of Supermarket And Small Retail Units And Associated Car Parking	Land off Phoenix Drive, Brymbo, Wrexham	1,672	234	£6,686 ¹³	£1.6
P/2012/0816	Resolved to approve	Outline Application For Erection Of Supermarket And Small Retail Units And Associated Car Parking	Land off Phoenix Drive, Brymbo, Wrexham	558	391	£3,000 ¹⁴	£1.2m
P/2012/0210	Resolved to approve	Outline Application For Erection Of Use Class A1 Foodstore With Associated Car Parking, Infrastructure And Ancillary Facilities.	Unit 14, Vauxhall Industrial Estate, Ruabon, Wrexham,	4,182	464	8,554 ¹⁵	£4.0m
Total					2,038		£9.55m

¹⁰ PBA Assumption¹¹ Ibid¹² Ibid¹³ Average for Top 10 UK supermarket operators¹⁴ PBA Assumption¹⁵ Average for 'Big 4' UK supermarket operators

Table 6.5 Convenience Retail Commitments in the Wrexham OCA (as at April 2014)

Application Ref.	Date Approved	Details of Proposal	Address	Gross Floorspace (sq.m)	Sales Area Floorspace (sq.m)	Convenience Sales Density at 2018 (£ per sq.m)	Convenience Turnover from OCA at 2018 (£m)
P/2013/0419	04/11/2013	Demolition Of Existing Buildings And Erection Of Residential Student Accommodation With Retail Unit With Undercroft Parking	33 to 35 Brook Street, Wrexham	71	64	3,500 ¹⁶	£0.2
P/2010/0745	01/11/2010	Resubmission Of Planning Application For Change Of Use Of Ground Floor From Offices (Class B1) To A Convenience Store	New Foundry Buildings, Gutter Hill, Johnstown, Wrexham	432	300	3,500 ¹⁷	£1.1
P/2011/0160	18/04/2011	Single Storey Extension To Retail Shop Area With Additional Single Storey Storage And Distribution Area And Construction Of New Car Park	29-31 Darby Road, Brynteg, Wrexham	75	58	3,500 ¹⁸	£0.2
P/2013/0002	04/03/2013	Variation Of Condition Nos. 1, 12 And 13 Of Planning Permission P/2007/0685	Land at Wrexham Road, Rhostyllen, Wrexham	280	252	3,500 ¹⁹	£0.9
P/2013/0120	01/07/2013	Erection Of 3 No Commercial Units Comprising A1, A2 And A3 Uses	Regent Service Station, Regent Street, Wrexham	279	255	3,500 ²⁰	£0.9
P/2012/0816	Resolved to approve	Outline Application For Erection Of Supermarket And Small Retail Units And Associated Car Parking	Land off Phoenix Drive, Brymbo, Wrexham	1,672	937	10,000 ²¹	£9.4
P/2012/0210	Resolved to approve	Outline Application For Erection Of Use Class A1 Foodstore With Associated Car Parking, Infrastructure And Ancillary Facilities.	Unit 14, Vauxhall Industrial Estate, Ruabon, Wrexham	4,182	2,323	12,714 ²²	£29.5
Total				-	4,185	-	£42.41m

¹⁶ PBA Assumption¹⁷ Ibid¹⁸ Ibid¹⁹ Ibid²⁰ Ibid²¹ Average for UK Top 10 supermarket operators²² Average for 'Big 4' UK supermarket operators

Step vi. Residual Expenditure Potentially Available for New Floorspace

- 6.25 Row G of Appendix C Table 7a for comparison goods and Row G of Appendix C Table 9a for convenience goods, set out the residual expenditure potentially available for new retail floorspace, having allowed for all of the claims on the growth in retained expenditure – that is, growth in floorspace efficiency, growth over time in SFT, and commitments.
- 6.26 In Table 7a we add to this residual expenditure an allowance for inflow of comparison goods expenditure of 2.5 per cent. This is a PBA assumption and accounts for spending by visitors from outside of the study area. We do not make an allowance for inflow of convenience goods expenditure in Tables 9a as this should ideally be carried out on a localised basis. Our final figures for residual expenditure, taking into account any inflow, are shown in Row J of Tables 7a and 9a.

Step vii. Adjustments for Under- or Over-trading in the Base Year

Comparison goods sector

- 6.27 Next, we consider the current trading position of existing stores relative to their 'benchmark' level.
- 6.28 Appendix C Table 4b reveals an estimated comparison goods turnover for Wrexham Town Centre of approximately £204.8 million, excluding any expenditure inflow from those who live outside of the Borough. As noted above, we consider that around 2.5 per cent of the comparison turnover of the town centre is likely to be derived from beyond the study area; that is, from people who live outside the Borough, but travel into Wrexham for leisure or shopping purposes, or for work. Taking into account this level of inflow, the total comparison turnover of Wrexham Town Centre rises to £209.9 million in 2014.
- 6.29 Using the latest data from Experian GOAD, we estimate that there is around 68,170 sq.m of comparison retail sales floorspace in Wrexham Town Centre, which would imply a comparison sales density of £3,080 per sq.m. This is a reasonable comparison sales density, although we might have expected it to be a little higher given the good stock of modern floorspace introduced by the Eagles Meadow development. However, we also recognise that the GOAD data includes a large amount of retail warehouse floorspace, including at Island Green Retail Park and, accordingly, we make no adjustments for over- or under-trading of comparison floorspace in Wrexham Town Centre for the year 2014.

Convenience Goods Sector

- 6.30 For the 15 main foodstores within the study area, we have compared the survey-based turnover estimates with the 'benchmark' turnover levels, as shown in Table 6.6. We have also amended the survey-based turnover estimates to take into account inflow (i.e. expenditure received from outside the study area). We have

considered this 'inflow' on a case by case basis, having regard to the size of the store, its operator and its location.

- 6.31 Our analysis indicates that eleven of the fifteen main foodstores in the study area are trading above their respective company averages. Of these eleven stores, the Asda and Aldi stores in Wrexham are substantially over-trading. We note that our figures indicate that the Aldi store is very significantly over-trading but that the results from the household survey have been checked by NEMS and found to be accurate. The Tesco Extra on Crescent Road Wrexham, Morrisons on Ruthin Road and the Sainsbury's in Wrexham are also performing well.
- 6.32 The household survey results indicate that the Tesco store at Dodds Lane, Gwersyllt, and Marks and Spencer foodhall at Eagles Meadow are trading slightly below benchmark levels but this is not a cause for concern. The only store within the study area that we estimate to be significantly under-trading is the out-of-centre Sainsbury's store at Whitchurch.
- 6.33 The aggregate level of over-trading, based on the household survey findings, is estimated to be £71.9 million in 2014. We apply this figure to our assessment of convenience floorspace requirements within the first interval period (Row L of Table 9 in Appendix C). We expect that current over-trading will be significantly reduced by the implementation of committed convenience goods floorspace.
- 6.34 It should be noted that we have only undertaken a detailed analysis of performance against benchmark turnovers for the main foodstores within the study area, and we have not included smaller or independent traders in our analysis. Whereas published information in relation to benchmark sales densities for the major foodstore operators is available, there are no published data on sales densities for independent foodstores. The largest foodstores within the study area collectively account for well over 80 per cent of the aggregate retained convenience goods expenditure, and our analysis therefore provides a good indication of the overall trading position of existing foodstores within the study area.

Table 6.6 Benchmark Assessment of Convenience Turnover of the Main Foodstores in Study Area

Main Foodstores within Study Area	Location of Store (in, edge or out- of-centre)	Convenience Sales Area Floorspace ²³ (sq.m)	Benchmark Sales Density (£ /sq.m) ²⁴	Benchmark Turnover (£m)	HHS derived from Study Area	Drawn from Study Area %	HHS Derived Turnover (£m)	Level of Under/ Over Trading (£m)
Tesco Extra, Crescent Road, Wrexham	Edge	3,767	11,520	£43.4	£48.9	95.00%	£51.3	£7.9
Marks & Spencer, Eagles Meadow, Wrexham	Edge	752	11,261	£8.5	£7.0	95.00%	£7.3	-£1.1
Tesco, Dodds Lane, Wrexham	Edge	904	11,520	£10.4	£8.2	95.00%	£8.6	-£1.8
Morrisons, Ruthin Road, Wrexham	Out	2,526	12,727	£32.1	£36.4	95.00%	£38.2	£6.1
Asda, Holt Road, Wrexham	Edge	2,678	12,905	£34.6	£61.8	95.00%	£64.9	£30.4
Sainsburys, Plas Coch Road, Wrexham	Out	3,318	13,704	£45.5	£51.8	95.00%	£54.4	£9.0
Aldi, Plas Coch, Retail Park, Wrexham	Out	544	11,200	£6.1	£30.1	100.00%	£30.1	£24.0
Tesco, Plas Kynaston Lane, , Cefn Mawr, Wrexham	Out	1,603	11,520	£18.5	£18.6	95.00%	£19.5	£1.0
Tesco, White Lion Meadow, Whitchurch	In	1,322	11,520	£15.2	£15.5	90.00%	£17.0	£1.8
Sainsburys, London Road, Whitchurch	Out	1,858	13,704	£25.5	£11.7	90.00%	£12.9	-£12.6
Tesco, Wharf Road, Ellesmere	Out	1,353	11,520	£15.6	£13.9	75.00%	£17.4	£1.8
Co-op, Morris Central Shopping Park, Wem	In	782	4,676	£3.7	£3.1	60.00%	£4.3	£0.6
Tesco Extra, Broughton Shopping Park	Out	3,387	11,520	£39.0	£20.6	30.00%	£35.0	-£4.0
Tesco, Lon Parcwr, Ruthin	Out	1,353	11,520	£15.6	£17.9	75.00%	£22.3	£6.7
Co-op, Stryd Fawr, Bala	In	413	4,676	£1.9	£3.7	90.00%	£4.0	£2.1
Total				£315.5	£349.1		£387.4	£71.9

²³ Sales area floorspace of all main foodstores are sourced from the IGD 2009, MM Stores 2010 or data from historic RIAs which have accompanied various planning applications in the area.

²⁴ The benchmark sales densities used are PBA estimates derived from Verdict's UK Grocery Food Retailers data (2014).

Step viii. Sensitivity Testing of Alternative Scenarios

Increase or Decrease in the Geographical Size of the Catchment Area

Comparison goods sector

- 6.35 Alternative scenarios for calculating growth in residual expenditure can be based on an increase or decrease in the geographical size of the catchment area, where this is justified as part of a strategy to raise the role and function of the centre(s) as part of the local development plan process.
- 6.36 As the study area is surrounded by centres such as Chester and Shrewsbury, and Wrexham has recently experienced considerable investment in its retail offer, we consider that the expansion of the town centre's catchment area is not likely to be achievable over the current development plan period.

Convenience goods sector

- 6.37 National planning policy seeks to ensure that people's every day needs, such as convenience shopping, are met on as localised basis as possible. As a consequence, Wrexham's OCA is defined, primarily, on the basis of comparison goods spending patterns, where the very existence of the retail hierarchy demands that people travel to higher order centres for their higher order goods and services. There would be no justification for expanding the geographical size of the catchment area on this basis.

Changes to the Expenditure Retention Level

Comparison goods sector

- 6.38 In the comparison goods sector we have tested a 'constant retention' scenario in Appendix C Table 7a, 7b and 7c, in which the overall retention level remains at 71 per cent in the period up to 2028. The current level of expenditure retention is good. Due to significant competition from neighbouring centres outside the study area we therefore consider that there is little scope for further improvement and as such we have not adopted a 'rising retention' level scenario for the comparison goods sector.

Convenience goods sector

- 6.39 In the convenience goods sector we similarly test a 'constant retention' scenario in Appendix C Table 9a, 9b and 9c, in which the overall retention level remains at 85.5 per cent in the period up to 2028. As in the comparison goods sector, we consider this to be a good level of retention and feel that there is little scope for further improvement. We therefore consider there to be very limited scope to improve the convenience expenditure retention rate within the study area.

Changes to the Population Projections

- 6.40 As explained at paragraph 5.7, the Welsh Government has produced alternative population projections to account for the relative uncertainty associated with forecasts of population growth. It has produced figures for a higher and lower population

variant. To take account of this we have run three different scenarios to determine floorspace capacity:

1. Main Population Scenario: based on the principle population projections;
2. Lower Population Scenario: based on the lower population variant; and
3. Higher Population Scenario: based on the higher population variant.

- 6.41 These higher and lower rates of population growth have been applied to Zones 1 to 5 of the study area which contain the bulk of its population and are largely contained within the Wrexham County Borough. For the remaining zones, which cross both local authority and national boundaries, we have used ONS based population projections.
- 6.42 Alternative population and expenditure forecasts under the lower population scenario are set out at Tables 1a, 3a(i) and 3b(i) of Appendix C. The overall population of the study area is forecast to be 265,625 in 2028 under the lower population scenario, compared to 267,765 under the main population scenario. Alternative population and expenditure forecasts for the higher population scenario are set out at Tables 1b, 3a(ii) and 3b(ii) of Appendix C. These show that under the higher population scenario the overall population of the study area is estimated to be 269,321 in 2028.

Findings in Relation to Retail Expenditure Capacity

- 6.43 Row N of Tables 7a, 7b and 7c in Appendix C for comparison goods, and Row O of Tables 9a, 9b, 9c for convenience goods, also in Appendix C, then converts the residual expenditure to a floorspace requirement expressed as a net sales area. We have converted the residual expenditure to a net floorspace requirement on the basis of an average sales density for comparison goods of £6,000 per sq.m in 2014. This is a PBA estimate for comparison goods floorspace, taking account of different types of new floorspace, including floorspace within foodstores. In relation to convenience goods, we have divided the residual expenditure by an average sales density of £10,000 per sq.m sales area in 2014. This figure is an average turnover of the ten main supermarket operators in the UK (derived from Verdict).
- 6.44 Finally, we convert the sales area requirement to a gross floorspace requirement, as set out in Row O of Tables 7a, 7b and 7c (comparison goods), and Row P of Tables 9a, 9b and 9c (convenience goods), using a gross to net ratio of 70 per cent for comparison goods and 65 per cent for convenience goods.

Comparison Goods Sector

- 6.45 Appendix C Tables 7a, 7b and 7c set out the quantitative comparison goods retail need under the three different population scenarios, which are summarised in Table 6.7 below.

Table 6.7 Quantitative Need in the Comparison Goods Sector

Period	Floorspace Requirements (sq.m net)		
	Lower Population Scenario	Main Population Scenario	Higher Population Scenario
2014-2018	839	1,003	1,085
2018-2023	5,325	5,554	5,700
2023-2028	8,264	8,538	8,800

- 6.46 Table 6.7 shows that the comparison floorspace requirement arising under all the scenarios is positive. This means that the growth in retained expenditure up to 2028 is sufficient to support prior 'claims' on that growth, namely an improvement in sales densities of existing centres and stores, growth in SFT and the turnover requirements of the extant comparison retail permissions noted in Table 6.4.
- 6.47 This positive residual for additional comparison retail floorspace becomes more substantial in the longer-term period to 2028. Table 6.7 shows that under the main population scenario, in total there is capacity for approximately 15,095 sq.m of additional comparison sales area floorspace across the study area in the period up to 2028. For the lower and higher population scenarios there is scope for some 14,428 sq.m and 15,585 sq.m net comparison floorspace respectively.
- 6.48 We therefore suggest that the Council should work towards a requirement of between 800 sq. m and 1,100 sq.m of additional comparison sales area floorspace in the 2014 to 2018 period rising to between 5,300 sq. mand 5,700 sq.m between 2018-203 and rising further to between 8,250 and 8,550 sq.m in the period up to 2028. The Council should direct this new floorspace to town centre locations, in accordance with the thrust of national and local planning policy.

Convenience Goods Sector

- 6.49 Appendix C Tables 9a, 9b and 9c set out the quantitative convenience goods retail need under the alternative population scenarios, as summarised in Table 6.8 below.

Table 6.8 Quantitative Need in the Convenience Goods Sector

Period	Floorspace Requirements (sq.m net)		
	Lower Population Scenario	Main Population Scenario	Higher Population Scenario
2014-2018	3,898	4,012	4,072
2018-2023	1,479	1,596	1,672
2023-2028	1,814	1,934	2,058

- 6.50 Table 6.8 shows that for the catchment area as a whole, the quantitative need in the period is positive throughout the entire reporting period up to 2028 under all the scenarios. As in the comparison sector, this means that the growth in retained expenditure is sufficient to support prior 'claims' on that growth in the short-term period to 2018, namely an improvement in sales densities of existing centres and stores, growth in SFT, and the turnover requirements of the commitments detailed in

Table 6.5. We note that much of the short term capacity arises from the over-trading of existing foodstores within the study area.

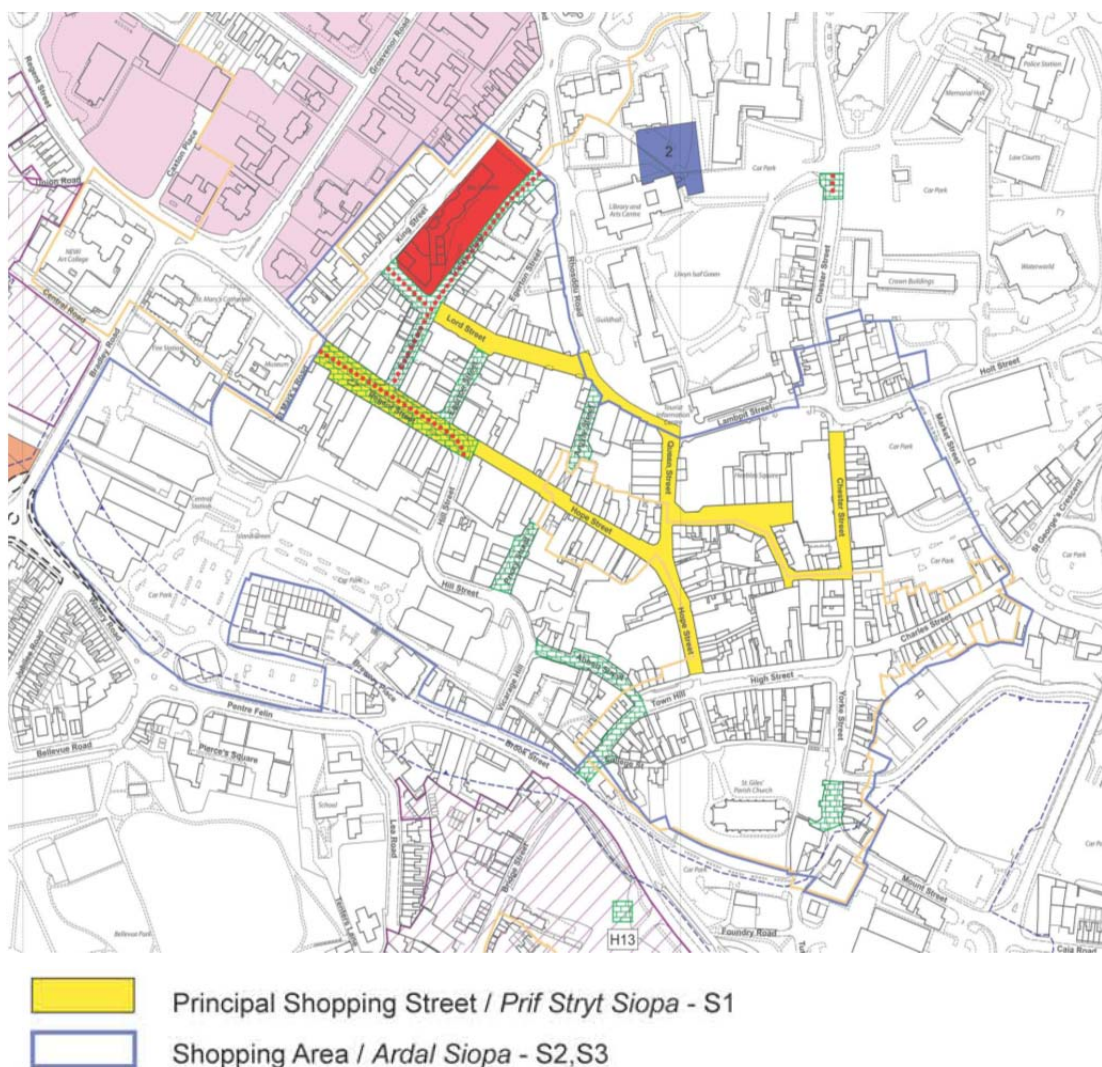
- 6.51 Table 6.8 shows that under the main population scenario, there is total capacity for approximately 7,542 sq.m of additional convenience sales area floorspace across the study area in the period up to 2028. For the higher and lower population scenarios there is scope for between 7,200 sq.m and 7,800 sq.m of additional convenience sales area floorspace respectively.
- 6.52 On the basis of these figures we would recommend that the Council should allow for between 7,000 sq. m and 8,000 sq m of net additional convenience goods floorspace over the period to 2028. Approximately half of this additional floorspace should be brought forward in the first study period up to 2018. However, if existing floorspace commitments are brought forward more slowly and existing levels of over-trading are reduced less rapidly, then the overall requirement could be spread more evenly over the study period. This will require the Council to closely monitor implementation of planning commitments and, if necessary, update the retail forecasts accordingly.

7 TOWN CENTRE BOUNDARIES

Current Policy

- 7.1 The Wrexham Unitary Development Plan (UDP) was adopted in February 2005. Policy S4 of the UDP states that large-scale retail development will be located within the shopping area of Wrexham Town Centre and within district shopping centres. The town centre's shopping area is shown outlined in blue in Figure 7.1 below. Policies S1 and S2 of the UDP seek to control uses within the principle shopping streets and elsewhere within Wrexham Town Centre in order to preserve the dominance of retail uses. The principal shopping streets (to which Policy S1 applies) are shown in yellow in Figure 7.1.

Figure 7.1 Existing Town Centre Boundaries in Wrexham Town Centre



Town Centre Shopping Area

- 7.2 The town centre shopping area comprises those parts of Wrexham Town Centre that are the focus of retail activity, including both primary and secondary areas. Since the adoption of the UDP, the Eagles Meadow development has been constructed to the southwest of the existing shopping area. Whilst we have highlighted the poor physical links between Eagles Meadow and the rest of the town centre earlier in this report, the concentration of key non-bulky retailers within the centre and its overall contribution to the town centre offer indicates that existing boundaries should be extended to include the whole of the Eagles Meadow development.
- 7.3 There are other retail areas on the periphery of the town centre including the Border and Wrexham Central Retail Parks. The latter has been constructed since the adoption of the UDP and Border Retail Park has been consolidated by the development of a Tesco Extra store. However, both these areas are located outside of the inner ring road and retain an edge-of-centre character, accommodating mainly bulky goods retailers. We therefore recommend that they continue to be excluded from the town centre shopping area.
- 7.4 Finally, we have considered whether the boundaries of the shopping area should be extended to include any existing or potential sites that may be suitable for future retail development. We do not consider there to be any readily available sites that are so well connected to the existing shopping area that it would be necessary to extend the boundaries of the shopping area to facilitate their development. This is especially the case given that the traditional core of the town centre is continuing to adjust to the Eagles Meadow development.

Principal Shopping Streets

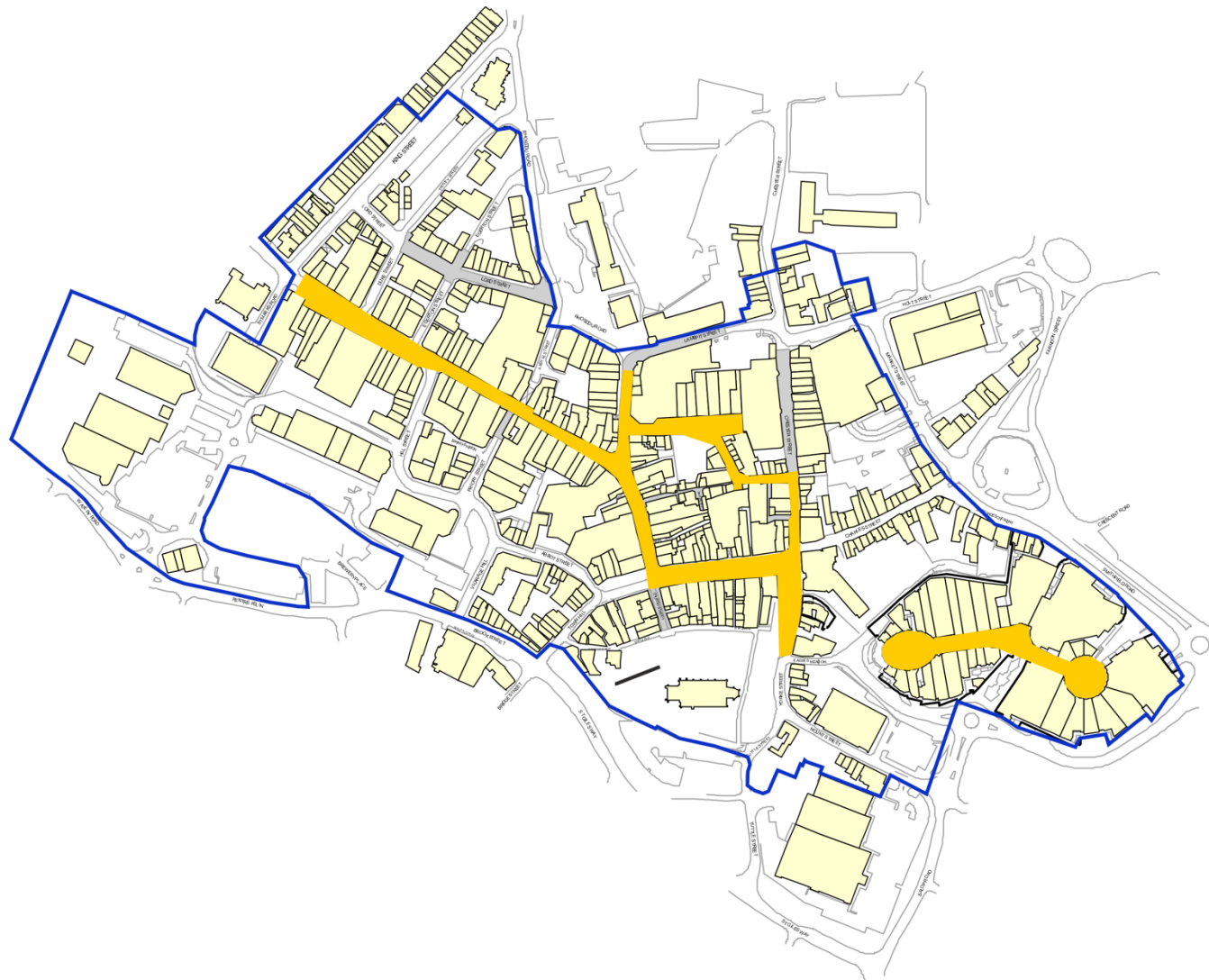
- 7.5 The principal shopping streets identified by the UDP include Regent Street, Lord Street, Hope Street, Queen Street and Chester Street. Under the terms of Policy S1, non-retail proposals on ground floor frontages will not be permitted if they have a detrimental impact on the character, vitality or viability of the area. Due to recent changes within the town centre it appears that retail activity is less dominant on some of the designated principal shopping streets. We would highlight Chester Street, which appears to attract only low levels of footfall, and Lord Street, which enjoys good levels of footfall but is now dominated by non-retail uses.
- 7.6 We would suggest the key objective in controlling ground floor uses is to protect existing retail areas and maintain a 'retail circuit' that drives pedestrian footfall through the town centre. As highlighted in Section 4 it is particularly important that pedestrian flows are encouraged between the Eagles Meadow development and the rest of the town centre. This is to support retail activity throughout the town centre and to ensure that shopping trips are not restricted to the largely self-contained Eagles Meadow development.
- 7.7 We therefore propose that High Street, the northern end of Yorke Street and the southern end of Chester Street should be designated as principal shopping streets. We acknowledge that existing retail activity is limited in all of these areas. However,

existing non-retail occupiers should not be affected by the proposed designation which will encourage future retail activity in the area, support the vitality of the nearby indoor markets and encourage the development of attractive assets such as the Overton Arcade and Central Arcade. The main section of the Eagles Meadow scheme (up to Marks and Spencer) is also designated as a principal shopping street to reflect the dominance of retail uses there.

Summary

- 7.8 Figure 7.2 below summarises the proposed changes to town centre boundaries. The blue line identifies the amended town centre shopping area where future retail development within Wrexham should be concentrated. Areas within the shopping area should be considered to be in-centre for the application of the sequential approach required by Planning Policy Wales. It is recommended that the existing boundary shown on the UDP proposals map is amended to include Eagles Meadow and adjoining commercial units on Smithfield Road and Mount Street to encourage future retail activity within and around the shopping centre.
- 7.9 In terms of controlling the distribution of retail and non-retail uses within the town centre we recommend some changes to the principal shopping streets identified by the UDP. The key change is to include the linking sections of High Street, Yorke Street and Chester Street to connect Eagles Meadow with Hope Street, Bank Street and Henblas Square. Figure 7.2 removes Lord Street and the northern section of Chester Street from the designated principal shopping streets, reflecting their largely secondary character.
- 7.10 There is scope to strengthen the protection of existing retail activity within the principal shopping streets beyond the existing controls contained within UDP Policy S1 which refers to detrimental impacts on the character and vitality or viability of the area. This may require proposals for non-retail uses to provide evidence that the property has been appropriately marketed for retail uses or may set a limit on the proportion of non-retail uses within any given ground floor frontage. However, we would recommend a more relaxed approach to non-retail uses within the rest of the town centre shopping area, particularly where these relate to food and drink uses that are currently under-represented within the town centre.

Figure 7.2 Recommended Town Centre Boundaries



8 SUMMARY AND RECOMMENDATIONS

Introduction

- 8.1 In February 2014 Wrexham County Borough Council commissioned Peter Brett Associates to undertake the Wrexham Retail Assessment on its behalf. The Borough Council wishes to update its evidence base to support the preparation of the Wrexham Local Plan. The purpose of this Retail Assessment is to provide a robust evidence base on the capacity for additional retail development in Wrexham in the period to 2028. The study is supported by a new household survey of shopping patterns, and accurately reflects current circumstances, the latest available data inputs/assumptions, and changes to planning policy.
- 8.2 In this section of our report we summarise the principal findings from the research and analysis that has informed the assessment, and set out our recommendations in terms of future planning policy and meeting identified needs.

Summary of Performance Analysis

- 8.3 Wrexham Town Centre's recent performance is very closely related to the opening of the Eagles Meadow scheme and subsequent changes to the composition of the town centre. Eagles Meadow opened in 2008 at the start of the economic downturn and has, to some extent, cushioned Wrexham against the effects of the recession and the continued growth in on-line retailing.
- 8.4 Eagles Meadow has provided a significant increase in the amount of comparison goods floorspace within Wrexham Town Centre and has attracted new retailers to the town. Existing retailers have also been encouraged to relocate into larger premises. The effects of this have been to dramatically improve Wrexham's position in the national retail rankings where it has, on the basis of rankings provide by Javelin's Venuescore, significantly narrowed the gap in the rankings with the nearby centre of Chester and overtaken other competing destinations such as Shrewsbury Town Centre.
- 8.5 Within the town centre the diversity of uses is good and, in quantitative terms, Wrexham has a strong comparison retail offer. This includes in key areas such as fashion and electrical goods. The convenience retail offer of the town centre is also considered to be adequate with a particularly good provision of independent retailers. The proportion of vacant street level property is broadly in-line with the UK national average.
- 8.6 However, the improvement in the town centre's offer deliver by Eagles Meadow masks some areas of weakness. Service uses within the town centre fall below the national average and this is particularly true of the restaurant, café and coffee bar sub-category. Such food and drink uses are increasingly important in attracting visitors to retail destinations.
- 8.7 There are also qualitative weaknesses within the comparison retail offer of the town centre. One impact of the Eagles Meadow scheme has been to concentrate major

national multiples within a largely self-contained development on the edges of the town centre. Whilst footfall on streets such as Hope Street, Queen Street, Lord Street and Regent Street has remained resilient, the retail offer is now strongly focused on the value sector. There is also a notable lack of high quality comparison retailers within the town centre.

Summary of Current Shopping Patterns

Comparison Goods Spending

- 8.8 Overall, 71 per cent of the comparison goods expenditure available to residents of the study area is retained by town centres, retail parks and freestanding stores located in the study area. The main comparison retail destination within the study area is Wrexham Town Centre, which secures £204.8m of the residents' comparison goods expenditure.
- 8.9 Around a third of the total comparison goods expenditure available within the study area therefore 'leaks' to destinations beyond the study area. Short-distance leakage to the Chester, Oswestry and Shrewsbury accounts for 17.9 per cent of residents' comparison goods expenditure.
- 8.10 Wrexham Town Centre achieves a comparison goods market share of 40 per cent and above in four of the ten survey zones. It also achieves a market share of at least 20 per cent in four other zones. This demonstrates that Wrexham is the dominant comparison shopping destination in terms of comparison retailing across the study area.

Convenience Goods Spending

- 8.11 Overall, 85.5 per cent of the convenience goods expenditure available to residents of the study area is retained by town, village and other centres, retail parks and freestanding stores located in the study area. Thus, as might be expected, there is less leakage than in the comparison sector, because convenience shopping is generally undertaken on a more localised basis.
- 8.12 The highest individual convenience market shares within the study area are achieved by the Tesco in Ruthin, the Tesco in Whitchurch and the Tesco Extra and the Morrison's stores in Wrexham. Foodstores on the edges of Wrexham Town Centre attract significant market share from six of the ten survey zones.
- 8.13 There are no parts of the study area where there is an acute localised deficiency in convenience goods provision. Most zones with lower retention levels are well served by nearby stores in adjacent zones, though there is scope to improve local provision around Coedpoeth. It is to be expected that retention levels will be lower in more rural zones. The majority of Wrexham's residents' convenience expenditure is spread amongst a number of convenience stores providing good consumer choice.

Summary of Quantitative Need for Retail Floorspace

- 8.14 Our quantitative assessment of retail floorspace requirements is contained at Appendix C and described in Section 6 of this report. We have examined three

alternative scenarios based on different levels of population growth within the study area.

- 8.15 The quantitative need for additional comparison goods retail floorspace is summarised in Table 8.1 below:

Table 8.1 Quantitative Need in the Comparison Goods Sector

Period	Floorspace Requirements (sq.m net)		
	Lower Population Scenario	Main Population Scenario	Higher Population Scenario
2014-2018	839	1,003	1,085
2018-2023	5,325	5,554	5,700
2023-2028	8,264	8,538	8,800

- 8.16 Table 8.1 shows that the comparison floorspace requirement arising under all the scenarios is positive. This means that the growth in retained expenditure up to 2028 is sufficient to support prior 'claims' on that growth, namely an improvement in sales densities of existing centres and stores, growth in SFT and the turnover requirements of the extant comparison retail permissions noted in Table 6.4.
- 8.17 This positive residual for additional comparison retail floorspace becomes more substantial in the longer-term period to 2028. Table 8.1 shows that under the main population scenario, in total there is capacity for approximately 15,095 sq.m of additional comparison sales area floorspace across the study area in the period up to 2028. For the lower and higher population scenarios there is scope for some 14,428 sq.m and 15,585 sq.m net comparison floorspace respectively.
- 8.18 The quantitative need for additional convenience goods retail floorspace is summarised in Table 8.2 below:

Table 8.2 Quantitative Need in the Convenience Goods Sector

Period	Floorspace Requirements (sq.m net)		
	Lower Population Scenario	Main Population Scenario	Higher Population Scenario
2014-2018	3,898	4,012	4,072
2018-2023	1,479	1,596	1,672
2023-2028	1,814	1,934	2,058

- 8.19 Table 8.2 shows that for the catchment area as a whole, the quantitative need in the period is positive throughout the entire reporting period up to 2028 under all the scenarios. As in the comparison sector, this means that the growth in retained expenditure is sufficient to support prior 'claims' on that growth in the short-term period to 2018, namely an improvement in sales densities of existing centres and stores, growth in SFT, and the turnover requirements of the commitments detailed in Table 6.5. We note that much of the short term capacity arises from the over-trading of existing foodstores within the study area.
- 8.20 Table 8.1 shows that under the main population scenario, there is total capacity for approximately 7,542 sq.m of additional convenience sales area floorspace across the

study area in the period up to 2028. For the higher and lower population scenarios there is scope for 7,191 sq.m and 7,802 sq.m additional convenience sales area floorspace respectively.

Recommendations

Retail Floorspace Requirements

- 8.21 The retail floorspace requirements identified in this report are provided as guidelines only and do not represent maximum limits on the quantum of retail floorspace that can be developed in Wrexham in the period to 2028. Should proposals over and above the identified requirements come forward, then these will need to be assessed against the wider policies and objectives of the development plan and national planning policy. Each proposal will need to be assessed on its own merits and, in accordance with Planning Policy Wales, it is not appropriate for the retail assessment to set a prescriptive 'cap' on future retail development.
- 8.22 Proposals that meet specific qualitative needs, or that deliver other wider benefits even where there is little or no quantitative capacity, can still be approved provided there are no overriding negative impacts that would outweigh the benefits of doing so. Any new applications for retail floorspace on the edge of, or outside, the defined town centre boundaries in any of the centres in the County Borough should demonstrate that there are no sequentially preferable sites available, and that no significant adverse impacts will arise on existing defined centres.

Comparison Retail

- 8.23 We suggest that the Council should work towards a requirement for up to 15,600 sq. m of additional comparison retail sales area floorspace over the plan period.

Table 8.3 Comparison Floorspace Requirements

Period	Floorspace Requirements (sq.m net)
2014-2018	839 -1,085
2018-2023	5,325 -5,700
2023-2028	8,264 – 8,800
2014-2028	14,428-15,585

- 8.24 As shown in Table 8.3, there is a positive requirement for additional comparison retail floorspace in each study period. A relatively modest requirement for approximately 1,000 sq m. of net floorspace increases to more significant requirements for approximately 5,500 sq. m between 2018 and 2023, and approximately 8,500 sq. m between 2023 and 2028.
- 8.25 In the comparison sector, centres and stores within the study area currently retain some 71 per cent the available comparison expenditure which we consider to be a healthy level of aggregate expenditure retention given the competition from nearby higher order centres. We therefore recommend that the Council's policy objectives should focus on maintaining the current retention rate whilst delivering appropriate improvements to address qualitative deficiencies in Wrexham Town Centre.

Convenience Retail

- 8.26 Requirements for additional convenience retail sales floorspace are shown in Table 8.4 below. Over the entire study period we estimate that between 7,200 sq. m and 7,800 sq. m of additional retail floorspace will be required. Floorspace requirements are at their highest in the short-term period to 2018 as a result of significant levels of overtrading from existing foodstores. However, if existing floorspace commitments are brought forward more slowly and existing levels of over-trading are reduced less rapidly, then the overall requirement could be spread more evenly over the study period.

Table 8.4 Convenience Floorspace Requirements

Period	Floorspace Requirements (sq.m net)
2014-2018	3,898-4,072
2018-2023	1,479-1,672
2023-2028	1,814-2,058
2014-2028	7,191-7,802

Town Centre Development and Management

Accommodating Retail Floorspace Requirements

- 8.27 It is not a requirement of this assessment to identify specific sites to accommodate the identified retail floorspace requirements. This assessment is also focused on Wrexham Town Centre and has not assessed the performance of lower order centres within the County Borough or any qualitative needs in these locations.
- 8.28 However, our recommended strategy would be to concentrate the provision of additional comparison retail floorspace within the shopping area of Wrexham Town Centre, in accordance with the approach advocated by Planning Policy Wales. We would highlight two potential 'areas of change' within the shopping area; the Island Green Retail Park and the area around St Giles Church.
- 8.29 We consider that the Island Green site provides opportunities for higher density retail development being well connected to the rest of the town centre and being served by the Wrexham Central railway station. The existing retail warehousing is fully occupied and surface level car parking is well used but there would be opportunities to make more efficient use of this land and expand retail floorspace here.
- 8.30 As described in Section 4 of this report, the area around St Giles Church provides opportunities to deliver qualitative improvements to the town centre's retail offer. There are unlikely to be any major development sites within this area but the existing building stock should be maintained and improved to encourage high quality and independent retail operators. There are also opportunities for environmental improvements within this area that would create better pedestrian links between Eagles Meadow, a redeveloped Island Green site and the rest of the town centre.
- 8.31 On the edges of the shopping area (as proposed to be amended) there are two further areas that may be capable of accommodating additional retail floorspace. We understand that there may be future development opportunities in the area to the

northeast of the shopping area that is currently dominated by civic facilities. There may also be opportunities for retail-led redevelopment to the south of the Eagles Meadow development. However, it is important that any large-scale retail development here does not further elongate the retail 'circuit' to the detriment of retail activity within the existing shopping area.

- 8.32 In terms of convenience floorspace, our recommended strategy would be to ensure that appropriate local provision is provided throughout the County Borough, especially in more deprived areas. Additional floorspace should be concentrated in existing local and district centres. In the town centre there may be opportunities to provide additional top-up food shopping facilities to support qualitative improvements to the town centre offer, whilst more significant volumes of convenience floorspace could be provided at the Island Green site or by way of extensions to the existing food superstores in the vicinity of the Border Retail Park which provide opportunities for linked trips with the town centre. In considering proposals in edge and out-of-centre locations the Council should be mindful of any adverse impacts on the healthy independent convenience offer within the town centre shopping area.
- 8.33 We recommend that specific policies and proposals for quantitative and qualitative improvements to the retail offer of Wrexham Town Centre are developed through the production of a masterplan, town centre strategy and/or supplementary planning documents.

Supporting Retail Uses in Wrexham Town Centre

- 8.34 We recommend that the existing boundary of the Wrexham Town Centre's shopping area shown on the UDP Proposals Map should be amended to include Eagles Meadow and adjoining commercial units on Smithfield Road and Mount Street. We recognise that Eagles Meadow now forms a key part of the town centre's retail offer and the inclusion of existing development on Smithfield Road and Mount Street might help to encourage pedestrian flows between the scheme and the rest of the town centre. Future retail floorspace development within the County should be directed to locations within the boundaries of the expanded town centre shopping area.
- 8.35 In terms of controlling the distribution of retail and non-retail uses within the town centre, we recommend some changes to the principal shopping streets identified by the UDP. The key change is to include the linking sections of High Street, Yorke Street and Chester Street to connect Eagles Meadow with Hope Street, Bank Street and Henblas Square. This is intended to strengthen the town centre retail circuit and ensure that Eagles Meadow strengthens the town centre as a whole. It is recommended that Lord Street and the northern section of Chester Street are removed from the designated principal shopping streets, reflecting their largely secondary character.
- 8.36 There is scope to strengthen the protection of existing retail activity within the principal shopping streets beyond the existing controls contained within UDP Policy S1 which refers to detrimental impacts on the character and vitality or viability of the area. This may require proposals for non-retail uses to provide evidence that the property has been appropriately marketed for retail uses or may set a limit on the

proportion of non-retail uses within any given ground floor frontage. However, we would recommend a more relaxed approach to non-retail uses within the rest of the town centre shopping area, particularly where these relate to food and drink uses that are currently under-represented within the town centre.

Monitoring and Review

- 8.37 Our assessment of retail floorspace requirements is based on three scenarios that relate to population growth forecasts published by the Welsh Government. In determining which of the three scenarios is unfolding the Council should pay close attention to any revised population projections issued by the Welsh Government or the Office for National Statistics.
- 8.38 There are also a number of other indicators that should be monitored by the Council to determine likely changes to retail floorspace requirements over the development plan period. These include:
- the implementation of existing retail commitments. Non-implementation of commitments or the expiry of existing planning permissions will release additional capacity, particularly in the short term period;
 - expenditure growth rates. These reflect general economic conditions and therefore an acceleration in economic growth is likely to result in higher floorspace requirements as a result of increased expenditure growth rates. Conversely, any future economic downturn is likely to reduce floorspace requirements as a result of lower or negative expenditure growth rates; and
 - the market share of non-store retail sales (special forms of trading). Such market shares have increased considerably in recent years but it remains to be seen whether this growth will be maintained. Special forms of trading continue to evolve, including through emerging channels such as 'click and collect' which require retailers to have both an online and physical retail presence. However, higher market shares for non-store retail sales will generally imply lower retail floorspace requirements.
- 8.39 We recommend that any sustained and significant changes in any of these indicators should prompt a review and update of this assessment to ensure that the Council is meeting objectively assessed retail needs, encouraging sustainable shopping patterns and implementing the most appropriate strategy to support the vitality and viability of Wrexham Town Centre.

APPENDIX A TOWN CENTRE GOAD DATA

TABLE 1 - Wrexham Town Centre Diversity of Uses

Goad Code	Operator Type	No. of Units				Floorspace			
		No. of units	% of Total	UK Average %	Index (UK=100)	Floorspace (sq.m)	% of Total	UK Average %	Index (UK=100)
	<i>Number (and %) of Convenience Goods Outlets</i>								
G1A	Bakers	11	2.52%	2.19%	115	1090	1.00%	1.11%	90
G1B	Butchers	4	0.92%	0.77%	119	370	0.34%	0.41%	83
G1C	Greengrocers & fishmongers	5	1.15%	0.62%	185	3880	3.56%	1.34%	265
G1D	Grocery and frozen foods	13	2.98%	2.92%	102	1700	1.56%	12.80%	12
G1E	Off-licences and home brew	0	0.00%	0.50%	0	0	0.00%	0.31%	0
G1F	Confectioners, tobacconists, newsagents	5	1.15%	1.83%	63	430	0.39%	1.91%	21
	TOTAL	38	8.72%	8.83%	99	7470	6.85%	17.87%	38
	<i>Number (and %) of Comparison Goods Outlets</i>								
G2A	Footwear & repair	8	1.83%	1.79%	103	1590	1.46%	1.29%	113
G2B	Men's & boys' wear	8	1.83%	1.00%	183	1550	1.42%	0.88%	161
G2C	Women's, girls, children's clothing	17	3.90%	3.61%	108	5240	4.80%	3.49%	138
G2D	Mixed and general clothing	18	4.13%	3.98%	104	10920	10.01%	6.29%	159
G2E	Furniture, carpets & textiles	12	2.75%	3.36%	82	4030	3.69%	3.74%	99
G2F	Booksellers, arts/crafts, stationers/copy bureaux	14	3.21%	4.37%	73	3020	2.77%	3.17%	87
G2G	Electrical, home entertainment, telephones and video	28	6.42%	3.81%	169	4940	4.53%	2.86%	158
G2H	DIY, hardware & household goods	6	1.38%	2.50%	55	7810	7.16%	4.88%	147
G2I	Gifts, china, glass and leather goods	2	0.46%	1.65%	28	140	0.13%	0.89%	14
G2J	Cars, motorcycles & motor accessories	2	0.46%	1.18%	39	1810	1.66%	1.82%	91
G2K	Chemists, toiletries & opticians	18	4.13%	3.88%	106	3620	3.32%	3.91%	85
G2L	Variety, department & catalogue showrooms	7	1.61%	0.64%	251	16710	15.31%	6.24%	245
G2M	Florists and gardens	4	0.92%	0.89%	103	260	0.24%	0.41%	58
G2N	Sports, toys, cycles and hobbies	7	1.61%	2.05%	78	1870	1.71%	2.22%	77
G2O	Jewellers, clocks & repair	11	2.52%	1.98%	127	1160	1.06%	0.91%	117
G2P	Charity shops, pets and other comparison	18	4.13%	4.19%	99	3500	3.21%	2.93%	109
	TOTAL	180	41.28%	40.88%	101	68170	62.48%	45.93%	136
	<i>Number (and %) of Service Uses</i>								
G3A	Restaurants, cafes, coffee bars, fast food & take-aways	54	12.39%	16.39%	76	9050	8.29%	11.82%	70
G3B	Hairdressers, beauty parlours & health centres	42	9.63%	9.44%	102	3120	2.86%	4.54%	63
G3C	Laundries & drycleaners	0	0.00%	0.92%	0	0	0.00%	0.41%	0
G3D	Travel agents	6	1.38%	1.13%	122	800	0.73%	0.69%	106
G3E	Banks & financial services (incl. accountants)	19	4.36%	4.25%	103	3680	3.37%	4.44%	76
G3F	Building societies	3	0.69%	0.58%	119	370	0.34%	0.47%	72
G3G	Estate agents & auctioneers	18	4.13%	3.85%	107	2440	2.24%	2.14%	104
	TOTAL	142	32.57%	36.56%	89	19460	17.84%	24.51%	73
	<i>Number (and %) of Miscellaneous Uses</i>								
G4A	Employment, careers, Post Offices and information	8	1.83%	1.15%	160	1290	1.18%	1.03%	115
G4B	Vacant units (all categories)	68	15.60%	12.60%	124	12720	11.66%	10.69%	109
	TOTAL	76	17.43%	13.75%	127	14010	12.84%	11.72%	110
	GRAND TOTAL	436	100%	100%		109110	100%	100%	

Source: Experian GOAD (July 2013)

APPENDIX B HOUSEHOLD SURVEY QUESTIONNAIRE

Wrexham Retail Assessment

Good afternoon/evening, I am from NEMS market research, and we are conducting a short survey in your area about shopping on behalf of Wrexham County Borough Council. Do you have time to answer some questions ? It will take about five minutes.

QA Are you the main shopper in your household?

- 1 Yes
- 2 No

IF 'YES' - CONTINUE INTERVIEW

IF 'NO' - ASK: "COULD I SPEAK TO THE PERSON WHO IS RESPONSIBLE FOR MOST OF THE SHOPPING?"

IF NOT AVAILABLE, THANK AND CLOSE THE INTERVIEW.

First we have a few questions about where you undertake food and groceries shopping. In answering these questions the location may be a supermarket, a smaller store or independent retailer, or a town centre, or could be the use of facilities such as the Internet.

Q01 Where did your household last undertake a main food and grocery shop?

DO NOT PROMPT, ONE ANSWER ONLY

IF 'OTHER' PLEASE SPECIFY STORE NAME AND LOCATION, IF 'MARKET STALL' PROBE FOR LOCATION

IF ANSWER 'WREXHAM TOWN CENTRE' PROMPT FOR 'EAGLES MEADOW' OR 'TOWN CENTRE'

#List A

Q02 And where did your household go the time before that for a main food and grocery shop (was it the same, or different, and if so, please specify)?

DO NOT PROMPT. ONE ANSWER ONLY.

IF 'OTHER' PLEASE SPECIFY STORE NAME AND LOCATION, IF 'MARKET STALL' PROBE FOR LOCATION

IF ANSWER 'WREXHAM TOWN CENTRE' PROMPT FOR 'EAGLES MEADOW' OR 'TOWN CENTRE'

#List A

Q03 Approximately how much money does your household normally spend on a main food and grocery shop?

DO NOT PROMPT. PLEASE WRITE IN TO THE NEAREST £

- 1 To the nearest £: (PLEASE WRITE IN)
- 2 (Don't know / varies)
- 3 (Refused)

Q04 How often does your household do a main food and grocery shop?

DO NOT READ OUT. ONE ANSWER ONLY

- 1 More than once a week
- 2 Once a week
- 3 Once a fortnight
- 4 Once a month
- 5 Less often
- 6 (Don't know / varies / no particular pattern)

Q05 Where did your household last undertake a 'top-up' food and grocery shop?

DO NOT READ OUT. ONE ANSWER ONLY

IF 'OTHER' PLEASE SPECIFY STORE NAME AND LOCATION, IF 'MARKET STALL' PROBE FOR LOCATION

IF ANSWER 'WREXHAM TOWN CENTRE' PROMPT FOR 'EAGLES MEADOW' OR 'TOWN CENTRE'

#List A

THOSE WHO DO TOP UP FOOD SHOPPING, OTHERS GOTO Q13

Q06 And where did your household shop the time before that for a 'top-up' food and grocery shop (was it the same, or different, and if different, please specify)?

DO NOT READ OUT. ONE ANSWER ONLY

IF 'OTHER' PLEASE SPECIFY STORE NAME AND LOCATION, IF 'MARKET STALL' PROBE FOR LOCATION

IF ANSWER 'WREXHAM TOWN CENTRE' PROMPT FOR 'EAGLES MEADOW' OR 'TOWN CENTRE'

#List A

Q07 Approximately how much money does your household normally spend on a 'top-up' food and grocery shop?

DO NOT PROMPT. PLEASE WRITE IN TO THE NEAREST £

- 1 To the nearest £: (PLEASE WRITE IN)
- 2 (Don't know / varies)
- 3 (Refused)

Q08 How often does your household normally do its top-up food shopping?

DO NOT READ OUT. ONE ANSWER ONLY

- 1 Daily
- 2 More than 3 times a week
- 3 Two or three times a week
- 4 Once a week
- 5 Once a fortnight
- 6 Less often
- 7 (Don't know / varies / no particular pattern)

[IF RESPONDENT GIVES SUPERMARKET LOCATIONS IN EACH OF Q01, Q02, Q05 AND Q06 THEN ASK Q09,
IF NOT GO TO Q13]

Q09 Does your household also spend money on food and groceries in small shops?

DO NOT READ OUT. ONE ANSWER ONLY

- 1 Yes
- 2 No

GO TO Q10
GO TO Q13

Q10 Where are these small shops located?

DO NOT READ OUT. ONE ANSWER ONLY.

IF ANSWER 'WREXHAM TOWN CENTRE' PROMPT FOR 'EAGLES MEADOW' OR 'TOWN CENTRE'

#List B

Q11 Approximately how much money does your household spend on food and groceries on a typical trip to these small shops?

DO NOT PROMPT. PLEASE WRITE IN TO THE NEAREST £

- 1 To the nearest £: (PLEASE WRITE IN)
- 2 (Don't know / varies)
- 3 (Refused)

Q12 How often do you normally visit these other small shops for food and groceries shopping?

DO NOT READ OUT. ONE ANSWER ONLY

- 1 Daily
- 2 More than 3 times a week
- 3 Two or three times a week
- 4 Once a week
- 5 Once a fortnight
- 6 Less often
- 7 (Don't know / varies / no particular pattern)

We now have a few questions about where you go for non-food shopping. In answering these questions the location may be a town centre, a retail park, or a free standing store, or could be facilities such as the Internet, TV / interactive shopping or use of a home catalogue. In the following questions, please don't include trips made for the purposes of christmas shopping.

Q13 So, speaking as an individual, can you tell me where you last made a purchase of clothes or shoes?

DO NOT PROMPT. ONE ANSWER ONLY.

IF ANSWER 'WREXHAM TOWN CENTRE' PROMPT FOR 'EAGLES MEADOW' OR 'TOWN CENTRE'

#List C

Not those who 'Don't do this type of shopping' or 'Don't know / can't remember' at Q13

Q14 And the time before that, where did you go to make a purchase of clothes or shoes?

DO NOT PROMPT. ONE ANSWER ONLY.

IF ANSWER 'WREXHAM TOWN CENTRE' PROMPT FOR 'EAGLES MEADOW' OR 'TOWN CENTRE'

#List C

Q15 Now can you tell me where your household last made a purchase of furniture, carpets, or soft household furnishings?

DO NOT PROMPT. ONE ANSWER ONLY.

IF ANSWER 'WREXHAM TOWN CENTRE' PROMPT FOR 'EAGLES MEADOW' OR 'TOWN CENTRE'

#List C

Not those who 'Don't do this type of shopping' or 'Don't know / can't remember' at Q15

Q16 And the time before that, where did your household go to make a purchase of furniture, carpets, or soft household furnishings?

DO NOT PROMPT. ONE ANSWER ONLY.

IF ANSWER 'WREXHAM TOWN CENTRE' PROMPT FOR 'EAGLES MEADOW' OR 'TOWN CENTRE'

#List C

Q17 Now can you tell me where your household last made a purchase of DIY and decorating goods?

DO NOT PROMPT. ONE ANSWER ONLY.

IF ANSWER 'WREXHAM TOWN CENTRE' PROMPT FOR 'EAGLES MEADOW' OR 'TOWN CENTRE'

#List C

Not those who 'Don't do this type of shopping' or 'Don't know / can't remember' at Q17

Q18 And the time before that, where did your household go to make a purchase of DIY and decorating goods?

DO NOT PROMPT. ONE ANSWER ONLY.

IF ANSWER 'WREXHAM TOWN CENTRE' PROMPT FOR 'EAGLES MEADOW' OR 'TOWN CENTRE'

#List C

Q19 Can you tell me where you or your household last made a purchase of electrical items such as TVs, DVD players, digital cameras, MP3 players, mobile phones, computers or domestic appliances, such as washing machines, fridges or cookers?

DO NOT PROMPT. ONE ANSWER ONLY.

IF ANSWER 'WREXHAM TOWN CENTRE' PROMPT FOR 'EAGLES MEADOW' OR 'TOWN CENTRE'

#List C

Not those who 'Don't do this type of shopping' or 'Don't know / can't remember' at Q19

- Q20 And the time before that, where you or your household last made a purchase of electrical items such as TVs, DVD players, digital cameras, MP3 players, mobile phones, computers or domestic appliances, such as washing machines, fridges or cookers?
DO NOT PROMPT. ONE ANSWER ONLY.
IF ANSWER 'WREXHAM TOWN CENTRE' PROMPT FOR 'EAGLES MEADOW' OR 'TOWN CENTRE'

#List C

- Q21 Can you tell me where you or your household last made a purchase of health, beauty or chemist items?

DO NOT PROMPT. ONE ANSWER ONLY.

IF ANSWER 'WREXHAM TOWN CENTRE' PROMPT FOR 'EAGLES MEADOW' OR 'TOWN CENTRE'

#List C

Not those who 'Don't do this type of shopping' or 'Don't know / can't remember' at Q21

- Q22 And the time before that, where did you or your household go to make a purchase of health, beauty or chemist items?
DO NOT PROMPT. ONE ANSWER ONLY.
IF ANSWER 'WREXHAM TOWN CENTRE' PROMPT FOR 'EAGLES MEADOW' OR 'TOWN CENTRE'

#List C

- Q23 Can you tell me where you or your household last made a purchase of recreational goods such as sports equipment, bicycles, musical instruments or toys?
DO NOT PROMPT. ONE ANSWER ONLY.

IF ANSWER 'WREXHAM TOWN CENTRE' PROMPT FOR 'EAGLES MEADOW' OR 'TOWN CENTRE'

#List C

Not those who 'Don't do this type of shopping' or 'Don't know / can't remember' at Q23

- Q24 And the time before that, where did you or your household go to make a purchase of recreational goods such as sports equipment, bicycles, musical instruments or toys?
DO NOT PROMPT. ONE ANSWER ONLY.
IF ANSWER 'WREXHAM TOWN CENTRE' PROMPT FOR 'EAGLES MEADOW' OR 'TOWN CENTRE'

#List C

- Q25 Can you tell me where you or your household last made a purchase of other non-food items such as books, CDs, jewellery or china and glass items?
DO NOT PROMPT. ONE ANSWER ONLY.

IF ANSWER 'WREXHAM TOWN CENTRE' PROMPT FOR 'EAGLES MEADOW' OR 'TOWN CENTRE'

#List C

Not those who 'Don't do this type of shopping' or 'Don't know / can't remember' at Q25

- Q26 And the time before that, where did you or your household go to make a purchase of other non-food items such as books, CDs, jewellery or china and glass items?
DO NOT PROMPT. ONE ANSWER ONLY.
IF ANSWER 'WREXHAM TOWN CENTRE' PROMPT FOR 'EAGLES MEADOW' OR 'TOWN CENTRE'

#List C

- Q27 Do you use the Internet, a home catalogue, or TV / Interactive shopping to undertake any of the following food or non-food shopping?

READ OUT. CAN BE MULTICODED

- | | | |
|---|---|------------|
| 1 | Food and Groceries | GO TO Q28A |
| 2 | Clothes and Shoes | GO TO Q28B |
| 3 | Furniture, Carpets, Soft Household Furnishings | GO TO Q28C |
| 4 | DIY and Decorating Goods | GO TO Q28D |
| 5 | Domestic Appliances and Electrical Items | GO TO Q28E |
| 6 | Health, Beauty and Chemist Items | GO TO Q28F |
| 7 | Recreational Goods, such as sports equipment, bicycles, musical instruments and toys | GO TO Q28G |
| 9 | Other Non-Food Items such as books, CDs, jewellery or china and glass items (PLEASE WRITE IN) | GO TO Q28H |
| A | (Don't use the Internet for shopping) | GO TO Q29 |

- Q28A What proportion of your overall food and grocery spend is via the Internet, a home catalogue, or TV / Interactive shopping?

WRITE IN THE PERCENTAGE

- 1 %age (PLEASE WRITE IN)
2 (Don't know / varies)

- Q28B What proportion of your overall clothing and shoes spend is via the Internet, a home catalogue, or TV / Interactive shopping?

WRITE IN THE PERCENTAGE

- 1 %age (PLEASE WRITE IN)
2 (Don't know / varies)

- Q28C What proportion of your overall furniture, carpets, soft household furnishing spend is via the Internet, a home catalogue, or TV / Interactive shopping?

WRITE IN THE PERCENTAGE

- 1 %age (PLEASE WRITE IN)

Q28D What proportion of your overall DIY and decorating goods spend is via the Internet, a home catalogue, or TV / Interactive shopping?

WRITE IN THE PERCENTAGE

- 1 %age (PLEASE WRITE IN)
- 2 (Don't know / varies)

Q28E What proportion of your overall domestic appliances and electrical items spend is via the Internet, a home catalogue, or TV / Interactive shopping?

WRITE IN THE PERCENTAGE

- 1 %age (PLEASE WRITE IN)
- 2 (Don't know / varies)

Q28F What proportion of your overall health, beauty and chemist items spend is via the Internet, a home catalogue, or TV / Interactive shopping?

WRITE IN THE PERCENTAGE

- 1 %age (PLEASE WRITE IN)
- 2 (Don't know / varies)

Q28G What proportion of your overall recreational goods spend is via the Internet, a home catalogue, or TV / Interactive shopping?

WRITE IN THE PERCENTAGE

- 1 %age (PLEASE WRITE IN)
- 2 (Don't know / varies)

Q28H What proportion of your overall other non-food items spend is via the Internet, a home catalogue, or TV / Interactive shopping?

WRITE IN THE PERCENTAGE

- 1 %age (PLEASE WRITE IN)
- 2 (Don't know / varies)

Q29 Do you visit Wrexham Town Centre?

- Yes
No

GO TO Q30
GO TO GEN

Q30 For what reasons do you visit Wrexham Town Centre?

DO NOT READ OUT. CAN BE MULTICODED.

- 1 Visiting town centre shops
- 2 Visiting bank a or other services (e.g. hairdressers, estate agents or post office)
- 3 Visiting a café or restaurant
- 4 Visiting a pub, bar or nightclub
- 5 Visiting a commercial leisure facility (e.g. cinema, theatre or gym)
- 6 Visiting a public facility (e.g. swimming pool, library or Council offices)
- 7 Work in the town centre
- 8 Attending school, college or university in the town centre
- 9 Other (PLEASE WRITE IN)
- A (Don't know / varies)

Q31 What do you like about Wrexham Town Centre?

DO NOT PROMPT. CODE UP TO 4 RESPONSES.

- 1 Appearance or character of the town centre
- 2 Cleanliness of the town centre
- 3 Convenient to home
- 4 Convenient to work
- 5 Good / cheap parking
- 6 Habit / Always used it / Familiar
- 7 Lower prices
- 8 Pedestrian Links
- 9 Public Transport or Cycle Links
- A Quality of shops
- B Range of shops
- C Range or quality of leisure facilities (e.g. cinema, gym etc)
- D Range or quality of places to eat
- E Range or quality of pubs or bars
- F Range or quality of services (e.g. banks, hairdressers etc)
- G Safety of the town centre
- H Other (PLEASE WRITE IN)
- I Nothing
- J (Don't know)

Q32 What do you dislike about Wrexham Town Centre?

DO NOT PROMPT. CODE UP TO 4 RESPONSES.

- 1 Appearance or character of the town centre
- 2 Cleanliness of the town centre
- 3 Difficult / expensive car parking
- 4 It is expensive
- 5 Pedestrian Links
- 6 Poor quality of shops
- 7 Poor range of shops
- 8 Poor range or quality of leisure facilities (e.g. cinema, gym etc)
- 9 Poor range or quality of places to eat
- A Poor range or quality of pubs or bars
- B Poor range or quality of services (e.g. banks, hairdressers etc)
- C Public Transport or Cycle Links
- D Safety of the town centre
- E Other (PLEASE WRITE IN)
- F Nothing
- G (Don't know)

GEN Gender of respondent

CODE FROM OBSERVATION

- 1 Male
- 2 Female

AGE Could I ask how old you are please?

ONE ANSWER ONLY. DO NOT READ OUT

- 1 18 to 24
- 2 25 to 34
- 3 35 to 44
- 4 45 to 54
- 5 55 to 64
- 6 65 +
- 7 (Refused)

OCC What is the occupation of the chief income earner in your household?

(IF RETIRED, ASK PREVIOUS OCCUPATION)

- 1 Occupation / job description (PLEASE WRITE IN)
- 2 Retired - Basic State Pension
- 3 (Refused)

CAR How many cars does your household own or have the use of?

ONE ANSWER ONLY. DO NOT READ OUT

- 1 None
- 2 One
- 3 Two
- 4 Three or more
- 5 (Refused)

WOR Which of the following best describes the chief wage earner of your household's current employment situation?

READ OUT. ONE ANSWER ONLY

- 1 Working full time
- 2 Working part time
- 3 Unemployed
- 4 Retired
- 5 A housewife
- 6 A student
- 7 Other (PLEASE WRITE IN)
- 8 (Refused)

Thank & close

APPENDIX C QUANTITATIVE ASSESSMENT OF EXPENDITURE CAPACITY

Table 1 — Population of study area to 2028

		Wrexham Catchment										Overall total persons
		Zone 1 persons	Zone 2 persons	Zone 3 persons	Zone 4 persons	Zone 5 persons	Zone 6 persons	Zone 7 persons	Zone 8 persons	Zone 9 persons	Zone 10 persons	
2012	actual	27,078	25,282	23,798	24,067	24,444	22,057	19,643	30,687	21,560	23,605	242,221
2014	estimate	27,588	25,758	24,246	24,520	24,904	22,274	19,811	30,872	21,716	23,902	245,592
2018	estimate	28,607	26,709	25,142	25,426	25,824	22,735	20,173	31,218	22,040	24,524	252,397
2023	estimate	29,804	27,827	26,194	26,490	26,905	23,364	20,674	31,515	22,443	25,253	260,469
2028	estimate	30,885	28,837	27,144	27,451	27,881	24,008	21,182	31,684	22,777	25,917	267,765

Baseline (2012) data source: Experian Micromarketer
Population projections sourced from Experian Micromarketer

Table 2a — Comparison goods expenditure forecasts (per capita)

		Wrexham Catchment										
		Zone 1 £	Zone 2 £	Zone 3 £	Zone 4 £	Zone 5 £	Zone 6 £	Zone 7 £	Zone 8 £	Zone 9 £	Zone 10 £	
2012	actual	2,642	3,024	2,628	2,636	2,350	2,920	2,598	3,335	2,890	2,619	
2014	estimate	2,811	3,218	2,796	2,805	2,500	3,107	2,764	3,548	3,075	2,787	
2018	estimate	3,136	3,590	3,120	3,129	2,790	3,466	3,084	3,959	3,431	3,109	
2023	estimate	3,625	4,149	3,606	3,617	3,225	4,007	3,565	4,576	3,966	3,594	
2028	estimate	4,182	4,787	4,160	4,173	3,720	4,622	4,113	5,279	4,575	4,146	

Applied expenditure growth rates:

2012-13	3.10%	Experian Retail Planner 11, Figure 1b
2013 -14	3.20%	Experian Retail Planner 11, Figure 1a
2014 -15	2.30%	Experian Retail Planner 11, Figure 1a
2015 -16	2.80%	Experian Retail Planner 11, Figure 1a
2016 - 20	3.00%	Experian Retail Planner 11, Figure 1a
2021+	2.90%	Experian Retail Planner 11, Figure 1a

Baseline (2012) data source: Experian Micromarketer
Growth rates source: Experian Retail Planner 11

Table 2b — Convenience goods expenditure forecasts (per capita)

		Wrexham Catchment										
		Zone 1 £	Zone 2 £	Zone 3 £	Zone 4 £	Zone 5 £	Zone 6 £	Zone 7 £	Zone 8 £	Zone 9 £	Zone 10 £	
2012	actual	2,003	2,152	1,980	1,997	1,891	2,162	2,000	2,269	2,316	2,089	
2014	estimate	1,979	2,126	1,956	1,973	1,868	2,136	1,976	2,242	2,288	2,064	
2018	estimate	2,007	2,156	1,984	2,001	1,895	2,166	2,004	2,273	2,320	2,093	
2023	estimate	2,088	2,244	2,064	2,082	1,972	2,254	2,085	2,366	2,415	2,178	
2028	estimate	2,173	2,335	2,148	2,167	2,052	2,346	2,170	2,462	2,513	2,267	

Applied expenditure growth rates:

2012-13	-0.60%	Experian Retail Planner 11, Figure 1b
2013-14	-0.60%	Experian Retail Planner 11, Figure 1a
2014-15	-0.30%	Experian Retail Planner 11, Figure 1a
2015-16	0.10%	Experian Retail Planner 11, Figure 1a
2016-20	0.80%	Experian Retail Planner 11, Figure 1a
2021+	0.80%	Experian Retail Planner 11, Figure 1a

Baseline (2012) data source: Experian Micromarketer
Growth rates source: Experian Retail Planner 11

Table 3a — Comparison goods expenditure forecasts (total)

		Wrexham Catchment										
		Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Zone 6 £m	Zone 7 £m	Zone 8 £m	Zone 9 £m	Zone 10 £m	Overall total £m
2014	Base	77.55	82.88	67.80	68.77	62.27	69.20	54.76	109.55	66.78	66.61	726.16
	less SFT	14.20	12.50	12.59	15.61	10.34	15.02	12.24	15.58	13.13	12.68	133.87
	Residual	63.35	70.38	55.21	53.16	51.93	54.19	42.52	93.97	53.64	53.93	592.29
2018	Base	89.72	95.88	78.43	79.56	72.04	78.81	62.21	123.59	75.61	76.24	832.10
	less SFT	20.45	18.00	18.13	22.48	14.90	21.29	17.31	21.88	18.51	18.07	191.04
	Residual	69.26	77.88	60.30	57.08	57.14	57.51	44.90	101.71	57.10	58.17	641.06
2023	Base	108.05	115.47	94.46	95.81	86.76	93.61	73.70	144.22	89.00	90.75	991.82
	less SFT	27.19	23.93	24.10	29.88	19.80	27.91	22.63	28.18	24.05	23.74	251.41
	Residual	80.86	91.54	70.36	65.93	66.96	65.70	51.07	116.03	64.95	67.01	740.41
2028	Base	129.17	138.04	112.92	114.55	103.72	110.97	87.11	167.27	104.20	107.45	1175.40
	less SFT	32.50	28.60	28.81	35.73	23.67	33.09	26.75	32.69	28.16	28.11	298.10
	Residual	96.67	109.44	84.11	78.82	80.05	77.88	60.36	134.58	76.04	79.34	877.30
Total expenditure growth excluding SFT												285.01

Source: Table 1 applied to Table 2a

Reduction for Special Forms of Trading (e.g. online shopping) applied as follows:

		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10
2014	HHS SFT %ages	18.31%	15.08%	18.56%	22.70%	16.61%	21.70%	22.35%	14.22%	19.66%	19.04%
2018		22.80%	18.78%	23.12%	28.26%	20.68%	27.02%	27.83%	17.71%	24.48%	23.70%
2023		25.16%	20.72%	25.51%	31.19%	22.82%	29.82%	30.71%	19.54%	27.02%	26.16%
2028		25.16%	20.72%	25.51%	31.19%	22.82%	29.82%	30.71%	19.54%	27.02%	26.16%

Experian SFT Figures	SFT % Growth	
2014	15.50%	2014-2018 24.52%
2018	19.30%	2018-2023 10.36%
2023	21.30%	2023-2028 0.00%
2028	21.30%	

Source: Experian Retail Planner 11, Estimated and forecast market share of non-store retail sales (adjusted for SFT sales from stores)

Table 3b — Convenience goods expenditure forecasts (total)

		Wrexham Catchment										
		Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Zone 6 £m	Zone 7 £m	Zone 8 £m	Zone 9 £m	Zone 10 £m	Overall total £m
2014	Base	54.60	54.77	47.43	48.38	46.53	47.58	39.15	69.21	49.69	49.33	506.7
	less SFT	2.64	1.50	0.87	2.53	3.61	2.41	0.26	2.08	2.03	3.52	21.5
	Residual	51.96	53.27	46.56	45.85	42.92	45.17	38.89	67.13	47.66	45.81	485.2
2018	Base	57.41	57.59	49.87	50.87	48.93	49.25	40.42	70.97	51.14	51.33	527.8
	less SFT	3.77	2.15	1.24	3.61	5.16	3.39	0.37	2.90	2.84	4.98	30.4
	Residual	53.64	55.44	48.63	47.26	43.77	45.86	40.05	68.06	48.30	46.35	497.4
2023	Base	62.24	62.44	54.07	55.16	53.05	52.67	43.11	74.56	54.19	55.00	566.5
	less SFT	5.26	3.00	1.74	5.05	7.21	4.67	0.51	3.93	3.88	6.87	42.1
	Residual	56.98	59.44	52.34	50.11	45.84	48.00	42.60	70.62	50.32	48.13	524.4
2028	Base	67.12	67.33	58.31	59.48	57.20	56.32	45.96	78.00	57.24	58.74	605.7
	less SFT	6.27	3.57	2.07	6.02	8.59	5.52	0.60	4.55	4.53	8.11	49.8
	Residual	60.85	63.76	56.24	53.46	48.61	50.80	45.37	73.46	52.71	50.63	555.9
Total expenditure growth excluding SFT												70.7

Reduction for Special Forms of Trading (e.g. online shopping) applied as follows:

		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10
2014	HHS SFT %ages	4.83%	2.74%	1.83%	5.23%	7.76%	5.07%	0.67%	3.01%	4.09%	7.13%
2018		6.56%	3.73%	2.49%	7.10%	10.55%	6.88%	0.91%	4.09%	5.55%	9.69%
2023		8.45%	4.80%	3.21%	9.15%	13.58%	8.87%	1.17%	5.27%	7.15%	12.49%
2028		9.34%	5.31%	3.55%	10.12%	15.02%	9.80%	1.30%	5.83%	7.91%	13.80%

Experian SFT Figures	SFT % Growth	
2014	9.20%	2014-2018 35.9%
2018	12.50%	2018-2023 28.8%
2023	16.10%	2023-2028 10.6%
2028	17.80%	

Source: Experian Retail Planner 11, Estimated and forecast market share of non-store retail sales

Table 1a — Population of study area to 2028 (Lower population scenario)

		Wrexham Catchment										Overall total persons
		Zone 1 persons	Zone 2 persons	Zone 3 persons	Zone 4 persons	Zone 5 persons	Zone 6 persons	Zone 7 persons	Zone 8 persons	Zone 9 persons	Zone 10 persons	
2012	actual	27,078	25,282	23,798	24,067	24,444	22,057	19,643	30,687	21,560	23,605	242,221
2014	estimate	27,551	25,723	24,213	24,487	24,871	22,274	19,811	30,872	21,716	23,902	245,420
2018	estimate	28,444	26,557	24,998	25,281	25,677	22,735	20,173	31,218	22,040	24,524	251,647
2023	estimate	29,488	27,532	25,916	26,209	26,619	23,364	20,674	31,515	22,443	25,253	259,013
2028	estimate	30,420	28,403	26,735	27,038	27,461	24,008	21,182	31,684	22,777	25,917	265,625

Baseline (2012) data source: Experian Micromarketer

Population projections sourced from Experian Micromarketer

Table 2a(i) — Comparison goods expenditure forecasts (per capita)

		Wrexham Catchment										
		Zone 1 £	Zone 2 £	Zone 3 £	Zone 4 £	Zone 5 £	Zone 6 £	Zone 7 £	Zone 8 £	Zone 9 £	Zone 10 £	
2012	actual	2,642	3,024	2,628	2,636	2,350	2,920	2,598	3,335	2,890	2,619	
2014	estimate	2,811	3,218	2,796	2,805	2,500	3,107	2,764	3,548	3,075	2,787	
2018	estimate	3,136	3,590	3,120	3,129	2,790	3,466	3,084	3,959	3,431	3,109	
2023	estimate	3,625	4,149	3,606	3,617	3,225	4,007	3,565	4,576	3,966	3,594	
2028	estimate	4,182	4,787	4,160	4,173	3,720	4,622	4,113	5,279	4,575	4,146	

Applied expenditure growth rates:

2012-13	3.10%	Experian Retail Planner 11, Figure 1b
2013 -14	3.20%	Experian Retail Planner 11, Figure 1a
2014 -15	2.30%	Experian Retail Planner 11, Figure 1a
2015 -16	2.80%	Experian Retail Planner 11, Figure 1a
2016 - 20	3.00%	Experian Retail Planner 11, Figure 1a
2021+	2.90%	Experian Retail Planner 11, Figure 1a

Baseline (2012) data source: Experian Micromarketer

Growth rates source: Experian Retail Planner 11

Table 2b(i) — Convenience goods expenditure forecasts (per capita)

		Wrexham Catchment										
		Zone 1 £	Zone 2 £	Zone 3 £	Zone 4 £	Zone 5 £	Zone 6 £	Zone 7 £	Zone 8 £	Zone 9 £	Zone 10 £	
2012	actual	2,003	2,152	1,980	1,997	1,891	2,162	2,000	2,269	2,316	2,089	
2014	estimate	1,979	2,126	1,956	1,973	1,868	2,136	1,976	2,242	2,288	2,064	
2018	estimate	2,007	2,156	1,984	2,001	1,895	2,166	2,004	2,273	2,320	2,093	
2023	estimate	2,088	2,244	2,064	2,082	1,972	2,254	2,085	2,366	2,415	2,178	
2028	estimate	2,173	2,335	2,148	2,167	2,052	2,346	2,170	2,462	2,513	2,267	

Applied expenditure growth rates:

2012-13	-0.60%	Experian Retail Planner 11, Figure 1b
2013-14	-0.60%	Experian Retail Planner 11, Figure 1a
2014-15	-0.30%	Experian Retail Planner 11, Figure 1a
2015-16	0.10%	Experian Retail Planner 11, Figure 1a
2016-20	0.80%	Experian Retail Planner 11, Figure 1a
2021+	0.80%	Experian Retail Planner 11, Figure 1a

Baseline (2012) data source: Experian Micromarketer

Growth rates source: Experian Retail Planner 11

Table 3a(i) — Comparison goods expenditure forecasts (total)

		Wrexham Catchment										
		Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Zone 6 £m	Zone 7 £m	Zone 8 £m	Zone 9 £m	Zone 10 £m	Overall total £m
2014	Base	77.45	82.76	67.70	68.68	62.19	69.20	54.76	109.55	66.78	66.61	725.67
	less SFT	14.18	12.48	12.57	15.59	10.33	15.02	12.24	15.58	13.13	12.68	133.79
	Residual	63.27	70.28	55.14	53.09	51.86	54.19	42.52	93.97	53.64	53.93	591.89
2018	Base	89.21	95.33	77.99	79.11	71.63	78.81	62.21	123.59	75.61	76.24	829.73
	less SFT	20.34	17.90	18.03	22.36	14.81	21.29	17.31	21.88	18.51	18.07	190.51
	Residual	68.87	77.43	59.96	56.75	56.82	57.51	44.90	101.71	57.10	58.17	639.23
2023	Base	106.90	114.24	93.45	94.80	85.84	93.61	73.70	144.22	89.00	90.75	986.51
	less SFT	26.90	23.67	23.84	29.57	19.59	27.91	22.63	28.18	24.05	23.74	250.08
	Residual	80.00	90.57	69.61	65.23	66.25	65.70	51.07	116.03	64.95	67.01	736.42
2028	Base	127.23	135.96	111.22	112.82	102.16	110.97	87.11	167.27	104.20	107.45	1166.39
	less SFT	32.01	28.17	28.37	35.19	23.31	33.09	26.75	32.69	28.16	28.11	295.85
	Residual	95.21	107.79	82.85	77.63	78.84	77.88	60.36	134.58	76.04	79.34	870.54
Total expenditure growth excluding SFT												278.65

Source: Table 1 applied to Table 2a

Source: Experian Retail Planner 10, Estimated and forecast market share of non-store retail sales (adjusted for SFT sales from stores)

Reduction for Special Forms of Trading (e.g. online shopping) applied as follows:

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10
2013 HHS SFT %ages	18.31%	15.08%	18.56%	22.70%	16.61%	21.70%	22.35%	14.22%	19.66%	19.04%
2016	22.80%	18.78%	23.12%	28.26%	20.68%	27.02%	27.83%	17.71%	24.48%	23.70%
2021	25.16%	20.72%	25.51%	31.19%	22.82%	29.82%	30.71%	19.54%	27.02%	26.16%
2026	25.16%	20.72%	25.51%	31.19%	22.82%	29.82%	30.71%	19.54%	27.02%	26.16%

Experian SFT Figures		SFT % Growth	
2014	15.50%	2014-2018	24.52%
2018	19.30%	2018-2023	10.36%
2023	21.30%	2023-2028	0.00%
2028	21.30%		

Source: Experian Retail Planner 11, Estimated and forecast market share of non-store retail sales (adjusted for SFT sales from stores)

Table 3b(i) — Convenience goods expenditure forecasts (total)

		Wrexham Catchment										
		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Overall total
		£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m
2014	Base	54.52	54.69	47.37	48.32	46.47	47.58	39.15	69.21	49.69	49.33	506.3
	less SFT	2.63	1.50	0.87	2.53	3.61	2.41	0.26	2.08	2.03	3.52	21.4
	Residual	51.89	53.19	46.50	45.79	42.86	45.17	38.89	67.13	47.66	45.81	484.9
2018	Base	57.08	57.26	49.59	50.58	48.65	49.25	40.42	70.97	51.14	51.33	526.3
	less SFT	3.74	2.13	1.24	3.59	5.13	3.39	0.37	2.90	2.84	4.98	30.3
	Residual	53.34	55.12	48.36	46.99	43.52	45.86	40.05	68.06	48.30	46.35	495.9
2023	Base	61.58	61.77	53.50	54.57	52.48	52.67	43.11	74.56	54.19	55.00	563.4
	less SFT	5.20	2.97	1.72	4.99	7.13	4.67	0.51	3.93	3.88	6.87	41.9
	Residual	56.38	58.81	51.78	49.58	45.35	48.00	42.60	70.62	50.32	48.13	521.6
2028	Base	66.11	66.32	57.44	58.58	56.34	56.32	45.96	78.00	57.24	58.74	601.1
	less SFT	6.18	3.52	2.04	5.93	8.46	5.52	0.60	4.55	4.53	8.11	49.4
	Residual	59.94	62.80	55.40	52.66	47.88	50.80	45.37	73.46	52.71	50.63	551.6
Total expenditure growth excluding SFT												66.7

Reduction for Special Forms of Trading (e.g. online shopping) applied as follows:

Reduction for Special Forms of Trading (e.g. online shopping) applied as follows:

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10
2014 HHS SFT %ages	4.83%	2.74%	1.83%	5.23%	7.76%	5.07%	0.67%	3.01%	4.09%	7.13%
2018	6.56%	3.73%	2.49%	7.10%	10.55%	6.88%	0.91%	4.09%	5.55%	9.69%
2023	8.45%	4.80%	3.21%	9.15%	13.58%	8.87%	1.17%	5.27%	7.15%	12.49%
2028	9.34%	5.31%	3.55%	10.12%	15.02%	9.80%	1.30%	5.83%	7.91%	13.80%

Experian SFT Figures		SFT % Growth	
2014	9.20%	2014-2018	35.9%
2018	12.50%	2018-2023	28.8%
2023	16.10%	2023-2028	10.6%
2028	17.80%		

Source: Experian Retail Planner 11, Estimated and forecast market share of non-store retail sales

Table 1b — Population of study area to 2028 (Lower population scenario)

		Wrexham Catchment										Overall total persons
		Zone 1 persons	Zone 2 persons	Zone 3 persons	Zone 4 persons	Zone 5 persons	Zone 6 persons	Zone 7 persons	Zone 8 persons	Zone 9 persons	Zone 10 persons	
2012	actual	27,078	25,282	23,798	24,067	24,444	22,057	19,643	30,687	21,560	23,605	242,221
2014	estimate	27,605	25,774	24,261	24,536	24,920	22,274	19,811	30,872	21,716	23,902	245,672
2018	estimate	28,687	26,784	25,212	25,497	25,896	22,735	20,173	31,218	22,040	24,524	252,767
2023	estimate	29,985	27,996	26,352	26,650	27,068	23,364	20,674	31,515	22,443	25,253	261,300
2028	estimate	31,223	29,152	27,441	27,751	28,186	24,008	21,182	31,684	22,777	25,917	269,321

Baseline (2012) data source: Experian Micromarketer

Population projections sourced from Experian Micromarketer

Table 2a(ii) — Comparison goods expenditure forecasts (per capita)

		Wrexham Catchment									
		Zone 1 £	Zone 2 £	Zone 3 £	Zone 4 £	Zone 5 £	Zone 6 £	Zone 7 £	Zone 8 £	Zone 9 £	Zone 10 £
2012	actual	2,642	3,024	2,628	2,636	2,350	2,920	2,598	3,335	2,890	2,619
2014	estimate	2,811	3,218	2,796	2,805	2,500	3,107	2,764	3,548	3,075	2,787
2018	estimate	3,136	3,590	3,120	3,129	2,790	3,466	3,084	3,959	3,431	3,109
2023	estimate	3,625	4,149	3,606	3,617	3,225	4,007	3,565	4,576	3,966	3,594
2028	estimate	4,182	4,787	4,160	4,173	3,720	4,622	4,113	5,279	4,575	4,146

Applied expenditure growth rates:

2012-13	3.10%	Experian Retail Planner 11, Figure 1b
2013-14	3.20%	Experian Retail Planner 11, Figure 1a
2014-15	2.30%	Experian Retail Planner 11, Figure 1a
2015-16	2.80%	Experian Retail Planner 11, Figure 1a
2016-20	3.00%	Experian Retail Planner 11, Figure 1a
2021+	2.90%	Experian Retail Planner 11, Figure 1a

Baseline (2012) data source: Experian Micromarketer

Growth rates source: Experian Retail Planner 11

Table 2b(ii) — Convenience goods expenditure forecasts (per capita)

		Wrexham Catchment									
		Zone 1 £	Zone 2 £	Zone 3 £	Zone 4 £	Zone 5 £	Zone 6 £	Zone 7 £	Zone 8 £	Zone 9 £	Zone 10 £
2012	actual	2,003	2,152	1,980	1,997	1,891	2,162	2,000	2,269	2,316	2,089
2014	estimate	1,979	2,126	1,956	1,973	1,868	2,136	1,976	2,242	2,288	2,064
2018	estimate	2,007	2,156	1,984	2,001	1,895	2,166	2,004	2,273	2,320	2,093
2023	estimate	2,088	2,244	2,064	2,082	1,972	2,254	2,085	2,366	2,415	2,178
2028	estimate	2,173	2,335	2,148	2,167	2,052	2,346	2,170	2,462	2,513	2,267

Applied expenditure growth rates:

2012-13	-0.60%	Experian Retail Planner 11, Figure 1b
2013-14	-0.60%	Experian Retail Planner 11, Figure 1a
2014-15	-0.30%	Experian Retail Planner 11, Figure 1a
2015-16	0.10%	Experian Retail Planner 11, Figure 1a
2016-20	0.80%	Experian Retail Planner 11, Figure 1a
2021+	0.80%	Experian Retail Planner 11, Figure 1a

Baseline (2012) data source: Experian Micromarketer

Growth rates source: Experian Retail Planner 11

Table 3a(ii) — Comparison goods expenditure forecasts (total)

		Wrexham Catchment										
		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Overall total
		£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m
2014	Base	77.60	82.93	67.84	68.81	62.31	69.20	54.76	109.55	66.78	66.61	726.39
	less SFT	14.21	12.51	12.59	15.62	10.35	15.02	12.24	15.58	13.13	12.68	133.91
	Residual	63.39	70.42	55.25	53.20	51.96	54.19	42.52	93.97	53.64	53.93	592.47
2018	Base	89.97	96.15	78.65	79.78	72.24	78.81	62.21	123.59	75.61	76.24	833.26
	less SFT	20.51	18.05	18.18	22.55	14.94	21.29	17.31	21.88	18.51	18.07	191.30
	Residual	69.46	78.10	60.47	57.24	57.30	57.51	44.90	101.71	57.10	58.17	641.96
2023	Base	108.70	116.17	95.03	96.39	87.28	93.61	73.70	144.22	89.00	90.75	994.85
	less SFT	27.35	24.07	24.24	30.06	19.92	27.91	22.63	28.18	24.05	23.74	252.16
	Residual	81.35	92.09	70.79	66.33	67.36	65.70	51.07	116.03	64.95	67.01	742.68
2028	Base	130.58	139.55	114.16	115.80	104.85	110.97	87.11	167.27	104.20	107.45	1181.95
	less SFT	32.86	28.92	29.12	36.12	23.93	33.09	26.75	32.69	28.16	28.11	299.73
	Residual	97.73	110.63	85.04	79.68	80.92	77.88	60.36	134.58	76.04	79.34	882.21
Total expenditure growth excluding SFT												289.74

Source: Table 1 applied to Table 2a

Reduction for Special Forms of Trading (e.g. online shopping) applied as follows:

2011	8.90%
2013	10.70%
2016	12.90%
2021	15.80%
2026	16.00%
2031	16.10%

Source: Experian Retail Planner 10, Estimated and forecast market share of non-store retail sales (adjusted for SFT sales from stores)

Reduction for Special Forms of Trading (e.g. online shopping) applied as follows:

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10
2014 HHS SFT %ages	18.31%	15.08%	18.56%	22.70%	16.61%	21.70%	22.35%	14.22%	19.66%	19.04%
2016	22.80%	18.78%	23.12%	28.26%	20.68%	27.02%	27.83%	17.71%	24.48%	23.70%
2021	25.16%	20.72%	25.51%	31.19%	22.82%	29.82%	30.71%	19.54%	27.02%	26.16%
2026	25.16%	20.72%	25.51%	31.19%	22.82%	29.82%	30.71%	19.54%	27.02%	26.16%

Experian SFT Figures		SFT % Growth	
2014	15.50%	2014-2018	24.52%
2018	19.30%	2018-2023	10.36%
2023	21.30%	2023-2028	0.00%
2028	21.30%		

Source: Experian Retail Planner 11, Estimated and forecast market share of non-store retail sales (adjusted for SFT sales from stores)

Table 3b(ii) — Convenience goods expenditure forecasts (total)

		Wrexham Catchment										
		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Overall total
		£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m
2014	Base	54.63	54.80	47.46	48.41	46.56	47.58	39.15	69.21	49.69	49.33	506.8
	less SFT	2.64	1.50	0.87	2.53	3.61	2.41	0.26	2.08	2.03	3.52	21.5
	Residual	51.99	53.30	46.59	45.88	42.95	45.17	38.89	67.13	47.66	45.81	485.4
2018	Base	57.57	57.75	50.01	51.01	49.06	49.25	40.42	70.97	51.14	51.33	528.5
	less SFT	3.78	2.15	1.25	3.62	5.17	3.39	0.37	2.90	2.84	4.98	30.5
	Residual	53.79	55.60	48.77	47.39	43.89	45.86	40.05	68.06	48.30	46.35	498.1
2023	Base	62.62	62.81	54.40	55.49	53.37	52.67	43.11	74.56	54.19	55.00	568.2
	less SFT	5.29	3.02	1.75	5.08	7.25	4.67	0.51	3.93	3.88	6.87	42.2
	Residual	57.33	59.80	52.66	50.41	46.12	48.00	42.60	70.62	50.32	48.13	526.0
2028	Base	67.86	68.07	58.95	60.13	57.83	56.32	45.96	78.00	57.24	58.74	609.1
	less SFT	6.34	3.61	2.09	6.08	8.69	5.52	0.60	4.55	4.53	8.11	50.1
	Residual	61.52	64.45	56.86	54.05	49.14	50.80	45.37	73.46	52.71	50.63	559.0
Total expenditure growth excluding SFT												73.6

Reduction for Special Forms of Trading (e.g. online shopping) applied as follows:

Reduction for Special Forms of Trading (e.g. online shopping) applied as follows:

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10
2013 HHS SFT %ages	4.83%	2.74%	1.83%	5.23%	7.76%	5.07%	0.67%	3.01%	4.09%	7.13%
2016	6.56%	3.73%	2.49%	7.10%	10.55%	6.88%	0.91%	4.09%	5.55%	9.69%
2021	8.45%	4.80%	3.21%	9.15%	13.58%	8.87%	1.17%	5.27%	7.15%	12.49%
2026	9.34%	5.31%	3.55%	10.12%	15.02%	9.80%	1.30%	5.83%	7.91%	13.80%

Experian SFT Figures		SFT % Growth	
2014	9.20%	2014-2018	35.9%
2018	12.50%	2018-2023	28.8%
2023	16.10%	2023-2028	10.6%
2028	17.80%		

Source: Experian Retail Planner 11, Estimated and forecast market share of non-store retail sales

Table 4a — Comparison goods market shares, 2014

	Wrexham Catchment									
	Zone 1 %	Zone 2 %	Zone 3 %	Zone 4 %	Zone 5 %	Zone 6 %	Zone 7 %	Zone 8 %	Zone 9 %	Zone 10 %
	53.9%	38.3%	47.8%	49.3%	48.9%	15.7%	25.1%	16.2%	27.1%	31.2%
Stores and centres in Zone 1										
Tesco Extra, Crescent Road, Wrexham	3.4%	2.3%	4.3%	2.4%	1.8%	0.4%	1.6%	0.7%	2.5%	0.5%
Other destinations, Zone 1	0.2%	0.0%	0.1%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total, survey zone 1	3.6%	2.3%	4.3%	3.4%	1.8%	0.4%	1.6%	0.7%	2.5%	0.5%
Stores and centres in Zone 2										
Other destinations, zone 2	0.4%	2.6%	1.0%	0.5%	0.1%	0.2%	0.0%	1.6%	0.2%	0.5%
Sub-total, survey zone 2	0.4%	2.6%	1.0%	0.5%	0.1%	0.2%	0.0%	1.6%	0.2%	0.5%
Stores and centres in Zone 3										
Wrexham - Town Centre (but excluding Eagles Meadow)	36.3%	27.2%	31.7%	35.4%	36.4%	9.0%	13.5%	10.7%	16.3%	20.0%
Wrexham - Eagles Meadow Shopping Centre	17.6%	11.1%	16.1%	13.9%	12.5%	6.7%	11.6%	5.5%	10.8%	11.2%
Plas Coch Retail Park, Wrexham	14.2%	23.5%	17.3%	14.1%	13.4%	1.9%	2.5%	5.3%	9.3%	12.2%
Asda, Holt Road, Eagles Meadow, Wrexham	3.5%	4.3%	6.0%	6.5%	2.8%	0.3%	0.1%	0.5%	0.9%	2.9%
B&Q, Berse Road, Wrexham	3.5%	1.8%	4.2%	2.8%	3.8%	0.3%	0.6%	1.5%	1.8%	1.6%
Other destinations, zone 3	2.7%	5.8%	3.4%	4.8%	2.4%	0.4%	0.7%	1.3%	1.5%	3.4%
Sub-total, survey zone 3	77.7%	73.7%	78.6%	77.5%	71.2%	18.7%	29.0%	24.8%	40.6%	51.3%
Stores and centres in Zone 4										
Other destinations, Zone 4	0.0%	0.1%	0.0%	0.4%	0.1%	0.0%	0.0%	0.0%	0.1%	0.0%
Sub-total, survey zone 4	0.0%	0.1%	0.0%	0.4%	0.1%	0.0%	0.0%	0.0%	0.1%	0.0%
Stores and centres in Zone 5										
Tesco, Plas Kynaston Lane, Cefn Maw	0.2%	0.0%	0.4%	0.0%	3.1%	0.1%	0.0%	0.2%	0.3%	0.4%
Other destinations, Zone 5	1.5%	0.4%	0.4%	0.7%	2.0%	0.0%	0.1%	0.2%	0.2%	2.0%
Sub-total, survey zone 5	1.7%	0.4%	0.8%	0.7%	5.1%	0.1%	0.1%	0.4%	0.5%	2.5%
Stores and centres in survey zone 6										
Whitchurch Town Centre	0.1%	0.0%	0.0%	0.2%	0.0%	33.9%	3.0%	0.0%	0.0%	0.0%
Wem Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	6.4%	0.0%	0.2%	0.0%
Other destinations, Zone 6	0.0%	0.0%	0.0%	0.0%	0.2%	2.9%	0.1%	0.0%	0.0%	0.0%
Sub-total, survey zone 6	0.2%	0.0%	0.0%	0.2%	0.2%	37.1%	9.5%	0.0%	0.3%	0.0%
Stores and centres in survey zone 7										
Ellesmere Town Centre	0.3%	0.0%	0.0%	0.4%	0.0%	0.8%	5.4%	0.1%	0.3%	0.3%
Other destinations, survey zone 7	0.5%	0.0%	0.0%	0.0%	0.2%	0.0%	1.3%	0.0%	0.0%	0.0%
Sub-total, survey zone 7	0.8%	0.0%	0.0%	0.4%	0.2%	0.8%	6.6%	0.1%	0.3%	0.3%
Stores and centres in survey zone 8										
Broughton Shopping Park	0.4%	4.0%	1.4%	2.3%	2.2%	0.6%	1.3%	22.4%	7.8%	0.6%
Tesco Extra, Broughton Shopping Park	0.0%	0.3%	0.0%	0.1%	0.1%	0.4%	0.0%	4.7%	0.4%	0.0%
Other destinations, Zone 8	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%
Sub-total, survey zone 8	0.4%	4.4%	1.4%	2.4%	2.3%	1.0%	1.3%	27.7%	8.2%	0.6%
Stores and centres in survey zone 9										
Ruthin Town Centre	0.5%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.1%	9.7%	0.0%
Other destinations, Zone 9	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.1%	0.4%
Sub-total, survey zone 9	0.5%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.1%	15.7%	0.4%
Stores and centres in survey zone 10										
Other destinations, Zone 10	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	0.2%	0.0%	0.3%	1.4%
Sub-total, survey zone 10	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	0.2%	0.0%	0.3%	1.4%
Sub-total for study area	85.3%	83.6%	86.2%	85.9%	81.1%	58.4%	48.4%	55.5%	68.8%	57.4%
Locations outside study area										
Chester										
Chester City Centre	8.9%	9.0%	8.2%	7.5%	3.7%	11.8%	4.5%	18.0%	17.7%	8.5%
Greyhound Retail Park, Chester	1.6%	3.1%	1.8%	0.3%	2.0%	0.5%	0.0%	7.9%	2.5%	1.2%
Other locations, Chester	0.0%	0.1%	0.2%	0.0%	0.2%	0.0%	0.4%	1.0%	0.5%	0.1%
Sub-total, Chester	10.4%	12.2%	10.1%	7.9%	5.8%	12.4%	4.9%	26.9%	20.7%	9.8%
Oswestry										
Oswestry Town Centre	0.3%	0.0%	0.3%	0.8%	7.3%	0.1%	15.5%	0.0%	0.2%	22.6%
Other locations, Oswestry	0.0%	0.0%	0.1%	0.0%	0.1%	0.0%	1.0%	0.0%	0.0%	0.4%
Sub-total, Oswestry	0.3%	0.0%	0.4%	0.8%	7.4%	0.1%	16.5%	0.0%	0.2%	23.0%
Shrewsbury										
Shrewsbury Town Centre	0.0%	0.0%	0.3%	0.1%	0.3%	15.8%	20.5%	0.0%	0.1%	6.2%
Other locations, Shrewsbury	0.0%	0.0%	0.0%	0.0%	0.0%	4.4%	5.1%	1.1%	0.0%	0.4%
Sub-total, Shrewsbury	0.0%	0.0%	0.3%	0.1%	0.3%	20.2%	25.6%	1.1%	0.1%	6.7%
Other locations										
Mold Town Centre	0.0%	0.1%	0.3%	0.2%	0.3%	0.0%	0.0%	5.1%	0.7%	0.0%
All other locations outside study area	4.0%	4.1%	2.8%	5.1%	5.1%	8.9%	4.7%	11.4%	9.6%	3.1%
Sub-total for outside study area	14.7%	16.4%	13.8%	14.1%	18.9%	41.6%	51.6%	44.5%	31.2%	42.6%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: NEMS Household Survey market shares (composite results), March 2014

Table 4b — Comparison goods spending patterns, 2014

	Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Zone 6 £m	Zone 7 £m	Zone 8 £m	Zone 9 £m	Zone 10 £m	Overall total £m	Overall Turnover %
Total expenditure available to study area, 2014	63.35	70.38	55.21	53.16	51.93	54.19	42.52	93.97	53.64	53.93	592.29	
Stores and centres in Zone 1												
Tesco Extra, Crescent Road, Wrexham	2.19	1.62	2.36	1.29	0.95	0.22	0.68	0.68	1.33	0.26	11.6	2.0%
Other destinations, Zone 1	0.10	0.00	0.04	0.51	0.00	0.00	0.00	0.00	0.00	0.00	0.65	0.1%
Sub-total, survey zone 1	2.28	1.62	2.40	1.80	0.95	0.22	0.68	0.68	1.33	0.26	12.21	2.1%
Stores and centres in Zone 2												
Other destinations, zone 2	0.25	1.84	0.54	0.26	0.06	0.12	0.00	1.50	0.08	0.26	4.92	1%
Sub-total, survey zone 2	0.25	1.84	0.54	0.26	0.06	0.12	0.00	1.50	0.08	0.26	4.92	1%
Stores and centres in Zone 3												
Wrexham - Town Centre (but excluding Eagles Meadow)	23.00	19.13	17.50	18.81	18.91	4.87	5.74	10.03	8.75	10.76	137.5	23.2%
Wrexham - Eagles Meadow Shopping Centre	11.12	7.80	8.89	7.40	6.49	3.65	4.91	5.21	5.79	6.06	67.3	11.4%
Plas Coch Retail Park, Wrexham	8.98	16.55	9.53	7.50	6.95	1.02	1.07	4.97	4.97	6.59	68.1	11.5%
Asda, Holt Road, Wrexham	2.20	3.01	3.30	3.47	1.47	0.17	0.06	0.45	0.48	1.54	16.2	2.7%
B&Q, Berse Road, Wrexham	2.23	1.28	2.30	1.50	1.95	0.18	0.27	1.43	0.98	0.87	13.0	2.2%
Other destinations, zone 3	1.69	4.08	1.86	2.53	1.23	0.23	0.29	1.24	0.83	1.83	15.8	2.7%
Sub-total, survey zone 3	49.24	51.85	43.38	41.21	37.00	10.12	12.35	23.34	21.80	27.64	317.9	53.7%
Stores and centres in Zone 4												
Other destinations, Zone 4	0.03	0.10	0.02	0.22	0.06	0.00	0.00	0.00	0.08	0.03	0.53	0%
Sub-total, survey zone 4	0.03	0.10	0.02	0.22	0.06	0.00	0.00	0.00	0.08	0.03	0.53	0%
Stores and centres in Zone 5												
Tesco, Plas Kynaston Lane, Off Wells Street, Cefn Mawr	0.14	0.00	0.22	0.00	1.61	0.06	0.00	0.19	0.17	0.24	2.6	0.4%
Other destinations, survey zone 5	0.94	0.27	0.24	0.35	1.04	0.00	0.06	0.19	0.10	1.10	4.28	1%
Sub-total, survey zone 5	1.08	0.27	0.46	0.36	2.65	0.06	0.06	0.38	0.26	1.34	6.91	1%
Stores and centres in survey zone 6												
Whitchurch Town Centre	0.09	0.00	0.00	0.11	0.00	18.37	1.26	0.00	0.00	0.00	19.8	3.3%
Wem Town Centre	0.00	0.00	0.00	0.00	0.00	0.17	2.74	0.00	0.13	0.00	3.0	0.5%
Other destinations, Zone 6	0.02	0.00	0.01	0.00	0.11	1.55	0.03	0.00	0.01	0.00	1.73	0%
Sub-total, survey zone 6	0.11	0.00	0.01	0.11	0.11	20.09	4.03	0.00	0.14	0.00	24.60	4%
Stores and centres in survey zone 7												
Ellesmere Town Centre	0.17	0.00	0.00	0.19	0.00	0.45	2.28	0.12	0.17	0.16	3.5	0.6%
Other destinations, survey zone 7	0.31	0.00	0.00	0.00	0.09	0.01	0.55	0.00	0.00	0.00	0.96	0%
Sub-total, survey zone 7	0.49	0.00	0.00	0.19	0.09	0.46	2.83	0.12	0.17	0.16	4.51	1%
Stores and centres in survey zone 8												
Broughton Shopping Park	0.26	2.79	0.77	1.22	1.15	0.33	0.55	21.09	4.18	0.32	32.7	5.5%
Tesco Extra, Broughton Shopping Park	0.00	0.19	0.00	0.07	0.05	0.22	0.00	4.42	0.23	0.00	5.18	0.9%
Other destinations, Zone 8	0.01	0.14	0.00	0.00	0.00	0.01	0.00	0.52	0.00	0.00	0.69	0%
Sub-total, survey zone 8	0.27	3.13	0.77	1.29	1.20	0.56	0.55	26.04	4.41	0.32	38.53	7%
Stores and centres in survey zone 9												
Ruthin Town Centre	0.30	0.00	0.00	0.04	0.01	0.00	0.00	0.12	5.19	0.00	5.7	1.0%
Other destinations, Zone 9	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.26	0.23	3.48	1%
Sub-total, survey zone 9	0.30	0.00	0.00	0.04	0.01	0.00	0.00	0.12	8.45	0.23	9.15	2%
Stores and centres in survey zone 10												
Other destinations, Zone 10	0.00	0.00	0.00	0.18	0.00	0.00	0.07	0.00	0.18	0.75	1.17	0%
Sub-total, survey zone 10	0.00	0.00	0.00	0.18	0.00	0.00	0.07	0.00	0.18	0.75	1.17	0%
Sub-total for study area	54.04	58.81	47.58	45.65	42.13	31.63	20.56	52.18	36.89	30.97	420.44	71.0%
Locations outside study area												
Chester												
Chester City Centre	5.62	6.37	4.51	4.00	1.91	6.41	1.90	16.94	9.48	4.58	61.7	10.4%
Greyhound Retail Park, Chester	1.00	2.17	0.97	0.18	1.01	0.29	0.00	7.40	1.35	0.67	15.1	2.5%
Other locations, Chester	0.00	0.08	0.11	0.02	0.10	0.02	0.16	0.90	0.26	0.03	1.7	0%
Sub-total, Chester	6.62	8.62	5.59	4.21	3.02	6.72	2.07	25.24	11.09	5.28	78.5	13.2%
Oswestry												
Oswestry Town Centre	0.19	0.00	0.16	0.42	3.77	0.04	6.59	0.00	0.10	12.21	23.5	4.0%
Other locations, Oswestry	0.00	0.00	0.04	0.00	0.05	0.00	0.43	0.00	0.00	0.22	0.8	0%
Sub-total, Oswestry	0.19	0.00	0.20	0.42	3.82	0.04	7.02	0.00	0.10	12.43	24.2	4.1%
Shrewsbury												
Shrewsbury Town Centre	0.00	0.00	0.14	0.06	0.13	8.55	8.71	0.00	0.04	3.37	21.0	3.5%
Other locations, Shrewsbury	0.00	0.00	0.00	0.00	0.02	2.40	2.16	1.02	0.00	0.23	5.8	1%
Sub-total, Shrewsbury	0.00	0.00	0.14	0.06	0.15	10.95	10.87	1.02	0.04	3.59	26.8	4.5%
Other locations												
Mold Town Centre	0.00	0.08	0.14	0.10	0.18	0.00	0.00	4.81	0.36	0.00	5.7	1%
All other locations outside study area	2.50	2.87	1.56	2.73	2.63	4.84	2.00	10.71	5.17	1.66	36.7	6%
Sub-total for outside study area	9.3	11.6	7.6	7.5	9.8	22.6	22.0	41.8	16.8	23.0	171.8	29.0%
Total	63.4	70.4	55.2	53.2	51.9	54.2	42.5	94.0	53.6	53.9	592.29	100%

Source: Table 4a, Table 3a

Table 5a — Percentage splits of Comparison goods expenditure

	Wrexham Catchment									
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10
	%	%	%	%	%	%	%	%	%	%
Clothing and footwear	31.3%	30.9%	31.1%	31.4%	32.1%	27.5%	26.4%	29.6%	28.9%	29.1%
Furniture, floorcoverings, household textiles	9.7%	9.9%	9.9%	9.5%	9.6%	13.1%	13.7%	11.1%	10.8%	11.1%
Audio-visual equipment	29.4%	30.2%	30.0%	29.5%	29.3%	22.9%	23.1%	27.3%	27.8%	26.8%
Hardware, DIY	4.2%	4.1%	4.1%	4.1%	4.0%	5.9%	6.0%	4.7%	5.3%	5.2%
Chemist goods	1.8%	2.0%	2.0%	1.8%	1.7%	2.2%	2.3%	2.5%	2.2%	2.1%
Recreational goods	10.8%	10.0%	10.3%	10.8%	10.7%	12.0%	11.9%	10.5%	10.3%	10.9%
Other non-food	12.8%	13.0%	12.6%	12.9%	12.6%	16.4%	16.7%	14.3%	14.7%	14.8%

Source: Experian MMG3 (2012)

Table 5b — Total Expenditure on Different Categories of Comparison Goods in 2014

	Wrexham Catchment										
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Overall total
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m
Clothing and footwear	19.86	21.74	17.19	16.68	16.66	14.89	11.21	27.85	15.50	15.69	177.3
Furniture, floorcoverings, household textiles	6.12	6.94	5.46	5.06	4.97	7.10	5.81	10.45	5.81	5.99	63.7
Audio-visual equipment	18.63	21.27	16.56	15.69	15.22	12.41	9.82	25.63	14.94	14.43	164.6
Hardware, DIY	2.64	2.91	2.27	2.16	2.08	3.21	2.57	4.42	2.82	2.80	27.9
Chemist goods	1.15	1.37	1.09	0.97	0.91	1.21	0.97	2.31	1.17	1.15	12.3
Recreational goods	6.83	7.01	5.67	5.73	5.57	6.51	5.07	9.86	5.51	5.87	63.6
Other Goods (books, CDs, jewellery, glass and china, etc)	8.12	9.14	6.98	6.88	6.54	8.86	7.08	13.45	7.90	8.00	82.9
Total Comparison Goods Expenditure	63.35	70.38	55.21	53.16	51.93	54.19	42.52	93.97	53.64	53.93	592.3

Source: Table 3a, Table 5a

Table 5c — Total Expenditure on Clothing and Shoes Goods in 2014

	Wrexham Catchment										Total £m	All Zones Market Share %
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10		
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m		
Destinations in Zone 1												
Other destinations, Zone 1	0.37	0.55	0.26	0.00	0.21	0.08	0.00	0.00	0.09	0.26	1.8	1.0%
Sub total, Zone 1	0.37	0.55	0.26	0.00	0.21	0.08	0.00	0.00	0.09	0.26	1.8	1.0%
Destinations in Zone 2												
Other destinations, zone 2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0	0.0%
Sub total, Zone 2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0	0.0%
Destinations in Zone 3												
Wrexham - Town Centre (but excluding Eagles Meadow)	6.29	6.02	4.45	4.68	5.97	2.63	1.88	1.86	2.04	2.91	38.7	21.9%
Wrexham - Eagles Meadow Shopping Centre	5.91	5.78	4.90	4.13	4.24	1.87	2.42	3.56	3.88	4.30	41.0	23.1%
Wrexham - Marks & Spencer, Eagles Meadow	1.05	0.29	1.39	0.89	0.46	0.12	0.18	0.12	0.29	0.34	5.1	2.9%
Asda, Holt Road, Eagles Meadow, Wrexham	0.27	0.62	1.41	0.90	0.65	0.07	0.00	0.00	0.20	0.82	5.0	2.8%
Plas Coch Retail Park, Wrexham	0.45	0.92	0.23	0.07	0.07	0.17	0.00	0.12	0.17	0.26	2.5	1.4%
Other destinations, zone 3	0.00	0.71	0.34	0.70	0.08	0.00	0.00	0.24	0.30	0.14	2.5	1.4%
Sub total, Zone 3	13.98	14.35	12.73	11.36	11.48	4.87	4.49	5.91	6.89	8.77	94.8	53.5%
Destinations in Zone 4												
Other destinations, zone 4	0.00	0.00	0.00	0.00	0.06	0.00	0.00	0.00	0.08	0.00	0.1	0.1%
Sub total, Zone 4	0.00	0.00	0.00	0.00	0.06	0.00	0.00	0.00	0.08	0.00	0.1	0.1%
Destinations in Zone 5												
Other destinations, Zone 5	0.00	0.00	0.00	0.00	0.52	0.06	0.00	0.15	0.07	0.14	0.9	0.5%
Sub total, Zone 5	0.00	0.00	0.00	0.00	0.52	0.06	0.00	0.15	0.07	0.14	0.9	0.5%
Destinations in Zone 6												
Whitchurch Town Centre	0.08	0.00	0.00	0.00	0.00	2.08	0.15	0.00	0.00	0.00	2.3	1.3%
Other destinations, Zone 6	0.00	0.00	0.00	0.00	0.00	0.12	0.00	0.00	0.00	0.00	0.1	0.1%
Sub total, Zone 6	0.08	0.00	0.00	0.00	0.00	2.19	0.15	0.00	0.00	0.00	2.4	1.4%
Destinations in Zone 7												
Other destinations, Zone 7	0.08	0.00	0.00	0.08	0.00	0.09	0.34	0.12	0.13	0.07	0.9	0.5%
Sub total, Zone 7	0.08	0.00	0.00	0.08	0.00	0.09	0.34	0.12	0.13	0.07	0.9	0.5%
Destinations in Zone 8												
Broughton Shopping Park	0.08	1.35	0.49	0.55	0.78	0.07	0.10	10.62	1.76	0.27	16.1	9.1%
Other destinations, Zone 8	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.16	0.00	0.00	0.2	0.1%
Sub total, Zone 8	0.08	1.35	0.49	0.55	0.78	0.07	0.10	10.78	1.76	0.27	16.3	9.2%
Destinations in Zone 9												
Other destinations, Zone 9	0.30	0.00	0.00	0.00	0.00	0.00	0.00	0.12	0.63	0.00	1.1	0.6%
Sub total, Zone 9	0.30	0.00	0.00	0.00	0.00	0.00	0.00	0.12	0.63	0.00	1.1	0.6%
Destinations in Zone 10												
Other destinations, Zone 10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.14	0.1	0.1%
Sub total, Zone 10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.14	0.1	0.1%
Sub-total for catchment area	14.90	16.25	13.48	11.99	13.06	7.37	5.08	17.09	9.64	9.63	118.5	66.9%
Destinations outside catchment area												
Chester												
Chester City Centre	3.26	3.14	2.02	2.01	0.61	2.34	1.17	6.26	3.34	1.91	26.1	14.7%
Other locations, Chester	0.00	0.28	0.19	0.12	0.08	0.07	0.00	0.31	0.18	0.00	1.2	0.7%
Sub-total, Chester	3.26	3.42	2.21	2.13	0.69	2.42	1.17	6.58	3.52	1.91	27.3	15.4%
Oswestry												
Oswestry Town Centre	0.11	0.00	0.14	0.25	1.10	0.00	0.59	0.00	0.09	2.33	4.6	2.6%
Other locations, Oswestry	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0	0.0%
Sub-total, Oswestry	0.11	0.00	0.14	0.25	1.10	0.00	0.59	0.00	0.09	2.33	4.6	2.6%
Shrewsbury												
Shrewsbury Town Centre	0.00	0.00	0.00	0.06	0.08	3.00	2.83	0.00	0.00	0.86	6.8	3.9%
Other locations, Shrewsbury	0.00	0.00	0.00	0.00	0.00	0.14	0.24	0.00	0.00	0.00	0.4	0.2%
Sub-total, Shrewsbury	0.00	0.00	0.00	0.06	0.08	3.14	3.07	0.00	0.00	0.86	7.2	4.1%
Other destinations outside catchment area	1.59	2.06	1.36	2.24	1.72	1.97	1.29	4.19	2.24	0.95	19.6	11%
Sub-total for outside catchment area	4.96	5.49	3.71	4.69	3.60	7.52	6.13	10.76	5.85	6.05	58.8	33%
Overall total	19.86	21.74	17.19	16.68	16.66	14.89	11.21	27.85	15.50	15.69	177.3	100%

Source: NEMS Household Survey market shares, February 2014, Table 5b

Table 5d — Total Expenditure on Electrical Items and Domestic Items in 2014

Wrexham Catchment												All Zones Market Share
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Total	
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	%
Destinations in Zone 1												
Tesco Extra, Crescent Road, Wrexham	1.0	0.3	0.9	0.6	0.3	0.1	0.6	0.2	1.0	0.0	4.9	3.0%
Other destinations, Zone 1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0%
Sub total, Zone 1	1.0	0.3	0.9	0.6	0.3	0.1	0.6	0.2	1.0	0.0	4.9	3%
Destinations in Zone 2												
Other destinations, zone 2	0.09	0.88	0.41	0.23	0.00	0.00	0.00	0.00	0.00	0.00	1.6	1.0%
Sub total, Zone 2	0.09	0.88	0.41	0.23	0.00	0.00	0.00	0.00	0.00	0.00	1.6	1.0%
Destinations in Zone 3												
Wrexham - Town Centre (but excluding Eagles Meadow)	4.0	4.4	3.5	4.5	3.8	0.2	0.9	2.7	1.6	1.8	27.4	16.6%
Wrexham - Eagles Meadow Shopping Centre	0.8	0.0	0.6	1.3	0.5	0.1	0.3	0.2	0.8	0.4	5.0	3.0%
Wrexham - Island Green Retail Park	2.0	0.6	1.3	0.7	0.8	0.0	0.0	0.3	0.7	0.2	6.5	3.9%
Plas Coch Retail Park, Wrexham	7.2	12.1	6.2	5.3	5.0	0.4	0.7	3.4	3.2	5.3	48.7	29.6%
B&Q, Berse Road, Wrexham	0.9	0.0	1.0	0.7	1.2	0.1	0.0	0.3	0.2	0.3	4.6	2.8%
Other destinations, zone 3	0.7	1.3	1.3	1.5	0.8	0.1	0.1	0.5	0.2	1.0	7.5	4.6%
Sub total, Zone 3	15.6	18.4	13.9	14.0	12.0	0.8	2.0	7.5	6.6	8.9	99.6	60.5%
Destinations in Zone 4												
Other destinations, zone 4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%
Sub total, Zone 4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%
Destinations in Zone 5												
Other destinations, Zone 5	0.7	0.3	0.4	0.2	0.7	0.0	0.0	0.0	0.2	0.0	2.4	1.5%
Sub total, Zone 5	0.7	0.3	0.4	0.2	0.7	0.0	0.0	0.0	0.2	0.0	2.4	1.5%
Destinations in Zone 6												
Whitchurch Town Centre	0.0	0.0	0.0	0.0	0.0	6.4	0.9	0.0	0.0	0.0	7.3	4.4%
Other destinations, Zone 6	0.0	0.0	0.0	0.0	0.0	0.4	1.0	0.0	0.1	0.0	1.5	1%
Sub total, Zone 6	0.0	0.0	0.0	0.0	0.0	6.8	1.9	0.0	0.1	0.0	8.8	5%
Destinations in Zone 7												
Ellesmere Town Centre	0.09	0.00	0.00	0.00	0.00	0.08	0.66	0.00	0.00	0.09	0.9	0.6%
Other destinations, Zone 7	0.30	0.00	0.00	0.00	0.09	0.00	0.30	0.00	0.00	0.00	0.7	0.4%
Sub total, Zone 7	0.40	0.00	0.00	0.00	0.09	0.08	0.96	0.00	0.00	0.09	1.6	1.0%
Destinations in Zone 8												
Broughton Shopping Park	0.00	0.13	0.00	0.12	0.00	0.14	0.00	2.60	0.14	0.00	3.1	2%
Tesco Extra, Broughton Shopping Park	0.0	0.0	0.0	0.0	0.0	0.2	0.0	3.8	0.2	0.0	4.3	2.6%
Other destinations, Zone 8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.1	0.1%
Sub total, Zone 8	0.0	0.1	0.0	0.1	0.0	0.4	0.0	6.6	0.4	0.0	7.5	4.6%
Destinations in Zone 9												
Ruthin Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.2	0.0	2.2	1.3%
Other destinations, Zone 9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.2	0.2	1.4	0.9%
Sub total, Zone 9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.4	0.2	3.6	2.2%
Destinations in Zone 10												
Other destinations, Zone 10	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%
Sub total, Zone 10	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0%
Sub-total for catchment area	17.77	19.92	15.59	15.06	13.03	8.18	5.43	14.24	11.65	9.20	130.1	79.0%
Destinations outside catchment area												
Chester												
Chester City Centre	0.39	0.66	0.78	0.52	0.18	0.83	0.16	2.62	1.79	0.41	8.3	5.1%
Greyhound Retail Park, Chester	0.29	0.53	0.08	0.00	0.07	0.00	0.00	3.90	0.43	0.18	5.5	3.3%
Other locations, Chester	0.00	0.00	0.00	0.00	0.00	0.00	0.15	0.00	0.00	0.00	0.1	0%
Sub-total, Chester	0.67	1.19	0.86	0.52	0.24	0.83	0.31	6.51	2.22	0.59	14.0	8%
Oswestry												
Oswestry Town Centre	0.0	0.0	0.0	0.0	1.7	0.0	1.7	0.0	0.0	3.2	6.6	4.0%
Other locations, Oswestry	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.1	0%
Sub-total, Oswestry	0.00	0.00	0.00	0.00	1.73	0.00	1.69	0.00	0.00	3.31	6.7	4.1%
Shrewsbury												
Shrewsbury Town Centre	0.00	0.00	0.00	0.00	0.00	1.22	1.31	0.00	0.00	1.00	3.5	2.1%
Meole Brace Retail Park, Shrewsbury	0.00	0.00	0.00	0.00	0.00	0.84	1.00	0.00	0.00	0.23	2.1	1.3%
Other locations, Shrewsbury	0.00	0.00	0.00	0.00	0.00	0.17	0.00	0.00	0.00	0.00	0.2	0.1%
Sub-total, Shrewsbury	0.00	0.00	0.00	0.00	0.00	2.23	2.31	0.00	0.00	1.23	5.8	3.5%
Other destinations outside catchment area	0.2	0.2	0.1	0.1	0.2	1.2	0.1	4.9	1.1	0.1	8.1	4.9%
Sub-total for outside catchment area	0.9	1.4	1.0	0.6	2.2	4.2	4.4	11.4	3.3	5.2	34.5	21.0%
Overall total	18.63	21.27	16.56	15.69	15.22	12.41	9.82	25.63	14.94	14.43	164.6	100%

Source: NEMS Household Survey market shares, February 2014 Table 5b

Table 6 — Retail planning commitments**Comparison goods planning commitments**

	Application ref	Gross Floorspace sq.m	Net floorspace sq.m	Turnover per sq.m £	Total turnover £m
Extension to rear of retail terrace	P/2009/0213	553	387	3,000	1.2
Outline consent for erection of new commercial unit for A1/A2/A3 use	P/2012/0653	350	245	3,000	0.7
Change of use from B1 to A1	P/2013/0654	78	66	3,000	0.2
Erection of three units for A1/A2/A3 use	P/2013/0120	279	251	3,000	0.8
Outline consent for supermarket and small retail units (foodstore)	P/2012/0816	1,672	234	6,686	1.6
Outline consent for supermarket and small retail units (small units)	P/2012/0816	558	391	3,000	1.2
Outline consent for foodstore	P/2012/0210	4,182	464	8,554	4.0
Total			2,038		9.55

Convenience goods planning commitments

Residential development with ground floor retail	P/2013/0419	71	64	3,500	0.2
Change of use from B1 to A1 (Convenience)	P/2010/0745	432	300	3,500	1.1
Extension to shop	P/2011/0160	75	58	3,500	0.2
Community centre, shop and café	P/2013/0002	280	252	3,500	0.9
Erection of three units for A1/A2/A3 use	P/2013/0120	279	251	3,500	0.9
Outline consent for supermarket and small retail units (foodstore)	P/2012/0816	1,672	937	10,000	9.4
Outline consent for foodstore	P/2012/0210	4,182	2,323	12,714	29.5
Total			4,185	-	42.14

Table 7 — Comparison goods capacity forecasts for study area

Constant market share scenario

Row		2014	2018	2023	2028	Incremental Growth			
						2014-18	2018-23	2023-28	2014-28
	Total Retained Expenditure								
A	Total Population	245,592	252,397	260,469	267,765	6,805	8,072	7,296	22,173
B	Total Expenditure £m	592.29	641.06	740.41	877.30	48.77	99.35	136.89	285.01
C	Retained Expenditure %	71.0%	71.0%	71.0%	71.0%				
D	Retained Expenditure £m	420.44	455.06	525.59	622.76	34.62	70.53	97.17	202.32
	Turnover of Comparison Stores in OCA Drawn from Catchment Area								
E	Total Comparison Retail Turnover of Stores in OCA £m	420.44	439.65	473.62	510.23	19.21	33.98	36.60	89.79
	Commitments								
F	Comparison Retail Commitments £m	0.00	9.99	10.76	11.59	9.99	0.77	0.83	11.59
G	Initial Residual Comparison Retail Expenditure £m	0.00	5.43	41.20	100.94	5.43	35.78	59.74	100.94
	Inflow of Expenditure from Outside the Catchment Area								
H	Inflow (%)	2.5%	2.5%	2.5%	2.5%				
I	Inflow £m	10.51	11.38	13.14	15.57	0.87	1.76	2.43	5.06
	SUMMARY								
J	Initial Residual Comparison Retail Expenditure £m					5.43	35.78	59.74	100.94
K	Growth in Inflow £m					0.87	1.76	2.43	5.06
L	FINAL RESIDUAL COMPARISON RETAIL EXPENDITURE £m					6.29	37.54	62.17	106.00
	Conversion to floorspace need								
M	Turnover per sq m (assumed)					6,274	6,759	7,281	-
N	Floorspace Requirement for study area (sq.m net)					1,003	5,554	8,538	15,095
O	Floorspace Requirement for study area (sq.m gross)					1,433	7,934	12,197	21,564

Assumed Sales efficiency growth of 1.5% per annum

Turnover per sq.m at 2013 PBA estimate. Turnover per sq.m increased to 2026 in line with sales efficiency growth rates shown above

Total requirement shown is cumulative. Gross: net ratio of 70%

Table 7b — Comparison goods capacity forecasts for study area- Lower Population Scenario

Constant market share scenario

Row		2014	2018	2023	2028	Incremental Growth			
						2014-18	2016-23	2023-28	2014-28
	Total Retained Expenditure								
A	Total Population	245,420	251,647	259,013	265,625	6,228	7,366	6,612	20,205
B	Total Expenditure £m	591.89	639.23	736.42	870.54	47.34	97.20	134.12	278.65
C	Retained Expenditure %	71.0%	71.0%	71.0%	71.0%				
D	Retained Expenditure £m	420.16	453.76	522.76	617.96	33.60	69.00	95.20	197.80
	Turnover of Comparison Stores in OCA Drawn from Catchment Area								
E	Total Comparison Retail Turnover of Stores in OCA £m	420.16	439.35	473.30	509.88	19.19	33.95	36.58	89.73
	Commitments								
F	Comparison Retail Commitments £m	0.00	9.99	10.76	11.59	9.99	0.77	0.83	11.59
G	Initial Residual Comparison Retail Expenditure £m	0.00	4.42	38.69	96.49	4.42	34.27	57.79	96.49
	Inflow of Expenditure from Outside the Catchment Area								
H	Inflow (%)	2.5%	2.5%	2.5%	2.5%				
I	Inflow £m	10.50	11.34	13.07	15.45	0.84	1.72	2.38	4.95
	SUMMARY								
J	Initial Residual Comparison Retail Expenditure £m					4.42	34.27	57.79	96.49
K	Growth in Inflow £m					0.84	1.72	2.38	4.95
L	FINAL RESIDUAL COMPARISON RETAIL EXPENDITURE £m					5.26	35.99	60.17	101.43
	Conversion to floorspace need								
M	Turnover per sq m (assumed)					6,274	6,759	7,281	-
N	Floorspace Requirement for study area (sq.m net)					839	5,325	8,264	14,428
O	Floorspace Requirement for study area (sq.m gross)					1,198	7,608	11,806	20,612

Assumed Sales efficiency growth of 1.5% per annum

Turnover per sq.m at 2013 PBA estimate. Turnover per sq.m increased to 2026 in line with sales efficiency growth rates shown above

Total requirement shown is cumulative. Gross: net ratio of 70%

Table 7c — Comparison goods capacity forecasts for study area

Constant market share scenario

Row		2014	2018	2023	2028	Incremental Growth			
						2014-18	2016-23	2023-28	2014-28
	Total Retained Expenditure								
A	Total Population	245,672	252,767	261,300	269,321	7,095	8,533	8,021	23,649
B	Total Expenditure £m	592.47	641.96	742.68	882.21	49.49	100.72	139.53	289.74
C	Retained Expenditure %	71.0%	71.0%	71.0%	71.0%				
D	Retained Expenditure £m	420.57	455.70	527.20	626.25	35.13	71.50	99.05	205.68
	Turnover of Comparison Stores in OCA Drawn from Catchment Area								
E	Total Comparison Retail Turnover of Stores in OCA £m	420.57	439.78	473.77	510.39	19.21	33.99	36.61	89.81
	Commitments								
F	Comparison Retail Commitments £m	0.00	9.99	10.76	11.59	9.99	0.77	0.83	11.59
G	Initial Residual Comparison Retail Expenditure £m	0.00	5.93	42.67	104.27	5.93	36.74	61.60	104.27
	Inflow of Expenditure from Outside the Catchment Area								
H	Inflow (%)	2.5%	2.5%	2.5%	2.5%				
I	Inflow £m	10.51	11.39	13.18	15.66	0.88	1.79	2.48	5.14
	SUMMARY								
J	Initial Residual Comparison Retail Expenditure £m					5.93	36.74	61.60	104.27
K	Growth in Inflow £m					0.88	1.79	2.48	5.14
L	FINAL RESIDUAL COMPARISON RETAIL EXPENDITURE £m					6.81	38.53	64.08	109.41
	Conversion to floorspace need								
M	Turnover per sq m (assumed)					6,274	6,759	7,281	-
N	Floorspace Requirement for study area (sq.m net)					1,085	5,700	8,800	15,585
O	Floorspace Requirement for study area (sq.m gross)					1,550	8,143	12,572	22,265

Assumed Sales efficiency growth of 1.5% per annum

Turnover per sq.m at 2013 PBA estimate. Turnover per sq.m increased to 2026 in line with sales efficiency growth rates shown above

Total requirement shown is cumulative. Gross: net ratio of 70%

Table 8a — Convenience goods market shares, 2014

	Wrexham Catchment									
	Zone 1 %	Zone 2 %	Zone 3 %	Zone 4 %	Zone 5 %	Zone 6 %	Zone 7 %	Zone 8 %	Zone 9 %	Zone 10 %
Foodstores in Zone 1										
Tesco Extra, Crescent Road, WREXHAM	28.7%	13.0%	21.2%	6.3%	8.9%	4.9%	0.5%	4.4%	3.1%	7.8%
Other destinations, Zone 1	6.8%	2.0%	4.4%	0.8%	0.4%	0.1%	0.1%	1.1%	0.0%	1.0%
Sub-total, survey zone 1	35.5%	15.0%	25.7%	7.1%	9.3%	5.1%	0.6%	5.4%	3.1%	8.7%
Foodstores in Zone 2										
Tesco, Dodds Lane, WREXHAM	0.0%	10.5%	1.2%	1.3%	0.0%	0.3%	0.0%	2.0%	0.0%	0.0%
Other destinations, Zone 2	0.3%	8.5%	0.6%	1.3%	1.8%	0.0%	0.7%	1.2%	0.3%	0.4%
Sub-total, survey zone 2	0.3%	18.9%	1.8%	2.6%	1.8%	0.3%	0.7%	3.2%	0.3%	0.4%
Foodstores in Zone 3										
Morrisons, Ruthin Road, Wrexham	5.9%	7.5%	11.0%	28.7%	9.7%	1.9%	0.8%	1.7%	4.9%	4.9%
Asda, Holt Road, Eagles Meadow, WREXHAM	26.5%	21.8%	24.1%	20.1%	17.5%	2.1%	2.5%	1.9%	3.1%	8.5%
Sainsburys, Plas Coch Road, WREXHAM	10.5%	18.3%	11.6%	20.6%	10.0%	3.1%	2.1%	9.8%	7.0%	11.7%
Aldi, Plas Coch, Retail Park, WREXHAM	3.8%	8.3%	12.1%	9.0%	5.8%	0.4%	5.4%	3.1%	7.1%	8.0%
Marks & Spencer, Eagles Meadow Shopping Centre, WREXHAM	2.8%	1.9%	5.0%	1.3%	1.4%	0.0%	0.3%	0.8%	0.3%	0.6%
Other destinations, Zone 3	10.7%	4.9%	7.3%	2.1%	1.9%	0.5%	1.0%	0.8%	0.8%	0.3%
Sub-total, survey zone 3	60.1%	62.6%	71.0%	81.8%	46.3%	8.0%	12.1%	18.1%	23.2%	34.0%
Foodstores in Zone 4										
Other destinations, Zone 4	0.2%	0.1%	0.0%	4.4%	0.3%	0.0%	0.2%	0.0%	0.0%	0.2%
Sub-total, survey zone 4	0.2%	0.1%	0.0%	4.4%	0.3%	0.0%	0.2%	0.0%	0.0%	0.2%
Foodstores in Zone 5										
Tesco, Plas Kynaston Lane, Off Wells Street, Cefn Mawr, WREXHAM	0.0%	0.0%	0.2%	2.2%	25.3%	0.0%	0.6%	1.0%	0.4%	12.0%
Other destinations, Zone 5	0.0%	0.4%	0.7%	0.9%	8.5%	0.0%	0.2%	0.3%	0.3%	5.9%
Sub-total, survey zone 5	0.0%	0.4%	0.9%	3.2%	33.8%	0.0%	0.8%	1.3%	0.7%	18.0%
Foodstores in Zone 6										
Tesco, White Lion Meadow, Whitchurch	0.3%	0.0%	0.0%	0.0%	0.0%	33.0%	1.1%	0.0%	0.0%	0.0%
Sainsburys, London Road, Whitchurch	0.0%	0.0%	0.0%	0.0%	0.0%	25.8%	0.1%	0.0%	0.0%	0.0%
Other destinations, Zone 6	0.0%	0.0%	0.0%	0.0%	0.0%	14.5%	3.2%	0.0%	0.0%	0.0%
Sub-total, survey zone 6	0.3%	0.0%	0.0%	0.0%	0.0%	73.3%	4.4%	0.0%	0.0%	0.0%
Foodstores in Zone 7										
Tesco, Wharf Road, ELLESMERE	2.3%	0.1%	0.0%	0.0%	0.3%	0.6%	28.6%	0.0%	0.0%	2.5%
Co-op, Morris Central Shopping Park, WEM	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	6.7%	0.0%	0.0%	0.0%
St Martins Village Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.1%	0.0%	0.3%	0.3%
Other destinations, Zone 7	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	6.5%	0.0%	0.0%	0.0%
Sub-total, survey zone 7	2.3%	0.1%	0.0%	0.0%	0.3%	2.1%	45.9%	0.0%	0.3%	2.8%
Foodstores in Zone 8										
Tesco Extra, Broughton Shopping Park, Broughton Road, CHESTER	0.0%	0.8%	0.0%	0.3%	0.0%	0.0%	0.8%	28.4%	1.3%	0.0%
Other destinations, Zone 8	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.8%	0.0%	0.0%
Sub-total, survey zone 8	0.0%	0.8%	0.0%	0.3%	0.0%	0.0%	0.8%	31.2%	1.3%	0.0%
Destinations in Zone 9										
Tesco, Lon Parcwr, RUTHIN	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	37.2%	0.0%
Co-op, Stryd Fawr, BALA	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.0%	0.0%
Other destinations, Zone 9	0.0%	0.3%	0.2%	0.0%	0.6%	0.0%	0.0%	0.0%	11.3%	0.0%
Sub-total, Zone 9	0.0%	0.9%	0.2%	0.3%	0.6%	0.0%	0.0%	0.0%	55.5%	0.0%
Destinations in Zone 10										
Other destinations, Zone 10	0.2%	0.2%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	1.1%	7.6%
Sub-total, Zone 10	0.2%	0.2%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	1.1%	7.6%
Overall sub-total for study area	98.9%	99.0%	99.6%	99.5%	92.3%	88.8%	65.7%	59.2%	85.5%	71.7%
Foodstores outside study area										
Oswestry Town Centre	0.7%	0.0%	0.0%	0.0%	7.3%	0.0%	17.3%	0.0%	0.0%	25.1%
Chester City Centre	0.0%	0.6%	0.1%	0.0%	0.0%	0.1%	0.0%	9.1%	0.0%	0.0%
Denbigh Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.1%	0.0%
Other foodstores outside study area	0.4%	0.4%	0.3%	0.5%	0.4%	11.1%	17.0%	31.7%	9.4%	3.2%
Overall sub-total for outside study area	1.1%	1.0%	0.4%	0.5%	7.7%	11.2%	34.3%	40.8%	14.5%	28.3%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: NEMS Household Survey market shares (composite results),
September 2013

Table 8b — Convenience goods spending patterns, 2014

	Wrexham Catchment											Overall total £m
	Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Zone 6 £m	Zone 7 £m	Zone 8 £m	Zone 9 £m	Zone 10 £m		
Total expenditure available to study area	51.96	53.27	46.56	45.85	42.92	45.17	38.89	67.13	47.66	45.81	485.2	
Foodstores in Zone 1												
Tesco Extra, Crescent Road, WREXHAM	14.9	6.9	9.9	2.9	3.8	2.2	0.2	2.9	1.5	3.6	48.9	
Other destinations, Zone 1	3.5	1.0	2.1	0.3	0.2	0.1	0.0	0.7	0.0	0.4	8.4	
Sub-total, survey zone 1	18.4	8.0	12.0	3.3	4.0	2.3	0.2	3.6	1.5	4.0	57.3	
Foodstores in Zone 2												
Tesco, Dodds Lane, WREXHAM	0.0	5.6	0.6	0.6	0.0	0.2	0.0	1.3	0.0	0.0	8.2	
Other destinations, Zone 2	0.2	4.5	0.3	0.6	0.8	0.0	0.3	0.8	0.1	0.2	7.4	
Sub-total, survey zone 2	0.2	10.1	0.8	1.2	0.8	0.2	0.3	2.1	0.1	0.2	15.9	
Foodstores in Zone 3												
Morrisons, Ruthin Road, Wrexham	3.1	4.0	5.1	13.2	4.1	0.9	0.3	1.1	2.3	2.2	36.4	
Asda, Holt Road, Eagles Meadow, Wrexham	13.8	11.6	11.2	9.2	7.5	0.9	1.0	1.3	1.5	3.9	61.8	
Sainsburys, Plas Coch Road, Wrexham	5.4	9.7	5.4	9.5	4.3	1.4	0.8	6.6	3.3	5.3	51.8	
Aldi, Plas Coch, Retail Park, Wrexham	2.0	4.4	5.6	4.1	2.5	0.2	2.1	2.1	3.4	3.7	30.1	
Marks & Spencer, Eagles Meadow Shopping Centre, WREXHAM	1.4	1.0	2.3	0.6	0.6	0.0	0.1	0.5	0.1	0.3	7.0	
Other destinations, Zone 3	5.6	2.6	3.4	1.0	0.8	0.2	0.4	0.5	0.4	0.2	15.0	
Sub-total, survey zone 3	31.2	33.4	33.1	37.5	19.9	3.6	4.7	12.1	11.1	15.6	202.2	
Foodstores in Zone 4												
Other destinations, Zone 4	0.1	0.1	0.0	2.0	0.1	0.0	0.1	0.0	0.0	0.1	2.5	
Sub-total, survey zone 4	0.1	0.1	0.0	2.0	0.1	0.0	0.1	0.0	0.0	0.1	2.5	
Foodstores in Zone 5												
Tesco, Plas Kynaston Lane, Off Wells Street, Cefn Mawr, WREXHAM	0.0	0.0	0.1	1.0	10.9	0.0	0.2	0.7	0.2	5.5	18.6	
Other destinations, Zone 5	0.0	0.2	0.3	0.4	3.7	0.0	0.1	0.2	0.1	2.7	7.8	
Sub-total, survey zone 5	0.0	0.2	0.4	1.4	14.5	0.0	0.3	0.9	0.3	8.2	26.3	
Foodstores in Zone 6												
Tesco, White Lion Meadow, WHITCHURCH	0.2	0.0	0.0	0.0	0.0	14.9	0.4	0.0	0.0	0.0	15.5	
Sainsburys, London Road, Whitchurch	0.0	0.0	0.0	0.0	0.0	11.7	0.1	0.0	0.0	0.0	11.7	
Other destinations, Zone 6	0.0	0.0	0.0	0.0	0.0	6.5	1.2	0.0	0.0	0.0	7.8	
Sub-total, survey zone 6	0.2	0.0	0.0	0.0	0.0	33.1	1.7	0.0	0.0	0.0	35.0	
Foodstores in Zone 7												
Tesco, Wharf Road, ELLESMERE	1.2	0.1	0.0	0.0	0.1	0.3	11.1	0.0	0.0	1.2	13.9	
Co-op, Morris Central Shopping Park, WEM	0.0	0.0	0.0	0.0	0.0	0.5	2.6	0.0	0.0	0.0	3.1	
St Martins Village Centre	0.0	0.0	0.0	0.0	0.0	0.0	1.6	0.0	0.1	0.1	0.0	
Other destinations, Zone 7	0.0	0.0	0.0	0.0	0.0	0.2	2.5	0.0	0.0	0.0	2.7	
Sub-total, survey zone 7	1.2	0.1	0.0	0.0	0.1	0.9	17.8	0.0	0.1	1.3	21.6	
Foodstores in Zone 8												
Tesco Extra, Broughton Shopping Park, Broughton Road, CHESTER	0.0	0.4	0.0	0.1	0.0	0.0	0.3	19.1	0.6	0.0	20.6	
Other destinations, Zone 8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.9	0.0	0.0	1.9	
Sub-total, survey zone 8	0.0	0.4	0.0	0.1	0.0	0.0	0.3	21.0	0.6	0.0	22.4	
Destinations in Zone 9												
Tesco, Lon Parcwr, RUTHIN	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	17.7	0.0	17.9	
Co-op, Stryd Fawr, BALA	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	3.3	0.0	3.7	
Other destinations, Zone 9	0.0	0.1	0.1	0.0	0.3	0.0	0.0	0.0	5.4	0.0	5.9	
Sub-total, Zone 9	0.0	0.5	0.1	0.1	0.3	0.0	0.0	0.0	26.4	0.0	27.4	
Destinations in Zone 10												
Other destinations, Zone 10	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.5	3.5	4.3	
Sub-total, Zone 10	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.5	3.5	4.3	
Overall sub-total for study area	51.39	52.75	46.36	45.64	39.63	40.11	25.54	39.73	40.77	32.86	414.8	
Foodstores outside study area												
Oswestry Town Centre	0.36	0.00	0.00	0.00	3.14	0.00	6.72	0.00	0.00	11.48	21.7	
Chester City Centre	0.00	0.32	0.05	0.00	0.00	0.04	0.00	6.10	0.00	0.00	6.5	
Denbigh Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.43	0.00	2.4	
Other foodstores outside study area	0.21	0.19	0.16	0.21	0.15	5.02	6.63	21.29	4.46	1.48	39.8	
Overall sub-total for outside study area	0.57	0.52	0.21	0.21	3.29	5.06	13.35	27.39	6.89	12.96	70.4	
Total	51.96	53.27	46.56	45.85	42.92	45.17	38.89	67.13	47.66	45.81	485.2	

Source: Table 3b, Table 7a

Table 9a — Convenience goods capacity forecasts for study area

Constant market share scenario

Row		2014	2018	2023	2028	Incremental Growth			
						2014-18	2018-2023	2023-28	2014-28
	Total population and expenditure								
A	Total Population	245,592	252,397	260,469	267,765	6,805	8,072	7,296	22,173
B	Total Expenditure £m	485.22	497.37	524.39	555.89	12.15	27.02	31.50	70.67
C	Retained Expenditure %	85.5%	85.5%	85.5%	85.5%				
D	Retained Expenditure £m	414.8	425.2	448.3	475.2	10.38	23.10	26.93	60.41
	Turnover of Convenience Stores in OCA Drawn from Catchment Area								
E	Total Convenience Retail Turnover of Stores in OCA £m	414.8	414.8	421.0	427.4	0.00	6.26	6.35	12.61
	Commitments								
F	Convenience Retail Commitments £m	0.00	42.14	42.78	43.42	42.14	0.64	0.65	43.42
G	Initial Residual Convenience Retail Expenditure £m	0.00	-31.76	-15.55	4.38	-31.76	16.20	19.93	4.38
	Inflow of Expenditure from Outside the Catchment Area								
H	Inflow (%)	0.0%	0.0%	0.0%	0.0%				
I	Inflow £m	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	SUMMARY								
J	Initial Residual Convenience Retail Expenditure £m					-31.76	16.20	19.93	4.38
K	Growth in Inflow £m					0.00	0.00	0.00	0.00
L	Allowance for current stores over-trading					71.87			
M	FINAL RESIDUAL COMPARISON RETAIL EXPENDITURE £m					40.12	16.20	19.93	4.38
	Conversion to floorspace need								
N	Turnover per sq m (assumed)					10,000	10,151	10,304	-
O	Floorspace Requirement for study area (sq.m net)					4,012	1,596	1,934	7,542
P	Floorspace Requirement for study area (sq.m gross)					6,172	2,456	2,976	11,603

Sales efficiency growth of 0% per annum to 2016 and 0.3% per annum thereafter.

Turnover per sq.m at 2013 PBA-RTP estimate. Turnover per sq.m increased to 2026 in line with sales efficiency growth rates shown above

Gross: net floorspace ratio (row R): 65%

Table 9b — Convenience goods capacity forecasts for study area
Constant market share scenario

Row		2014	2018	2023	2028	Incremental Growth			
						2014-18	2018-2023	2023-28	2014-28
	Total population and expenditure								
A	Total Population	245,420	251,647	259,013	265,625	6,228	7,366	6,612	20,205
B	Total Expenditure £m	484.89	495.95	521.58	551.63	11.06	25.63	30.05	66.74
C	Retained Expenditure %	85.5%	85.5%	85.5%	85.5%				
D	Retained Expenditure £m	414.5	423.9	445.9	471.5	9.45	21.91	25.69	57.05
	Turnover of Convenience Stores in OCA Drawn from Catchment Area								
E	Total Convenience Retail Turnover of Stores in OCA £m	414.5	414.5	420.7	427.1	0.00	6.25	6.35	12.60
	Commitments								
F	Convenience Retail Commitments £m	0.00	42.14	42.78	43.42	42.14	0.64	0.65	43.42
G	Initial Residual Convenience Retail Expenditure £m	0.00	-32.69	-17.67	1.02	-32.69	15.02	18.70	1.02
	Inflow of Expenditure from Outside the Catchment Area								
H	Inflow (%)	0.0%	0.0%	0.0%	0.0%				
I	Inflow £m	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	SUMMARY								
J	Initial Residual Convenience Retail Expenditure £m					-32.69	15.02	18.70	1.02
K	Grow in Inflow £m					0.00	0.00	0.00	0.00
L	Allowance for current stores over-trading					71.66			
M	FINAL RESIDUAL COMPARISON RETAIL EXPENDITURE £m					38.98	15.02	18.70	1.02
	Conversion to floorspace need								
N	Turnover per sq m (assumed)					10,000	10,151	10,304	-
O	Floorspace Requirement for study area (sq.m net)					3,898	1,479	1,814	7,191
P	Floorspace Requirement for study area (sq.m gross)					5,996	2,276	2,791	11,063

Sales efficiency growth of 0% per annum to 2016 and 0.3% per annum thereafter.

Turnover per sq.m at 2013 PBA-RTP estimate. Turnover per sq.m increased to 2026 in line with sales efficiency growth rates shown above

Gross: net floorspace ratio (row R): 65%

Table 9c — Convenience goods capacity forecasts for study area
Constant market share scenario

Row		2014	2018	2023	2028	Incremental Growth			
						2014-18	2018-2023	2023-28	2014-28
	Total population and expenditure								
A	Total Population	245,592	252,397	260,469	267,765	6,805	8,072	7,296	22,173
B	Total Expenditure £m	485.37	498.06	525.99	558.98	12.69	27.92	33.00	73.62
C	Retained Expenditure %	85.5%	85.5%	85.5%	85.5%				
D	Retained Expenditure £m	414.9	425.8	449.6	477.8	10.85	23.87	28.21	62.93
	Turnover of Convenience Stores in OCA Drawn from Catchment Area								
E	Total Convenience Retail Turnover of Stores in OCA £m	414.9	414.9	421.2	427.5	0.00	6.26	6.36	12.62
	Commitments								
F	Convenience Retail Commitments £m	0.00	42.14	42.78	43.42	42.14	0.64	0.65	43.42
G	Initial Residual Convenience Retail Expenditure £m	0.00	-31.29	-14.32	6.89	-31.29	16.97	21.21	6.89
	Inflow of Expenditure from Outside the Catchment Area								
H	Inflow (%)	0.0%	0.0%	0.0%	0.0%				
I	Inflow £m	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	SUMMARY								
J	Initial Residual Convenience Retail Expenditure £m					-31.29	16.97	21.21	6.89
K	Grow in Inflow £m					0.00	0.00	0.00	0.00
L	Allowance for current stores over-trading					72.01			
M	FINAL RESIDUAL COMPARISON RETAIL EXPENDITURE £m					40.72	16.97	21.21	6.89
	Conversion to floorspace need								
N	Turnover per sq m (assumed)					10,000	10,151	10,304	-
O	Floorspace Requirement for study area (sq.m net)					4,072	1,672	2,058	7,802
P	Floorspace Requirement for study area (sq.m gross)					6,264	2,573	3,166	12,003

Sales efficiency growth of 0% per annum to 2016 and 0.3% per annum thereafter.

Turnover per sq.m at 2013 PBA-RTP estimate. Turnover per sq.m increased to 2026 in line with sales efficiency growth rates shown above

Gross: net floorspace ratio (row R): 65%