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Flintshire County Council

Flintshire Retail Capacity Study

Final Report | June 2011

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Glossary

Technical Term	Definition/Explanation
Aggregate Retention Rate	The overall proportion of retail expenditure available to residents within the study area that is spent at town centres, retail parks and freestanding stores within the study area. For example, if there is £100m of 'available' retail expenditure within the study area and £40m of that expenditure is spent at retail facilities within the study area, this would equate to an aggregate retention rate of 40 per cent.
Benchmark Trading Level	The 'benchmark' turnover of a retail store is derived by applying company average sales densities to the quantum of sales area floorspace within the store. If this exercise indicates that existing floorspace is achieving a turnover in excess of the 'benchmark' level, this is commonly referred to as 'over-trading', whereas if the floorspace is achieving a turnover below the 'benchmark' level, this is commonly referred to as 'under-trading'.
Comparison Goods	Non-food retail goods.
Convenience Goods	Food and groceries goods.
Expenditure Leakage	The overall proportion of retail expenditure available to residents within the study area that is spent at town centres, retail parks and freestanding stores outside of the study area. For instance, if there is £100m of 'available' retail expenditure within the study area and £60m of that expenditure is spent at retail facilities outside of the study area, this would equate to an expenditure 'leakage' rate of 60 per cent.
Expenditure Retention	The proportion of retail expenditure available to residents within the study area, or a specific zone or zones, that is spent at town centres, retail parks and freestanding stores located inside of the study area, or a particular zone or zones. For instance, if there is £10m of 'available' retail expenditure within a specific zone and £7m of that expenditure is spent at retail facilities inside of the study area, this would equate to an expenditure retention rate within the study area of 70 per cent for that zone.
Gross Floorspace	The total built floor area of a retail unit. It should be noted that gross floorspace excludes any open areas used for the storage, display or sale of goods.
Localised Expenditure Retention	The proportion of retail expenditure available to residents within a specific zone that is spent in town centres, retail parks and freestanding stores located within that zone.
Floorspace Efficiency	The monetary value of convenience or comparison goods sales divided by the sales area floorspace generating those sales. Floorspace efficiency is also referred to as sales density, and is usually expressed as £ per sq.m.
Overall Catchment Area	The overall area that is served by the study centres when considered collectively.

Sales Area Floorspace	For all retail shops and stores other than foodstores, the widely accepted definition of net sales area (as prepared by the National Retail Planning Forum) is the total internal floorspace to which customers have access to or from which sales are made, including areas such as sales counters, fitting rooms and customer service areas, but excluding cafes and customer toilets. For foodstores, the Competition Commission define the net sales area as all internal floorspace to which customers have access to, excepting checkouts, lobbies, concessions, restaurants, customer toilets and walkways behind the checkouts.
Sales Density	See floorspace efficiency.
Special Forms of Trading	Retail sales not undertaken in shops or stores, including catalogue, TV and internet shopping, and sales via temporary open market stalls.

List of Abbreviations Used in the Report

Abbreviation	
FTCHS	Flintshire Town Centre Healthchecks Study
OCA	Overall Catchment Area
OE	Oxford Economics
ONS	Office of National Statistics
PBBI	Pitney Bowes Business Insight
PPS	Planning Policy Statement
PPW	Planning Policy Wales
RTP	Roger Tym & Partners
SFT	Special Forms of Trading
UDP	Unitary Development Plan
WAG	Welsh Assembly Government

1 PURPOSE OF THE STUDY AND STRUCTURE OF REPORT

Purpose of the Study

1.1 Roger Tym & Partners has previously undertaken two assessments of retail capacity in Flintshire. The first assessment formed part of the Flintshire Town Centre Healthchecks Study (FTCHS), which we completed in August 2008. In the FTCHS we assessed the capacity for additional comparison and convenience retail floorspace across Flintshire as a whole in the period to 2020, which was informed by a household telephone survey of shopping patterns undertaken in February and March 2008 by NEMS. In the second exercise, which we completed in September 2010, we assessed the scope for additional comparison retail floorspace only, but this time focusing on Mold's catchment area.

1.2 To inform the emerging Local Development Plan, the Council has decided to commission a new, County-wide retail capacity assessment, underpinned by a new household survey which will provide evidence of current shopping patterns. Although the County-wide retail capacity assessment which we undertook as part of the FTCHS was completed fairly recently, many of the inputs and assumptions which underpinned the 2008 study have already become out-of-date. For instance, various foodstores have opened in Flintshire in the past two or three years and more up-to-date information is available in relation to the following data inputs and assumptions:

- population projections;
- forecast rates of retail expenditure growth;
- forecast rate of floorspace efficiency change;
- spending on special forms of trading; and
- retail commitments.

1.3 All of the data inputs listed above are important but of particular importance is the one relating to forecast rates of future retail expenditure growth. The 2008 study pre-dated the economic recession which affected the UK, and so the inputs which informed our previous assessment of quantitative need do not accurately reflect current circumstances. Experian and Pitney Bowes Business Insight each published new forecasts of future expenditure growth rates in September 2010.

1.4 As well as using more up-to-date data inputs that have become available since the FTCHS was completed, we consider it prudent to undertake some further sensitivity testing of alternative expenditure retention rates, and to assess under/over trading, which is becoming standard industry practice in retail capacity studies.

1.5 The Welsh Assembly Government's requirements in terms of planning for retail and other town centre uses are set out in Chapter 10 of its Planning Policy Wales document ('PPW', July 2010). Paragraph 10.2.10 of PPW confirms that in deciding whether to identify sites for retail and leisure developments, local planning authorities should consider whether there is a need for additional provision. However, PPW does not provide any advice as to how a need assessment should be undertaken.

1.6 In the absence of definitive guidance in PPW, we consider it reasonable to refer, wherever appropriate, to the corresponding guidance in England (Planning Policy Statement 4: Planning for Sustainable Economic Growth) and the accompanying 'Practice Guidance on Need, Impact and the Sequential Approach'[1]. PPS4 and the Practice Guidance provide detailed advice on the main steps that should be followed in assessing need/expenditure capacity.

Structure of Our Report

1.7 In Section 2 we describe current patterns of retail spending, drawing on the new telephone survey of households across Flintshire's overall catchment area. In Section 3 we then provide our analysis of quantitative retail needs in the period up to 2021 and, more tentatively, up to 2026.

1.8 A series of Appendices are provided, which contain a plan of the overall catchment area, the household survey questionnaire, our retail capacity tables for the comparison and convenience retail sectors, and two tables containing our analysis of the turnover of the County's comparison and convenience retail floorspace against 'benchmark' turnover levels..

[1] Hereafter referred to as 'the PPS4 Practice Guidance'.

2 CURRENT PATTERNS OF RETAIL SPENDING

Household Survey Methodology

2.1 The last comprehensive county-wide survey of shopping patterns was undertaken three years ago, and so the Council has decided to commission a new household survey to provide up-to-date evidence of current shopping patterns and inform the present study. Accordingly, our assessment of local patterns of retail spending, as set out in this section of our report, is based on a telephone survey of 1,004 households undertaken by NEMS Market Research in November and December 2010.

2.2 The overall catchment area (OCA) for the surveys – as shown in Appendix 1 – is the same as the OCA that was defined for the telephone survey undertaken in February and March 2008. Thus, the OCA covers the administrative area of Flintshire, but also extends slightly into the administrative area of Denbighshire. The OCA is disaggregated into eight study zones, based on postcode sector boundaries, as shown in Appendix 1 and listed in Spreadsheet 1 in Appendix 3[2].

2.3 We ensured that there was a minimum of 100 completed interviews in each of the eight survey zones and the results of the survey were weighted according to the actual population in each zone. As with any sample-based data collection, there is potentially a difference between the response from the sample and the true situation in the population as a whole – known as the 'standard error' – although we took various steps to minimise this difference (for example, through random sample selection and careful construction of the questionnaire).

2.4 We have also defined seven 'buffer areas', which are located adjacent to but beyond the OCA, in order to better assess the direction of expenditure leakage from the County. The seven 'buffer areas' are depicted in Appendix 1. No surveys of households were undertaken in the buffer zones.

2.5 The survey questionnaire, which is reproduced in Appendix 2, 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, and the amount spent per week (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, and the amount spent per week (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);

[2] All references to spreadsheets in this and subsequent sections of our report relate to the spreadsheets contained in Appendix 3 (Comparison Spreadsheets 1 to 9b) and Appendix 4 (Convenience Spreadsheets 10 to 16c).

- 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, computers and mobile phones, and 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 products (questions 25 and 26).

2.6 The composite pattern of spending for convenience goods was achieved on the basis of the mean weekly household spend findings, as follows:

Table 2.1 Composite Patterns of Convenience Goods Spend

	Mean Weekly Household Spend	Percentage Weighting
Main food & groceries	£77.19	76.3
Top-up food & groceries	£21.16	20.9
Small local shops	£2.86	2.8
All Convenience Goods	£101.22	100.0

2.7 The composite pattern of spending for comparison goods was achieved on the basis of MapInfo expenditure data in relation to the seven categories of spend, as follows:

Table 2.2 Composite Patterns of Comparison Goods Spend

	Percentage Weighting
Clothes and shoes	22.6
Furniture, carpets and soft household furnishings	9.6
DIY and decorating goods	9.5
Electrical items and domestic appliances	14.3
Health, beauty and chemist items	11.7
Recreational goods	22.7
Other non-food goods	9.5
All Comparison Goods	100.0

Comparison Goods Spending Patterns in 2010

2.8 The population of the catchment area in 2010, disaggregated by zone, is shown in the second row of figures in Spreadsheet 2 in Appendix 3 and Spreadsheet 11 in Appendix 4. The overall population in the 2010 base year amounts to approximately 152,500 persons, which is derived by applying the Welsh Assembly Government's 2008-based Local Authority Population Projections to the mid-year 2008 zonal estimates provided by MapInfo/Oxford Economics.

2.9 The per capita spend on comparison goods in 2010 (Spreadsheet 3) varies from a low of £2,733 in Zone 7 to a high of £2,957 in Zone 2 and so all eight zones have per capita comparison goods spending levels which are below the Great Britain average, which in 2010 was £3,063 per capita.

2.10 The total amount of comparison goods spending for residents of the whole of the catchment area in 2010 is £431.93m (Spreadsheet 4), of which £43.34m, or just over 10.0 per cent, is spent on special forms of trading (catalogue, TV and internet shopping, which we subsequently abbreviate as SFT), based on the findings of the survey of households.

2.11 The pattern of expenditure flows for the comparison goods sector as a whole, as revealed by the survey of households, is set out in Spreadsheets 5 and 6.

2.12 Table 2.3, which is derived from the final column of Spreadsheet 6, summarises the main destinations for comparison goods expenditure within and outside the County. Broughton Retail Park and Mold Town Centre are the main destinations for comparison shopping within the OCA, attracting £76.3m (17.7 per cent) and £41.8m (9.7 per cent), respectively. Other town centres, retail parks and freestanding stores located within the OCA account for a further £95.3m (22.1 per cent) of the comparison goods expenditure available to residents of the OCA. Thus, overall, some 49.4 per cent of expenditure on comparison goods available to the OCA's residents is spent in town, district and local centres, or in retail parks and freestanding stores, which are located within the OCA. This is known as the aggregate retention rate.

2.13 A lower aggregate retention rate was identified by the 2008 household survey, of 34.0 per cent[3]. Rather than indicating a significant improvement to comparison retail facilities across the County, however, we consider that the change in the retention rate may in part be due to differences in the approach to the two household surveys. Our 2010 survey asked residents about their shopping habits in relation to seven different categories of comparison goods, rather than just five categories, as in the 2008 survey. One of the new categories considered as part of the 2010 survey is shopping trips to purchase '*health, beauty and chemist items'*. Typically, shopping for these items is undertaken on a relatively localised basis, and the effect of considering this sub-category will be to elevate small centres within the OCA, and potentially increase the aggregate retention rate.

2.14 The survey findings in relation to comparison shopping patterns confirm that a greater dispersal of response has been achieved in the 2010 survey, compared to the 2008 survey. Thus, the smaller centres within the OCA feature more prominently in the 2010 survey findings than they did in the 2008 survey. Conversely, the 2010 comparison market shares

[3] The 2008 percentage market shares set out in the FTCHS, which are derived from the results of the 2008 household survey, exclude spending on SFT, whereas the percentage market shares set out in Spreadsheet 5 in Appendix 3 and Spreadsheet 14 in Appendix 4, which are derived from the results of the 2010 household survey, include SFT. The percentage market shares derived from the results of the 2008 and 2010 household surveys are therefore not directly comparable. If SFT was included in the derivation of the 2008 percentage market shares, the percentage market share of each store and centre would be slightly lower. Accordingly, the aggregate retention rate derived from the results of the 2008 household survey would also be slightly lower.

for larger centres outside of the OCA are generally lower than the corresponding market shares indicated by the 2008 survey.

2.15 Furthermore, since March 2008, Flintshire has benefitted from of a number of new retail schemes, including the redevelopment of Ffordd Llanarth neighbourhood centre, as well as the opening of Morrisons in Saltney, Charlies Stores and B&M Bargains at Deeside Retail Park in Shotton, Aldi in Flint, Sainsbury's at Flintshire Retail Park, and Lidl in Mold. Accordingly, it is likely that Flintshire has clawed back some expenditure that previously leaked to retail facilities located beyond the OCA.

2.16 We consider that 49.4 per cent is a reasonably good level of retention for the Flintshire OCA, especially given that the County is bordered by higher-order centres to the east and south, namely Chester and Wrexham. Nevertheless, there is still some scope to further improve upon this level of expenditure retention, and we address this issue in detail in Section 3.

2.17 Table 2.3 shows that just over half of the comparison retail expenditure available within the OCA leaks to destinations beyond the County. In addition to the 10.0 per cent spent on SFT, some 36.2 per cent of comparison goods expenditure flows to town and city centres and retail parks in the buffer areas located just outside the OCA (Chester City Centre and Greyhound Retail Park, Chester are the main recipients of this expenditure leakage to the buffer zones, collectively accounting for £116m of the comparison retail expenditure available to OCA residents). The balance of 4.4 per cent is spent in more distant locations, such as Cheshire Oaks Designer Outlet in Ellesmere Port.

Table 2.3 Broad Destinations for Comparison Goods Expenditure

Broad Destinations for Comparison Goods Expenditure	£m	%
Broughton Retail Park, Chester Road, Broughton	76.3	17.7
Mold Town Centre	41.8	9.7
Other destinations within the OCA	95.3	22.1
Total Retained Expenditure	**213.3**	**49.4**
Buffer zones just outside the OCA	156.2	36.2
Other more distant locations	19.01	4.4
SFT	43.3	10.0
Total Leakage	**218.6**	**50.6**
TOTAL	**431.9**	**100.0**

2.18 The market shares and estimated comparison goods turnovers of the main centres and retail parks/freestanding stores within the OCA, prior to making any allowance for any expenditure inflow from those who are resident beyond the OCA, are set out in the last two columns of Spreadsheet 6 and are summarised in Table 2.4.

Table 2.4 Comparison Goods Expenditure Retained Within the OCA

Town/District Centres Within the OCA	£m	%
Mold Town Centre	41.8	8.6
Flint Town Centre (including Flintshire Retail Park)[4]	21.1	4.9
Queensferry District Centre (including Asda)[5]	17.1	4.0
Holywell Town Centre	7.9	1.8
Buckley Town Centre	7.2	1.7
Shotton Town Centre	5.5	1.3
Connah's Quay District Centre	5.0	1.2
Hawarden Local Centre[6]	2.7	0.6
Saltney District Centre	1.1	0.3
Retail Parks and Freestanding Stores Within the OCA	**£m**	**%**
Broughton Retail Park, Chester Road, Broughton	76.3	17.7
B&Q, Deeside Retail Park, Chester Road East, Shotton	22.1	5.1
B&M Bargains, Deeside Retail Park, Chester Road East, Shotton	2.0	0.5

2.19 Table 2.4 confirms that Broughton Retail Park is the main comparison shopping destination in the County, with a comparison goods turnover of approximately £76.3m, and a market share of 17.7 per cent. Mold Town Centre achieves the second-highest market share for comparison shopping and it is the main town centre within Flintshire, but has a comparison goods turnover (£41.8m) which is just over half that achieved by Broughton Retail Park. The B&Q store at Deeside Retail Park in Shotton has the third-highest comparison retail turnover of £22.1m, and is followed by Flint Town Centre (including Flintshire Retail Park) and Queensferry District Centre (including Asda), with comparison retail turnovers of £21.1m and £17.1m, respectively.

2.20 The only other destinations in the OCA which achieve comparison retail turnovers in excess of £3m are Holywell Town Centre (£7.9m), Buckley Town Centre (£7.2m), Shotton Town Centre (£5.5m) and Connah's Quay District Centre (£5.0m).

2.21 The household survey findings indicate that Hawarden Local Centre achieves a comparison retail turnover of £2.7m. However, there is only a handful of comparison retailers in the centre – a pharmacy, an antiques shop, a newsagent, a stationers and a gents' clothes

[4] Note that the definition of Flint Town Centre in this report includes Flintshire Retail Park in Flint, as per the definition on the Adopted UDP Proposals Map.

[5] Note that the definition of Queensferry District Centre in this report includes the Asda store at Aston Road in Queensferry, as per the definition on the Adopted UDP Proposals MAP.

[6] Hawarden is not defined as a Town Centre or District Centre in the Proposed Modifications versions of the emerging UDP.

retailer, as well as a small amount of comparison retail goods that are available in the Post Office – and so we consider that the £2.7m figure is artificially high. Some £2.26m of the £2.7m figure is accounted for by expenditure on electrical items and domestic appliances (see Spreadsheet 8h), although these goods are not available in Hawarden Local Centre. We suspect that some respondents who cited ‘Hawarden’ in the survey might have really meant Hawarden Industrial Park – which contains some trade counter uses – or maybe even the Asda store in nearby Queensferry. However, we have no way of confirming this.

2.22 Notably, the comparison turnover of Queensferry District Centre is substantially higher than that of Holywell, Buckley and Shotton, which are identified as ‘town centres’ in the Proposed Modifications version of the emerging UDP. This is due to the presence of the Asda superstore in Queensferry District Centre, which accounts for £14.9m of the centre’s total comparison turnover of £17.1m. Buckley and Holywell Town Centres also contain foodstores but they are considerably smaller than the Asda store in Queensferry.

2.23 In addition, the comparison turnover of Connah’s Quay District Centre is only marginally lower than that of Shotton Town Centre. Saltney justifies its status as a ‘district centre’ with a comparison retail turnover of just over £1m. However, the NEMS survey suggests that Hawarden Local Centre – which is not currently identified as a Town Centre or District Centre in Flintshire – currently achieves a higher comparison turnover than Saltney District Centre. No other town, district or local centre in Flintshire achieves a material comparison market share.

2.24 The latest household survey indicates that the comparison goods market shares of almost all the individual stores and centres within the catchment area have increased since the 2008 household survey. However, as we explained above in relation to the OCA’s aggregate retention rate, the changes in the market share of a number of individual stores and centres is substantial and goes some way to explaining the higher aggregate retention rate. Specifically, the comparison goods market shares of the B&Q store at Deeside Retail Park, the Asda store in Queensferry District Centre, and Broughton Shopping Park are all substantially higher than in the previous household survey, whereas the market share of other stores in Queensferry District Centre has decreased considerably[7].

2.25 The market share of Broughton Shopping Park identified by the latest household survey is 17.7 per cent, compared to 10.7 per cent in 2008. Rather than indicating any particular improvement in the performance of the Shopping Park, we consider that the comparison goods expenditure retained by Broughton Shopping Park – of £76.3m, as shown in Table 2.4 – is now more realistic than the turnover that was indicated by the previous household survey. The latest survey-derived comparison turnover is in line with our estimate of the benchmark turnover for the Shopping Park which is derived from residents of the catchment area, of just under £70m, as shown in Table A5.1 in Appendix 5.

[7] As noted above, the percentage market shares derived from the 2008 household survey exclude SFT. If SFT was included, the percentage market share of each store and centre would be slightly lower.

2.26 Similarly, whilst the market share of the Asda store in Queensferry District Centre appears to have increased from 1.6 per cent to 3.5 per cent, the comparison turnover of the store of £14.9m is now closer to its company average benchmark, which we estimate to be £26.9m. Again, as with Broughton Shopping Park, we consider that the findings for the Asda store in Queensferry identified through the latest survey are more realistic that the findings for the store that were established by the 2008 survey.

2.27 The market share of the B&Q store in Queensferry has apparently increased from 2.7 per cent to 5.1 per cent. In this case, rather than indicating any particular improvement in the performance of the store, we consider that this increase can be attributed, at least in part, to the decrease in the market share experienced by Queensferry District Centre (excluding the Asda store), which is 0.5 per cent as opposed to 1.9 per cent in 2008. These changes indicate that many of the respondents who shopped in B&Q may have responded ‘Queensferry’ when interviewed as part of the 2008 survey, rather than specifying B&Q. Nevertheless, the resultant comparison goods turnover of the B&Q store of £22.1m, as derived by applying the survey-derived market shares to the expenditure pot, is considerably above the benchmark turnover of the store, which we estimate to be £7.4m. We therefore consider that, in reality, the turnover of the B&Q store is likely to be lower than that indicated by the results of the 2010 household survey.

2.28 The main destinations for expenditure leakage, again as shown in the last two columns of Spreadsheet 6, are summarised in Table 2.5. There are six principal destinations for comparison goods expenditure leakage which, in order of importance, are Chester City Centre, Greyhound Retail Park in Chester, Wrexham Town Centre, Chester Retail Park, Rhyl Town Centre and Cheshire Oaks Designer Outlet in Ellesmere Port.

Table 2.5 Main Destinations for Comparison Goods Expenditure Leakage

Town/City Centres Outside the OCA	**£m**	**%**
Chester City Centre	68.80	15.9
Wrexham Town Centre	19.67	4.6
Rhyl Town Centre	6.56	1.5
Liverpool City Centre	2.03	0.5
Ellesmere Port Town Centre	2.00	0.5
Llandudno Town Centre	1.99	0.5
Retail Parks and Freestanding Stores Outside the OCA	**£m**	**%**
Greyhound Retail Park, Sealand Road, Chester	47.56	11.0
Chester Retail Park, Old Seals Way, Chester	6.84	1.6
Cheshire Oaks Designer Outlet, Kinsey Road, Ellesmere Port	3.95	0.9
B&Q, Berse Road, Wrexham	1.24	0.3

2.29 The OCA's retention level by zone (see Spreadsheet 5, *'Total Inside Catchment Area'* row) varies from a low of 37.0 per cent in Zone 5 to a high of 55.7 per cent in Zone 4.

2.30 The localised retention rate – which is the proportion of expenditure on comparison goods available to residents in a specific zone that is spent in town centres and stores located within that zone – is highest for Zone 4, which contains Mold Town Centre (see Spreadsheet 5, *'*Zone 4' column and 'Total Zone *4'* row) and Zone 8, which includes Broughton Shopping Park, at 34.8 per cent and 34.7 per cent, respectively. The next highest localised retention rates for comparison goods are for Zone 7 (30.2 per cent), and Zone 3 (28.2 per cent). All of the remaining localised retention rates are below 12 per cent, indicating that there is a relatively broad dispersal of comparison shopping patterns around the OCA.

Comparison Goods Market Shares

2.31 Below, we provide an analysis of the comparison goods market shares achieved by each of the five Town Centres and the three District Centres in Flintshire that are defined in the emerging UDP, as well as for the out-of-centre Broughton Shopping Park, which as shown above is also an important destination for comparison goods spending in Flintshire.

Mold Town Centre

2.32 Mold Town Centre achieves a comparison goods market share of 34.6 per cent in its own zone (Zone 4), and a market share of 21.5 per cent and 17.3 per cent in neighbouring Zones 2 and 5, respectively. Zone 6 is the only other zone in which Mold achieves a material market share (8.7 per cent). Mold Town Centre does not achieve a market share in excess of 5 per cent in the remaining four zones, and its market share is particularly low in Zones 7 and 3, at 1.6 per cent and 2.0 per cent, respectively.

Flint Town Centre

2.33 Flint Town Centre (including Flintshire Retail Park) achieves its highest comparison goods market share of 28.2 per cent in its own zone (Zone 3). The only other zone in which Flint achieves a material market share, of 10.1 per cent, is in neighbouring Zone 1, from which Flint Town Centre/Flintshire Retail Park draws 36 per cent of its comparison goods turnover, as revealed by Spreadsheet 6. Flint does not achieve a market share in excess of 3 per cent in any of the remaining six survey zones.

Holywell Town Centre

2.34 Holywell Town Centre achieves a maximum comparison goods market share of 10.2 per cent in its own zone (Zone 1) and does not achieve a market share of over 0.5 per cent in any of the other seven survey zones.

Buckley Town Centre

2.35 Buckley Town Centre's comparison goods market share reaches a maximum of 12.0 per cent in its own zone (Zone 6). The comparison goods market share of Buckley is less than 2 per cent in all other survey zones.

Shotton Town Centre

2.36 Shotton Town Centre achieves a maximum comparison goods market shares of 5.1 per cent in its own zone (Zone 7) and does not achieve a market share of over 1 per cent in any of the other seven survey zones.

Queensferry, Connah's Quay and Saltney District Centres

2.37 Queensferry District Centre (including Asda) achieves a maximum comparison goods market share of 9.7 per cent in its own zone (Zone 7) and a market share of between 2.6 per cent and 3.1 per cent in Zones 1, 2, 3, 6 and 8. Queensferry's comparison goods market share is less than 2 per cent in the remaining two survey zones. Notably, the Asda store in Queensferry District Centre accounts for the vast majority of the comparison goods market share achieved by the centre in all of the survey zones. In Zone 7, for example, the Asda store achieves a comparison goods market share of 8.7 per cent, whilst the other stores in Queensferry District Centre collectively achieve a market share of just 1.0 per cent, highlighting Asda's dominance in the centre in terms of comparison goods shopping.

2.38 Connah's Quay District Centre – which is also in Zone 7 – achieves a maximum comparison goods market share of 4.5 per cent in its own zone and does not achieve a market share of over 1 per cent in any of the other seven survey zones.

2.39 Saltney District Centre, which is located in Zone 8, does not achieve a comparison goods market share in excess of 1 per cent even in its own zone.

Broughton Shopping Park

2.40 Broughton Shopping Park achieves a relatively high comparison goods market share of 33.1 per cent in its own zone (Zone 8), and 22.8 per cent in neighbouring Zone 6. Spreadsheet 5 shows that the Shopping Park also achieves a market share in excess of 10 per cent in the remaining six zones, which emphasises its appeal to residents across the whole of Flintshire.

Overlapping Comparison Goods Catchments

2.41 Table 2.6 presents an analysis of dominant centres/out-of-centre retail parks – defined for this exercise as instances where the comparison goods market share exceeds 20 per cent – and centres of subsidiary influence, which are defined on the basis of having comparison goods market shares of between 10 per cent and 20 per cent. Table 2.6 reveals that:

i. Broughton Shopping Park is the dominant comparison shopping destination in two zones, and has a subsidiary influence in the remaining six zones.

ii. Mold Town Centre is the dominant centre in its own zone, and has a subsidiary influence in two zone.

iii. Flint Town Centre (including Flintshire Retail Park) is the dominant centre in its own zone, and has a subsidiary influence in one other zone.

iv. Buckley Town Centre is not the dominant centre in any zones, but has a subsidiary influence in its own zone.

v. Chester City Centre is not the dominant centre in any of the zones[8], but exerts a significant influence in all of the zones. Similarly, Greyhound Retail Park in Chester is not the dominant centre in any of the zones, but exerts a subsidiary influence in the four zones towards the east of the catchment area (Zones 2, 6, 7 and 8). Wrexham Town Centre is the dominant centre in the southern-most zone in the catchment area (Zone 5), although it does not have a subsidiary influence in any of the other zones. The influence of competing centres, located outside the OCA, is therefore significant in all of the eight survey zones.

vi. In five of the eight zones, there is one dominant centre, and at least two centres of subsidiary influence. There is no dominant centre in the remaining three zones, but there are at least three centres of significant influence. Competition for market share in each zone is therefore intense.

Table 2.6 Dominant Comparison Goods Centres/Retail Parks and Centres/Retail Parks of Subsidiary Influence

Zone	Dominant Centres /Retail Parks (Market Share 20%+)	Other Centres/Retail Parks of Significant Influence (Market Share 10% to 20%)
1		Chester City Centre, Broughton Shopping Park, Holywell Town Centre , Flint Town Centre (including Flintshire Retail Park)
2		Mold, Broughton Shopping Park, Chester City Centre, Greyhound Retail Park
3	Flint Town Centre (including Flintshire Retail Park)	Chester City Centre, Broughton Shopping Park
4	Mold Town Centre	Chester City Centre, Broughton Retail Park
5	Wrexham Town Centre	Mold Town Centre, Broughton Shopping Park, Chester City Centre
6	Broughton Shopping Park	Chester City Centre, Greyhound Retail Park, Buckley Town Centre
7		Chester City Centre, Broughton Shopping Park, Greyhound Retail Park
8	Broughton Shopping Park	Chester City Centre, Greyhound Retail Park

[8] Although it should be noted that Chester achieves a market share in Zones 1 and 7 which, although not as high as 20 per cent, is still higher than the market share achieved in these zones by any other centre in Flintshire.

Comparison Goods Sub-Sectors

2.42 We now turn to the patterns of shopping for various comparison goods sub-sectors[9], which are listed below:

- clothes and shoes, which account for £98m of the comparison goods spending of the OCA's residents;
- furniture, carpets, and soft household furnishings, which account for £42m;
- DIY and decorating goods, which account for £41m;
- electrical items and domestic appliances, which account for £62m;
- health, beauty and chemist items, which account for £51m;
- recreational goods (for example, sports equipment and musical instruments), which account for £98m; and
- specialist/other comparison items (for example, books, CDs, jewellery, glass and china items), which account for £41m of the comparison goods expenditure available to residents of the catchment area.

Clothes and Shoes

2.43 Overall, 42.3 per cent of the expenditure on clothes and shoes available to the OCA's residents is spent in town centres, retail parks and in freestanding stores which are located within the catchment area (see final column of Spreadsheet 8b); this is a relatively low retention level for basic comparison needs.

2.44 Broughton Shopping Park accounts for £25.3m of the £41.2m of clothes and shoes expenditure that is retained in the OCA (which equates to a retention rate of 25.9 per cent), followed by Mold Town Centre (£5.5m, or 5.6 per cent) and Queensferry District Centre (including Asda) (£5.5m, or 5.6 per cent), as shown in Table 2.7.

Table 2.7 Main Destinations for Clothes and Shoes within the OCA

Destination	Clothes & Shoes Expenditure (£m)	Market Share (%)
Broughton Shopping Park	25.3	25.9
Mold Town Centre	5.5	5.6
Queensferry District Centre (including Asda)	5.5	5.6

2.45 The main leakage destinations for clothes and shoes expenditure are Chester City Centre and Wrexham Town Centre, as shown in Table 2.8.

[9] The shopping patterns for each of the comparison goods sub-sectors are set out in full in Spreadsheets 8a to 8n.

Table 2.8 Leakage Destinations for Clothes and Shoes

Destination	Clothes & Shoes Expenditure (£m)	Market Share (%)
Chester City Centre	29.1	29.8
Wrexham Town Centre	7.6	7.8

Furniture, Carpets and Soft Furnishings

2.46 Overall, 36.9 per cent of expenditure on furniture, carpets and soft furnishings available to the OCA's residents is spent in town centres, retail parks and freestanding stores which are located within the catchment area (see final column of Spreadsheet 8d), equating to £15.4m. This is again a relatively modest level of retention for this category of comparison retail.

2.47 The main destinations for expenditure on furniture, carpets and soft furnishings within the catchment area are shown in Table 2.9. The table shows that Mold Town Centre accounts for £4.0m of the £41.7m expenditure on this category of goods that is retained within the OCA (which equates to a market share of 10 per cent), followed by Broughton Shopping Park (£3.1m, or 7 per cent) and then Flint Town Centre (including Flintshire Retail Park) (£2.8m, or 7 per cent). No other town centre, retail park or freestanding store within the OCA achieves a spending level on this category of goods which is in excess of £2.0m.

Table 2.9 Main Destinations for Furniture, Carpets and Soft Furnishings within the OCA

Destination	Furniture, Carpets & Soft Furnishings Expenditure (£m)	Market Share (%)
Mold Town Centre	4.0	9.5
Broughton Shopping Park	3.1	7.4
Flint Town Centre (including Flintshire Retail Park)	2.8	6.6

2.48 The main leakage destinations for furniture, carpets and soft furnishings are shown in Table 2.10.

Table 2.10 Leakage Destinations for Furniture, Carpets and Soft Furnishings

Destination	Furniture, Carpets & Soft Furnishings Expenditure (£m)	Market Share (%)
Greyhound Retail Park, Sealand Road, Chester	11.3	27.2
Chester City Centre	7.0	16.7

DIY and Decorating Goods

2.49 Overall, 74.1 per cent of the expenditure on DIY and decorating goods available to residents of the OCA is spent in town centres, retail parks and freestanding stores which are located within the catchment area (see final column of Spreadsheet 8f). This is a high level of retention and reflects the fact that shopping for this category of comparison goods is usually undertaken on a localised basis.

2.50 As shown in Table 2.11, the B&Q store in Shotton accounts for £19.2m of the DIY and decorating expenditure within the OCA (which equates to a market share of 46.8 per cent), making it the most important destination for this category of goods, by a considerable margin. Apart from Mold Town Centre (£6.3m, or 15 per cent), no other town centre, retail park or freestanding store within the OCA accounts for more than £1.5m of expenditure on this type of goods.

Table 2.11 Main Destinations for DIY and Decorating Goods within the OCA

Destination	Expenditure on DIY and Decorating Goods (£m)	Market Share (%)
B&Q, Deeside Retail Park, Shotton	19.2	46.8
Mold Town Centre	6.3	15.4

2.51 The main leakage destination for expenditure on DIY and decorating goods is Greyhound Retail Park, Chester (£4.3m, which equates to a market share of 10.3 per cent).

Electrical Items and Domestic Appliances

2.52 Overall, 36.8 per cent of the expenditure on electrical items and domestic appliances of the OCA's residents is spent in town centres, retail parks and freestanding stores which are located within the catchment area (see final column of Spreadsheet 8h). Whilst spending on the Internet is typically quite high for these types of items, this is a still a low level of retention for this category of comparison goods.

2.53 The main destinations for expenditure on electrical items and domestic appliances within the study area, as shown in Table 2.12, are Mold Town Centre (£5.1m, equating to a market share of 8 per cent), Broughton Shopping Park (£4.6m, or 7 per cent) and Flint Town Centre (including Flintshire Retail Park) (£3.4m, or 6 per cent). No other town centre, retail park or freestanding store within the OCA accounts for more than £3m of expenditure on this type of goods.

Table 2.12 Main Destinations for Electrical Items and Domestic Appliances within the OCA

Destination	Expenditure on Electrical Items and Domestic Appliances (£m)	Market Share (%)
Mold Town Centre	5.1	8.3

Broughton Shopping Park	4.6	7.4
Flint Town Centre (including Flintshire Retail Park)	3.4	5.5

2.54 The main leakage destinations for expenditure on electrical items and domestic appliances are shown in Table 2.13.

Table 2.13 Leakage Destinations for Electrical Items and Domestic Appliances

Destination	Expenditure on Domestic Appliances (£m)	Market Share (%)
Greyhound Retail Park, Sealand Road, Chester	16.3	26.3
Chester City Centre	4.3	6.9
Wrexham Town Centre	2.9	4.7

Health, Beauty and Chemist Items

2.55 Overall, 84.0 per cent of OCA residents' expenditure on health, beauty and chemist items is spent in town centres, retail parks and freestanding stores which are located within the catchment area (see final column of Spreadsheet 8j). This is the highest level of retention attained out of the seven categories of comparison retail goods, reflecting the fact that shopping for these items is usually undertaken on a relatively localised basis.

2.56 The main destinations for expenditure on health, beauty and chemist items within the catchment area, as shown in Table 2.14, are Broughton Shopping Park (£11.1m, which equates to a market share of 22 per cent), and Mold Town Centre (£10.1m, or 20 per cent). Flint Town Centre (including Flintshire Retail Park), Buckley Town Centre, Holywell Town Centre, Queensferry District Centre (including Asda) and Shotton Town Centre are the other destinations within the catchment area that achieve a market share of 5 per cent or greater for this category of goods.

Table 2.14 Main Destinations for Health, Beauty and Chemist Items within the OCA

Destination	Expenditure on Health, Beauty & Chemist Items (£m)	Market Share (%)
Broughton Shopping Park	11.1	21.9
Mold Town Centre	10.1	19.9
Flint Town Centre (including Flintshire Retail Park)	4.5	8.8
Buckley Town Centre	3.7	7.3
Holywell Town Centre	3.7	7.2
Queensferry District Centre (including Asda)	2.9	5.6
Shotton Town Centre	2.5	5.0

2.57 The main leakage destination for expenditure on health, beauty and chemist items is Chester City Centre (£4.1m, which equates to a market share of 8.1 per cent).

Recreational Goods

2.58 Overall, 42.7 per cent of the expenditure on recreational goods (such as sporting equipment, bicycles and musical instruments) of the OCA's residents is spent in town centres, retail parks and freestanding stores which are located within the catchment area (see final column of Spreadsheet 8I). We consider this to be a reasonably good level of retention for this quite specialised category of comparison goods.

2.59 The main destinations for expenditure on recreational goods within the catchment area, as shown in Table 2.15, are Broughton Shopping Park (£24.8m, which equates to a market share of 25 per cent), Mold Town Centre (£5.7m, or 6 per cent), and then Flint Town Centre (including Flintshire Retail Park) (£5.4m, or 6 per cent).

Table 2.15 Main Destinations for Recreational Goods within the OCA

Destination	Expenditure on Recreational Goods (£m)	Market Share (%)
Broughton Shopping Park	24.8	25.3
Mold Town Centre	5.7	5.8
Flint Town Centre (including Flintshire Retail Park)	5.4	5.5

2.60 The main leakage destinations for expenditure on recreational goods are shown in Table 2.16.

Table 2.16 Leakage Destinations for Recreational Goods

Towns Outside the OCA & Other Leakage Destinations	Expenditure on Recreational Goods (£m)	Market Share (%)
Chester City Centre	16.7	17.0
Greyhound Retail Park, Sealand Road, Chester	13.3	13.6
Wrexham Town Centre	3.6	3.6
Chester Retail Park, Old Seals Way, Chester	2.7	2.7

Specialist/Other Comparison Items

2.61 Overall, 46.7 per cent of expenditure on 'other', more specialist comparison goods items (such as books, CDs, jewellery, glass and china items) available to residents of the OCA is spent in town centres, retail parks and freestanding stores which are located within the OCA (see final column of Spreadsheet 8n). This is a reasonably good level of retention for this category of goods, given the close proximity of Chester City Centre in particular, which offers a wide variety of specialist shops.

2.62 The main destinations for expenditure on other goods within the catchment area, as shown in Table 2.17, are Broughton Shopping Park (£7.2m, which equates to a retention rate of 18 per cent), Mold Town Centre (£5.3m, or 13 per cent), and then Queensferry District Centre (including Asda) (£3.3m, or 8 per cent).

Table 2.17 Main Destinations for Specialist/Other Comparison Items within the OCA

Destination	Expenditure on Specialist Comparison Goods (£m)	Market Share (%)
Broughton Shopping Park	7.2	17.5
Mold Town Centre	5.3	12.8
Queensferry District Centre (including Asda)	3.3	8.0

2.63 Table 2.18 shows the main leakage destinations for expenditure on specialist/other comparison goods.

Table 2.18 Leakage Destinations for Specialist/Other Comparison Items

Destination	Expenditure on Specialist Comparison Goods (£m)	Market Share (%)
Chester City Centre	6.8	16.7
Wrexham Town Centre	1.9	4.7

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

2.64 Table 2.19 presents a summary of retention and leakage for each of the seven comparison goods sub-sectors. Mold Town Centre's sub-sector market shares (first row of percentages) are highest for health, beauty and chemist items; DIY and decorating goods; and other/specialist comparison goods, at 20 per cent, 15 per cent and 13 per cent, respectively. Conversely, Mold Town Centre's market share is lowest for recreational goods, as well as for the important clothes and shoes sub-sector, achieving market shares of 6 per cent or less in both categories.

2.65 Nevertheless, Mold Town Centre is the main defined centre in the OCA for all categories of comparison retailing. Indeed, none of the other town and district centres within Flintshire achieves a market share of over 9 per cent in the any of the comparison goods sub-sectors.

2.66 The out-of-centre Broughton Shopping Park achieves relatively high market shares in the clothes and shoes; health, beauty and chemist; recreational goods; and other/specialist goods sub-sectors, in the range 18 per cent to 26 per cent.

2.67 The overall retention rate for the OCA (11th row of percentages in Table 2.19) is highest for the DIY and decorating goods, and health, beauty and chemist items sub-sectors, and lowest for the clothes and shoes; furniture, carpets, and soft household furnishings; electrical items and domestic appliances; and recreational goods sub-sectors. The modest retention rate of 42 per cent in the important clothes and shoes sub-sector is particularly disappointing, as it is this sector which forms the core of the 'high street' retail offer. Moreover, the majority of expenditure retained in this sub-sector is spent in the out-of-centre Broughton Shopping Park, which has a retention rate of 26 per cent in the clothes and shoes sub-sector, and only a small fraction is spent in Flintshire's largest town centre, Mold, which has a retention rate of just 6 per cent in the clothes and shoes sub-sector. This is an important piece of evidence which suggests the need to promote quality developments within and around Flintshire's centres, which are targeted at higher value comparison retailers.

Table 2.19 Summary of Expenditure Retention and Leakage by Comparison Goods Sub-Sectors

	Clothes & Shoes	Furniture	DIY	Electrical	Health	Recreation	Specialist / Other	All Comparison
Mold Town Centre	6%	10%	15%	8%	20%	6%	13%	10%
Flint Town Centre (including Flintshire Retail Park)	2%	7%	3%	6%	9%	6%	3%	5%
Holywell Town Centre	1%	0%	1%	1%	7%	1%	2%	2%
Buckley Town Centre	0%	2%	2%	1%	7%	1%	1%	2%
Shotton Town Centre	0%	1%	0%	1%	5%	1%	0%	1%
Queensferry District Centre (including Asda)	6%	2%	0%	4%	6%	2%	8%	4%
Connah's Quay District Centre	0%	4%	0%	0%	4%	0%	1%	1%
Saltney District Centre	0%	1%	0%	0%	1%	0%	0%	0%
Broughton Shopping Park, Chester Road, Broughton	26%	7%	1%	7%	22%	25%	18%	18%
Other centres/retail parks/stores within the OCA	0%	4%	51%	8%	4%	0%	0%	0%
Total Retained Expenditure	**42%**	**37%**	**74%**	**37%**	**84%**	**43%**	**47%**	**49%**
Buffer Zones just outside the OCA	43%	53%	22%	47%	13%	38%	24%	36%
Other more distant leakage	15%	10%	4%	17%	3%	19%	30%	14%
Total Leakage	**58%**	**63%**	**26%**	**63%**	**16%**	**57%**	**53%**	**51%**
TOTAL	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Convenience Goods Spending Patterns in 2010

2.68 The per capita spend on convenience goods in 2010 (Spreadsheet 12) varies from a low of £1,635 in Zone 7 to a high of £1,697 in Zone 2. The average spending on convenience goods in Great Britain as a whole in 2010 is £1,760 per capita. All of the eight survey zones in Flintshire's OCA therefore have convenience goods spending levels below the Great Britain average.

2.69 The total amount of convenience goods spending for residents of the whole study area in 2010 is £253.8m (Spreadsheet 13), of which £3.4m, or 1.3 per cent, is spent on SFT[10]. The pattern of expenditure flows for the convenience goods sector as a whole, as revealed by the survey of households, is set out in Spreadsheets 14 and 15.

2.70 Table 2.20 – which is derived from the final column of Spreadsheet 15 – reveals that, overall, some £227.9m, or 89.8 per cent, of the expenditure on convenience goods available to residents of the OCA is spent in town and village centres and in freestanding stores which are located within the catchment area; this is known as the aggregate retention rate (see Spreadsheet 15, final column, '*Total Inside Catchment Area*' row). A further 8.4 per cent of convenience expenditure (equating to £21.4m) currently flows to stores in the nearby buffer zones (as shown in Appendix 1), but only 0.4 per cent flows to more distant locations.

Overall retention rate

2.71 The overall retention rate at 89.8 per cent is considerably higher than the retention rate of 76.2 per cent that was identified from the results of the 2008 household survey[11]. The higher retention rate could, in part, be the result of methodological differences between the two household surveys. In particular, in our 2010 survey, residents were questioned on where they undertook their last two food and grocery shopping trips, whereas in the 2008 survey, residents were asked about where they undertook most of their food and grocery shopping. The approach in the latest survey therefore makes respondents think about actual trips, whereas the way the questions in the 2008 survey were worded tended to result in a bias towards the larger foodstores and centres.

2.72 The higher aggregate retention rate could also represent a shift in convenience shopping patterns to convenience stores located within the OCA. In 2008, we considered that the aggregate retention rate of 76.2 per cent was relatively modest and capable of some improvement, because convenience shopping should be undertaken on as localised a basis as possible. Since the 2008 survey was

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[10] In Section 3 of this report we set out in more detail the allowances we have made to account for SFT in 2010 and in each of the forecast years.

[11] As noted above, the percentage market shares derived from the results of the 2008 household survey exclude SFT. If SFT was included, the percentage market share of each store and centre, and therefore the aggregate retention rate, would be slightly lower.

undertaken, a number of new foodstores have opened in Flintshire – Sainsbury's at Flintshire Retail Park in Flint, Morrisons in Saltney, Morrisons in Ffordd Llanarth, Aldi in Flint and Lidl in Mold – and we expect that the enhancement in local convenience shopping provision is likely to have improved the level of expenditure retention. We consider that the current level of retention, of 89.8 per cent, is high and that there is little scope for further improvement. We consider this in more detail in Section 3 of our report.

Table 2.20 Broad Destinations for Convenience Goods Expenditure

Broad Destination for Convenience Goods Expenditure	£m	%
Destinations within the OCA	227.9	89.8
Total Retained Expenditure	***227.9***	***89.8***
Buffer zones just outside the OCA	21.4	8.4
Other more distant locations	1.1	0.4
SFT	3.4	1.3
Total Leakage	***25.9***	***10.2***
TOTAL	**253.8**	**100.0**

Main destinations for food and grocery shopping

2.73 The estimated convenience goods turnovers of the main foodstores located 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 penultimate column of Spreadsheet 15, and are summarised in Table 2.21. For the purposes of this exercise, we have identified the main foodstores as those stores which draw £3m or more of convenience expenditure from the residents of the OCA. There are, of course, other foodstores within the OCA, such as Lidl in Holywell Town Centre and Iceland in Flint Town Centre. None of these stores, however, accounts for £3m or more of convenience expenditure from the OCA and we have therefore not included these stores in Table 2.21 as a main convenience shopping destination.

Table 2.21 Main Destinations for Convenience Goods Expenditure Retained within the OCA

Foodstores/Centres within the OCA	Convenience Goods Expenditure Retained within the OCA (£m)	Market Share (%)
Asda, Aston Road, Queensferry District Centre	40.4	15.9
Tesco, Ponterwyl, Mold Town Centre	33.1	13.0
Tesco Extra, Broughton Shopping Park, Broughton Road, Broughton	29.3	11.5
Tesco, Whitford Street, Holywell Town Centre	18.5	7.3
Morrisons, Ffordd Llanarth	13.6	5.4
Sainsbury's, Flintshire Retail Park, Holywell Road, Flint Town Centre	12.8	5.1
Morrisons, High Street, Saltney District Centre	8.7	3.4
Co-operative, Brunswick Road, Buckley Town Centre	6.0	2.4
Aldi, Chester Street, Mold Town Centre	5.4	2.1
Co-operative, Ambrose Lloyd Centre, Mold Town Centre	5.0	2.0
Co-operative, High Street, Connah's Quay District Centre	3.5	1.4

2.74 Table 2.21 shows that the most popular destination for food and groceries shopping within Flintshire is the Asda store at Aston Road, Queensferry District Centre, which has a convenience goods turnover of around £40.4m, and a market share of 15.9 per cent. The Tesco store in Mold Town Centre is the second most popular destination for convenience shopping within the OCA, with a convenience turnover of £33.1m, and a market share of 13.0 per cent. The third most popular foodstore within the OCA is the Tesco Extra store at Broughton Shopping Park with a convenience goods turnover of approximately £29.3m, and a market share of 11.5 per cent. The only other facility in the OCA which achieves a convenience retail turnover in excess of £15m is the Tesco store in Holywell Town Centre.

2.75 The main leakage destinations for convenience goods expenditure, again as shown in the penultimate column of Spreadsheet 15, are set out in Table 2.22.

Table 2.22 Main Destinations for Convenience Goods Expenditure Leakage

Stores Outside the OCA	Convenience Goods Expenditure Leakage (£m)	Market Share (%)
Sainsbury's, Plas Coch Retail Park, Wrexham	3.4	1.3
Asda, Holt Road, Eagles Meadow, Wrexham	1.7	0.7
Morrisons, Marsh Road, Rhyl Town Centre	1.7	0.7
Sainsbury's, Caldy Valley Road, Boughton Heath, Chester	1.5	0.6
Marks & Spencer, Foregate Street, Chester City Centre	1.5	0.6

2.76 The OCA'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 OCA (see Spreadsheet 14, *'Total Inside Catchment Area'* row) – is very high (being more than 88 per cent) for seven of the eight survey zones (Zones 1, 2, 3, 4, 6, 7 and 8), and is above 95 per cent for two of these zones (Zone 3 and 6). The retention level is a relatively modest 59 per cent for the remaining survey zone, Zone 5, but this encompasses a largely rural area which does not contain any defined centres, and the zone is close to the OCA's southern boundary, meaning that expenditure leakage to Wrexham is inevitable.

2.77 The localised convenience goods retention rate – that is, 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 4, which encompasses Mold Town Centre, and has a localised retention rate of 79.5 per cent (see Spreadsheet 14, *'Zone 4'* column and *'Total Zone 4'* row, and Table 2.23). The next highest localised retention rates for convenience goods are for Zone 7, which has a localised retention rate of 77.3 per cent, and Zone 3, which has a localised retention rate of 76.3 per cent.

2.78 The localised retention rate in Zones 8 and 1 is a more modest 64.8 per cent and 58.2 per cent respectively. Many of the residents of Zone 8 undertake their food and grocery shopping outside of Zone 8, at the nearby Asda store in Queensferry in neighbouring Zone 7, whilst many residents of Zone 1 also undertake their food and grocery shopping at Sainsbury's in Flint (Zone 3), Asda in Queensferry (Zone 7), Tesco in Mold (Zone 4) and Morrisons in Rhyl (Buffer Zone 1).

2.79 The localised retention rate in Zone 6, which contains Buckley Town Centre, is relatively low at 33.0 per cent. Whilst the town centre contains a Co-operative supermarket, the store is relatively small and provides only around 700 sq.m of convenience sales area floorspace. The survey findings indicate that residents of Zone 6 travel to larger foodstores in nearby zones – the Asda store in Queensferry, the Tesco Extra at Broughton Shopping Park and the Tesco store in Mold Town Centre – to meet their convenience shopping needs.

2.80 The survey findings indicate that there are two zones where the localised retention rate is particularly low, being less than 10 per cent. These are Zone 2 and Zone 5, where the localised retention rates are 3.1 per cent and 9.9 per cent, respectively. However, Zones 2 and 5 both encompass rural areas containing no town or district centres. Zone 2 is located between Mold, Flint, Buckley and Shotton, and residents primarily shop at the Tesco store in Mold Town Centre and the Asda store in Queensferry, which are located within easy travelling distance from Zone 2. Residents of Zone 5 are similarly able to travel to Mold or Wrexham for their food and grocery shopping.

Table 2.23 Localised Convenience Goods Retention Rates

Zone	Zonal Retention Rate (%)
1 (Holywell)	58.2
2 (Central Flintshire)	3.1
3 (Flint)	76.3
4 (Mold and West Flintshire)	79.5
5 (South Flintshire)	9.9
6 (Buckley)	33.0
7 (Connah's Quay, Shotton and Queensferry)	77.3
8 (Broughton and Saltney)	64.8

2.81 Overall, it is evident from the survey findings that there are no zones with an acute deficiency in convenience retail provision. Whilst the convenience provision in Zones 2 and 5 is limited, there are no town or other defined centres located within either of these zones and residents are served by existing stores in the surrounding area, in Mold and other locations nearby.

2.82 However, the localised convenience retention rate in Zone 6 is relatively low despite the presence of Buckley Town Centre within the zone. Whilst a Co-operative supermarket is located in Buckley, the survey findings reveal that many residents of Zone 6 travel to larger foodstores in the surrounding areas close to Zone 6. This indicates that there is a localised qualitative requirement for additional convenience provision in Buckley.

Convenience Goods Market Shares

2.83 In Table 2.24, we present an analysis of convenience goods market shares, which 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.

2.84 The analysis in Table 2.24 shows that:

- Two of the eight survey zones lack a dominant store with a market share of over 25 per cent; these are Zones 5 and 6.

- No zone has two dominant stores.
- Zone 5, which is located between Mold and Wrexham, has no dominant store, although there are two stores which have a subsidiary influence within the zone (the Tesco store in Mold and the Sainsbury's store in Wrexham).
- Zone 6, which contains Buckley Town Centre, also has no dominant store, although there are four stores which have a subsidiary influence within the zone (the Co-operative store in Buckley, the Asda store in Queensferry, the Tesco Extra store at Broughton Shopping Park and the Tesco store in Mold).
- The Asda store in Queensferry is the dominant store for Zone 7 residents, and has a subsidiary influence in four further zones.
- The highest individual zonal market shares are enjoyed by:
  - Tesco at Ponterwyl, Mold Town Centre, which accounts for 45.7 per cent of the convenience goods expenditure of Zone 4 residents, and 34.9 per cent of the convenience goods expenditure of Zone 2 residents;
  - Tesco Extra at Broughton Shopping Park, which accounts for 39.5 per cent of the convenience goods expenditure of Zone 8 residents, and over 15 per cent of the convenience goods expenditure of Zone 6 residents;
  - Tesco at Whitford Street, Holywell, which accounts for 37.9 per cent of the expenditure of residents of Zone 1;
  - Asda at Aston Road, Queensferry, which accounts for 35.7 per cent of the convenience goods expenditure of Zone 7 residents, over 14 per cent of the convenience goods expenditure of residents of Zones 2, 6 and 8; and
  - Sainsbury's at Flintshire Retail Park, which accounts for 35.0 per cent of the expenditure available to residents of Zone 3.

2.85 The survey findings confirm that most convenience shopping is undertaken on a highly localised basis. Indeed, Spreadsheet 14 reveals that only three stores within the OCA have market shares of over 8 per cent in three or more zones; these are the Asda store in Queensferry, the Tesco store in Mold and the Tesco Extra store at Broughton Shopping Park.

Table 2.24 Dominant Convenience Goods Stores, and Stores with Subsidiary Influence

Zone	Dominant Stores (Market Share of 25%+)	Subsidiary Stores (Market Share 8% to 25%)
1 (Holywell)	Tesco, Whitford Street, Holywell Town Centre	Sainsbury's, Flintshire Retail Park, Flint Town Centre Asda, Aston Road, Queensferry District Centre
2 (Central Flintshire)	Tesco, Ponterwyl, Mold Town Centre	Asda, Aston Road, Queensferry District Centre
3 (Flint)	Sainsbury's, Flintshire Retail Park, Flint Town Centre	Iceland, Church Street, Flint Town Centre
4 (Mold and West Flintshire)	Tesco, Ponterwyl, Mold Town Centre	Co-operative, Ambrose Lloyd Centre, Mold Town Centre
5 (South Flintshire)	-	Tesco, Ponterwyl, Mold Town Centre Sainsbury's, Plas Coch Retail Park, Wrexham
6 (Buckley)	-	Co-operative, Brunswick Road, Buckley Town Centre, Asda, Aston Road, Queensferry District Centre Tesco Extra, Broughton Shopping Park Tesco, Ponterwyl, Mold Town Centre
7 (Connah's Quay, Shotton and Queensferry)	Asda, Aston Road, Queensferry District Centre	Morrisons, Ffordd Llanarth Tesco Extra, Broughton Shopping Park
8 (Broughton and Saltney)	Tesco Extra, Broughton Shopping Park	Asda, Aston Road, Queensferry District Centre Morrisons, High Street, Saltney District Centre

Conclusions in Relation to Retail Spending Patterns

Comparison Goods Spending

2.86 Overall, some 49 per cent of the comparison goods expenditure available to residents of the OCA is retained by town centres, retail parks, and freestanding stores located in the catchment area. The main comparison retail destinations within the OCA are Broughton Retail Park, which secures £76.3m of the residents' comparison goods expenditure, and Mold Town Centre, which accounts for £41.8m.

2.87 Short-distance leakage to places like Chester City Centre, Greyhound Retail Park in Chester and Wrexham Town Centre accounts for 36 per cent of residents' comparison goods expenditure. A further 4 per cent of comparison goods expenditure is accounted for by longer distance leakage to places like Cheshire Oaks Designer Outlet in Ellesmere Port, and the remaining 10 per cent is spent on SFT.

2.88 Mold Town Centre achieves a comparison goods market share in excess of 34 per cent in its own survey zone (Zone 4) and a market share of between 17 per cent and 22 per cent in Zones 2 and 5. Mold Town Centre achieves a market share of less than 9 per cent in the remaining five zones, and the market share for the town centre is particularly low in Zones 7 and Zone 3, at less than 2 per cent.

2.89 Flint Town Centre's comparison goods market share reaches a maximum of 28 per cent in own zone (Zone 3), and Flint also achieves a reasonable market share of 10 per cent in neighbouring Zone 1. Holywell, Buckley and Shotton Town Centres, meanwhile, achieve a maximum market share of 10 per cent, 12 per cent, and 5 per cent in their own zones (Zones 1, 6 and 7), respectively. Queensferry and Connah's Quay District Centres achieve a maximum comparison market share of 10 and 5 per cent in their own zone (Zone 7), respectively. However, Saltney District Centre does not achieve a comparison goods market share in excess of 1 per cent in any of the survey zones.

2.90 Broughton Shopping Park achieves a relatively high comparison goods market share of 33 per cent in its own zone (Zone 8), and 23 per cent in neighbouring Zone 6. Broughton Shopping Park also achieves a market share in excess of 10 per cent in the remaining six zones.

2.91 We also found, from our analysis of the seven different categories of comparison goods, that the overall retention rate is lowest for the clothes and shoes; furniture, carpets, and soft household furnishings; electrical items and domestic appliances; and recreational goods sub-sectors (ranging from 37 per cent to 43 per cent). Moreover, less than two fifths of the 42 per cent of expenditure retained in the important clothes and shoes sub-sector is spent in Flintshire's town and district centres, with the majority spent in out-of-centre locations. This is an important piece of evidence which suggests the need to promote quality developments in town centre locations, targeted at higher value comparison retailers.

Convenience Goods Spending

2.92 Overall, 90 per cent of the convenience goods expenditure available to residents of the OCA is retained by town, district and local centres and freestanding stores located in the OCA. Thus, as might be expected, there is less strategic leakage than in the comparison sector, because convenience shopping is generally undertaken on a more localised basis.

2.93 The highest individual market shares within the OCA are achieved by Asda in Queensferry, Tesco in Mold, Tesco Extra at Broughton Shopping Park and Tesco in Holywell.

2.94 With the exception of Buckley, there are no parts of the catchment area where there is an acute localised deficiency in convenience goods provision. The residents located in the rural areas to the south of Mold and Buckley, and in the central part of the County between Flintshire's town and district centres, are served by a limited local food and grocery offer and so they have to travel for their food and grocery shopping. Nevertheless, there are no town or district centres located within these areas, and the residents of these zones are already well served by the existing convenience provision in the immediate surrounding areas. Residents in the Buckley zone are also served by foodstores in the surrounding areas, but given Buckley's status as a defined Town Centre, we consider that a priority of the Council should be to enhance the convenience retail provision in Buckley Town Centre.

3 ASSESSMENT OF QUANTITATIVE RETAIL NEED

Methodology for Assessing Quantitative Retail Need

3.1 In the absence of any advice in Planning Policy Wales as to how a need assessment should be undertaken, for our assessment of quantitative retail need we have followed the approach outlined in Appendix B of the Practice Guidance to PPS4 in England[12]. The key steps in our quantitative need assessment are as listed below:

i. Establish the appropriate catchment area for the highest order centre within the area being considered (as advised by Step 1 in Figure B1 of the PPS4 Practice Guidance), in this case Mold.

ii. Assess the existing level of population and existing volume of retail expenditure for those resident within the defined catchment area (Step 2 in Figure B1 of the PPS4 Practice Guidance).

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 (Step 3 in Figure B1 of the PPS4 Practice Guidance).

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, using, initially, a constant retention assumption (Step 2 in Figure B1 of the PPS4 Practice Guidance).

v. Make allowance for 'claims' on the growth in retained expenditure (Step 5 in Figure B1 of the PPS4 Practice Guidance) as a result of:

- floorspace efficiency change (that is, the growth in turnover for existing retailers within existing floorspace);
- growth over time in special forms of trading (SFT), mainly e-tail growth, but taking account, also, of the projected decline in catalogue sales; and
- planning commitments.

vi. Calculate the initial residual expenditure pot which is potentially available for new retail floorspace, based on steps iv) and v) above (Step 5 in Figure B1 of the PPS4 Practice Guidance).

vii. Make an allowance for under-trading or over-trading in the base year, if this is justified (Step 4 in Figure B1 of the Practice Guidance).

[12] 'Planning for Town Centres: Practice guidance on need, impact and the sequential approach', CLG, December 2009. Hereafter referred to as 'the PPS4 Practice Guidance.'

viii. Develop alternative scenarios for calculating growth in residual expenditure (Step 5 in Figure B1 of the Practice Guidance), based on:
- increases or decreases in the projected retention level; and
- sensitivity testing of key assumptions.

3.2 Below, we describe each stage of our assessment of retail need in detail and provide a summary of our findings.

Definition of the Overall Catchment Area

3.3 The overall catchment area (OCA) is as described at the beginning of Section 2 of this report and is split into eight zones based on postcode boundaries, as shown in Appendix 1 and Spreadsheet 1 in Appendix 3. The OCA remains the same as for the Flintshire Town Centre Healthchecks Study (FTCHS), which we undertook in 2008.

Existing Level of Population and Expenditure

3.4 The population by zone in the 2010 base year is set out in the second row of Spreadsheet 2. Those data are based on year 2008 zonal population figures supplied by Pitney Bowes Business Insight[13] (PBBI) and Oxford Economics (OE), and are rolled forward to 2010, using the 2008 based Local Authority population projections for Wales, sourced from the Welsh Assembly Government (WAG).

3.5 The zonal per capita expenditure data for comparison goods were also supplied by PBBI for the year 2008, as set out in the top row of Spreadsheet 3 for comparison goods and the top row of Spreadsheet 12 for convenience goods. These data were then rolled forward to 2010 using the mid-point of the estimates and forecasts as provided by PBBI[14] in September 2010 and by Experian[15] in August 2010 (as set out in Tables 3.1 and 3.2, and summarised in Tables 3.3 and 3.4 below), of 0.2 per cent per capita per annum for comparison goods and -1.3 per cent per capita per annum, between 2008 and 2010.

3.6 The total pot of comparison goods expenditure in 2010 is derived from the product of Spreadsheets 2 and 3 for comparison goods and from the product of Spreadsheets 11 and 12 for convenience goods as set out in the top row of Spreadsheet 4 for comparison goods, and Spreadsheet 13 for convenience goods. From this we have made an allowance for SFT (i.e. mail order, TV and internet shopping) and have therefore made a deduction from the total expenditure in each zone, of an average of 10.0 per cent for comparison goods and 1.3 per cent for convenience goods at 2010. These rates are based on the findings from the household survey. Thus, the total available expenditure for 2010 is set out in the final column of Spreadsheet 4 for comparison goods, and Spreadsheet 13 for convenience goods.

[13] Formerly known as Pitney Bowes MapInfo.
[14] Table 3.5, Retail Expenditure Guide 2010/2011, PBBI, September 2010.
[15] Figure 1, Retail Planner Briefing Note 8.1, Experian, August 2010.

Existing Retention Rate

3.7 Next we use the household survey findings to establish current patterns of expenditure and the current retention rate, as described in Section 2 of our report. The current pattern of expenditure and the current retention rate for comparison goods is as set out in Spreadsheet 6, with the overall retention rate for comparison goods being 49.4 per cent (as set out in the final column, '*Total Inside Catchment Area*' row). For convenience goods, the pattern of expenditure and the current retention rate is as set out in Spreadsheet 15, which reveals an overall convenience goods retention rate of 89.8 per cent (see the final column of Spreadsheet 15, in the '*Total Inside Catchment Area*' row).

Growth in Expenditure and Growth in Retained Expenditure

3.8 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 an assessment of growth in retained expenditure, using, initially, a constant retention assumption.

3.9 Population change is based on the mid-2008 population estimates from the ONS, and the WAG's 2008-based population forecasts, as set out in Spreadsheets 2 and 11. Using this method, the resident population across the OCA is forecast to increase from 152,530 in the 2010 base year to 155,429 in 2021. This equates to a total population increase of 1.9 per cent over the entire study period.

3.10 The data on growth in per capita expenditure are as set out in Spreadsheets 3 and 12, which utilise the growth rates as shown in Table 3.3 for comparison goods and Table 3.4 for convenience goods below.

3.11 The expenditure growth rates estimated by Experian[16] in August 2010 and PBBI/OE[17] in September 2010 are relatively low between 2008 and 2011 due to the current economic slowdown, as shown in Tables 3.1 and 3.2 below. However, PBBI/OE anticipate a much faster recovery than Experian in the comparison sector, and significant differences arise between the comparison expenditure growth forecast by Experian and PBBI/OE over the medium and longer term periods.

3.12 As such, the per capita comparison and convenience goods expenditure growth rates that we have adopted for the twelve year period from 2008 to 2020 are the mid-points of the estimates and forecasts provided by Experian and PBBI/OE, and are set out for each forecast year in Tables 3.1 and 3.2. PBBI/OE do not provide any forecasts for growth in per capita expenditure beyond 2020. We have therefore assumed that the per capita expenditure growth rate for the period 2020 to 2026 will be the mid-point of Experian's forecast for the same period, and PBBI/OE's forecast for the year 2019 to

[16] Figure 1, Experian Retail Planner Briefing Note 8.1, August 2010.

[17] Table 3.5, Retail Expenditure Guide 2010/2011, PBBI, Sept 2010.

2020; 3.3 per cent per capita per annum for comparison goods and 0.7 per cent per capita per annum for convenience goods.

3.13 The per capita expenditure growth rates for comparison and convenience goods that we have adopted are summarised for each of the forecast periods in Table 3.3 and Table 3.4, respectively.

Table 3.1 Comparison Expenditure Growth Per Capita, 2008-2026

Year	Forecast Rate Per Annum		
	Experian[18]	PBBI/OE[19]	Mid-point of Experian and PBBI/OE
2008 - 2009	-0.6%	-0.3%	-0.5%
2009 - 2010	0.4%	1.3%	0.9%
2010 - 2011	1.2%	2.3%	1.8%
2011 - 2012	2.4%	3.8%	3.1%
2012 - 2013	2.7%	4.4%	3.6%
2013 - 2014	2.7%	5.3%	4.0%
2014 - 2015	2.7%	5.1%	3.9%
2015 - 2016	2.7%	4.8%	3.8%
2016 - 2017	2.7%	4.0%	3.4%
2017 - 2018	2.9%	3.8%	3.4%
2018 - 2019	2.9%	3.7%	3.3%
2019 - 2020	2.9%	3.6%	3.3%
2020 - 2026	2.9%	N/A	3.3%[20]

[18] Figure 1, Experian Retail Planner Briefing Note 8.1, August 2010.

[19] Table 3.5, Retail Expenditure Guide 2010/2011, PBBI, Sept 2010.

[20] Mid-point of Experian's per capita expenditure growth rate for the period 2020 to 2026, and PBBI/OE's per capita expenditure growth rate for the period 2019 to 2020.

Table 3.2 Convenience Expenditure Growth Per Capita, 2008-2026

Year	Forecast Rate Per Annum		
	Experian[21]	PBBI/OE[22]	Mid-point of Experian and PBBI/OE
2008 - 2009	-2.9%	-2.7%	-2.8%
2009 - 2010	0.3%	0.1%	0.2%
2010 - 2011	0.0%	-0.5%	-0.3%
2011 - 2012	0.4%	0.1%	0.3%
2012 - 2013	0.8%	0.5%	0.7%
2013 - 2014	0.8%	1.1%	1.0%
2014 - 2015	0.8%	1.0%	0.9%
2015 - 2016	0.8%	0.9%	0.9%
2016 - 2017	0.8%	0.5%	0.7%
2017 - 2018	0.9%	0.4%	0.7%
2018 - 2019	0.9%	0.4%	0.7%
2019 - 2020	0.9%	0.4%	0.7%
2020 - 2026	0.9%	N/A	0.7%[23]

Table 3.3 Comparison Expenditure Growth Per Capita for each Forecast Period, 2008-2026

Year	Rate Per Annum
2008 - 2010	0.2%
2010 - 2016	3.3%
2016 - 2021	3.3%
2021 - 2026	3.3%

Table 3.4 Convenience Expenditure Growth Per Capita for each Forecast Period, 2008-2026

Year	Rate Per Annum
2007 - 2010	-1.3%
2010 - 2016	0.6%
2016 - 2021	0.6%
2021 - 2026	0.6%

3.14 Spreadsheet 4 is the product of Spreadsheets 2 and 3 and it sets out the total growth in comparison goods expenditure for all residents in the OCA. Spreadsheet 13 sets out the corresponding data for growth in convenience goods expenditure.

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[21] Figure 1, Experian Retail Planner Briefing Note 8.1, August 2010.

[22] Table 3.5, Retail Expenditure Guide 2010/2011, PBBI, Sept 2010.

[23] Mid-point of Experian's per capita expenditure growth rate for the period 2020 to 2026, and PBBI/OE's per capita expenditure growth rate for the period 2019 to 2020.

3.15 To allow for the growth in SFT over time, we have made a deduction from the total expenditure pot in each zone at the rates set out in Table 3.5 below. As described in Section 2, the allowance for SFT in the 2010 base year is based on the household survey findings in both the comparison and convenience sectors. In each of the forecast years, the rates of SFT reflect the advice provided by Experian in August 2010[24]. However, in the convenience sector, we have halved the proportions of expenditure accounted for by SFT (as specified by Experian) so as to reflect the fact that some of the convenience goods bought over the internet are still supplied from shelves in local supermarkets, rather than from distribution warehouses, as is more often the case in the comparison goods sector.

Table 3.5 Projected Rates of Special Forms of Trading (SFT)

Year	Comparison Goods	Convenience Goods
2010	Average of 10%	Average of 1.3%
2016	13.9%	4.8%
2021	13.6%	5.05%
2026	13.3%	5.35%

3.16 The total available expenditure (excluding expenditure on SFT) for the forecast years is set out in the final column of Spreadsheet 4 for comparison goods, and reproduced as Row A of Spreadsheet 9a. Similarly, Spreadsheet 13 presents the total growth in convenience goods expenditure up to 2026, which is also set out in Row A of Spreadsheet 16a.

3.17 Having calculated the growth in total expenditure for all residents of the OCA, the next step is to assess the growth in retained expenditure (Row C of Spreadsheets 9a and 16a), initially on the basis of a constant aggregate retention level (Row B of Spreadsheets 9a and 16a).

Further 'Claims' on Growth in Retained Expenditure

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

- growth in floorspace efficiency, which is growth in the turnover of existing retailers within their existing floorspace (retail sales per unit sales area); and
- an allowance for the turnover absorbed by planning commitments.

3.19 Below, we describe the allowances that we have made for growth in floorspace efficiency and commitments.

[24] Appendix 3: non store retail sales, Retail Planner Briefing Note 8.1, Experian , August 2010.

Growth in floorspace efficiency

3.20 Figures 4a and 4b of Experian's Retail Planner Briefing Note 8.1 contain the forecaster's predictions of change in comparison and convenience goods floorspace efficiency for the 2009 to 2027 period[25]. These forecasts are considerably lower than Experian's estimates for previous growth in floorspace efficiencies over the period 1987 to 2007[26], particularly in the period up to 2011. However, current forecast per capita expenditure growth rates for the period 2009 up to 2027 are also much lower than those experienced between 1987 and 2007. Moreover, in the comparison goods sector, Experian's forecast sales densities between 2009 and 2027 are only marginally below their per capita expenditure growth forecasts. In the convenience sector, Experian's floorspace efficiency projections are also high compared to their expenditure growth forecasts, albeit to a lesser degree.

3.21 In our assessment, therefore, the low expenditure growth rates projected by Experian for the period up to 2027, particularly in the comparison sector, are not sufficient to support its rates of floorspace efficiency change set out in Tables 4a and 4b of its Retail Planner Briefing Note 8.1. PBBI/OE provides no information on anticipated change in floorspace efficiency.

3.22 Thus, in making an allowance for growth in floorspace efficiency (Rows D and E of Spreadsheets 9a and 16a), we adopted the rate of floorspace efficiency change set out in Table 3.6 below. We have tied the rate of comparison and convenience goods floorspace efficiency change to the expenditure forecasts for the assessment period in question, using a ratio of 37.9 per cent for comparison goods and 46.2 per cent for convenience goods, which is based on our analysis of the historic relationship between expenditure growth and floorspace efficiency change[27].

Table 3.6 Improvements in Floorspace Efficiency

Year	Rate per Annum	
	Comparison Goods	Convenience Goods
2008 - 2010	0.1%	-0.6%
2010 - 2016	1.3%	0.3%
2016 - 2021	1.3%	0.3%
2021 - 2026	1.2%	0.3%

[25] For example, comparison sales density growth is -0.5 per cent in 2009, 0.4 per cent in 2010, 1.5 per cent in 2011, 2.3 per cent in 2012, 2.2 per cent between 2013 and 2017, and 2.3 per cent between 2018 and 2027.

[26] As set out in Experian's previous Retail Planner Briefing Note 7.1 (August 2009). For example, comparison sales density growth is 2.5 per cent between 1987 and 1999, 3.6 per cent between 2000 and 2005, and 2.8 per cent between 2006 and 2007.

[27] Between 1987 and 1999, the underlying floorspace efficiency trend (as recommended by Experian in its previous Retail Planner Briefing Note 7.1 (August 2009) was 2.2 per cent per annum for comparison goods and 0.6 per cent per annum for convenience goods. Over the same period, expenditure growth was 5.8 per cent per annum and 1.3 per cent per annum, respectively (as set out in Appendix 4 of Experian's Retail Planner Briefing Note 7.1, August 2009), which equates to a ratio of 37.9 per cent for comparison goods and 46.2 per cent for convenience goods.

Allowance for planning commitments

3.23 The next step is to allow for the future turnover requirements of commitments for new comparison and convenience goods floorspace, having made an assessment of how much of the commitments' turnovers will be derived from residents of the OCA.

3.24 The comparison goods commitments are scheduled in Table 3.7 and the convenience goods commitments are scheduled in Table 3.8[28]. The total turnover of the commitments derived from residents of the OCA also appears in Row G of Spreadsheets 9a and 16a, respectively.

3.25 The commitment with the highest anticipated turnover for both comparison and convenience goods is the extension to Broughton Shopping Park, and specifically the Marks & Spencer store, which we assume will be open and trading by 2016. We assume that all other elements of the Broughton Shopping Park extension and the other committed scheme will also be trading by 2016.

Residual Expenditure Potentially Available for New Floorspace

3.26 Row H of Spreadsheets 9a and 16a sets out the residual expenditure pot potentially available for new retail floorspace, having allowed for all of the claims on the growth in retained expenditure – that is, growth over time in SFT, growth in floorspace efficiency and commitments.

3.27 Row I of Spreadsheets 9a and 16a converts the residual expenditure to a floorspace requirement expressed as a net sales area, having divided the residual expenditure by an average sales density for comparison goods of £3,650 per sq.m sales area in 2010[29] and an average sales density for convenience goods of £10,170 per sq.m sales area in 2010[30]. Finally, we convert the sales area requirement to a gross floorspace requirement, as set out in Row J of Spreadsheets 9a and 16a, using a gross to net ratio of 70 per cent for comparison goods and 65 per cent for convenience goods.

[28] Please note the distinction in Tables 3.7 and 3.8 between gross floorspace and net sales area; it is the latter that is used in calculating the turnover requirements of the commitments.

[29] The comparison goods sales density for Mold Town Centre, derived from the findings of the household survey.

[30] The average convenience sales density of the main foodstore operators in the UK, derived from Verdict's UK Food & Grocery Retailers 2010 report (revised edition, November 2010).

Table 3.7 Comparison Retail Commitments in the Flintshire OCA (as at 12 January 2011)

Application Ref.	Details of Proposal	Address	Date Approved	Gross Floorspace (sq.m)	Net Comp. Sales Area Floorspace (sq.m)	Comp. Turnover from OCA at 2016 (£m)
037891	Broughton Shopping Park Extension:	Broughton Shopping Park, Broughton	15/02/07			
	Tesco Extension			2,471	1,743	7.3
	New Marks & Spencer Store			8,631	5,528	14.6
	New Retail Parade			7,525	5,644	11.2
047514	A1 Retail Unit	Flintshire Retail Park Overflow Car Park, Flint	14/07/2010	2,044	1,737	6.2
TOTAL					**14,652**	**39.2**

Table 3.8 Convenience Retail Commitments in the Flintshire OCA (as at 20 January 2011)

Application Ref.	Details of Proposal	Address	Date Approved	Gross Floorspace (sq.m)	Net Conv. Sales Area Floorspace (sq.m)	Conv. Turnover from OCA at 2016 (£m)
037891	Broughton Shopping Park Extension:	Broughton Shopping Park, Broughton	15/02/07			
	New Marks & Spencer store			8,631	836	4.5
TOTAL					**836**	**4.5**

Adjustments for Under-trading/Over-trading in the Base Year

Comparison goods sector

3.28 Next, we consider the current trading position of existing stores relative to their 'benchmark' trading level.

3.29 Table A5.1 in Appendix 5 sets out our analysis of the benchmark turnover of comparison retail floorspace in each of the defined centres within the catchment area, and at Broughton Shopping Park, including comparison retail floorspace in supermarkets/food superstores.

3.1 Our analysis assumes a benchmark sales density for the comparison goods floorspace within each centre which reflects the typical trading level achieved in centres at a similar position within the retail hierarchy, and is based on our professional judgment. For the comparison retail floorspace in supermarkets/food superstores, the benchmark sales density is the average for the particular operator as derived from Verdict's Food & Grocery Retailers Report 2010. Thus, the benchmark sales densities that we have used are as follows:

- Mold Town Centre: £3,600 per sq.m.
- All other defined centres: £2,300 per sq.m.
- Broughton Shopping Park: £4,800 per sq.m.
- Supermarkets/food superstores: company averages as derived from Verdict.

3.2 Accordingly, the 'benchmark' sales densities for each centre, as shown in the third column of Table A5.1, are different for each centre. For instance, the benchmark comparison sales density for Queensferry District Centre is £6,360 per sq.m, because most of the comparison floorspace in that centre is accounted for by the Asda store, which has a relatively high average comparison benchmark sales density of just over £8,000 per sq.m. In contrast, Buckley and Shotton Town Centres, and Connah's Quay District Centre, contain little comparison retail floorspace in supermarkets, and so their benchmark comparison sales densities are much lower than in Queensferry, at £2,350 per sq.m, £2,310 per sq.m and £2,590 per sq.m, respectively.

3.3 Our analysis indicates that all but one of Flintshire's defined centres are trading below our expectations for centres at their respective positions within the retail hierarchy. The one exception is Connah's Quay, but this finding is something of an anomaly, because Connah's Quay is one of the least healthy centres in Flintshire. We suspect that some of the household survey respondents who cited Connah's Quay probably meant Shotton, although we have no way of confirming this. The comparison retail floorspace at Broughton Shopping Park appears to be trading more of less in line with expectations.

3.4 It should be noted that although some of the percentages in the final column of Table A5.1 are quite high, the absolute monetary levels of under-trading indicated by Table A5.1 are in most cases in the order of £1m to £2m, as shown in the penultimate column. As some of the study centres are quite small and have a relatively low benchmark turnover, under-trading of £1m or £2m translates into a high percentage. For instance, the benchmark comparison turnover for Shotton Town Centre is quite modest at £6.8m, which means that the identified under-trading of £1.4m equates to a high percentage figure, of 20 per cent (and, as we explained above, we suspect that some of the household survey respondents who cited Connah's Quay actually meant Shotton, which would have the effect of reducing the apparently level of under-trading in Shotton).

3.5 Whilst the analysis described above implies that the comparison retail floorspace in most of Flintshire's defined centres is performing below its 'benchmark' level, the Practice Guidance which accompanies PPS4 in England advises that such under-performance suggests a qualitative need to improve the quality of existing stock or the performance of stores, rather than representing an existing over-supply of comparison retail floorspace[31].

3.6 Furthermore, many of the retail operators in Flintshire's centres are independent traders, for which there is no published information on 'average' sales densities, and it is therefore very difficult to establish an appropriate 'benchmark' trading level for particular centres. Indeed, whilst the PPS4 Practice Guidance encourages the consideration of benchmarks, where appropriate, it does acknowledge in paragraph B.41 that: *'…it is often difficult to devise meaningful benchmarks for an "acceptable" performance of a whole centre, or even a single store*', and so *'…turnover benchmarks should not be used prescriptively*' (paragraph B.42).

3.7 Moreover, Table A5.1 indicates that the aggregate comparison goods benchmark turnover across all of Flintshire's defined centres and Broughton Shopping Park, from residents within the catchment area, is £201.2m, which is approximately £18m higher than the aggregate survey based comparison turnover estimate of £183.0m. Our analysis therefore indicates that comparison retail floorspace across all Flintshire as a whole is trading at a level that is below expectations.

3.8 If we exclude the identified over-trading in Connah's Quay District Centre and at Broughton Shopping Park, the aggregate level of under performance indicated by Table A5.1 reduces to £15.6m. Even when the substantial margins for error associated with the benchmark approach are taken into account, it therefore seems clear that the aggregate position across Flintshire's defined centres, and Broughton Shopping Park, is one of under-trading rather than over-trading.

3.9 We therefore make no adjustments for over- or under-trading at comparison retail stores in Flintshire in the 2010 base year.

Convenience goods sector

3.10 The convenience goods expenditure retained by centres and foodstores within the OCA is set out in Spreadsheet 15. For the eleven main foodstores within the OCA – which are defined for the purposes of this analysis as those stores which draw over £3m of convenience turnover from the residents of the OCA – the convenience expenditure derived from the OCA is summarised in Table 2.21 in Section 2 of this report. The eleven main foodstores collectively account for 69 per cent of the aggregate convenience goods expenditure of the OCA's residents.

[31] There is no corresponding guidance in Wales on how to treat so-called over-trading and under-trading, and so we consider it appropriate to refer to the guidance in England.

3.11 For the eleven main foodstores within the OCA, we have made a comparison of survey-based turnover estimates with their respective company average, or 'benchmark', trading levels[32]. The analysis, which is set out in Table 3.9, reveals that the Tesco stores in Mold and Holywell are trading substantially above their company average and a further three stores (Sainsbury's in Flint, Co-operative in Buckley and Aldi in Mold) are also over-trading, albeit to a more limited extent than the Tesco stores. The remaining six stores – Asda in Queensferry, Tesco Extra at Broughton Shopping Park, Morrisons in Ffordd Llanarth, the Co-operative stores in Mold and Connah's Quay, and the Morrisons store in Saltney – are trading substantially below their benchmark level.

3.12 However, each of the five stores which are over-trading is located within one of Flintshire's town centres where strong trading performance is, in principle, to be welcomed unless it causes customer discomfort. Furthermore, the Morrisons store at Ffordd Llanarth opened in November 2010, just two days before the household survey began. The survey was therefore not able to fully capture the effect of the new Morrisons store, which will take some time for its market share to stabilise.

3.13 If we exclude the 'over-trading' stores located in Mold, Holywell, Flint and Buckley Town Centres, and the 'under-trading' at the Morrisons in Ffordd Llanarth, the aggregate level of under-trading for the eleven stores increases from approximately £37.0m, to £53.9m. Of this, £9.8m can be attributed to 'under-trading' at the Asda store in Queensferry, where the turnover of the store is around 15 per cent below the company average level (albeit the store still achieves a very considerable convenience turnover, of over £40m). A further £22.7m arises from the under-trading at the Tesco Extra store at Broughton Shopping Park. However, we do not consider that it is sensible to make an allowance for improving the performance of an out-of-centre store.

3.14 Accordingly, as in the comparison goods sector, we make no adjustment for under-trading or over-trading in the convenience goods sector.

32 The Morrisons store at Saltney is located at the edge of the OCA and is likely to derive a substantial proportion of its trade from beyond the catchment area. However, and with this proviso in mind, we have not excluded the Morrisons store from our analysis, in order to provide a comprehensive picture.

Table 3.9 Convenience Survey-based Turnover Estimates and Benchmark Turnover Estimates for the Main Foodstores[33] in Flintshire

Main Foodstores within Flintshire	Location of Store (in, edge or out-of-centre)	Gross Floorspace (sq.m)	Sales Area Floorspace (sq.m)	% of Convenience Floorspace	Convenience Sales Area Floorspace (sq.m)	Benchmark Sales Density (£ /sq.m)	Benchmark Turnover (£m)	Convenience Goods Turnover from 2010 Household Survey (£m)	Convenience Goods Turnover from 2010 Household Survey including allowance for inflow (£m)	Quantum of Under/Over Trading (£m)
Asda, Aston Road, Queensferry District Centre	In		7,661	56.2	4,305	14,783	63.6	40.4	53.9	-9.8
Tesco, Ponterwyl, Mold Town Centre	In		3,236	62.8	2,032	13,219	26.9	33.1	44.1	17.3
Tesco Extra, Broughton Shopping Park, Broughton Road, Chester	Out		7,436	62.8	4,670	13,219	61.7	29.3	39.0	-22.7
Tesco, Whitford Street, Holywell Town Centre	In		2,055	62.8	1,291	13,219	17.1	18.5	24.7	7.6
Morrisons, Connah's Quay Shopping Centre, Ffordd Llanarth	In	4,459	3,112	75.6	2,353	12,843	30.2	13.6	18.1	-12.1
Sainsbury's, Flintshire Retail Park, Holywell Road, Flint Town Centre	In		1,625	70.5	1,146	12,810	14.7	12.8	17.1	2.5
Co-op, Brunswick Road, Buckley Town Centre	In		805	87.1	701	8,973	6.3	6.0	8.0	1.7
Aldi, Chester Street, Mold Town Centre	In	1,380	897	67.1	602	7,585	4.6	5.4	7.2	2.6
Co-op, Ambrose Lloyd Centre, Mold Town Centre	In	2,240	1,199	87.1	1,044	8,973	9.4	5.0	6.7	-2.7
Co-op, High Street, Connah's Quay District Centre	In		1,731	87.1	1,508	8,973	13.5	3.4	4.6	-8.9
Morrisons, High Street, Saltney District Centre	In	6,113	3,082	75.6	2,330	12,843	29.9	8.7	17.5	-12.4
TOTAL					21,982		277.9	176.3	240.9	-37.0
TOTAL (excluding over-trading in town centre stores)					12,813		168.8	81.8	114.9	-53.9

[33] For the purposes of this exercise, 'main foodstores' are defined as those which draw at least £3m of convenience goods expenditure from the OCA.

Increase or Decrease in the Geographical Size of the Catchment Area

Comparison goods sector

3.15 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.

3.16 Mold, the highest order centre in Flintshire, is located centrally in the OCA, and there are currently no strategic proposals to change the role or function of Mold, Flint, Holywell, Buckley or Shotton Town Centres in the sub-regional retail hierarchy. Moreover, Flintshire's OCA is surrounded by the higher order centres of Chester, Wrexham and Rhyl, which means that any significant expansion of the Flintshire OCA is not likely to be achievable.

3.17 Finally, a town centre's performance in the comparison goods sector is the prime determinant of its place in the retail hierarchy. It is important to recognise, therefore, that our analysis of comparison goods spending patterns and market shares – as described in Section 2 of our report – suggests that there has been no shrinkage in the geographical size of Flintshire's OCA.

3.18 For the purposes of our need assessment we therefore consider that the catchment area shown in Appendix 1 is appropriate.

Convenience goods sector

3.19 PPW seeks to ensure that people's everyday needs, such as convenience shopping, are met on as localised a basis as possible (see, for instance, paragraph 10.3.7 of PPW). As a consequence, Flintshire'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.

Changes to the Retention Level

Comparison goods sector

3.20 In the comparison goods sector, we have concluded that there is no justification for making any adjustment for under-trading or over-trading and that there is no case for amending the geographical size of Flintshire's OCA. Thus, we turn now to the explanation of our sensitivity testing of changes to the comparison goods retention level.

3.21 We have undertaken two sensitivity tests of changes to the comparison goods retention level, as specified below:

- **'Static Retention'** – under this scenario, the overall retention level is kept constant at 49.4 per cent throughout the entire study period, 2010 to 2026.
- **'Rising Retention'** – in this sensitivity test, the overall retention level rises moderately from 49.4 per cent in the year 2010, to 55.0 per cent by 2016, remaining at this new level in the periods to 2021 and 2026.

3.22 In order to achieve an improvement to 55.0 per cent, a substantial enhancement of the quantity and quality of the County's comparison retail offer will be required, particularly given the proximity of higher-order centres outside of but close to Flintshire. The approved

Broughton Shopping Park extension scheme will go some way to improving the overall retention rate but, ideally, further high-quality development would also take place in town centre locations. Without the delivery of schemes such as these, and the attraction to Flintshire of the type of high-profile operators whose presence is currently limited in the County, it is unlikely that the OCA's overall comparison sector retention rate will improve materially from the current level.

3.23 In the 2008 FTCHS, we considered that a rise in the overall retention rate of 2 percentage points over the period 2008 to 2020 was reasonable given the planned extension to Broughton Shopping Park and other new comparison retail developments proposed in Flintshire. No significant new comparison retail developments are planned in Flintshire over and above those that were already in the pipeline at 2008. Nevertheless, we have reconsidered the potential for Flintshire to achieve an improvement in its comparison goods retention rate and we now consider that a rise of 5 percentage points represents a realistic target, given the proactive approach that is being taken to Flintshire's defined centres by the County Council and its partners.

Convenience goods sector

3.24 In the convenience sector we similarly test a '**Static Retention**' scenario, with the overall retention level remaining at 89.8 per cent. The current level of retention is very high and we consider that there is little scope for further improvement. Nevertheless, as a sensitivity test, we also consider a '**Rising Retention**' level scenario, whereby the overall retention level improves by approximately 2 percentage points from 89.8 per cent in the year 2010, to 92 per cent by 2026.

3.25 Additionally, we have undertaken a further sensitivity test of the localised convenience goods retention level in Zone 6 – an '**Rising Localised Retention in Zone 6**' scenario, in which the localised retention level in Zone 6 rises from 33 per cent at 2010 to 60 per cent by 2016, and remains at 60 per cent up to 2026. The localised convenience goods retention rate is the proportion of expenditure on convenience goods available to residents in a specific zone which is spent in town centres and stores within that zone. The survey findings indicate a need for an improved convenience retail offer in Buckley, where the localised retention level is considered to be inadequate, and our view is that one of the Council's policy aspirations should be to improve the localised convenience sector retention rate in Zone 6 (Buckley). A substantial improvement in the localised retention rate, of over 20 percentage points, could be achieved in Zone 6 through the delivery of a foodstore scheme in Buckley, of a sufficient scale to compete with the existing foodstore provision in the surrounding centres.

Findings in Relation to Quantitative Retail Need

Comparison Goods Sector

3.26 Spreadsheets 9a and 9b set out the quantitative comparison goods retail need for the static retention and rising retention scenarios, respectively. These quantitative needs, as set out in Row I of the spreadsheets in terms of net sales area, are summarised in Table 3.10 below.

3.27 Table 3.10 shows that there is a negative residual floorspace requirement in the comparison sector in the period up to 2016, under both scenarios. This means that the growth in retained expenditure up to 2016 is not sufficient to support prior 'claims' on that growth, namely an improvement in sales densities of existing centres and stores, and the turnover requirements of extant permissions, in particular the planned extension to Broughton Shopping Park.

3.28 Over the longer-term, however, there is a positive residual for additional comparison retail floorspace under the rising retention rate scenario in the period up to 2021, and under both scenarios in the period up to 2026. The residual comparison floorspace requirements are more significant under the rising retention scenario, particularly in the period up to 2026, and this corresponds with the period of higher expenditure growth that we anticipate to follow the current downturn in the economy.

Table 3.10 Quantitative Need in the Comparison Goods Sector

Period	Floorspace Requirements	
	Static Retention Scenario (sq.m net)	Rising Retention Scenario (sq.m net)
2010 - 2016	-9,487	-1,912
2016 - 2021	5,184	6,037
2010 - 2021	***-4,303***	***4,125***
2021 - 2026	5,576	6,469
2010 - 2026	***1,273***	***10,594***

3.29 Thus, in both scenarios there is only a modest (or indeed negative under the static retention scenario) requirement for the development of further comparison retail floorspace in Flintshire in the period up to 2021. The limited need is a direct result of the scale of existing comparison retail commitments in the study area, most notably the proposed extension to Broughton Shopping Park. Indeed, under the rising retention rate scenario, the Broughton Shopping Park extension 'claims' over two thirds of the surplus expenditure in the period up to 2021 (£41.7m from the total surplus of £59.0m).

3.30 The proposed extension to Broughton Shopping Park will substantially improve the quantity and quality of Flintshire's comparison retail offer, and we expect that the scheme will help to improve the County's overall retention rate. Nevertheless, Broughton Shopping Park represents an out-of-centre location. We therefore recommend that one of the Council's policy aspirations should be to attain an improvement in the overall retention rate by attracting additional expenditure to Flintshire's centres themselves, which will also soon need to respond to the increasing competition provided at Broughton Shopping Park.

3.31 Making Flintshire's town and district centres more attractive will essentially require high-quality, comparison retail development of sufficient scale and critical mass to make them more competitive, vis-à-vis the competing centres outside of (but close to) the County, and in relation to Broughton Shopping Park.

3.32 We thus consider that there is a requirement for up to 4,100 sq.m of comparison sales area floorspace in the period 2010 to 2021, over and above existing commitments. More indicatively, Table 3.10 shows a requirement for up to an additional 10,600 sq.m of comparison sales area floorspace in the period 2010 to 2026 under the rising retention scenario. However, this longer term forecast should be treated with caution and kept under review, due to the exponential nature of expenditure growth forecasts.

3.33 The comparison floorspace requirements that we have identified in this study are in the same ballpark as the floorspace requirements that we identified in 2008 through the FTCHS, when we identified a requirement arising in the 2008 to 2020 study period for up an additional 3,700 sq.m of comparison sales area floorspace under rising retention rate scenario. The most recent expenditure growth rate forecasts in the comparison sector are lower than at 2008. However, we now consider that a greater improvement in the overall retention rate – of around 5 percentage points – represents an achievable target, and this counteracts the effect of reduced expenditure growth forecasts on the requirement for additional comparison floorspace in Flintshire.

Convenience Goods Sector

3.34 Spreadsheets 16a and 16b set out the quantitative convenience goods retail need for a static aggregate retention level and increased retention rate, respectively. The quantitative needs, as set out in Row I of Spreadsheets 16a and 16b, in terms of sales area floorspace, are summarised in Table 3.11.

Table 3.11 Quantitative Need in the Convenience Goods Sector

Period	Floorspace Requirements	
	Static Retention Scenario (sq.m net)	Rising Retention Scenario (sq.m net)
2010 - 2016	-698	-487
2016 - 2021	460	645
2010 - 2021	***-238***	***158***
2021 - 2026	352	543
2010 - 2026	***114***	***700***

3.35 Table 3.11 shows that the residual convenience goods need is negative in the period up to 2021 under the static retention scenario, and in the period up to 2016 under the rising retention scenario. As in the comparison sector, this means that the growth in retained expenditure is not 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 existing commitments.

3.36 In the later time intervals there is a small positive residual need for convenience floorspace under both scenarios, and particularly under the rising retention scenario. However, even in the longer term period to 2026 and assuming that the overall retention rate can be improved to 92 per cent, there is still only a requirement for up to 700 sq.m of additional convenience sales area floorspace across the County. This floorspace requirement is based on an average sales density for convenience goods of £10,170 per sq.m sales area in 2010. Alternatively, the £7.5m convenience expenditure residual arising in the overall 2010-26 study period under the rising retention rate scenario would be capable of supporting a slightly higher quantum of new convenience floorspace if it was developed in small supermarket format of the sort operated by Aldi or Lidl.

3.37 The low convenience floorspace requirements reflect the low growth in expenditure and the combined effects of the claims on that growth. Furthermore, the current level of convenience expenditure retention achieved by the catchment area (89.8 per cent) is high, which means that there is little scope for further improvement.

3.38 In the 2008 FTCHS, we identified a negative expenditure residual for additional convenience floorspace in the OCA arising in the 2008 to 2020 study period under the increased retention rate scenario. Our most recent forecasts represent an increase in the residual requirement for additional convenience floorspace, albeit our forecasts remain negative in the period up to 2021 and are small-scale up to 2026 under both retention rate scenarios. The quantitative need is low because there is not much scope to improve upon the current retention rate of approximately 90 per cent, which is largely due to the number of new foodstores that have recently opened in Flintshire, over and above the convenience retail development in the pipeline at the time of our previous forecasts.

3.39 Whilst there is no generic need for significant new convenience floorspace across the OCA, as we have explained, there is a localised deficiency in the convenience goods provision in Buckley (Zone 6). In Spreadsheet 16c we therefore make an allowance for the localised convenience goods retention rate in Zone 6 to improve from 33 per cent at 2010 to 60 per cent by 2016, remaining at 60 per cent up to 2026. The residual expenditure arising to support additional convenience retail floorspace in Buckley, as set out in Row H of Spreadsheet 16c, is summarised in Table 3.12 below.

Table 3.12 Residual Convenience Expenditure Capacity in Zone 6

Year	Rising Localised Retention in Zone 6 Scenario (£m)
2010 - 2016	5.7
2010 - 2021	6.0
2010 - 2026	6.3

3.40 Table 3.12 indicates that the increase in retained convenience goods expenditure in Buckley would be sufficient to support an expansion of the existing Co-operative supermarket in Buckley, or the development of a small supermarket of the sort operated by Aldi or Lidl. Taking into account the findings of our sensitivity test, and our view that one of the Council's policy aspirations should be to improve the localised convenience sector retention rate in Zone 6, we suggest that the Council should work towards the requirement for either expansion of the existing supermarket or a new small supermarket in Buckley.

3.41 We similarly assessed the effect of an increase in the localised retention rate in Zone 6 of just over 27 percentage points in the 2008 FTCHS, and identified £7.7m (in 2005 prices) of residual expenditure at 2016 to support new convenience floorspace in Buckley. Our most recent estimates therefore represent a reduction in the capacity for new convenience goods floorspace in Buckley. This reduction is largely attributable to the lower expenditure growth rate forecasts in the convenience sector compared to those that were forecast at 2008 before the full effects of the economic downturn were known.

Conclusions in Relation to Retail Need

Comparison Retail Goods

3.42 We have considered two different scenarios in our assessment of the quantitative need for additional comparison floorspace: a static retention scenario and an increased retention scenario. There is a negative residual for additional comparison retail floorspace under the static retention scenario in the period up to 2021, and in the period up to 2016 under the rising retention scenario (Table 3.10). This means that the growth in retained expenditure is not 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 existing commitments.

3.43 However, there is a small positive residual need for convenience floorspace in the period up to 2021 under the rising retention scenario, and under both scenarios up to 2026. The residual comparison floorspace requirements are most significant under the rising retention scenario.

3.44 In our assessment there is scope to improve the current level of comparison expenditure retention that is achieved by the catchment area, of 49.4 per cent. We thus suggest that the requirement for up to an additional 4,100 sq.m comparison sales area that we have identified in the 2010 to 2021 period under the rising retention scenario should be directed to town centre locations. The floorspace requirement over the longer term period 2010 to 2026 is significantly higher, at 10,600 sq.m (Table 3.10), but again the Council should seek to direct development to town centre locations – in accordance with the thrust of national planning policy – rather than an alternative strategy of permitting large-scale retail development in out-of-centre locations.

Convenience Retail Goods

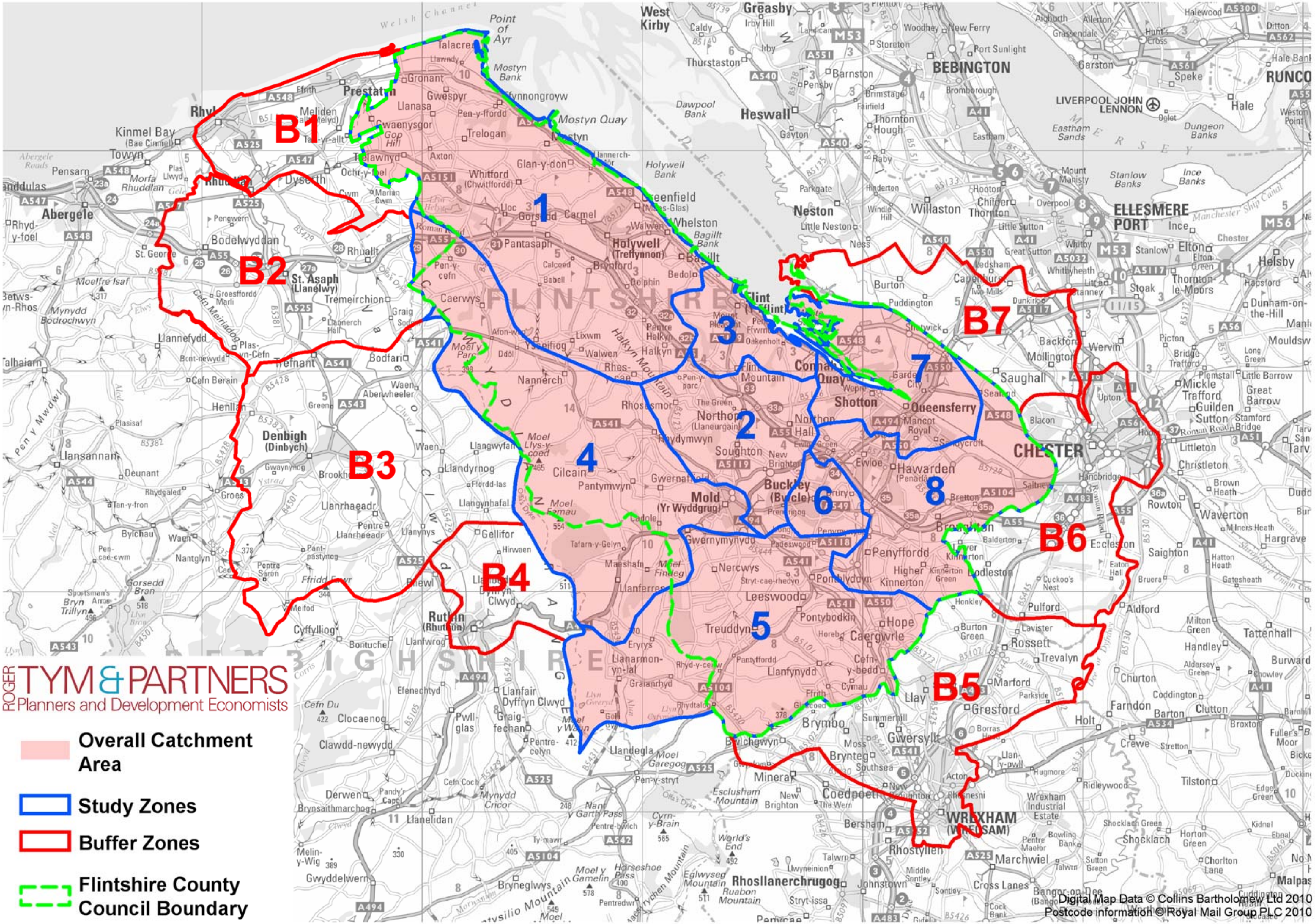
3.45 In the convenience sector, we similarly considered a static retention rate scenario and a rising retention rate scenario. The residual convenience floorspace requirement is negative from 2010 up to 2021 under the static retention scenario, and from 2010 to 2016 under the rising retention scenario (Table 3.11).

3.46 A small positive residual need for convenience floorspace arises in the longer-term period up to 2021 under the rising retention scenario, and under both scenarios up to 2026. This requirement is most significant under the rising retention scenario. However, we consider that there is limited scope to further improve the aggregate retention rate across the OCA, which at 90 per cent is already very high. We therefore suggest that there is no 'overall' quantitative requirement for additional convenience sales area floorspace in the period up to 2021 within the OCA, and only a small quantitative requirement for up to 100 sq.m over the longer-term period to 2026.

3.47 Nevertheless, we have identified a localised deficiency in convenience retail provision in Buckley Town Centre (Zone 6), and in our view one of the Council's policy aspirations should be to increase the localised convenience goods retention rate through the delivery of enhanced convenience retail provision in Buckley Town Centre. We therefore considered an increased localised retention scenario for Zone 6 and, under this sensitivity test, we have identified £5.7m of residual expenditure at 2016 to support new convenience floorspace in Buckley. We consider that meeting this need – via the expansion of the existing Co-operative store, or through the development of a new supermarket – should be treated as a priority by the Council.

APPENDIX 1

Plan Showing Flintshire's Overall Catchment Area


ROGER TYM & PARTNERS
Planners and Development Economists
Overall Catchment Area
Study Zones
Buffer Zones
Flintshire County Council Boundary
B1
B2
B3
B4
B5
B6
B7
1
2
3
4
5
6
7
8
Digital Map Data © Collins Bartholomew Ltd 2010
Postcode information © Royal Mail Group PLC 2010

APPENDIX 2

Questionnaire for the Household Survey undertaken by NEMS in November and December 2010

Flintshire Retail Capacity Study

Good afternoon / evening, I am …… from NEMS market research, and we are conducting a short survey in your area about shopping on behalf of Flintshire County 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 — GO TO Q01
2 No — **CLOSE**

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 **Excluding Christmas shopping, 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

Specified Stores & Centres: Choose from Lists A and B

Other:
Internet / delivered
Home Catalogue
TV/Interactive Shopping
Market Stalls (PLEASE PROBE FOR LOCATION)
Other (PLEASE WRITE IN STORE NAME AND LOCATION)
(Don't know / varies)
(Don't do a main food shop) — GO TO Q05

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.

Specified Stores & Centres: Choose from Lists A and B

Other:
Internet / delivered
Home Catalogue
TV/Interactive Shopping
Market Stalls (PLEASE PROBE FOR LOCATION)
Other (PLEASE WRITE IN STORE NAME AND LOCATION)
(Don't know / varies)
(Don't do a main food shop) — GO TO Q05

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 £……………………
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

Specified Stores & Centres: Choose from Lists A and B

Other:
Internet / delivered
Home Catalogue
TV/Interactive Shopping
Market Stalls (PLEASE PROBE FOR LOCATION)
Other (PLEASE WRITE IN STORE NAME AND LOCATION)
(Don't know / varies)
(Don't do top-up food shopping) GO TO Q13

Those who do top-up shopping at Q05:

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 PROMPT. ONE ANSWER ONLY.

Specified Stores & Centres: Choose from Lists A and B

Other:
Internet / delivered
Home Catalogue
TV/Interactive Shopping
Market Stalls (PLEASE PROBE FOR LOCATION)
Other (PLEASE WRITE IN STORE NAME AND LOCATION)
(Don't know / varies)
(Don't do top-up food shopping)

Those who do top-up shopping at Q05/Q06:

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 £…………………..
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 PROMPT. ONE ANSWER ONLY.

1 Yes GO TO Q10
2 No GO TO Q13

Those who also buy food and groceries in small shops at Q09

Q10 **Where are these small shops located?**
DO NOT READ OUT. ONE ANSWER ONLY.
QUOTE STORES ONLY IF RESPONDENT IS UNSURE OF DESTINATION.

Specified centre: Choose from List B
Specific stores (write in name and location)
Other (write in name and location)
(Don't know / varies)

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 £……………………
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.

Specified Stores and Centres: Choose from Lists B and C

Other:
1 Internet / delivered
2 Home Catalogue
3 TV/Interactive Shopping
4 Market Stalls (PLEASE PROBE FOR LOCATION)
5 Other (PLEASE WRITE IN STORE NAME AND LOCATION)
6 (Don't know / varies) GO TO Q15

Q14 **And the time before that, where did you go to make a purchase of clothes or shoes?**
DO NOT PROMPT. ONE ANSWER ONLY.

Specified Stores and Centres: Choose from Lists B and C

Other:
1 Internet / delivered
2 Home Catalogue
3 TV/Interactive Shopping
4 Market Stalls (PLEASE PROBE FOR LOCATION)
5 Other (PLEASE WRITE IN STORE NAME AND LOCATION)
6 (Don't know / varies)
7 (Nowhere else / Same as before)

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.

Specified Stores and Centres: Choose from Lists B and C

Other:
Internet / delivered
Home Catalogue
TV/Interactive Shopping
Market Stalls (PLEASE PROBE FOR LOCATION)
Other (PLEASE WRITE IN STORE NAME AND LOCATION)
(Don't know / varies) GO TO Q17

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.

Specified Stores and Centres: Choose from Lists B and C

Other:
Internet / delivered
Home Catalogue
TV/Interactive Shopping
Market Stalls (PLEASE PROBE FOR LOCATION)
Other (PLEASE WRITE IN STORE NAME AND LOCATION)
(Don't know / varies)
(Nowhere else / Same as before)

Q17 **Now can you tell me where your household last made a purchase of DIY and decorating goods?**
DO NOT PROMPT. ONE ANSWER ONLY.

Specified Stores and Centres: Choose from Lists B and C

Other:
Internet / delivered
Home Catalogue
TV/Interactive Shopping
Market Stalls (PLEASE PROBE FOR LOCATION)
Other (PLEASE WRITE IN STORE NAME AND LOCATION)
(Don't know / varies) GO TO Q19

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.

Specified Stores and Centres: Choose from Lists B and C

Other:
Internet / delivered
Home Catalogue
TV/Interactive Shopping
Market Stalls (PLEASE PROBE FOR LOCATION)
Other (PLEASE WRITE IN STORE NAME AND LOCATION)
(Don't know / varies)
(Nowhere else / Same as before)

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.

Specified Stores and Centres: Choose from Lists B and C

Other:
Internet / delivered
Home Catalogue
TV/Interactive Shopping
Market Stalls (PLEASE PROBE FOR LOCATION)
Other (PLEASE WRITE IN STORE NAME AND LOCATION)
(Don't know / varies) GO TO Q21

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.

Specified Stores and Centres: Choose from Lists B and C

Other:
Internet / delivered
Home Catalogue
TV/Interactive Shopping
Market Stalls (PLEASE PROBE FOR LOCATION)
Other (PLEASE WRITE IN STORE NAME AND LOCATION)
(Don't know / varies)
(Nowhere else / Same as before)

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.

Specified Stores and Centres: Choose from Lists B and C

Other:
Internet / delivered
Home Catalogue
TV/Interactive Shopping
Market Stalls (PLEASE PROBE FOR LOCATION)
Other (PLEASE WRITE IN STORE NAME AND LOCATION)
(Don't know / varies) GO TO Q23

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.

Specified Stores and Centres: Choose from Lists B and C

Other:
Internet / delivered
Home Catalogue
TV/Interactive Shopping
Market Stalls (PLEASE PROBE FOR LOCATION)
Other (PLEASE WRITE IN STORE NAME AND LOCATION)
(Don't know / varies)
(Nowhere else / Same as before)

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.

Specified Stores and Centres: Choose from Lists B and C

Other:
Internet / delivered
Home Catalogue
TV/Interactive Shopping
Market Stalls (PLEASE PROBE FOR LOCATION)
Other (PLEASE WRITE IN STORE NAME AND LOCATION)
(Don't know / varies) GO TO Q25

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. **Specified Stores and Centres: Choose from Lists B and C** **Other:** Internet / delivered Home Catalogue TV/Interactive Shopping Market Stalls (PLEASE PROBE FOR LOCATION) Other (PLEASE WRITE IN STORE NAME AND LOCATION) (Don't know / varies) (Nowhere else / Same as before)	
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. **Specified Stores and Centres: Choose from Lists B and C** **Other:** Internet / delivered Home Catalogue TV/Interactive Shopping Market Stalls (PLEASE PROBE FOR LOCATION) Other (PLEASE WRITE IN STORE NAME AND LOCATION) (Don't know / varies)	GO TO Q27
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. **Specified Stores and Centres: Choose from Lists B and C** **Other:** Internet / delivered Home Catalogue TV/Interactive Shopping Market Stalls (PLEASE PROBE FOR LOCATION) Other (PLEASE WRITE IN STORE NAME AND LOCATION) (Don't know / varies) (Nowhere else / Same as before)	
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
10	(Don't use the internet for shopping)	GO TO Q29

Q28A **What proportion of your overall *__food and grocery__* spend is via the internet?**
WRITE IN THE PERCENTAGE

1

Q28B **What proportion of your overall *__clothing and shoes__* spend is via the internet?**
WRITE IN THE PERCENTAGE

1

Q28C **What proportion of your overall *__furniture, carpets, soft household furnishing__* spend is via the internet?**

WRITE IN THE PERCENTAGE

1

Q28D **What proportion of your overall *__DIY and decorating goods__* spend is via the internet?**
WRITE IN THE PERCENTAGE

1

Q28E **What proportion of your overall *__domestic appliances and electrical items__* spend is via the internet?**

WRITE IN THE PERCENTAGE

1

Q28F **What proportion of your overall __health, beauty and chemist__ items spend is via the internet?**
WRITE IN THE PERCENTAGE

1

Q28G **What proportion of your overall *__recreational goods__* spend is via the internet?**
WRITE IN THE PERCENTAGE

1

Q28H **What proportion of your overall *__other non-food items__* spend is via the internet?**
WRITE IN THE PERCENTAGE

1

Q29 **Which town centre is closest to your home?**
ONE ANSWER ONLY. READ OUT LIST.

1	Buckley	
2	Connah's Quay	
3	Flint	
4	Holywell	
5	Mold	
6	Saltney	
7	Shotton	
8	Queensferry	
9	Other (PLEASE WRITE IN)	
10	(Don't know)	GO TO GEN

Q30 **Do you visit your nearest town centre on a regular basis?**

1	Yes	GO TO GEN
2	No	GO TO Q31

Those who don't visit their nearest town centre at Q30

Q31 **Can I ask, why don't you visit your nearest town centre on a regular basis?**
DO NOT PROMPT. CAN BE MULTI-CODED. RANK UP TO 3 ANSWERS

ACCESS AND TRANSPORT FACTORS

1 Another town centre is more convenient because I work there, or for some other personal circumstance (i.e. pass by another centre to drop children at school)
2 Unsafe for pedestrians / pedestrian-traffic conflict
3 Parking too expensive
4 Not enough parking / other difficulties in parking
5 Poor public transport links to / from the centre
6 Road congestion
7 Poor directional signage to the centre
8 Inadequate signposting within the centre
9 Inconvenient location of bus stops / bus station
A Inadequate access for wheelchair and pushchair users

ENVIRONMENTAL FACTORS

B Dirty shopping streets
C Feels unsafe / inadequate security measures
D The appearance / environment of centre needs improving
E Inadequate street furniture / floral displays
F Insufficient or poor quality open space and green areas
G Lack of character/atmosphere

ATTRACTIONS – RETAIL/LEISURE/SERVICES OFFER

H Not enough national multiple (high street chain) retailers
I Not enough independent / specialist shops
J Inadequate supermarket offer
K Inadequate quality / choice of shops in general
L Specific shop missing from the centre (PLEASE WRITE IN)
M Poor / limited shop opening hours
N Shops / services spread over too wide an area
O Inadequate range of services (banks, hairdressers, etc)
P Inadequate quality / range of night-life (bars, pubs and clubs)
Q Inadequate quality / range of eating places
R Inadequate quality / range of leisure facilities (leisure centre, cinema, theatre, etc)
S Not enough children's play areas
T Other (PLEASE WRITE IN)
U (Don't know / refused)
V (None mentioned)

GEN	**Gender of respondent.** CODE FROM OBSERVATION
1	Male
2	Female

AGE **Could I ask, how old are you?**
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)

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)

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)

Thank & close

APPENDIX 3

Comparison Retail Capacity Spreadsheets

Spreadsheet 1 - Definition of Zones

Zone	Postcode Sectors	Local Authority[1]
Zone 1	CH6 6 CH8 7 CH8 8 CH8 9 LL18 6 LL19 8 LL19 9	**Flintshire**
Zone 2	CH7 6	**Flintshire**
Zone 3	CH6 5	**Flintshire**
Zone 4	CH7 1 CH7 5 LL17 0 (part)	**Flintshire** / Denbighshire
Zone 5	CH7 4 LL11 3 (part) LL11 5 (part) LL12 0 (part) LL12 9 (part)	**Flintshire** / Denbighshire
Zone 6	CH7 2 CH7 3	**Flintshire**
Zone 7	CH5 1 CH5 2 (part) CH5 4 CH64 5 (part)	**Flintshire**
Zone 8	CHA 5 CH1 6 (part) CH4 0 CH4 8 (part) CH4 9 (part) CH5 3	**Flintshire**

NOTES:
(1) The predominant local authority in each zone is highlighted in bold (ie.the local authority in which the majority of the populated area of the zone is located).

Spreadsheet 2 - Population Projections

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	All Zones Total
Population 2008	27,003	11,619	12,741	16,614	11,723	14,929	31,520	25,751	151,900
Population 2010	27,115	11,667	12,794	16,683	11,772	14,991	31,651	25,858	152,530
Population 2016	27,394	11,787	12,925	16,854	11,893	15,145	31,976	26,123	154,097
Population 2021	27,575	11,865	13,011	16,966	11,971	15,245	32,188	26,297	155,119
Population 2026	27,630	11,889	13,037	17,000	11,995	15,276	32,252	26,349	155,429
Change in population 2010 - 2016									
Numeric change	279	120	131	171	121	154	325	266	1,567
Percentage change	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%
Change in population 2016 - 2021									
Numeric change	182	78	86	112	79	100	212	173	1,022
Percentage change	0.7%	0.7%	0.7%	0.7%	0.7%	0.7%	0.7%	0.7%	0.7%
Change in population 2021 - 2026									
Numeric change	55	24	26	34	24	31	64	53	310
Percentage change	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%
Change in population 2010 - 2026									
Numeric change	515	222	243	317	224	285	602	492	2,899
Percentage change	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%

NOTES:

(1) Population data were sourced from sourced from Oxford Economics 2010 via MapInfo Anysite 8.8.1 (mid-year 2008). The population in each zone was projected forward to the base year and forecast years using population multipliers derived from the Welsh Assembly Government's 2008-based Local Authority Population Projections for Wales.

(2) The population multiplier has been calculated for the predominant local authority in each zone (highlighted in **bold** in Spreadsheet 1) and has been applied to the total population within that zone.

Spreadsheet 3 - Comparison Goods Expenditure (per capita)

Year	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
	£	£	£	£	£	£	£	£
2008	2,774	2,945	2,747	2,925	2,901	2,832	2,722	2,860
2010	2,785	2,957	2,758	2,937	2,912	2,843	2,733	2,871
2016	3,392	3,601	3,359	3,576	3,547	3,463	3,328	3,497
2021	3,989	4,235	3,951	4,207	4,172	4,073	3,915	4,113
2026	4,681	4,970	4,636	4,936	4,895	4,779	4,593	4,826

NOTES:
(1) 2008-based per capita comparison expenditure data were sourced from Oxford Economics 2010 via MapInfo Anysite 8.8.1.
(2) The 2008-based per capita comparison expenditure data were projected forward to the base year and forecast years using the midpoint of the forecasts provided by Pitney Bowes Business Insight, as set out in its Retail Expenditure Guide 2010/2011 (Table 3.5, September 2010), and Experian in its Retail Planner Briefing Note 8.1 (Figure 1, August 2010). The forecasts that we have used are as shown in the following table:

Per Capita Comparison Expenditure Growth Forecasts (2008 - 2026)

	Annual Growth Rates		
Year	Experian	PBBI	RTP
2008 - 2009	-0.6%	-0.3%	-0.5%
2009 - 2010	0.4%	1.3%	0.9%
2010 - 2011	1.2%	2.3%	1.8%
2011 - 2012	2.4%	3.8%	3.1%
2012 - 2013	2.7%	4.4%	3.6%
2013 - 2014	2.7%	5.3%	4.0%
2014 - 2015	2.7%	5.1%	3.9%
2015 - 2016	2.7%	4.8%	3.8%
2016 - 2017	2.7%	4.0%	3.4%
2017 - 2018	2.9%	3.8%	3.4%
2018 - 2019	2.9%	3.7%	3.3%
2019 -2026	2.9%	3.6%	3.3%

All monetary values are held constant at 2008 prices.

Spreadsheet 4 - Total Comparison Goods Expenditure and Expenditure Growth

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	All Zones Total
	£m	£m	£m	£m	£m	£m	£m	£m	£m
Total expenditure 2010	**75.51**	**34.50**	**35.28**	**48.99**	**34.28**	**42.62**	**86.49**	**74.25**	**431.93**
Spending on SFT in 2010 of average of 10.0%	8.27	3.29	2.79	5.86	2.24	3.05	9.86	7.98	**43.34**
Total expenditure excluding SFT 2010	67.24	31.20	32.49	43.14	32.04	39.57	76.64	66.27	**388.59**
Total expenditure 2016	**92.91**	**42.44**	**43.41**	**60.27**	**42.18**	**52.44**	**106.42**	**91.35**	**531.42**
Spending on SFT in 2016 of 13.9%	12.91	5.90	6.03	8.38	5.86	7.29	14.79	12.70	**73.87**
Total expenditure excluding SFT 2016	79.99	36.54	37.38	51.90	36.32	45.15	91.62	78.65	**457.55**
Total expenditure 2021	**110.01**	**50.25**	**51.40**	**71.37**	**49.95**	**62.09**	**126.00**	**108.16**	**629.23**
Spending on SFT in 2021 of 13.6%	14.96	6.83	6.99	9.71	6.79	8.44	17.14	14.71	**85.58**
Total expenditure excluding SFT 2021	95.05	43.42	44.41	61.66	43.15	53.65	108.87	93.45	**543.65**
Total expenditure 2026	**129.34**	**59.09**	**60.43**	**83.91**	**58.72**	**73.00**	**148.15**	**127.17**	**739.82**
Spending on SFT in 2026 of 13.3%	17.20	7.86	8.04	11.16	7.81	9.71	19.70	16.91	**98.40**
Total expenditure excluding SFT 2026	112.14	51.23	52.40	72.75	50.91	63.29	128.45	110.26	**641.43**
Growth in total expenditure 2010 - 2016	17.39	7.95	8.13	11.28	7.90	9.82	19.92	17.10	**99.48**
Growth in total expenditure 2016 - 2021	17.10	7.81	7.99	11.09	7.76	9.65	19.59	16.81	**97.81**
Growth in total expenditure 2021 - 2026	19.33	8.83	9.03	12.54	8.78	10.91	22.15	19.01	**110.59**
Growth in total expenditure 2010 - 2026	53.83	24.59	25.15	34.92	24.44	30.38	61.65	52.92	**307.89**

NOTES:

(1) The figures in the above table are the product of multiplying the data presented in Spreadsheet 2 (population) by Spreadsheet 3 (per capita comparison goods expenditure), and are in millions of pounds (£m).

(2) The total expenditure includes a proportion of expenditure on Special Forms of Trading (SFT) (i.e. mail order, TV and Internet shopping and markets). The proportion of expenditure on SFT in 2010 is derived from the telephone survey of households and varies between the different zones, ranging from 6.5% of expenditure in Zone 5 to 12.0% of expenditure in Zone 4. For each of the forecast years, we have assumed that the proportion of expenditure spent on SFT in each zone will be 13.9% in 2016, 13.6% in 2021 and 13.3% in 2026 (the levels estimated by Experian in Appendix 3 of Retail Planner Briefing Note 8.1, August 2010).

All monetary values are held constant at 2008 prices.

Spreadsheet 5 - Comparison Goods Spending Patterns in 2010 as a Percentage Across the Study Area Zones

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
	%	%	%	%	%	%	%	%
Inside Catchment Area								
Zone 1								
Holywell Town Centre	10.20	0.00	0.49	0.00	0.00	0.00	0.04	0.00
Other, Zone 1	0.46	0.00	0.10	0.00	0.00	0.00	0.06	0.00
Total Zone 1	***10.66***	***0.00***	***0.59***	***0.00***	***0.00***	***0.00***	***0.10***	***0.00***
Zone 2								
Mynydd Isa	0.00	1.33	0.00	0.00	0.00	0.07	0.00	0.00
Total Zone 2	***0.00***	***1.33***	***0.00***	***0.00***	***0.00***	***0.07***	***0.00***	***0.00***
Zone 3								
Flintshire Retail Park, Flint Town Centre	3.56	0.00	3.48	0.31	0.00	0.10	0.81	0.00
Other, Flint Town Centre	6.55	1.34	24.67	0.37	0.87	0.00	1.88	0.12
Total Zone 3	***10.11***	***1.34***	***28.16***	***0.68***	***0.87***	***0.10***	***2.69***	***0.12***
Zone 4								
Mold Town Centre	4.71	21.53	1.98	34.58	17.34	8.74	1.55	2.92
Other, Zone 4	0.03	0.00	0.13	0.17	0.25	0.00	0.00	0.00
Total Zone 4	***4.74***	***21.53***	***2.11***	***34.75***	***17.59***	***8.74***	***1.55***	***2.92***
Zone 5								
Caergwrle	0.00	0.00	0.00	0.00	2.19	0.00	0.00	0.00
Other, Zone 5	0.00	0.00	0.00	0.00	0.34	0.00	0.00	0.00
Total Zone 5	***0.00***	***0.00***	***0.00***	***0.00***	***2.53***	***0.00***	***0.00***	***0.00***
Zone 6								
Buckley Town Centre	0.00	1.79	0.00	0.62	0.71	11.96	0.34	0.92
Total Zone 6	***0.00***	***1.79***	***0.00***	***0.62***	***0.71***	***11.96***	***0.34***	***0.92***
Zone 7								
B&Q, Deeside Retail Park, Chester Road East, Queensferry	4.21	4.63	4.75	2.42	0.49	5.36	9.52	5.05
Asda, Aston Road, Queensferry District Centre	2.73	2.45	2.68	1.27	0.84	2.88	8.73	1.88
Other, Queensferry District Centre	0.32	0.11	0.12	0.57	0.00	0.10	0.97	0.89
Shotton Town Centre	0.04	0.32	0.34	0.00	0.99	0.00	5.14	0.56
Connah's Quay District Centre	0.39	0.44	0.78	0.42	0.00	0.08	4.51	0.21
B&M Bargains, Deeside Retail Park, Chester Road East, Queensferr	0.17	0.00	0.58	1.14	0.00	0.77	0.64	0.32
Other, Zone 7	0.07	0.00	0.08	0.00	0.00	0.24	0.63	0.09
Total Zone 7	***7.94***	***7.95***	***9.33***	***5.83***	***2.31***	***9.43***	***30.15***	***9.00***
Zone 8								
Broughton Shopping Park, Chester Road, Broughton	10.55	17.70	13.06	12.96	11.33	22.84	15.10	33.08
Hawarden	0.40	0.83	0.51	0.78	0.52	0.76	0.68	0.62
Saltney District Centre	0.00	0.20	0.00	0.00	0.77	0.17	0.04	0.86
Other, Zone 8	0.00	0.63	0.00	0.09	0.33	0.00	0.31	0.12
Total Zone 8	***10.95***	***19.36***	***13.57***	***13.83***	***12.95***	***23.78***	***16.13***	***34.68***
TOTAL INSIDE CATCHMENT AREA	**44.40**	**53.30**	**53.76**	**55.70**	**36.96**	**54.08**	**50.95**	**47.63**
Inside Buffer Area								
Buffer 1								
Rhyl	7.77	0.08	0.91	0.48	0.00	0.14	0.06	0.00
Clwyd Retail Park, Rhyl Road, Rhuddlan	1.37	0.00	0.68	0.31	0.00	0.00	0.08	0.00
Prestatyn	1.88	0.32	0.00	0.00	0.00	0.00	0.00	0.00
Other, Buffer 1	0.14	0.32	0.00	0.00	0.00	0.00	0.00	0.00
Total Buffer 1	***11.17***	***0.71***	***1.59***	***0.79***	***0.00***	***0.14***	***0.14***	***0.00***
Buffer 2								
St Asaph	0.32	0.30	0.27	0.98	0.57	0.00	0.00	0.00
Other, Buffer 2	0.00	0.00	0.00	0.11	0.00	0.00	0.06	0.00
Total Buffer 2	***0.32***	***0.30***	***0.27***	***1.10***	***0.57***	***0.00***	***0.06***	***0.00***
Buffer 3								
Other, Buffer 3	0.00	0.00	0.00	0.55	0.16	0.00	0.00	0.05
Total Buffer 3	***0.00***	***0.00***	***0.00***	***0.55***	***0.16***	***0.00***	***0.00***	***0.05***
Buffer 4								
Ruthin	0.05	0.00	0.00	0.25	0.46	0.00	0.00	0.00
Total Buffer 4	***0.05***	***0.00***	***0.00***	***0.25***	***0.46***	***0.00***	***0.00***	***0.00***
Buffer 5								
Wrexham Town Centre	2.04	4.30	0.81	5.07	28.90	4.75	0.78	1.72
Plas Coch Retail Park, Plas Coch Road, Wrexham	0.00	0.35	0.00	0.00	1.67	0.00	0.00	0.32
Other, Buffer 5	0.00	0.00	0.13	0.17	1.01	0.00	0.00	0.05
Total Buffer 5	***2.04***	***4.65***	***0.94***	***5.24***	***31.57***	***4.75***	***0.78***	***2.08***
Buffer 6								
Chester City Centre	13.25	14.95	18.58	14.23	10.28	17.05	18.70	17.70
Greyhound Retail Park, Sealand Road, Chester	9.78	12.28	9.57	5.34	3.59	12.74	13.10	16.11
Chester Retail Park, Old Seals Way, Chester	2.33	0.53	2.75	0.46	1.67	0.00	1.45	2.52
Other, Buffer 6	0.00	0.00	0.17	0.00	0.08	0.00	0.07	0.00
Total Buffer 6	***25.36***	***27.76***	***31.07***	***20.03***	***15.62***	***29.78***	***33.32***	***36.33***
Buffer 7								
Other, Buffer 7	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Buffer 7	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***
TOTAL INSIDE BUFFER AREA	**38.94**	**33.42**	**33.88**	**27.95**	**48.38**	**34.67**	**34.31**	**38.46**
Outside Buffer Area								
Cheshire Oaks Designer Outlet, Kinsey Road, Ellesmere Port	1.08	1.91	1.51	0.93	0.35	0.82	0.73	0.51
Liverpool	1.04	0.56	0.77	0.30	0.39	0.32	0.22	0.25
Llandudno	1.43	0.00	0.47	0.11	1.09	0.30	0.06	0.18
Ellesmere Port	0.41	0.30	0.70	0.24	0.34	0.41	0.92	0.19
B&Q, Berse Road, Wrexham	0.00	0.00	0.00	0.30	2.63	0.00	0.05	0.19
Warrington	0.09	0.25	0.22	0.27	0.00	0.53	0.17	0.70
Other, Outside Buffer Area	1.66	0.70	0.78	2.25	3.33	1.69	1.20	1.15
Internet	8.61	7.10	6.68	10.82	5.60	4.54	9.29	9.03
Home Catalogue	1.69	0.24	0.35	1.01	0.93	1.21	1.16	1.13
TV / Interactive Shopping	0.66	2.20	0.89	0.12	0.00	1.42	0.95	0.58
TOTAL OUTSIDE BUFFER AREA	**16.66**	**13.28**	**12.36**	**16.35**	**14.66**	**11.24**	**14.75**	**13.91**
TOTAL	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**

Spreadsheet 6 - Comparison Goods Spending Patterns in 2010 Across the Study Area Zones

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Total[1]	All Zones Market Share[2]
	£m	£m	£m	£m	£m	£m	£m	£m	£m	%
Inside Catchment Area										
Zone 1										
Holywell Town Centre	7.70	0.00	0.17	0.00	0.00	0.00	0.03	0.00	7.91	1.8%
Other, Zone 1	0.35	0.00	0.04	0.00	0.00	0.00	0.05	0.00	0.43	0.1%
Total Zone 1	***8.05***	***0.00***	***0.21***	***0.00***	***0.00***	***0.00***	***0.08***	***0.00***	***8.34***	***1.9%***
Zone 2										
Mynydd Isa	0.00	0.46	0.00	0.00	0.00	0.03	0.00	0.00	0.49	0.1%
Total Zone 2	***0.00***	***0.46***	***0.00***	***0.00***	***0.00***	***0.03***	***0.00***	***0.00***	***0.49***	**0.1%**
Zone 3										
Flintshire Retail Park, Flint Town Centre	2.69	0.00	1.23	0.15	0.00	0.04	0.70	0.00	4.81	1.1%
Other, Flint Town Centre	4.95	0.46	8.71	0.18	0.30	0.00	1.63	0.09	16.31	3.8%
Total Zone 3	***7.63***	***0.46***	***9.93***	***0.33***	***0.30***	***0.04***	***2.32***	***0.09***	***21.11***	**4.9%**
Zone 4										
Mold Town Centre	3.55	7.43	0.70	16.94	5.94	3.73	1.34	2.17	41.80	9.7%
Other, Zone 4	0.03	0.00	0.05	0.08	0.09	0.00	0.00	0.00	0.24	0.1%
Total Zone 4	***3.58***	***7.43***	***0.74***	***17.02***	***6.03***	***3.73***	***1.34***	***2.17***	***42.04***	***9.7%***
Zone 5										
Caergwrle	0.00	0.00	0.00	0.00	0.75	0.00	0.00	0.00	0.75	0.2%
Other, Zone 5	0.00	0.00	0.00	0.00	0.11	0.00	0.00	0.00	0.11	0.0%
Total Zone 5	***0.00***	***0.00***	***0.00***	***0.00***	***0.87***	***0.00***	***0.00***	***0.00***	***0.87***	**0.2%**
Zone 6										
Buckley Town Centre	0.00	0.62	0.00	0.30	0.24	5.10	0.29	0.68	7.24	1.7%
Total Zone 6	***0.00***	***0.62***	***0.00***	***0.30***	***0.24***	***5.10***	***0.29***	***0.68***	***7.24***	***1.7%***
Zone 7										
B&Q, Deeside Retail Park, Chester Road East, Queensferry	3.18	1.60	1.68	1.19	0.17	2.28	8.23	3.75	22.08	5.1%
Asda, Aston Road, Queensferry District Centre	2.06	0.84	0.94	0.62	0.29	1.23	7.55	1.39	14.94	3.5%
Other, Queensferry District Centre	0.24	0.04	0.04	0.28	0.00	0.04	0.84	0.66	2.14	0.5%
Shotton Town Centre	0.03	0.11	0.12	0.00	0.34	0.00	4.45	0.41	5.46	1.3%
Connah's Quay District Centre	0.30	0.15	0.28	0.20	0.00	0.04	3.90	0.16	5.02	1.2%
B&M Bargains, Deeside Retail Park, Chester Road East, Queensfer	0.13	0.00	0.21	0.56	0.00	0.33	0.56	0.24	2.02	0.5%
Other, Zone 7	0.05	0.00	0.03	0.00	0.00	0.10	0.54	0.07	0.80	0.2%
Total Zone 7	***5.99***	***2.74***	***3.29***	***2.86***	***0.79***	***4.02***	***26.07***	***6.68***	***52.45***	***12.1%***
Zone 8										
Broughton Shopping Park, Chester Road, Broughton	7.96	6.11	4.61	6.35	3.88	9.74	13.06	24.56	76.27	17.7%
Hawarden	0.30	0.29	0.18	0.38	0.18	0.32	0.59	0.46	2.70	0.6%
Saltney District Centre	0.00	0.07	0.00	0.00	0.26	0.07	0.03	0.64	1.08	0.3%
Other, Zone 8	0.00	0.22	0.00	0.04	0.11	0.00	0.27	0.09	0.73	0.2%
Total Zone 8	***8.27***	***6.68***	***4.79***	***6.77***	***4.44***	***10.14***	***13.95***	***25.75***	***80.78***	***18.7%***
TOTAL INSIDE CATCHMENT AREA	**33.53**	**18.39**	**18.97**	**27.29**	**12.67**	**23.05**	**44.07**	**35.36**	**213.33**	**49.4%**
Inside Buffer Area										
Buffer 1										
Rhyl	5.87	0.03	0.32	0.24	0.00	0.06	0.05	0.00	6.56	1.5%
Clwyd Retail Park, Rhyl Road, Rhuddlan	1.04	0.00	0.24	0.15	0.00	0.00	0.07	0.00	1.50	0.3%
Prestatyn	1.42	0.11	0.00	0.00	0.00	0.00	0.00	0.00	1.53	0.4%
Other, Buffer 1	0.11	0.11	0.00	0.00	0.00	0.00	0.00	0.00	0.22	0.1%
Total Buffer 1	***8.43***	***0.25***	***0.56***	***0.39***	***0.00***	***0.06***	***0.12***	***0.00***	***9.81***	***2.3%***
Buffer 2										
St Asaph	0.24	0.10	0.10	0.48	0.20	0.00	0.00	0.00	1.12	0.3%
Other, Buffer 2	0.00	0.00	0.00	0.06	0.00	0.00	0.05	0.00	0.11	0.0%
Total Buffer 2	***0.24***	***0.10***	***0.10***	***0.54***	***0.20***	***0.00***	***0.05***	***0.00***	***1.23***	***0.3%***
Buffer 3										
Other, Buffer 3	0.00	0.00	0.00	0.27	0.05	0.00	0.00	0.04	0.36	0.1%
Total Buffer 3	***0.00***	***0.00***	***0.00***	***0.27***	***0.05***	***0.00***	***0.00***	***0.04***	***0.36***	**0.1%**
Buffer 4										
Ruthin	0.04	0.00	0.00	0.12	0.16	0.00	0.00	0.00	0.32	0.1%
Total Buffer 4	***0.04***	***0.00***	***0.00***	***0.12***	***0.16***	***0.00***	***0.00***	***0.00***	***0.32***	**0.1%**
Buffer 5										
Wrexham Town Centre	1.54	1.48	0.29	2.48	9.91	2.03	0.68	1.27	19.67	4.6%
Plas Coch Retail Park, Plas Coch Road, Wrexham	0.00	0.12	0.00	0.00	0.57	0.00	0.00	0.24	0.93	0.2%
Other, Buffer 5	0.00	0.00	0.05	0.08	0.34	0.00	0.00	0.04	0.51	0.1%
Total Buffer 5	***1.54***	***1.60***	***0.33***	***2.57***	***10.82***	***2.03***	***0.68***	***1.55***	***21.11***	**4.9%**
Buffer 6										
Chester City Centre	10.01	5.16	6.56	6.97	3.53	7.27	16.18	13.14	68.80	15.9%
Greyhound Retail Park, Sealand Road, Chester	7.39	4.23	3.38	2.62	1.23	5.43	11.33	11.96	47.56	11.0%
Chester Retail Park, Old Seals Way, Chester	1.76	0.18	0.97	0.23	0.57	0.00	1.26	1.87	6.84	1.6%
Other, Buffer 6	0.00	0.00	0.06	0.00	0.03	0.00	0.06	0.00	0.15	0.0%
Total Buffer 6	***19.15***	***9.58***	***10.96***	***9.81***	***5.35***	***12.70***	***28.82***	***26.97***	***123.35***	**28.6%**
Buffer 7										
Other, Buffer 7	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Buffer 7	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	**0.0%**
TOTAL INSIDE BUFFER AREA	**29.40**	**11.53**	**11.95**	**13.69**	**16.59**	**14.78**	**29.67**	**28.55**	**156.17**	***36.2%***
Outside Buffer Area										
Cheshire Oaks Designer Outlet, Kinsey Road, Ellesmere Port	0.81	0.66	0.53	0.46	0.12	0.35	0.63	0.38	3.95	0.9%
Liverpool	0.78	0.19	0.27	0.15	0.13	0.13	0.19	0.18	2.03	0.5%
Llandudno	1.08	0.00	0.17	0.06	0.37	0.13	0.05	0.13	1.99	0.5%
Ellesmere Port	0.31	0.10	0.25	0.12	0.12	0.18	0.79	0.14	2.00	0.5%
B&Q, Berse Road, Wrexham	0.00	0.00	0.00	0.15	0.90	0.00	0.05	0.14	1.24	0.3%
Warrington	0.07	0.09	0.08	0.13	0.00	0.22	0.15	0.52	1.26	0.3%
Other, Outside Buffer Area	1.25	0.24	0.27	1.10	1.14	0.72	1.04	0.86	6.63	1.5%
Internet	6.50	2.45	2.36	5.30	1.92	1.94	8.03	6.70	35.20	8.1%
Home Catalogue	1.27	0.08	0.12	0.50	0.32	0.51	1.01	0.84	4.66	1.1%
TV / Interactive Shopping	0.50	0.76	0.31	0.06	0.00	0.60	0.82	0.43	3.48	0.8%
TOTAL OUTSIDE BUFFER AREA	**12.58**	**4.58**	**4.36**	**8.01**	**5.03**	**4.79**	**12.75**	**10.33**	**62.44**	**14.5%**
TOTAL	**75.51**	**34.50**	**35.28**	**48.99**	**34.28**	**42.62**	**86.49**	**74.25**	**431.93**	**100.0%**

NOTES:

(1) The spending patterns are calculated by multiplying the total comparison goods expenditure including SFT in 2010 (Spreadsheet 4) by the market share (Spreadsheet 5). The figures in the 'Total' column are the sum of the expenditure attracted to each centre/store from each zone.

(2) The 'All Zones Market Share' is calculated by dividing the total expenditure retained by each centre by the total expenditure in the catchment area.

All monetary values are held constant at 2008 prices.

Spreadsheet 7 - Total Expenditure on Different Categories of Comparison Goods

Table A - Per Capita Expenditure on Different Categories of Comparison Goods in 2008 and 2010

	Expenditure Category	**Expenditure per capita (£)**							
		Zone 1	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**
2008	Clothes and Shoes	623	662	626	641	645	639	626	654
	Furniture, Carpets, Soft Household Furnishings	268	288	260	290	283	274	257	276
	DIY and Decorating Goods	266	276	267	276	275	270	262	267
	Electrical Items and Domestic Appliances	399	423	392	423	418	406	389	410
	Health, Beauty and Chemist Items	326	347	320	349	343	334	316	335
	Recreational Goods	632	669	624	667	661	642	618	647
	Other Goods (books, CDs, jewellery, glass and china, etc)	262	279	257	280	276	267	255	272
	Total Comparison Goods Expenditure	**2,774**	**2,945**	**2,747**	**2,925**	**2,901**	**2,832**	**2,722**	**2,860**
2010	Clothes and Shoes	625	665	629	643	648	642	628	656
	Furniture, Carpets, Soft Household Furnishings	269	289	261	291	284	275	258	277
	DIY and Decorating Goods	267	277	268	277	276	271	263	268
	Electrical Items and Domestic Appliances	400	425	394	425	420	408	390	411
	Health, Beauty and Chemist Items	327	348	321	350	344	335	317	336
	Recreational Goods	634	672	627	669	664	645	620	649
	Other Goods (books, CDs, jewellery, glass and china, etc)	263	280	258	281	277	268	256	273
	Total Comparison Goods Expenditure	**2,785**	**2,957**	**2,758**	**2,937**	**2,912**	**2,843**	**2,733**	**2,871**

Table B - Total Expenditure on Different Categories of Comparison Goods in 2010

	Expenditure Category	**Total Expenditure (in £m)**								
		Zone 1	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**Total**
2010	Clothes and Shoes	16.95	7.76	8.04	10.73	7.62	9.62	19.88	16.97	**97.58**
	Furniture, Carpets, Soft Household Furnishings	7.29	3.37	3.34	4.86	3.34	4.12	8.16	7.16	**41.66**
	DIY and Decorating Goods	7.24	3.23	3.43	4.62	3.25	4.06	8.32	6.93	**41.09**
	Electrical Items and Domestic Appliances	10.85	4.96	5.04	7.08	4.94	6.11	12.36	10.64	**61.98**
	Health, Beauty and Chemist Items	8.87	4.07	4.11	5.84	4.05	5.03	10.04	8.69	**50.70**
	Recreational Goods	17.19	7.84	8.02	11.17	7.81	9.66	19.63	16.79	**98.11**
	Other Goods (books, CDs, jewellery, glass and china, etc)	7.13	3.27	3.30	4.69	3.26	4.02	8.10	7.06	**40.83**
	Total Comparison Goods Expenditure	**75.51**	**34.50**	**35.28**	**48.99**	**34.28**	**42.62**	**86.49**	**74.25**	**431.93**

NOTES:

(1) Table A sets out 2008-based per capita expenditure sourced from Oxford Economics 2010 via MapInfo Anysite 8.8.1. for seven different categories of comparison goods. The 2008-based per capita expenditure data for the seven comparison goods categories are projected forward to the base year (2010) using the midpoint of the forecasts provided by Pitney Bowes Business Insight, as set out in its Retail Expenditure Guide 2010/2011 (Table 3.5, September 2010), and Experian in its Retail Planner Briefing Note 8.1 (Figure 1, August 2010)., as set out in Note (2) of Spreadsheet 3.

(2) The figures in Table B are the products of multiplying the 2010 per capita expenditure data presented in Table A by the 2010 population data set out in Spreadsheet 2, and are in millions of pounds (£m).

All monetary values are held constant at 2008 prices.

Spreadsheet 8a - Clothes and Shoes: Spending Patterns in 2010 as a Percentage Across the Study Area Zones

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
	%	%	%	%	%	%	%	%
Inside Catchment Area								
Zone 1								
Holywell Town Centre	6.81	0.00	0.60	0.00	0.00	0.00	0.00	0.00
Other, Zone 1	0.00	0.00	0.00	0.00	0.00	0.00	0.25	0.00
Total Zone 1	***6.81***	***0.00***	***0.60***	***0.00***	***0.00***	***0.00***	***0.25***	***0.00***
Zone 2								
Mynydd Isa	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Zone 2	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***
Zone 3								
Flintshire Retail Park, Flint Town Centre	1.47	0.00	1.21	0.00	0.00	0.00	0.00	0.00
Other, Flint Town Centre	5.09	1.30	6.04	0.98	0.00	0.00	2.10	0.00
Total Zone 3	***6.56***	***1.30***	***7.25***	***0.98***	***0.00***	***0.00***	***2.10***	***0.00***
Zone 4								
Mold Town Centre	3.91	8.57	3.02	21.86	8.07	2.67	2.11	1.58
Other, Zone 4	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Zone 4	***3.91***	***8.57***	***3.02***	***21.86***	***8.07***	***2.67***	***2.11***	***1.58***
Zone 5								
Other, Zone 5	0.00	0.00	0.00	0.00	0.77	0.00	0.00	0.00
Total Zone 5	***0.00***	***0.00***	***0.00***	***0.00***	***0.77***	***0.00***	***0.00***	***0.00***
Zone 6								
Buckley Town Centre	0.00	0.65	0.00	0.00	0.00	3.69	0.00	0.31
Total Zone 6	***0.00***	***0.65***	***0.00***	***0.00***	***0.00***	***3.69***	***0.00***	***0.31***
Zone 7								
Asda, Aston Road, Queensferry District Centre	3.84	4.62	3.64	3.40	2.24	4.82	12.02	3.10
Other, Queensferry District Centre	0.00	0.00	0.00	0.00	0.00	0.00	1.05	0.31
Connah's Quay District Centre	0.00	0.00	0.60	0.00	0.00	0.00	1.32	0.00
Shotton Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	1.84	0.00
Other, Zone 7	0.00	0.00	0.00	0.00	0.00	0.00	0.52	0.00
Total Zone 7	***3.84***	***4.62***	***4.23***	***3.40***	***2.24***	***4.82***	***16.75***	***3.40***
Zone 8								
Broughton Shopping Park, Chester Road, Broughton	17.25	27.83	19.49	16.60	18.32	32.36	27.15	40.76
Saltney District Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other, Zone 8	0.00	0.00	0.62	0.00	0.77	0.00	0.00	0.32
Total Zone 8	***17.25***	***27.83***	***20.11***	***16.60***	***19.09***	***32.36***	***27.15***	***41.08***
TOTAL INSIDE CATCHMENT AREA	**38.37**	**42.97**	**35.21**	**42.83**	**30.17**	**43.55**	**48.37**	**46.36**
Inside Buffer Area								
Buffer 1								
Rhyl	12.21	0.00	2.43	0.00	0.00	0.00	0.25	0.00
Other, Buffer 1	0.31	0.65	0.60	0.00	0.00	0.00	0.00	0.00
Total Buffer 1	***12.51***	***0.65***	***3.02***	***0.00***	***0.00***	***0.00***	***0.25***	***0.00***
Buffer 2								
St Asaph	1.23	1.33	1.21	1.95	1.41	0.00	0.00	0.00
Other, Buffer 2	0.00	0.00	0.00	0.50	0.00	0.00	0.27	0.00
Total Buffer 2	***1.23***	***1.33***	***1.21***	***2.45***	***1.41***	***0.00***	***0.27***	***0.00***
Buffer 3								
Other, Buffer 3	0.00	0.00	0.00	0.98	0.70	0.00	0.00	0.00
Total Buffer 3	***0.00***	***0.00***	***0.00***	***0.98***	***0.70***	***0.00***	***0.00***	***0.00***
Buffer 4								
Ruthin	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Buffer 4	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***
Buffer 5								
Wrexham Town Centre	3.94	8.00	3.04	12.79	36.13	10.55	1.30	3.79
Other, Buffer 5	0.00	0.68	0.00	0.00	0.70	0.00	0.00	0.32
Total Buffer 5	***3.94***	***8.68***	***3.04***	***12.79***	***36.84***	***10.55***	***1.30***	***4.11***
Buffer 6								
Chester City Centre	20.31	32.45	44.78	27.88	16.27	30.53	31.67	35.77
Greyhound Retail Park, Sealand Road, Chester	2.08	0.00	0.62	0.95	0.00	1.09	3.41	2.83
Other, Buffer 6	0.00	0.00	0.60	0.00	0.00	0.00	0.00	0.31
Total Buffer 6	***22.40***	***32.45***	***45.99***	***28.83***	***16.27***	***31.61***	***35.08***	***38.90***
Buffer 7								
Other, Buffer 7	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Buffer 7	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***
TOTAL INSIDE BUFFER AREA	**40.08**	**43.10**	**53.26**	**45.05**	**55.22**	**42.16**	**36.91**	**43.02**
Outside Buffer Area								
Cheshire Oaks Designer Outlet, Kinsey Road, Ellesmere Port	3.63	5.33	2.45	1.45	0.70	1.56	2.64	1.23
Llandudno	4.78	0.00	0.60	0.50	2.24	1.04	0.25	0.31
Ellesmere Port	1.21	1.33	0.60	0.00	0.77	1.06	3.18	0.64
Liverpool	0.60	2.00	2.45	0.48	0.70	0.00	0.52	0.93
The Trafford Centre, Manchester	0.00	0.65	0.62	0.00	0.00	1.04	0.00	0.61
Manchester	0.29	0.65	0.62	0.48	0.00	0.00	0.00	0.63
Birkenhead	0.60	0.00	0.00	0.00	0.77	0.00	0.54	0.63
Other, Outside Buffer Area	2.37	0.65	1.81	1.93	3.52	3.22	0.25	0.63
Internet	2.99	1.33	1.21	3.88	2.95	1.06	4.48	4.07
Home Catalogue	3.29	0.68	1.19	3.40	2.95	4.23	2.86	0.95
TV / Interactive Shopping	1.79	1.33	0.00	0.00	0.00	1.06	0.00	0.00
TOTAL OUTSIDE BUFFER AREA	**21.56**	**13.93**	**11.53**	**12.12**	**14.60**	**14.29**	**14.72**	**10.62**
OVERALL TOTAL	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**

Spreadsheet 8b - Clothes and Shoes: Spending Patterns in 2010 Across the Study Area Zones

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Total[1]	All Zones Market Share[2]
	£m	£m	£m	£m	£m	£m	£m	£m	£m	%
Inside Catchment Area										
Zone 1										
Holywell Town Centre	1.15	0.00	0.05	0.00	0.00	0.00	0.00	0.00	1.20	1.2%
Other, Zone 1	0.00	0.00	0.00	0.00	0.00	0.00	0.05	0.00	0.05	0.1%
Total Zone 1	***1.15***	***0.00***	***0.05***	***0.00***	***0.00***	***0.00***	***0.05***	***0.00***	***1.25***	***1.3%***
Zone 2										
Mynydd Isa	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Zone 2	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.0%***
Zone 3										
Flintshire Retail Park, Flint Town Centre	0.25	0.00	0.10	0.00	0.00	0.00	0.00	0.00	0.35	0.4%
Other, Flint Town Centre	0.86	0.10	0.49	0.10	0.00	0.00	0.42	0.00	1.97	2.0%
Total Zone 3	***1.11***	***0.10***	***0.58***	***0.10***	***0.00***	***0.00***	***0.42***	***0.00***	***2.32***	***2.4%***
Zone 4										
Mold Town Centre	0.66	0.67	0.24	2.35	0.62	0.26	0.42	0.27	5.48	5.6%
Other, Zone 4	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Zone 4	***0.66***	***0.67***	***0.24***	***2.35***	***0.62***	***0.26***	***0.42***	***0.27***	***5.48***	***5.6%***
Zone 5										
Other, Zone 5	0.00	0.00	0.00	0.00	0.06	0.00	0.00	0.00	0.06	0.1%
Total Zone 5	***0.00***	***0.00***	***0.00***	***0.00***	***0.06***	***0.00***	***0.00***	***0.00***	***0.06***	***0.1%***
Zone 6										
Buckley Town Centre	0.00	0.05	0.00	0.00	0.00	0.35	0.00	0.05	0.46	0.5%
Total Zone 6	***0.00***	***0.05***	***0.00***	***0.00***	***0.00***	***0.35***	***0.00***	***0.05***	***0.46***	***0.5%***
Zone 7										
Asda, Aston Road, Queensferry District Centre	0.65	0.36	0.29	0.37	0.17	0.46	2.39	0.53	5.22	5.3%
Other, Queensferry District Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.21	0.05	0.26	0.3%
Connah's Quay District Centre	0.00	0.00	0.05	0.00	0.00	0.00	0.26	0.00	0.31	0.3%
Shotton Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.37	0.00	0.37	0.4%
Other, Zone 7	0.00	0.00	0.00	0.00	0.00	0.00	0.10	0.00	0.10	0.1%
Total Zone 7	***0.65***	***0.36***	***0.34***	***0.37***	***0.17***	***0.46***	***3.33***	***0.58***	***6.26***	***6.4%***
Zone 8										
Broughton Shopping Park, Chester Road, Broughton	2.92	2.16	1.57	1.78	1.40	3.11	5.40	6.92	25.26	25.9%
Saltney District Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Other, Zone 8	0.00	0.00	0.05	0.00	0.06	0.00	0.00	0.05	0.16	0.2%
Total Zone 8	***2.92***	***2.16***	***1.62***	***1.78***	***1.46***	***3.11***	***5.40***	***6.97***	***25.42***	***26.0%***
TOTAL INSIDE CATCHMENT AREA	**6.50**	**3.33**	**2.83**	**4.60**	**2.30**	**4.19**	**9.62**	**7.87**	**41.24**	**42.3%**
Inside Buffer Area										
Buffer 1										
Rhyl	2.07	0.00	0.20	0.00	0.00	0.00	0.05	0.00	2.31	2.4%
Other, Buffer 1	0.05	0.05	0.05	0.00	0.00	0.00	0.00	0.00	0.15	0.2%
Total Buffer 1	***2.12***	***0.05***	***0.24***	***0.00***	***0.00***	***0.00***	***0.05***	***0.00***	***2.46***	***2.5%***
Buffer 2										
St Asaph	0.21	0.10	0.10	0.21	0.11	0.00	0.00	0.00	0.73	0.7%
Other, Buffer 2	0.00	0.00	0.00	0.05	0.00	0.00	0.05	0.00	0.11	0.1%
Total Buffer 2	***0.21***	***0.10***	***0.10***	***0.26***	***0.11***	***0.00***	***0.05***	***0.00***	***0.83***	***0.9%***
Buffer 3										
Other, Buffer 3	0.00	0.00	0.00	0.10	0.05	0.00	0.00	0.00	0.16	0.2%
Total Buffer 3	***0.00***	***0.00***	***0.00***	***0.10***	***0.05***	***0.00***	***0.00***	***0.00***	***0.16***	***0.2%***
Buffer 4										
Ruthin	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Buffer 4	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.0%***
Buffer 5										
Wrexham Town Centre	0.67	0.62	0.24	1.37	2.75	1.01	0.26	0.64	7.58	7.8%
Other, Buffer 5	0.00	0.05	0.00	0.00	0.05	0.00	0.00	0.05	0.16	0.2%
Total Buffer 5	***0.67***	***0.67***	***0.24***	***1.37***	***2.81***	***1.01***	***0.26***	***0.70***	***7.74***	***7.9%***
Buffer 6										
Chester City Centre	3.44	2.52	3.60	2.99	1.24	2.94	6.30	6.07	29.10	29.8%
Greyhound Retail Park, Sealand Road, Chester	0.35	0.00	0.05	0.10	0.00	0.10	0.68	0.48	1.77	1.8%
Other, Buffer 6	0.00	0.00	0.05	0.00	0.00	0.00	0.00	0.05	0.10	0.1%
Total Buffer 6	***3.80***	***2.52***	***3.70***	***3.09***	***1.24***	***3.04***	***6.98***	***6.60***	***30.97***	***31.7%***
Buffer 7										
Other, Buffer 7	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Buffer 7	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.0%***
TOTAL INSIDE BUFFER AREA	**6.79**	**3.34**	**4.28**	**4.83**	**4.21**	**4.06**	**7.34**	**7.30**	**42.16**	**43.2%**
Outside Buffer Area										
Cheshire Oaks Designer Outlet, Kinsey Road, Ellesmere Port	0.62	0.41	0.20	0.16	0.05	0.15	0.52	0.21	2.32	2.4%
Llandudno	0.81	0.00	0.05	0.05	0.17	0.10	0.05	0.05	1.29	1.3%
Ellesmere Port	0.21	0.10	0.05	0.00	0.06	0.10	0.63	0.11	1.26	1.3%
Liverpool	0.10	0.16	0.20	0.05	0.05	0.00	0.10	0.16	0.82	0.8%
The Trafford Centre, Manchester	0.00	0.05	0.05	0.00	0.00	0.10	0.00	0.10	0.30	0.3%
Manchester	0.05	0.05	0.05	0.05	0.00	0.00	0.00	0.11	0.31	0.3%
Birkenhead	0.10	0.00	0.00	0.00	0.06	0.00	0.11	0.11	0.37	0.4%
Other, Outside Buffer Area	0.40	0.05	0.15	0.21	0.27	0.31	0.05	0.11	1.54	1.6%
Internet	0.51	0.10	0.10	0.42	0.22	0.10	0.89	0.69	3.03	3.1%
Home Catalogue	0.56	0.05	0.10	0.37	0.22	0.41	0.57	0.16	2.43	2.5%
TV / Interactive Shopping	0.30	0.10	0.00	0.00	0.00	0.10	0.00	0.00	0.51	0.5%
TOTAL OUTSIDE BUFFER AREA	**3.65**	**1.08**	**0.93**	**1.30**	**1.11**	**1.37**	**2.93**	**1.80**	**14.18**	**14.5%**
OVERALL TOTAL	**16.95**	**7.76**	**8.04**	**10.73**	**7.62**	**9.62**	**19.88**	**16.97**	**97.58**	**100.0%**

NOTES:
(1) The spending patterns are calculated by multiplying the total expenditure on clothes and shoes in 2010 (Spreadsheet 7, Table B) by the market share (Spreadsheet 8a). The figures in the 'Total' column are the sum of the expenditure on clothes and shoes attracted to each centre/store from each zone.
(2) The 'All zones market share' is calculated through dividing the total expenditure on clothes and shoes retained by each centre/store, by the total expenditure on clothes and shoes in the catchment area.

All monetary values are held constant at 2008 prices.

Spreadsheet 8c - Furniture, Carpets and Soft Household Furnishings: Spending Patterns in 2010 as a Percentage Across the Study Area Zones

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
	%	%	%	%	%	%	%	%
Inside Catchment Area								
Zone 1								
Holywell Town Centre	2.31	0.00	0.00	0.00	0.00	0.00	0.40	0.00
Other, Zone 1	0.45	0.00	1.04	0.00	0.00	0.00	0.00	0.00
Total Zone 1	***2.76***	***0.00***	***1.04***	***0.00***	***0.00***	***0.00***	***0.40***	***0.00***
Zone 2								
Mynydd Isa	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Zone 2	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***
Zone 3								
Flintshire Retail Park, Flint Town Centre	7.56	0.00	4.46	2.56	0.00	0.00	0.75	0.00
Other, Flint Town Centre	11.27	1.80	19.94	0.00	2.65	0.00	2.99	0.00
Total Zone 3	***18.82***	***1.80***	***24.40***	***2.56***	***2.65***	***0.00***	***3.74***	***0.00***
Zone 4								
Mold Town Centre	3.81	21.57	1.19	31.36	18.18	11.70	2.24	1.74
Other, Zone 4	0.00	0.00	0.00	1.75	0.00	0.00	0.00	0.00
Total Zone 4	***3.81***	***21.57***	***1.19***	***33.11***	***18.18***	***11.70***	***2.24***	***1.74***
Zone 5								
Caergwrle	0.00	0.00	0.00	0.00	5.30	0.00	0.00	0.00
Other, Zone 5	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Zone 5	***0.00***	***0.00***	***0.00***	***0.00***	***5.30***	***0.00***	***0.00***	***0.00***
Zone 6								
Buckley Town Centre	0.00	3.60	0.00	0.81	2.27	13.45	0.00	0.00
Total Zone 6	***0.00***	***3.60***	***0.00***	***0.81***	***2.27***	***13.45***	***0.00***	***0.00***
Zone 7								
Connah's Quay District Centre	2.31	1.80	6.70	1.75	0.00	0.88	12.66	1.79
Asda, Aston Road, Queensferry District Centre	0.49	0.00	0.00	0.94	2.65	0.00	1.15	0.48
Other, Queensferry District Centre	0.45	0.00	0.00	4.31	0.00	0.00	0.75	1.32
B&Q, Deeside Retail Park, Chester Road East, Queensferry	3.32	2.71	0.00	0.00	0.00	1.80	2.93	0.48
Shotton Town Centre	0.00	0.00	2.23	0.00	0.00	0.00	3.40	0.00
B&M Bargains, Deeside Retail Park, Chester Road East, Queensferr	0.00	0.00	0.00	0.81	0.00	0.93	1.09	0.00
Other, Zone 7	0.00	0.00	0.00	0.00	0.00	0.88	2.19	0.00
Total Zone 7	***6.58***	***4.51***	***8.93***	***7.81***	***2.65***	***4.48***	***24.17***	***4.06***
Zone 8								
Broughton Shopping Park, Chester Road, Broughton	4.23	9.03	8.63	4.31	5.30	11.74	5.18	12.55
Saltney District Centre	0.00	0.89	0.00	0.00	0.00	1.80	0.40	1.79
Hawarden	0.00	1.80	0.00	0.81	0.00	0.00	0.00	0.00
Other, Zone 8	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Zone 8	***4.23***	***11.72***	***8.63***	***5.11***	***5.30***	***13.55***	***5.58***	***14.34***
TOTAL INSIDE CATCHMENT AREA	**36.21**	**43.21**	**44.20**	**49.39**	**36.36**	**43.18**	**36.13**	**20.14**
Inside Buffer Area								
Buffer 1								
Rhyl	7.63	0.00	1.04	1.75	0.00	0.00	0.00	0.00
Prestatyn	2.42	1.80	0.00	0.00	0.00	0.00	0.00	0.00
Other, Buffer 1	1.93	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Buffer 1	***11.97***	***1.80***	***1.04***	***1.75***	***0.00***	***0.00***	***0.00***	***0.00***
Buffer 2								
St Asaph	0.00	0.00	0.00	0.00	2.65	0.00	0.00	0.00
Other, Buffer 2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Buffer 2	***0.00***	***0.00***	***0.00***	***0.00***	***2.65***	***0.00***	***0.00***	***0.00***
Buffer 3								
Other, Buffer 3	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Buffer 3	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***
Buffer 4								
Ruthin	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Buffer 4	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***
Buffer 5								
Wrexham Town Centre	0.45	6.33	0.00	1.89	29.17	1.80	0.81	1.79
Other, Buffer 5	0.00	0.00	0.00	1.75	0.00	0.00	0.00	0.95
Total Buffer 5	***0.45***	***6.33***	***0.00***	***3.64***	***29.17***	***1.80***	***0.81***	***2.75***
Buffer 6								
Greyhound Retail Park, Sealand Road, Chester	24.00	27.03	25.89	11.03	5.30	27.92	35.04	43.17
Chester City Centre	16.55	11.72	15.48	17.09	14.02	18.08	19.74	16.61
Chester Retail Park, Old Seals Way, Chester	4.69	0.00	6.70	0.94	2.27	0.00	0.40	3.47
Other, Buffer 6	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Buffer 6	***45.24***	***38.75***	***48.07***	***29.06***	***21.59***	***46.00***	***55.18***	***63.25***
Buffer 7								
Other, Buffer 7	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Buffer 7	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***
TOTAL INSIDE BUFFER AREA	**57.66**	**46.88**	**49.11**	**34.45**	**53.41**	**47.81**	**55.98**	**65.99**
Outside Buffer Area								
Warrington	0.94	1.80	2.23	2.83	0.00	3.56	1.50	4.85
Liverpool	0.94	0.00	2.23	0.94	1.52	0.00	0.00	0.00
Ellesmere Port	0.94	0.00	1.19	0.94	0.00	1.80	0.75	0.00
Llandudno	0.45	0.00	0.00	0.00	2.65	0.00	0.00	0.00
Cheshire Oaks Designer Outlet, Kinsey Road, Ellesmere Port	0.49	0.00	0.00	0.00	1.14	0.88	0.34	0.00
Other, Outside Buffer Area	0.49	0.89	0.00	5.39	1.14	0.93	0.00	1.79
Internet	1.85	3.60	1.04	6.06	2.65	1.85	3.40	4.90
Home Catalogue	0.00	0.89	0.00	0.00	1.14	0.00	0.40	1.37
TV / Interactive Shopping	0.00	2.71	0.00	0.00	0.00	0.00	1.50	0.95
TOTAL OUTSIDE BUFFER AREA	**6.12**	**9.90**	**6.70**	**16.16**	**10.23**	**9.02**	**7.88**	**13.87**
OVERALL TOTAL	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**

Spreadsheet 8d - Furniture, Carpets and Soft Household Furnishings: Spending Patterns in 2010 Across the Study Area Zones

	Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Zone 6 £m	Zone 7 £m	Zone 8 £m	Total[(1)] £m	All Zones Market Share[(2)] %
Inside Catchment Area										
Zone 1										
Holywell Town Centre	0.17	0.00	0.00	0.00	0.00	0.00	0.03	0.00	0.20	0.5%
Other, Zone 1	0.03	0.00	0.03	0.00	0.00	0.00	0.00	0.00	0.07	0.2%
Total Zone 1	***0.20***	***0.00***	***0.03***	***0.00***	***0.00***	***0.00***	***0.03***	***0.00***	***0.27***	***0.6%***
Zone 2										
Mynydd Isa	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Zone 2	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.0%***
Zone 3										
Flintshire Retail Park, Flint Town Centre	0.55	0.00	0.15	0.12	0.00	0.00	0.06	0.00	0.89	2.1%
Other, Flint Town Centre	0.82	0.06	0.67	0.00	0.09	0.00	0.24	0.00	1.88	4.5%
Total Zone 3	***1.37***	***0.06***	***0.82***	***0.12***	***0.09***	***0.00***	***0.31***	***0.00***	***2.77***	***6.6%***
Zone 4										
Mold Town Centre	0.28	0.73	0.04	1.52	0.61	0.48	0.18	0.12	3.97	9.5%
Other, Zone 4	0.00	0.00	0.00	0.08	0.00	0.00	0.00	0.00	0.08	0.2%
Total Zone 4	***0.28***	***0.73***	***0.04***	***1.61***	***0.61***	***0.48***	***0.18***	***0.12***	***4.05***	***9.7%***
Zone 5										
Caergwrle	0.00	0.00	0.00	0.00	0.18	0.00	0.00	0.00	0.18	0.4%
Other, Zone 5	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Zone 5	***0.00***	***0.00***	***0.00***	***0.00***	***0.18***	***0.00***	***0.00***	***0.00***	***0.18***	***0.4%***
Zone 6										
Buckley Town Centre	0.00	0.12	0.00	0.04	0.08	0.55	0.00	0.00	0.79	1.9%
Total Zone 6	***0.00***	***0.12***	***0.00***	***0.04***	***0.08***	***0.55***	***0.00***	***0.00***	***0.79***	***1.9%***
Zone 7										
Connah's Quay District Centre	0.17	0.06	0.22	0.08	0.00	0.04	1.03	0.13	1.74	4.2%
Asda, Aston Road, Queensferry District Centre	0.04	0.00	0.00	0.05	0.09	0.00	0.09	0.03	0.30	0.7%
Other, Queensferry District Centre	0.03	0.00	0.00	0.21	0.00	0.00	0.06	0.09	0.40	1.0%
B&Q, Deeside Retail Park, Chester Road East, Queensferry	0.24	0.09	0.00	0.00	0.00	0.07	0.24	0.03	0.68	1.6%
Shotton Town Centre	0.00	0.00	0.07	0.00	0.00	0.00	0.28	0.00	0.35	0.8%
B&M Bargains, Deeside Retail Park, Chester Road East, Queensfer	0.00	0.00	0.00	0.04	0.00	0.04	0.09	0.00	0.17	0.4%
Other, Zone 7	0.00	0.00	0.00	0.00	0.00	0.04	0.18	0.00	0.21	0.5%
Total Zone 7	***0.48***	***0.15***	***0.30***	***0.38***	***0.09***	***0.18***	***1.97***	***0.29***	***3.85***	***9.2%***
Zone 8										
Broughton Shopping Park, Chester Road, Broughton	0.31	0.30	0.29	0.21	0.18	0.48	0.42	0.90	3.09	7.4%
Saltney District Centre	0.00	0.03	0.00	0.00	0.00	0.07	0.03	0.13	0.27	0.6%
Hawarden	0.00	0.06	0.00	0.04	0.00	0.00	0.00	0.00	0.10	0.2%
Other, Zone 8	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Zone 8	***0.31***	***0.40***	***0.29***	***0.25***	***0.18***	***0.56***	***0.46***	***1.03***	***3.46***	***8.3%***
TOTAL INSIDE CATCHMENT AREA	**2.64**	**1.46**	**1.48**	**2.40**	**1.22**	**1.78**	**2.95**	**1.44**	**15.36**	**36.9%**
Inside Buffer Area										
Buffer 1										
Rhyl	0.56	0.00	0.03	0.08	0.00	0.00	0.00	0.00	0.68	1.6%
Prestatyn	0.18	0.06	0.00	0.00	0.00	0.00	0.00	0.00	0.24	0.6%
Other, Buffer 1	0.14	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.14	0.3%
Total Buffer 1	***0.87***	***0.06***	***0.03***	***0.08***	***0.00***	***0.00***	***0.00***	***0.00***	***1.05***	***2.5%***
Buffer 2										
St Asaph	0.00	0.00	0.00	0.00	0.09	0.00	0.00	0.00	0.09	0.2%
Other, Buffer 2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Buffer 2	***0.00***	***0.00***	***0.00***	***0.00***	***0.09***	***0.00***	***0.00***	***0.00***	***0.09***	***0.2%***
Buffer 3										
Other, Buffer 3	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Buffer 3	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.0%***
Buffer 4										
Ruthin	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Buffer 4	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.0%***
Buffer 5										
Wrexham Town Centre	0.03	0.21	0.00	0.09	0.98	0.07	0.07	0.13	1.58	3.8%
Other, Buffer 5	0.00	0.00	0.00	0.08	0.00	0.00	0.00	0.07	0.15	0.4%
Total Buffer 5	***0.03***	***0.21***	***0.00***	***0.18***	***0.98***	***0.07***	***0.07***	***0.20***	***1.74***	***4.2%***
Buffer 6										
Greyhound Retail Park, Sealand Road, Chester	1.75	0.91	0.87	0.54	0.18	1.15	2.86	3.09	11.34	27.2%
Chester City Centre	1.21	0.40	0.52	0.83	0.47	0.75	1.61	1.19	6.96	16.7%
Chester Retail Park, Old Seals Way, Chester	0.34	0.00	0.22	0.05	0.08	0.00	0.03	0.25	0.97	2.3%
Other, Buffer 6	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Buffer 6	***3.30***	***1.31***	***1.61***	***1.41***	***0.72***	***1.90***	***4.50***	***4.53***	***19.28***	***46.3%***
Buffer 7										
Other, Buffer 7	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Buffer 7	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.0%***
TOTAL INSIDE BUFFER AREA	**4.20**	**1.58**	**1.64**	**1.67**	**1.79**	**1.97**	**4.57**	**4.73**	**22.15**	**53.2%**
Outside Buffer Area										
Warrington	0.07	0.06	0.07	0.14	0.00	0.15	0.12	0.35	0.96	2.3%
Liverpool	0.07	0.00	0.07	0.05	0.05	0.00	0.00	0.00	0.24	0.6%
Ellesmere Port	0.07	0.00	0.04	0.05	0.00	0.07	0.06	0.00	0.29	0.7%
Llandudno	0.03	0.00	0.00	0.00	0.09	0.00	0.00	0.00	0.12	0.3%
Cheshire Oaks Designer Outlet, Kinsey Road, Ellesmere Port	0.04	0.00	0.00	0.00	0.04	0.04	0.03	0.00	0.14	0.3%
Other, Outside Buffer Area	0.04	0.03	0.00	0.26	0.04	0.04	0.00	0.13	0.53	1.3%
Internet	0.14	0.12	0.03	0.29	0.09	0.08	0.28	0.35	1.38	3.3%
Home Catalogue	0.00	0.03	0.00	0.00	0.04	0.00	0.03	0.10	0.20	0.5%
TV / Interactive Shopping	0.00	0.09	0.00	0.00	0.00	0.00	0.12	0.07	0.28	0.7%
TOTAL OUTSIDE BUFFER AREA	**0.45**	**0.33**	**0.22**	**0.78**	**0.34**	**0.37**	**0.64**	**0.99**	**4.14**	**9.9%**
OVERALL TOTAL	**7.29**	**3.37**	**3.34**	**4.86**	**3.34**	**4.12**	**8.16**	**7.16**	**41.66**	**100.0%**

NOTES:

(1) The spending patterns are calculated by multiplying the total expenditure on furniture, carpets and soft household furnishings in 2010 (Spreadsheet 7, Table B) by the market share (Spreadsheet 8c). The figures in the 'Total' column are the sum of the expenditure on furniture, carpets and soft household furnishings attracted to each centre/store from each zone.

(2) The 'All zones market share' is calculated through dividing the total expenditure on furniture, carpets and soft household furnishings retained by each centre/store, by the total expenditure on furniture, carpets and soft household furnishings in the catchment area.

All monetary values are held constant at 2008 prices.

Spreadsheet 8e - DIY & Decorating Goods: Spending Patterns in 2010 as a Percentage Across the Study Area Zones

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
	%	%	%	%	%	%	%	%
Inside Catchment Area								
Zone 1								
Holywell Town Centre	6.96	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other, Zone 1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Zone 1	***6.96***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***
Zone 2								
Mynydd Isa	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Zone 2	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***
Zone 3								
Flintshire Retail Park, Flint Town Centre	2.94	0.00	0.86	0.64	0.00	0.00	0.00	0.00
Other, Flint Town Centre	5.54	0.00	19.27	0.62	0.00	0.00	0.85	0.00
Total Zone 3	***8.48***	***0.00***	***20.14***	***1.26***	***0.00***	***0.00***	***0.85***	***0.00***
Zone 4								
Mold Town Centre	7.08	33.29	6.13	53.96	29.63	19.19	1.41	2.71
Other, Zone 4	0.36	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Zone 4	***7.44***	***33.29***	***6.13***	***53.96***	***29.63***	***19.19***	***1.41***	***2.71***
Zone 5								
Other, Zone 5	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Zone 5	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***
Zone 6								
Buckley Town Centre	0.00	3.25	0.00	0.00	0.86	12.31	0.00	0.34
Total Zone 6	***0.00***	***3.25***	***0.00***	***0.00***	***0.86***	***12.31***	***0.00***	***0.34***
Zone 7								
B&Q, Deeside Retail Park, Chester Road East, Queensferry	37.75	44.74	47.32	21.46	5.11	52.59	80.02	50.25
B&M Bargains, Deeside Retail Park, Chester Road East, Queensfer	0.00	0.00	6.13	6.29	0.00	7.13	5.30	3.38
Charlies Stores, Deeside Retail Park, Chester Road East, Queensfe	0.74	0.00	0.86	0.00	0.00	0.00	1.13	0.00
Other, Queensferry District Centre	0.74	0.00	0.00	0.62	0.00	0.00	0.27	0.00
Shotton Town Centre	0.00	0.00	0.00	0.00	0.86	0.00	0.29	0.00
Connah's Quay District Centre	0.74	0.00	0.00	0.00	0.00	0.00	0.29	0.00
Other, Zone 7	0.00	0.00	0.00	0.00	0.00	0.76	0.00	0.00
Total Zone 7	***40.33***	***44.74***	***54.31***	***28.37***	***5.98***	***60.48***	***87.30***	***53.63***
Zone 8								
Broughton Shopping Park, Chester Road, Broughton	0.38	1.63	0.00	0.00	0.00	0.00	0.29	2.38
Saltney District Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.68
Other, Zone 8	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Zone 8	***0.38***	***1.63***	***0.00***	***0.00***	***0.00***	***0.00***	***0.29***	***3.05***
TOTAL INSIDE CATCHMENT AREA	**63.59**	**82.91**	**80.57**	**83.59**	**36.47**	**91.98**	**89.84**	**59.73**
Inside Buffer Area								
Buffer 1								
Rhyl	10.25	0.81	0.00	1.28	0.00	0.00	0.00	0.00
Clwyd Retail Park, Rhyl Road, Rhuddlan	6.62	0.00	1.75	1.26	0.00	0.00	0.00	0.00
Other, Buffer 1	0.74	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Buffer 1	***17.61***	***0.81***	***1.75***	***2.54***	***0.00***	***0.00***	***0.00***	***0.00***
Buffer 2								
Other, Buffer 2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Buffer 2	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***
Buffer 3								
Other, Buffer 3	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Buffer 3	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***
Buffer 4								
Ruthin	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Buffer 4	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***
Buffer 5								
Wrexham Town Centre	0.00	2.43	0.00	0.00	16.98	0.76	0.27	1.70
Plas Coch Retail Park, Plas Coch Road, Wrexham	0.00	0.00	0.00	0.00	7.61	0.00	0.00	0.68
Other, Buffer 5	0.00	0.00	0.00	0.00	1.70	0.00	0.00	0.00
Total Buffer 5	***0.00***	***2.43***	***0.00***	***0.00***	***26.29***	***0.76***	***0.27***	***2.37***
Buffer 6								
Greyhound Retail Park, Sealand Road, Chester	11.44	8.14	8.90	7.57	1.70	2.97	5.11	27.42
Chester Retail Park, Old Seals Way, Chester	2.94	0.82	5.26	0.00	3.39	0.00	1.41	6.43
Chester City Centre	2.21	4.07	1.75	1.28	3.39	3.60	1.41	2.03
Focus, Bridge Works, Tarvin Road, Chester	0.00	0.00	1.75	0.00	0.86	0.00	0.29	0.00
Other, Buffer 6	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Buffer 6	***16.59***	***13.04***	***17.67***	***8.86***	***9.34***	***6.57***	***8.21***	***35.88***
Buffer 7								
Other, Buffer 7	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Buffer 7	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***
TOTAL INSIDE BUFFER AREA	**34.20**	**16.27**	**19.43**	**11.40**	**35.63**	**7.32**	**8.48**	**38.25**
Outside Buffer Area								
B&Q, Berse Road, Wrexham	0.00	0.00	0.00	3.13	26.24	0.00	0.56	2.02
Other, Outside Buffer Area	1.11	0.00	0.00	1.26	0.83	0.00	0.56	0.00
Internet	0.74	0.82	0.00	0.00	0.83	0.00	0.27	0.00
Home Catalogue	0.36	0.00	0.00	0.62	0.00	0.69	0.00	0.00
TV / Interactive Shopping	0.00	0.00	0.00	0.00	0.00	0.00	0.29	0.00
TOTAL OUTSIDE BUFFER AREA	**2.21**	**0.82**	**0.00**	**5.01**	**27.90**	**0.69**	**1.68**	**2.02**
OVERALL TOTAL	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**

Spreadsheet 8f - DIY & Decorating Goods: Spending Patterns in 2010 Across the Study Area Zones

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Total[(1)]	All Zones Market Share[(2)]
	£m	£m	£m	£m	£m	£m	£m	£m	£m	%
Inside Catchment Area										
Zone 1										
Holywell Town Centre	0.50	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.50	1.2%
Other, Zone 1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Zone 1	***0.50***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.50***	***1.2%***
Zone 2										
Mynydd Isa	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Zone 2	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.0%***
Zone 3										
Flintshire Retail Park, Flint Town Centre	0.21	0.00	0.03	0.03	0.00	0.00	0.00	0.00	0.27	0.7%
Other, Flint Town Centre	0.40	0.00	0.66	0.03	0.00	0.00	0.07	0.00	1.16	2.8%
Total Zone 3	***0.61***	***0.00***	***0.69***	***0.06***	***0.00***	***0.00***	***0.07***	***0.00***	***1.43***	***3.5%***
Zone 4										
Mold Town Centre	0.51	1.08	0.21	2.49	0.96	0.78	0.12	0.19	6.34	15.4%
Other, Zone 4	0.03	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.03	0.1%
Total Zone 4	***0.54***	***1.08***	***0.21***	***2.49***	***0.96***	***0.78***	***0.12***	***0.19***	***6.37***	***15.5%***
Zone 5										
Other, Zone 5	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Zone 5	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.0%***
Zone 6										
Buckley Town Centre	0.00	0.11	0.00	0.00	0.03	0.50	0.00	0.02	0.66	1.6%
Total Zone 6	***0.00***	***0.11***	***0.00***	***0.00***	***0.03***	***0.50***	***0.00***	***0.02***	***0.66***	***1.6%***
Zone 7										
B&Q, Deeside Retail Park, Chester Road East, Queensferry	2.73	1.45	1.62	0.99	0.17	2.14	6.66	3.48	19.24	46.9%
B&M Bargains, Deeside Retail Park, Chester Road East, Queensferry	0.00	0.00	0.21	0.29	0.00	0.29	0.44	0.23	1.47	3.6%
Charlies Stores, Deeside Retail Park, Chester Road East, Queensferr	0.05	0.00	0.03	0.00	0.00	0.00	0.09	0.00	0.18	0.4%
Other, Queensferry District Centre	0.05	0.00	0.00	0.03	0.00	0.00	0.02	0.00	0.10	0.3%
Shotton Town Centre	0.00	0.00	0.00	0.00	0.03	0.00	0.02	0.00	0.05	0.1%
Connah's Quay District Centre	0.05	0.00	0.00	0.00	0.00	0.00	0.02	0.00	0.08	0.2%
Other, Zone 7	0.00	0.00	0.00	0.00	0.00	0.03	0.00	0.00	0.03	0.1%
Total Zone 7	***2.89***	***1.45***	***1.86***	***1.31***	***0.19***	***2.46***	***7.27***	***3.72***	***21.15***	***51.5%***
Zone 8										
Broughton Shopping Park, Chester Road, Broughton	0.03	0.05	0.00	0.00	0.00	0.00	0.02	0.16	0.27	0.7%
Saltney District Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.05	0.05	0.1%
Other, Zone 8	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Zone 8	***0.03***	***0.05***	***0.00***	***0.00***	***0.00***	***0.00***	***0.02***	***0.21***	***0.32***	***0.8%***
TOTAL INSIDE CATCHMENT AREA	**4.57**	**2.68**	**2.76**	**3.86**	**1.19**	**3.74**	**7.48**	**4.14**	**30.42**	**74.1%**
Inside Buffer Area										
Buffer 1										
Rhyl	0.74	0.03	0.00	0.06	0.00	0.00	0.00	0.00	0.83	2.0%
Clwyd Retail Park, Rhyl Road, Rhuddlan	0.48	0.00	0.06	0.06	0.00	0.00	0.00	0.00	0.60	1.5%
Other, Buffer 1	0.05	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.05	0.1%
Total Buffer 1	***1.27***	***0.03***	***0.06***	***0.12***	***0.00***	***0.00***	***0.00***	***0.00***	***1.48***	***3.6%***
Buffer 2										
Other, Buffer 2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Buffer 2	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.0%***
Buffer 3										
Other, Buffer 3	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Buffer 3	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.0%***
Buffer 4										
Ruthin	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Buffer 4	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.0%***
Buffer 5										
Wrexham Town Centre	0.00	0.08	0.00	0.00	0.55	0.03	0.02	0.12	0.80	2.0%
Plas Coch Retail Park, Plas Coch Road, Wrexham	0.00	0.00	0.00	0.00	0.25	0.00	0.00	0.05	0.29	0.7%
Other, Buffer 5	0.00	0.00	0.00	0.00	0.06	0.00	0.00	0.00	0.06	0.1%
Total Buffer 5	***0.00***	***0.08***	***0.00***	***0.00***	***0.85***	***0.03***	***0.02***	***0.16***	***1.15***	***2.8%***
Buffer 6										
Greyhound Retail Park, Sealand Road, Chester	0.83	0.26	0.31	0.35	0.06	0.12	0.43	1.90	4.25	10.3%
Chester Retail Park, Old Seals Way, Chester	0.21	0.03	0.18	0.00	0.11	0.00	0.12	0.45	1.09	2.7%
Chester City Centre	0.16	0.13	0.06	0.06	0.11	0.15	0.12	0.14	0.93	2.3%
Focus, Bridge Works, Tarvin Road, Chester	0.00	0.00	0.06	0.00	0.03	0.00	0.02	0.00	0.11	0.3%
Other, Buffer 6	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Buffer 6	***1.20***	***0.42***	***0.61***	***0.41***	***0.30***	***0.27***	***0.68***	***2.49***	***6.38***	***15.5%***
Buffer 7										
Other, Buffer 7	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Buffer 7	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.0%***
TOTAL INSIDE BUFFER AREA	**2.47**	**0.53**	**0.67**	**0.53**	**1.16**	**0.30**	**0.71**	**2.65**	**9.01**	**21.9%**
Outside Buffer Area										
B&Q, Berse Road, Wrexham	0.00	0.00	0.00	0.14	0.85	0.00	0.05	0.14	1.18	2.9%
Other, Outside Buffer Area	0.08	0.00	0.00	0.06	0.03	0.00	0.05	0.00	0.21	0.5%
Internet	0.05	0.03	0.00	0.00	0.03	0.00	0.02	0.00	0.13	0.3%
Home Catalogue	0.03	0.00	0.00	0.03	0.00	0.03	0.00	0.00	0.08	0.2%
TV / Interactive Shopping	0.00	0.00	0.00	0.00	0.00	0.00	0.02	0.00	0.02	0.1%
TOTAL OUTSIDE BUFFER AREA	**0.16**	**0.03**	**0.00**	**0.23**	**0.91**	**0.03**	**0.14**	**0.14**	**1.63**	**4.0%**
OVERALL TOTAL	**7.21**	**3.23**	**3.43**	**4.62**	**3.25**	**4.06**	**8.32**	**6.93**	**41.06**	**100.0%**

NOTES:
(1) The spending patterns are calculated by multiplying the total expenditure on DIY and decorating goods in 2010 (Spreadsheet 7, Table B) by the market share (Spreadsheet 8e). The figures in the 'Total' column are the sum of the expenditure on DIY and decorating goods attracted to each centre/store from each zone.
(2) The 'All zones market share' is calculated through dividing the total expenditure on DIY and decorating goods retained by each centre/store, by the total expenditure on DIY and decorating goods in the catchment area.

All monetary values are held constant at 2008 prices.

Spreadsheet 8g - Electrical Items and Domestic Appliances: Spending Patterns in 2010 as a Percentage Across the Study Area Zones

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
	%	%	%	%	%	%	%	%
Inside Catchment Area								
Zone 1								
Holywell Town Centre	6.30	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other, Zone 1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Zone 1	***6.30***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***
Zone 2								
Mynydd Isa	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Zone 2	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***
Zone 3								
Flintshire Retail Park, Flint Town Centre	9.51	0.00	5.21	0.00	0.00	0.68	1.18	0.00
Other, Flint Town Centre	5.19	0.78	21.02	0.63	0.00	0.00	2.02	0.00
Total Zone 3	***14.70***	***0.78***	***26.22***	***0.63***	***0.00***	***0.68***	***3.20***	***0.00***
Zone 4								
Mold Town Centre	3.24	10.24	1.76	28.96	20.76	12.35	0.84	2.27
Other, Zone 4	0.00	0.00	0.91	0.00	0.00	0.00	0.00	0.00
Total Zone 4	***3.24***	***10.24***	***2.67***	***28.96***	***20.76***	***12.35***	***0.84***	***2.27***
Zone 5								
Other, Zone 5	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Zone 5	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***
Zone 6								
Buckley Town Centre	0.00	0.00	0.00	0.00	0.00	4.46	0.00	0.64
Total Zone 6	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***4.46***	***0.00***	***0.64***
Zone 7								
Asda, Aston Road, Queensferry District Centre	2.81	3.96	3.57	0.63	0.00	1.81	7.56	3.52
Other, Queensferry District Centre	1.44	0.78	0.85	0.69	0.00	0.68	1.11	0.31
B&Q, Deeside Retail Park, Chester Road East, Queensferry	2.11	0.79	1.76	2.64	0.00	1.29	10.89	1.59
Shotton Town Centre	0.00	0.00	0.85	0.00	0.93	0.00	4.89	0.00
B&M Bargains, Deeside Retail Park, Chester Road East, Queensferr	0.00	0.00	0.00	3.26	0.00	0.00	0.00	0.00
Connah's Quay District Centre	0.70	0.00	0.00	1.32	0.00	0.00	0.57	0.00
Other, Zone 7	0.00	0.00	0.00	0.00	0.00	0.60	0.00	0.64
Total Zone 7	***7.06***	***5.53***	***7.03***	***8.54***	***0.93***	***4.38***	***25.03***	***6.06***
Zone 8								
Broughton Shopping Park, Chester Road, Broughton	2.45	11.02	5.21	5.28	2.63	14.00	2.80	17.10
Hawarden	2.81	3.93	2.60	3.96	3.61	4.38	4.28	3.55
Saltney District Centre	0.00	0.79	0.00	0.00	0.00	0.00	0.00	0.00
Other, Zone 8	0.00	0.00	0.00	0.63	0.00	0.00	1.15	0.31
Total Zone 8	***5.26***	***15.75***	***7.81***	***9.86***	***6.24***	***18.38***	***8.23***	***20.96***
TOTAL INSIDE CATCHMENT AREA	**36.57**	**32.30**	**43.73**	**47.99**	**27.92**	**40.26**	**37.31**	**29.94**
Inside Buffer Area								
Buffer 1								
Rhyl	13.03	0.00	0.00	1.32	0.00	0.00	0.00	0.00
Clwyd Retail Park, Rhyl Road, Rhuddlan	3.88	0.00	2.67	1.32	0.00	0.00	0.57	0.00
Other, Buffer 1	2.38	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Buffer 1	***19.29***	***0.00***	***2.67***	***2.64***	***0.00***	***0.00***	***0.57***	***0.00***
Buffer 2								
Other, Buffer 2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Buffer 2	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***
Buffer 3								
Other, Buffer 3	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.33
Total Buffer 3	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.33***
Buffer 4								
Ruthin	0.34	0.00	0.00	1.25	0.88	0.00	0.00	0.00
Total Buffer 4	***0.34***	***0.00***	***0.00***	***1.25***	***0.88***	***0.00***	***0.00***	***0.00***
Buffer 5								
Wrexham Town Centre	0.37	3.15	0.85	5.28	38.84	3.18	0.57	1.32
Plas Coch Retail Park, Plas Coch Road, Wrexham	0.00	0.79	0.00	0.00	5.41	0.00	0.00	0.64
Other, Buffer 5	0.00	0.00	0.91	0.00	3.61	0.00	0.00	0.33
Total Buffer 5	***0.37***	***3.94***	***1.76***	***5.28***	***47.86***	***3.18***	***0.57***	***2.29***
Buffer 6								
Greyhound Retail Park, Sealand Road, Chester	17.85	37.80	26.35	13.82	4.43	32.35	34.16	35.66
Chester City Centre	1.44	9.44	7.94	9.79	2.73	6.52	10.66	6.43
Chester Retail Park, Old Seals Way, Chester	3.85	3.15	5.27	2.57	2.73	0.00	0.84	6.43
Other, Buffer 6	0.00	0.00	0.00	0.00	0.00	0.00	0.30	0.00
Total Buffer 6	***23.14***	***50.38***	***39.55***	***26.18***	***9.89***	***38.87***	***45.96***	***48.53***
Buffer 7								
Other, Buffer 7	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Buffer 7	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***
TOTAL INSIDE BUFFER AREA	**43.14**	**54.33**	**43.98**	**35.35**	**58.63**	**42.04**	**47.11**	**51.14**
Outside Buffer Area								
Liverpool	1.37	0.78	0.00	0.69	0.00	0.00	0.27	0.00
Queensway Retail Park, New Chester Road, Birkenhead	0.00	0.00	0.00	1.32	0.00	0.60	0.57	0.00
Llandudno	0.70	0.00	1.69	0.00	0.00	0.00	0.00	0.00
Ellesmere Port	0.34	0.00	0.00	0.63	0.00	0.00	0.88	0.31
Cheshire Oaks Designer Outlet, Kinsey Road, Ellesmere Port	0.00	0.00	1.76	0.00	0.00	0.00	0.30	0.00
Other, Outside Buffer Area	0.34	0.00	0.00	0.00	2.73	1.29	0.00	1.62
Internet	14.74	9.44	8.84	14.03	10.72	10.13	10.43	16.03
Home Catalogue	2.81	0.00	0.00	0.00	0.00	1.29	1.15	0.96
TV / Interactive Shopping	0.00	3.15	0.00	0.00	0.00	4.38	1.99	0.00
TOTAL OUTSIDE BUFFER AREA	**20.30**	**13.37**	**12.30**	**16.67**	**13.45**	**17.69**	**15.59**	**18.92**
OVERALL TOTAL	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**

Spreadsheet 8h - Electrical Items and Domestic Appliances: Spending Patterns in 2010 Across the Study Area Zones

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Total[1]	All Zones Market Share[2]
	£m	£m	£m	£m	£m	£m	£m	£m	£m	%
Inside Catchment Area										
Zone 1										
Holywell Town Centre	0.68	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.68	1.1%
Other, Zone 1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Zone 1	***0.68***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.68***	***1.1%***
Zone 2										
Mynydd Isa	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Zone 2	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.0%***
Zone 3										
Flintshire Retail Park, Flint Town Centre	1.03	0.00	0.26	0.00	0.00	0.04	0.15	0.00	1.48	2.4%
Other, Flint Town Centre	0.56	0.04	1.06	0.04	0.00	0.00	0.25	0.00	1.96	3.2%
Total Zone 3	***1.60***	***0.04***	***1.32***	***0.04***	***0.00***	***0.04***	***0.40***	***0.00***	***3.44***	***5.5%***
Zone 4										
Mold Town Centre	0.35	0.51	0.09	2.05	1.03	0.75	0.10	0.24	5.13	8.3%
Other, Zone 4	0.00	0.00	0.05	0.00	0.00	0.00	0.00	0.00	0.05	0.1%
Total Zone 4	***0.35***	***0.51***	***0.13***	***2.05***	***1.03***	***0.75***	***0.10***	***0.24***	***5.17***	***8.3%***
Zone 5										
Other, Zone 5	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Zone 5	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.0%***
Zone 6										
Buckley Town Centre	0.00	0.00	0.00	0.00	0.00	0.27	0.00	0.07	0.34	0.6%
Total Zone 6	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.27***	***0.00***	***0.07***	***0.34***	***0.6%***
Zone 7										
Asda, Aston Road, Queensferry District Centre	0.31	0.20	0.18	0.04	0.00	0.11	0.93	0.37	2.14	3.5%
Other, Queensferry District Centre	0.16	0.04	0.04	0.05	0.00	0.04	0.14	0.03	0.50	0.8%
B&Q, Deeside Retail Park, Chester Road East, Queensferry	0.23	0.04	0.09	0.19	0.00	0.08	1.35	0.17	2.14	3.4%
Shotton Town Centre	0.00	0.00	0.04	0.00	0.05	0.00	0.60	0.00	0.69	1.1%
B&M Bargains, Deeside Retail Park, Chester Road East, Queensfer	0.00	0.00	0.00	0.23	0.00	0.00	0.00	0.00	0.23	0.4%
Connah's Quay District Centre	0.08	0.00	0.00	0.09	0.00	0.00	0.07	0.00	0.24	0.4%
Other, Zone 7	0.00	0.00	0.00	0.00	0.00	0.04	0.00	0.07	0.11	0.2%
Total Zone 7	***0.77***	***0.27***	***0.35***	***0.60***	***0.05***	***0.27***	***3.09***	***0.64***	***6.05***	***9.8%***
Zone 8										
Broughton Shopping Park, Chester Road, Broughton	0.27	0.55	0.26	0.37	0.13	0.86	0.35	1.82	4.60	7.4%
Hawarden	0.31	0.19	0.13	0.28	0.18	0.27	0.53	0.38	2.26	3.7%
Saltney District Centre	0.00	0.04	0.00	0.00	0.00	0.00	0.00	0.00	0.04	0.1%
Other, Zone 8	0.00	0.00	0.00	0.04	0.00	0.00	0.14	0.03	0.22	0.4%
Total Zone 8	***0.57***	***0.78***	***0.39***	***0.70***	***0.31***	***1.12***	***1.02***	***2.23***	***7.12***	***11.5%***
TOTAL INSIDE CATCHMENT AREA	**3.97**	**1.60**	**2.20**	**3.40**	**1.38**	**2.46**	**4.61**	**3.19**	**22.81**	**36.8%**
Inside Buffer Area										
Buffer 1										
Rhyl	1.41	0.00	0.00	0.09	0.00	0.00	0.00	0.00	1.51	2.4%
Clwyd Retail Park, Rhyl Road, Rhuddlan	0.42	0.00	0.13	0.09	0.00	0.00	0.07	0.00	0.72	1.2%
Other, Buffer 1	0.26	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.26	0.4%
Total Buffer 1	***2.09***	***0.00***	***0.13***	***0.19***	***0.00***	***0.00***	***0.07***	***0.00***	***2.49***	***4.0%***
Buffer 2										
Other, Buffer 2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Buffer 2	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.0%***
Buffer 3										
Other, Buffer 3	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.03	0.03	0.1%
Total Buffer 3	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.03***	***0.03***	***0.1%***
Buffer 4										
Ruthin	0.04	0.00	0.00	0.09	0.04	0.00	0.00	0.00	0.17	0.3%
Total Buffer 4	***0.04***	***0.00***	***0.00***	***0.09***	***0.04***	***0.00***	***0.00***	***0.00***	***0.17***	***0.3%***
Buffer 5										
Wrexham Town Centre	0.04	0.16	0.04	0.37	1.92	0.19	0.07	0.14	2.94	4.7%
Plas Coch Retail Park, Plas Coch Road, Wrexham	0.00	0.04	0.00	0.00	0.27	0.00	0.00	0.07	0.38	0.6%
Other, Buffer 5	0.00	0.00	0.05	0.00	0.18	0.00	0.00	0.03	0.26	0.4%
Total Buffer 5	***0.04***	***0.20***	***0.09***	***0.37***	***2.36***	***0.19***	***0.07***	***0.24***	***3.57***	***5.8%***
Buffer 6										
Greyhound Retail Park, Sealand Road, Chester	1.94	1.87	1.33	0.98	0.22	1.98	4.22	3.79	16.33	26.3%
Chester City Centre	0.16	0.47	0.40	0.69	0.13	0.40	1.32	0.68	4.25	6.9%
Chester Retail Park, Old Seals Way, Chester	0.42	0.16	0.27	0.18	0.13	0.00	0.10	0.68	1.95	3.1%
Other, Buffer 6	0.00	0.00	0.00	0.00	0.00	0.00	0.04	0.00	0.04	0.1%
Total Buffer 6	***2.51***	***2.50***	***1.99***	***1.85***	***0.49***	***2.37***	***5.68***	***5.16***	***22.56***	***36.4%***
Buffer 7										
Other, Buffer 7	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Buffer 7	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.0%***
TOTAL INSIDE BUFFER AREA	**4.68**	**2.69**	**2.21**	**2.50**	**2.90**	**2.57**	**5.82**	**5.44**	**28.82**	**46.5%**
Outside Buffer Area										
Liverpool	0.15	0.04	0.00	0.05	0.00	0.00	0.03	0.00	0.27	0.4%
Queensway Retail Park, New Chester Road, Birkenhead	0.00	0.00	0.00	0.09	0.00	0.04	0.07	0.00	0.20	0.3%
Llandudno	0.08	0.00	0.09	0.00	0.00	0.00	0.00	0.00	0.16	0.3%
Ellesmere Port	0.04	0.00	0.00	0.04	0.00	0.00	0.11	0.03	0.22	0.4%
Cheshire Oaks Designer Outlet, Kinsey Road, Ellesmere Port	0.00	0.00	0.09	0.00	0.00	0.00	0.04	0.00	0.13	0.2%
Other, Outside Buffer Area	0.04	0.00	0.00	0.00	0.13	0.08	0.00	0.17	0.42	0.7%
Internet	1.60	0.47	0.45	0.99	0.53	0.62	1.29	1.71	7.65	12.3%
Home Catalogue	0.31	0.00	0.00	0.00	0.00	0.08	0.14	0.10	0.63	1.0%
TV / Interactive Shopping	0.00	0.16	0.00	0.00	0.00	0.27	0.25	0.00	0.67	1.1%
TOTAL OUTSIDE BUFFER AREA	**2.20**	**0.66**	**0.62**	**1.18**	**0.66**	**1.08**	**1.93**	**2.01**	**10.35**	**16.7%**
OVERALL TOTAL	**10.85**	**4.96**	**5.04**	**7.08**	**4.94**	**6.11**	**12.36**	**10.64**	**61.98**	**100.0%**

NOTES:
(1) The spending patterns are calculated by multiplying the total expenditure on electrical items and domestic appliances in 2010 (Spreadsheet 7, Table B) by the market share (Spreadsheet 8g). The figures in the 'Total' column are the sum of the expenditure on electrical items and domestic appliances attracted to each centre/store from each zone.
(2) The 'All zones market share' is calculated through dividing the total expenditure on electrical items and domestic appliances retained by each centre/store, by the total expenditure on electrical items and domestic appliances in the catchment area.

All monetary values are held constant at 2008 prices.

Spreadsheet 8i - Health, Beauty and Chemist Items: Spending Patterns in 2010 as a Percentage Across the Study Area Zones

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
	%	%	%	%	%	%	%	%
Inside Catchment Area								
Zone 1								
Holywell Town Centre	41.44	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Bagillt	2.25	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other, Zone 1	1.30	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Zone 1	***44.99***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***
Zone 2								
Mynydd Isa	0.00	11.36	0.00	0.00	0.00	0.56	0.00	0.00
Total Zone 2	***0.00***	***11.36***	***0.00***	***0.00***	***0.00***	***0.56***	***0.00***	***0.00***
Zone 3								
Flintshire Retail Park, Flint Town Centre	1.93	0.00	0.72	0.00	0.00	0.00	0.00	0.00
Other, Flint Town Centre	10.31	3.79	73.91	0.00	1.43	0.00	0.81	0.00
Total Zone 3	***12.24***	***3.79***	***74.64***	***0.00***	***1.43***	***0.00***	***0.81***	***0.00***
Zone 4								
Mold Town Centre	8.69	52.27	2.17	78.60	35.71	7.98	3.24	3.70
Caerwys	0.00	0.00	0.00	0.00	2.14	0.00	0.00	0.00
Other, Zone 4	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Zone 4	***8.69***	***52.27***	***2.17***	***78.60***	***37.86***	***7.98***	***3.24***	***3.70***
Zone 5								
Caergwrle	0.00	0.00	0.00	0.00	12.86	0.00	0.00	0.00
Leeswood	0.00	0.00	0.00	0.00	2.86	0.00	0.00	0.00
Total Zone 5	***0.00***	***0.00***	***0.00***	***0.00***	***15.71***	***0.00***	***0.00***	***0.00***
Zone 6								
Buckley Town Centre	0.00	3.03	0.00	0.00	2.86	59.60	0.54	4.63
Total Zone 6	***0.00***	***3.03***	***0.00***	***0.00***	***2.86***	***59.60***	***0.54***	***4.63***
Zone 7								
Shotton Town Centre	0.33	0.00	0.00	0.00	0.00	0.00	22.43	2.78
Asda, Aston Road, Queensferry District Centre	3.54	3.03	1.45	2.26	0.00	3.98	14.60	2.15
Other, Queensferry District Centre	0.00	0.00	0.00	0.00	0.00	0.00	3.24	0.62
Connah's Quay District Centre	0.00	2.27	0.00	0.00	0.00	0.00	18.11	0.31
Other, Zone 7	0.00	0.00	0.00	0.00	0.00	0.00	1.08	0.00
Total Zone 7	***3.87***	***5.30***	***1.45***	***2.26***	***0.00***	***3.98***	***59.46***	***5.86***
Zone 8								
Broughton Shopping Park, Chester Road, Broughton	7.37	14.39	10.14	5.06	7.86	20.47	20.55	66.03
Saltney District Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.33
Hawarden Local Centre	0.00	0.76	0.00	1.12	0.00	1.14	0.54	0.31
Other, Zone 8	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.62
Total Zone 8	***7.37***	***15.15***	***10.14***	***6.19***	***7.86***	***21.61***	***21.09***	***71.29***
TOTAL INSIDE CATCHMENT AREA	**77.16**	**90.91**	**88.41**	**87.05**	**65.71**	**93.73**	**85.14**	**85.48**
Inside Buffer Area								
Buffer 1								
Prestatyn	9.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Rhyl	2.26	0.00	1.45	0.00	0.00	0.00	0.00	0.00
Other, Buffer 1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Buffer 1	***11.25***	***0.00***	***1.45***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***
Buffer 2								
Other, Buffer 2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Buffer 2	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***
Buffer 3								
Other, Buffer 3	0.00	0.00	0.00	0.56	0.00	0.00	0.00	0.00
Total Buffer 3	***0.00***	***0.00***	***0.00***	***0.56***	***0.00***	***0.00***	***0.00***	***0.00***
Buffer 4								
Ruthin	0.00	0.00	0.00	0.57	2.86	0.00	0.00	0.00
Total Buffer 4	***0.00***	***0.00***	***0.00***	***0.57***	***2.86***	***0.00***	***0.00***	***0.00***
Buffer 5								
Wrexham Town Centre	0.33	0.76	0.00	1.69	19.29	2.85	1.08	0.62
Other, Buffer 5	0.00	0.00	0.00	0.00	2.86	0.00	0.00	0.00
Total Buffer 5	***0.33***	***0.76***	***0.00***	***1.69***	***22.14***	***2.85***	***1.08***	***0.62***
Buffer 6								
Chester City Centre	9.02	6.06	8.70	7.32	2.86	3.42	9.46	12.05
Other, Buffer 6	0.00	0.00	0.00	0.00	0.00	0.00	0.54	0.31
Total Buffer 6	***9.02***	***6.06***	***8.70***	***7.32***	***2.86***	***3.42***	***10.00***	***12.36***
Buffer 7								
Other, Buffer 7	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Buffer 7	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***
TOTAL INSIDE BUFFER AREA	**20.59**	**6.82**	**10.14**	**10.14**	**27.86**	**6.27**	**11.08**	**12.98**
Outside Buffer Area								
Other, Outside Buffer Area	0.97	1.52	0.00	0.00	5.71	0.00	0.81	0.31
Internet	1.28	0.76	0.72	2.25	0.71	0.00	0.81	0.92
Home Catalogue	0.00	0.00	0.72	0.57	0.00	0.00	2.16	0.31
TV / Interactive Shopping	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
TOTAL OUTSIDE BUFFER AREA	**2.25**	**2.27**	**1.45**	**2.82**	**6.43**	**0.00**	**3.78**	**1.55**
OVERALL TOTAL	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**

Spreadsheet 8j - Health, Beauty and Chemist Items: Spending Patterns in 2010 Across the Study Area Zones

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Total[1]	All Zones Market Share[2]
	£m	£m	£m	£m	£m	£m	£m	£m	£m	%
Inside Catchment Area										
Zone 1										
Holywell Town Centre	3.68	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.68	7.2%
Bagillt	0.20	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.20	0.4%
Other, Zone 1	0.12	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.12	0.2%
Total Zone 1	***3.99***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***3.99***	***7.9%***
Zone 2										
Mynydd Isa	0.00	0.46	0.00	0.00	0.00	0.03	0.00	0.00	0.49	1.0%
Total Zone 2	***0.00***	***0.46***	***0.00***	***0.00***	***0.00***	***0.03***	***0.00***	***0.00***	***0.49***	***1.0%***
Zone 3										
Flintshire Retail Park, Flint Town Centre	0.17	0.00	0.03	0.00	0.00	0.00	0.00	0.00	0.20	0.4%
Other, Flint Town Centre	0.91	0.15	3.04	0.00	0.06	0.00	0.08	0.00	4.25	8.4%
Total Zone 3	***1.09***	***0.15***	***3.07***	***0.00***	***0.06***	***0.00***	***0.08***	***0.00***	***4.45***	***8.8%***
Zone 4										
Mold Town Centre	0.77	2.13	0.09	4.59	1.45	0.40	0.33	0.32	10.07	19.9%
Caerwys	0.00	0.00	0.00	0.00	0.09	0.00	0.00	0.00	0.09	0.2%
Other, Zone 4	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Zone 4	***0.77***	***2.13***	***0.09***	***4.59***	***1.53***	***0.40***	***0.33***	***0.32***	***10.16***	***20.0%***
Zone 5										
Caergwrle	0.00	0.00	0.00	0.00	0.52	0.00	0.00	0.00	0.52	1.0%
Leeswood	0.00	0.00	0.00	0.00	0.12	0.00	0.00	0.00	0.12	0.2%
Total Zone 5	***0.00***	***0.00***	***0.00***	***0.00***	***0.64***	***0.00***	***0.00***	***0.00***	***0.64***	***1.3%***
Zone 6										
Buckley Town Centre	0.00	0.12	0.00	0.00	0.12	3.00	0.05	0.40	3.69	7.3%
Total Zone 6	***0.00***	***0.12***	***0.00***	***0.00***	***0.12***	***3.00***	***0.05***	***0.40***	***3.69***	***7.3%***
Zone 7										
Shotton Town Centre	0.03	0.00	0.00	0.00	0.00	0.00	2.25	0.24	2.52	5.0%
Asda, Aston Road, Queensferry District Centre	0.31	0.12	0.06	0.13	0.00	0.20	1.47	0.19	2.48	4.9%
Other, Queensferry District Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.33	0.05	0.38	0.7%
Connah's Quay District Centre	0.00	0.09	0.00	0.00	0.00	0.00	1.82	0.03	1.94	3.8%
Other, Zone 7	0.00	0.00	0.00	0.00	0.00	0.00	0.11	0.00	0.11	0.2%
Total Zone 7	***0.34***	***0.22***	***0.06***	***0.13***	***0.00***	***0.20***	***5.97***	***0.51***	***7.43***	***14.7%***
Zone 8										
Broughton Shopping Park, Chester Road, Broughton	0.65	0.59	0.42	0.30	0.32	1.03	2.06	5.74	11.10	21.9%
Saltney District Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.38	0.38	0.7%
Hawarden Local Centre	0.00	0.03	0.00	0.07	0.00	0.06	0.05	0.03	0.23	0.5%
Other, Zone 8	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.05	0.05	0.1%
Total Zone 8	***0.65***	***0.62***	***0.42***	***0.36***	***0.32***	***1.09***	***2.12***	***6.20***	***11.77***	***23.2%***
TOTAL INSIDE CATCHMENT AREA	**6.84**	**3.70**	**3.64**	**5.09**	**2.66**	**4.71**	**8.55**	**7.43**	**42.61**	**84.0%**
Inside Buffer Area										
Buffer 1										
Prestatyn	0.80	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.80	1.6%
Rhyl	0.20	0.00	0.06	0.00	0.00	0.00	0.00	0.00	0.26	0.5%
Other, Buffer 1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Buffer 1	***1.00***	***0.00***	***0.06***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***1.06***	***2.1%***
Buffer 2										
Other, Buffer 2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Buffer 2	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.0%***
Buffer 3										
Other, Buffer 3	0.00	0.00	0.00	0.03	0.00	0.00	0.00	0.00	0.03	0.1%
Total Buffer 3	***0.00***	***0.00***	***0.00***	***0.03***	***0.00***	***0.00***	***0.00***	***0.00***	***0.03***	***0.1%***
Buffer 4										
Ruthin	0.00	0.00	0.00	0.03	0.12	0.00	0.00	0.00	0.15	0.3%
Total Buffer 4	***0.00***	***0.00***	***0.00***	***0.03***	***0.12***	***0.00***	***0.00***	***0.00***	***0.15***	***0.3%***
Buffer 5										
Wrexham Town Centre	0.03	0.03	0.00	0.10	0.78	0.14	0.11	0.05	1.25	2.5%
Other, Buffer 5	0.00	0.00	0.00	0.00	0.12	0.00	0.00	0.00	0.12	0.2%
Total Buffer 5	***0.03***	***0.03***	***0.00***	***0.10***	***0.90***	***0.14***	***0.11***	***0.05***	***1.36***	***2.7%***
Buffer 6										
Chester City Centre	0.80	0.25	0.36	0.43	0.12	0.17	0.95	1.05	4.12	8.1%
Other, Buffer 6	0.00	0.00	0.00	0.00	0.00	0.00	0.05	0.03	0.08	0.2%
Total Buffer 6	***0.80***	***0.25***	***0.36***	***0.43***	***0.12***	***0.17***	***1.00***	***1.07***	***4.20***	***8.3%***
Buffer 7										
Other, Buffer 7	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Buffer 7	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.0%***
TOTAL INSIDE BUFFER AREA	**1.83**	**0.28**	**0.42**	**0.59**	**1.13**	**0.32**	**1.11**	**1.13**	**6.80**	**13.4%**
Outside Buffer Area										
Other, Outside Buffer Area	0.09	0.06	0.00	0.00	0.23	0.00	0.08	0.03	0.49	1.0%
Internet	0.11	0.03	0.03	0.13	0.03	0.00	0.08	0.08	0.50	1.0%
Home Catalogue	0.00	0.00	0.03	0.03	0.00	0.00	0.22	0.03	0.31	0.6%
TV / Interactive Shopping	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
TOTAL OUTSIDE BUFFER AREA	**0.20**	**0.09**	**0.06**	**0.16**	**0.26**	**0.00**	**0.38**	**0.13**	**1.29**	**2.5%**
OVERALL TOTAL	**8.87**	**4.07**	**4.11**	**5.84**	**4.05**	**5.03**	**10.04**	**8.69**	**50.70**	**100.0%**

NOTES:
(1) The spending patterns are calculated by multiplying the total expenditure on health, beauty and chemist items in 2010 (Spreadsheet 7, Table B) by the market share (Spreadsheet 8i). The figures in the 'Total' column are the sum of the expenditure on health, beauty and chemist items attracted to each centre/store from each zone.
(2) The 'All zones market share' is calculated through dividing the total expenditure on health, beauty and chemist items retained by each centre/store, by the total expenditure on health, beauty and chemist items in the catchment area.

All monetary values are held constant at 2008 prices.

Spreadsheet 8k - Recreational Goods: Spending Patterns in 2010 as a Percentage Across the Study Area Zones

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
	%	%	%	%	%	%	%	%
Inside Catchment Area								
Zone 1								
Holywell Town Centre	2.92	0.00	1.56	0.00	0.00	0.00	0.00	0.00
Other, Zone 1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Zone 1	***2.92***	***0.00***	***1.56***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***
Zone 2								
Mynydd Isa	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Zone 2	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***
Zone 3								
Flintshire Retail Park, Flint Town Centre	1.47	0.00	7.81	0.00	0.00	0.00	2.49	0.00
Other, Flint Town Centre	7.33	1.39	25.00	0.00	1.61	0.00	2.46	0.52
Total Zone 3	***8.80***	***1.39***	***32.81***	***0.00***	***1.61***	***0.00***	***4.95***	***0.52***
Zone 4								
Mold Town Centre	2.92	18.06	0.00	15.51	6.80	6.44	0.00	5.10
Other, Zone 4	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Zone 4	***2.92***	***18.06***	***0.00***	***15.51***	***6.80***	***6.44***	***0.00***	***5.10***
Zone 5								
Other, Zone 5	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Zone 5	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***
Zone 6								
Buckley Town Centre	0.00	2.78	0.00	2.38	0.00	1.22	1.22	0.00
Total Zone 6	***0.00***	***2.78***	***0.00***	***2.38***	***0.00***	***1.22***	***1.22***	***0.00***
Zone 7								
Asda, Aston Road, Queensferry District Centre	1.47	0.00	1.56	0.00	0.00	2.61	4.34	0.52
Other, Queensferry District Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.54
Shotton Town Centre	0.00	1.39	0.00	0.00	3.40	0.00	3.75	1.01
Connah's Quay District Centre	0.00	0.00	0.00	0.00	0.00	0.00	1.85	0.00
Other, Zone 7	0.75	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Zone 7	***2.22***	***1.39***	***1.56***	***0.00***	***3.40***	***2.61***	***9.94***	***4.06***
Zone 8								
Broughton Shopping Park, Chester Road, Broughton	17.69	26.39	20.31	29.64	18.78	32.69	18.62	38.75
Saltney District Centre	0.00	0.00	0.00	0.00	3.40	0.00	0.00	0.51
Ewloe	0.00	2.78	0.00	0.00	0.00	0.00	0.00	0.00
Other, Zone 8	0.00	0.00	0.00	0.00	0.00	0.00	0.63	0.00
Total Zone 8	***17.69***	***29.17***	***20.31***	***29.64***	***22.18***	***32.69***	***19.25***	***39.25***
TOTAL INSIDE CATCHMENT AREA	**34.56**	**52.78**	**56.25**	**47.53**	**33.99**	**42.95**	**35.36**	**48.93**
Inside Buffer Area								
Buffer 1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Rhyl	4.41	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other, Buffer 1	0.00	1.39	0.00	0.00	0.00	0.00	0.00	0.00
Total Buffer 1	***4.41***	***1.39***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***
Buffer 2								
St Asaph	0.00	0.00	0.00	2.38	0.00	0.00	0.00	0.00
Other, Buffer 2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Buffer 2	***0.00***	***0.00***	***0.00***	***2.38***	***0.00***	***0.00***	***0.00***	***0.00***
Buffer 3								
Other, Buffer 3	0.00	0.00	0.00	1.16	0.00	0.00	0.00	0.00
Total Buffer 3	***0.00***	***0.00***	***0.00***	***1.16***	***0.00***	***0.00***	***0.00***	***0.00***
Buffer 4								
Ruthin	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Buffer 4	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***
Buffer 5								
Wrexham Town Centre	2.96	2.78	0.00	3.55	25.40	2.61	0.63	0.52
Other, Buffer 5	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Buffer 5	***2.96***	***2.78***	***0.00***	***3.55***	***25.40***	***2.61***	***0.63***	***0.52***
Buffer 6								
Chester City Centre	19.08	12.50	14.06	11.91	15.38	20.70	21.71	14.83
Greyhound Retail Park, Sealand Road, Chester	13.98	15.28	9.38	5.98	10.02	20.87	14.96	15.28
Chester Retail Park, Old Seals Way, Chester	4.41	0.00	3.13	0.00	3.23	0.00	4.97	2.57
Other, Buffer 6	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Buffer 6	***37.48***	***27.78***	***26.56***	***17.90***	***28.63***	***41.57***	***41.64***	***32.68***
Buffer 7								
Other, Buffer 7	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Buffer 7	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***
TOTAL INSIDE BUFFER AREA	**44.85**	**31.94**	**26.56**	**24.99**	**54.03**	**44.17**	**42.27**	**33.19**
Outside Buffer Area								
Cheshire Oaks Designer Outlet, Kinsey Road, Ellesmere Port	0.75	2.78	3.13	2.38	0.00	1.39	0.00	1.03
Liverpool	1.47	0.00	0.00	0.00	0.00	1.39	0.00	0.00
Manchester	0.00	0.00	0.00	1.22	0.00	0.00	1.24	0.00
Other, Outside Buffer Area	3.69	0.00	1.56	2.38	5.18	2.44	2.49	1.02
Internet	13.94	9.72	9.38	21.50	6.80	6.44	18.01	12.26
Home Catalogue	0.75	0.00	0.00	0.00	0.00	0.00	0.00	2.04
TV / Interactive Shopping	0.00	2.78	3.13	0.00	0.00	1.22	0.63	1.53
TOTAL OUTSIDE BUFFER AREA	**20.59**	**15.28**	**17.19**	**27.48**	**11.98**	**12.87**	**22.37**	**17.87**
OVERALL TOTAL	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**

Spreadsheet 8l - Recreational Goods: Spending Patterns in 2010 Across the Study Area Zones

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Total[1]	All Zones Market Share[2]
	%	%	%	%	%	%	%	%	£m	%
Inside Catchment Area										
Zone 1										
Holywell Town Centre	0.50	0.00	0.13	0.00	0.00	0.00	0.00	0.00	0.63	0.6%
Other, Zone 1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Zone 1	***0.50***	***0.00***	***0.13***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.63***	***0.6%***
Zone 2										
Mynydd Isa	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Zone 2	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.0%***
Zone 3										
Flintshire Retail Park, Flint Town Centre	0.25	0.00	0.63	0.00	0.00	0.00	0.49	0.00	1.37	1.4%
Other, Flint Town Centre	1.26	0.11	2.00	0.00	0.13	0.00	0.48	0.09	4.07	4.1%
Total Zone 3	***1.51***	***0.11***	***2.63***	***0.00***	***0.13***	***0.00***	***0.97***	***0.09***	***5.44***	***5.5%***
Zone 4										
Mold Town Centre	0.50	1.42	0.00	1.73	0.53	0.62	0.00	0.86	5.66	5.8%
Other, Zone 4	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Zone 4	***0.50***	***1.42***	***0.00***	***1.73***	***0.53***	***0.62***	***0.00***	***0.86***	***5.66***	***5.8%***
Zone 5										
Other, Zone 5	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Zone 5	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.0%***
Zone 6										
Buckley Town Centre	0.00	0.22	0.00	0.27	0.00	0.12	0.24	0.00	0.84	0.9%
Total Zone 6	***0.00***	***0.22***	***0.00***	***0.27***	***0.00***	***0.12***	***0.24***	***0.00***	***0.84***	***0.9%***
Zone 7										
Asda, Aston Road, Queensferry District Centre	0.25	0.00	0.13	0.00	0.00	0.25	0.85	0.09	1.57	1.6%
Other, Queensferry District Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.43	0.43	0.4%
Shotton Town Centre	0.00	0.11	0.00	0.00	0.27	0.00	0.74	0.17	1.28	1.3%
Connah's Quay District Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.36	0.00	0.36	0.4%
Other, Zone 7	0.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.13	0.1%
Total Zone 7	***0.38***	***0.11***	***0.13***	***0.00***	***0.27***	***0.25***	***1.95***	***0.68***	***3.77***	***3.8%***
Zone 8										
Broughton Shopping Park, Chester Road, Broughton	3.04	2.07	1.63	3.31	1.47	3.16	3.65	6.51	24.84	25.3%
Saltney District Centre	0.00	0.00	0.00	0.00	0.27	0.00	0.00	0.08	0.35	0.4%
Ewloe	0.00	0.22	0.00	0.00	0.00	0.00	0.00	0.00	0.22	0.2%
Other, Zone 8	0.00	0.00	0.00	0.00	0.00	0.00	0.12	0.00	0.12	0.1%
Total Zone 8	***3.04***	***2.29***	***1.63***	***3.31***	***1.73***	***3.16***	***3.78***	***6.59***	***25.53***	***26.0%***
TOTAL INSIDE CATCHMENT AREA	**5.94**	**4.14**	**4.51**	**5.31**	**2.65**	**4.15**	**6.94**	**8.22**	**41.86**	**42.7%**
Inside Buffer Area										
Buffer 1										
Rhyl	0.76	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.76	0.8%
Other, Buffer 1	0.00	0.11	0.00	0.00	0.00	0.00	0.00	0.00	0.11	0.1%
Total Buffer 1	***0.76***	***0.11***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.87***	***0.9%***
Buffer 2										
St Asaph	0.00	0.00	0.00	0.27	0.00	0.00	0.00	0.00	0.27	0.3%
Other, Buffer 2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Buffer 2	***0.00***	***0.00***	***0.00***	***0.27***	***0.00***	***0.00***	***0.00***	***0.00***	***0.27***	***0.3%***
Buffer 3										
Other, Buffer 3	0.00	0.00	0.00	0.13	0.00	0.00	0.00	0.00	0.13	0.1%
Total Buffer 3	***0.00***	***0.00***	***0.00***	***0.13***	***0.00***	***0.00***	***0.00***	***0.00***	***0.13***	***0.1%***
Buffer 4										
Ruthin	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Buffer 4	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.0%***
Buffer 5										
Wrexham Town Centre	0.51	0.22	0.00	0.40	1.98	0.25	0.12	0.09	3.57	3.6%
Other, Buffer 5	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Buffer 5	***0.51***	***0.22***	***0.00***	***0.40***	***1.98***	***0.25***	***0.12***	***0.09***	***3.57***	***3.6%***
Buffer 6										
Chester City Centre	3.28	0.98	1.13	1.33	1.20	2.00	4.26	2.49	16.67	17.0%
Greyhound Retail Park, Sealand Road, Chester	2.40	1.20	0.75	0.67	0.78	2.02	2.94	2.56	13.32	13.6%
Chester Retail Park, Old Seals Way, Chester	0.76	0.00	0.25	0.00	0.25	0.00	0.98	0.43	2.67	2.7%
Other, Buffer 6	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Buffer 6	***6.44***	***2.18***	***2.13***	***2.00***	***2.24***	***4.02***	***8.17***	***5.49***	***32.66***	***33.3%***
Buffer 7										
Other, Buffer 7	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Buffer 7	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.0%***
TOTAL INSIDE BUFFER AREA	**7.71**	**2.50**	**2.13**	**2.79**	**4.22**	**4.27**	**8.30**	**5.57**	**37.50**	**38.2%**
Outside Buffer Area										
Cheshire Oaks Designer Outlet, Kinsey Road, Ellesmere Port	0.13	0.22	0.25	0.27	0.00	0.13	0.00	0.17	1.17	1.2%
Liverpool	0.25	0.00	0.00	0.00	0.00	0.13	0.00	0.00	0.39	0.4%
Manchester	0.00	0.00	0.00	0.14	0.00	0.00	0.24	0.00	0.38	0.4%
Other, Outside Buffer Area	0.63	0.00	0.13	0.27	0.40	0.24	0.49	0.17	2.33	2.4%
Internet	2.40	0.76	0.75	2.40	0.53	0.62	3.53	2.06	13.06	13.3%
Home Catalogue	0.13	0.00	0.00	0.00	0.00	0.00	0.00	0.34	0.47	0.5%
TV / Interactive Shopping	0.00	0.22	0.25	0.00	0.00	0.12	0.12	0.26	0.97	1.0%
TOTAL OUTSIDE BUFFER AREA	**3.54**	**1.20**	**1.38**	**3.07**	**0.94**	**1.24**	**4.39**	**3.00**	**18.76**	**19.1%**
OVERALL TOTAL	**17.19**	**7.84**	**8.02**	**11.17**	**7.81**	**9.66**	**19.63**	**16.79**	**98.11**	**100.0%**

NOTES:
(1) The spending patterns are calculated by multiplying the total expenditure on recreational goods in 2010 (Spreadsheet 7, Table B) by the market share (Spreadsheet 8k). The figures in the 'Total' column are the sum of the expenditure on recreational goods attracted to each centre/store from each zone.
(2) The 'All zones market share' is calculated through dividing the total expenditure on recreational goods retained by each centre/store, by the total expenditure on recreational goods in the catchment area.

All monetary values are held constant at 2008 prices.

Spreadsheet 8m - Other Goods: Spending Patterns in 2010 as a Percentage Across the Study Area Zones

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
	%	%	%	%	%	%	%	%
Inside Catchment Area								
Zone 1								
Holywell Town Centre	14.25	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other, Zone 1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Zone 1	***14.25***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***
Zone 2								
Mynydd Isa	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Zone 2	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***
Zone 3								
Flintshire Retail Park, Flint Town Centre	3.10	0.00	0.96	0.00	0.00	0.00	0.00	0.00
Other, Flint Town Centre	1.76	0.00	23.08	0.00	0.82	0.00	1.00	0.00
Total Zone 3	***4.86***	***0.00***	***24.04***	***0.00***	***0.82***	***0.00***	***1.00***	***0.00***
Zone 4								
Mold Town Centre	6.70	27.97	0.96	48.43	23.54	10.74	2.32	2.32
Other, Zone 4	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Zone 4	***6.70***	***27.97***	***0.96***	***48.43***	***23.54***	***10.74***	***2.32***	***2.32***
Zone 5								
Other, Zone 5	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Zone 5	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***
Zone 6								
Buckley Town Centre	0.00	0.00	0.00	0.00	0.82	7.88	0.00	1.94
Total Zone 6	***0.00***	***0.00***	***0.00***	***0.00***	***0.82***	***7.88***	***0.00***	***1.94***
Zone 7								
Asda, Aston Road, Queensferry District Centre	6.64	5.08	8.65	0.63	0.82	4.98	22.44	2.71
Other, Queensferry District Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.98	0.00
Connah's Quay District Centre	0.00	0.00	0.00	0.63	0.00	0.00	3.58	0.00
Shotton Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	1.98	0.00
Other, Zone 7	0.00	0.00	0.00	0.00	0.00	0.00	1.66	0.00
Total Zone 7	***6.64***	***5.08***	***8.65***	***1.26***	***0.82***	***4.98***	***30.65***	***2.71***
Zone 8								
Broughton Shopping Park, Chester Road, Broughton	10.28	11.86	13.46	7.55	11.77	27.12	14.82	36.30
Saltney District Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other, Zone 8	0.00	0.00	0.00	0.00	1.68	0.00	0.00	0.00
Total Zone 8	***10.28***	***11.86***	***13.46***	***7.55***	***13.45***	***27.12***	***14.82***	***36.30***
TOTAL INSIDE CATCHMENT AREA	**42.73**	**44.92**	**47.12**	**57.23**	**39.46**	**50.74**	**48.79**	**43.26**
Inside Buffer Area								
Buffer 1								
Rhyl	1.80	0.00	0.96	0.00	0.00	1.43	0.00	0.00
Prestatyn	2.67	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other, Buffer 1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Buffer 1	***4.47***	***0.00***	***0.96***	***0.00***	***0.00***	***1.43***	***0.00***	***0.00***
Buffer 2								
Other, Buffer 2	0.43	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Buffer 2	***0.43***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***
Buffer 3								
Other, Buffer 3	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Buffer 3	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***
Buffer 4								
Ruthin	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Buffer 4	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***
Buffer 5								
Wrexham Town Centre	3.58	5.08	0.00	2.51	28.55	7.84	0.34	1.54
Other, Buffer 5	0.00	0.85	0.00	0.00	0.00	0.00	0.00	0.00
Total Buffer 5	***3.58***	***5.93***	***0.00***	***2.51***	***28.55***	***7.84***	***0.34***	***1.54***
Buffer 6								
Chester City Centre	13.34	12.71	15.38	12.59	7.55	21.45	20.54	22.39
Greyhound Retail Park, Sealand Road, Chester	1.80	0.00	1.92	0.00	0.00	1.43	1.02	0.77
Other, Buffer 6	0.43	0.00	0.00	0.00	0.00	0.00	0.34	0.00
Total Buffer 6	***15.57***	***12.71***	***17.31***	***12.59***	***7.55***	***22.88***	***21.90***	***23.17***
Buffer 7								
Other, Buffer 7	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Buffer 7	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***
TOTAL INSIDE BUFFER AREA	**24.05**	**18.64**	**18.27**	**15.09**	**36.09**	**32.15**	**22.24**	**24.71**
Outside Buffer Area								
Llandudno	0.00	0.00	0.96	0.00	1.68	0.74	0.00	1.16
Cheshire Oaks Designer Outlet, Kinsey Road, Ellesmere Port	0.43	0.85	0.00	0.63	0.82	0.74	0.64	0.00
Liverpool	1.80	0.00	0.00	0.00	0.86	0.00	0.32	0.38
Warrington	0.00	0.85	0.00	0.00	0.00	0.00	0.00	1.16
Other, Outside Buffer Area	0.89	0.00	1.92	1.27	4.23	0.00	0.00	0.39
Internet	23.87	28.81	29.81	23.26	15.18	12.79	23.72	25.85
Home Catalogue	3.56	0.00	0.00	1.26	1.68	0.00	0.64	1.54
TV / Interactive Shopping	2.67	5.93	1.92	1.26	0.00	2.86	3.64	1.54
TOTAL OUTSIDE BUFFER AREA	**33.22**	**36.44**	**34.62**	**27.67**	**24.45**	**17.12**	**28.97**	**32.03**
OVERALL TOTAL	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**

Spreadsheet 8n - Other Goods: Spending Patterns in 2010 Across the Study Area Zones

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Total[1]	All Zones Market Share[2]
	£m	£m	£m	£m	£m	£m	£m	£m	£m	%
Inside Catchment Area										
Zone 1										
Holywell Town Centre	1.02	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.02	2.5%
Other, Zone 1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Zone 1	***1.02***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***1.02***	***2.5%***
Zone 2										
Mynydd Isa	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Zone 2	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.0%***
Zone 3										
Flintshire Retail Park, Flint Town Centre	0.22	0.00	0.03	0.00	0.00	0.00	0.00	0.00	0.25	0.6%
Other, Flint Town Centre	0.13	0.00	0.76	0.00	0.03	0.00	0.08	0.00	1.00	2.4%
Total Zone 3	***0.35***	***0.00***	***0.79***	***0.00***	***0.03***	***0.00***	***0.08***	***0.00***	***1.25***	***3.1%***
Zone 4										
Mold Town Centre	0.48	0.91	0.03	2.27	0.77	0.43	0.19	0.16	5.25	12.8%
Other, Zone 4	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Zone 4	***0.48***	***0.91***	***0.03***	***2.27***	***0.77***	***0.43***	***0.19***	***0.16***	***5.25***	***12.8%***
Zone 5										
Other, Zone 5	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Zone 5	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.0%***
Zone 6										
Buckley Town Centre	0.00	0.00	0.00	0.00	0.03	0.32	0.00	0.14	0.48	1.2%
Total Zone 6	***0.00***	***0.00***	***0.00***	***0.00***	***0.03***	***0.32***	***0.00***	***0.14***	***0.48***	***1.2%***
Zone 7										
Asda, Aston Road, Queensferry District Centre	0.47	0.17	0.29	0.03	0.03	0.20	1.82	0.19	3.19	7.8%
Other, Queensferry District Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.08	0.00	0.08	0.2%
Connah's Quay District Centre	0.00	0.00	0.00	0.03	0.00	0.00	0.29	0.00	0.32	0.8%
Shotton Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.16	0.00	0.16	0.4%
Other, Zone 7	0.00	0.00	0.00	0.00	0.00	0.00	0.13	0.00	0.13	0.3%
Total Zone 7	***0.47***	***0.17***	***0.29***	***0.06***	***0.03***	***0.20***	***2.48***	***0.19***	***3.89***	***9.5%***
Zone 8										
Broughton Shopping Park, Chester Road, Broughton	0.73	0.39	0.44	0.35	0.38	1.09	1.20	2.56	7.15	17.5%
Saltney District Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Other, Zone 8	0.00	0.00	0.00	0.00	0.05	0.00	0.00	0.00	0.05	0.1%
Total Zone 8	***0.73***	***0.39***	***0.44***	***0.35***	***0.44***	***1.09***	***1.20***	***2.56***	***7.21***	***17.7%***
TOTAL INSIDE CATCHMENT AREA	**3.05**	**1.47**	**1.56**	**2.68**	**1.29**	**2.04**	**3.95**	**3.05**	**19.08**	**46.7%**
Inside Buffer Area										
Buffer 1										
Rhyl	0.13	0.00	0.03	0.00	0.00	0.06	0.00	0.00	0.22	0.5%
Prestatyn	0.19	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.19	0.5%
Other, Buffer 1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Buffer 1	***0.32***	***0.00***	***0.03***	***0.00***	***0.00***	***0.06***	***0.00***	***0.00***	***0.41***	***1.0%***
Buffer 2										
Other, Buffer 2	0.03	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.03	0.1%
Total Buffer 2	***0.03***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.03***	***0.1%***
Buffer 3										
Other, Buffer 3	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Buffer 3	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.0%***
Buffer 4										
Ruthin	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Buffer 4	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.0%***
Buffer 5										
Wrexham Town Centre	0.25	0.17	0.00	0.12	0.93	0.32	0.03	0.11	1.92	4.7%
Other, Buffer 5	0.00	0.03	0.00	0.00	0.00	0.00	0.00	0.00	0.03	0.1%
Total Buffer 5	***0.25***	***0.19***	***0.00***	***0.12***	***0.93***	***0.32***	***0.03***	***0.11***	***1.95***	***4.8%***
Buffer 6										
Chester City Centre	0.95	0.42	0.51	0.59	0.25	0.86	1.66	1.58	6.82	16.7%
Greyhound Retail Park, Sealand Road, Chester	0.13	0.00	0.06	0.00	0.00	0.06	0.08	0.05	0.39	0.9%
Other, Buffer 6	0.03	0.00	0.00	0.00	0.00	0.00	0.03	0.00	0.06	0.1%
Total Buffer 6	***1.11***	***0.42***	***0.57***	***0.59***	***0.25***	***0.92***	***1.77***	***1.64***	***7.26***	***17.8%***
Buffer 7										
Other, Buffer 7	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Buffer 7	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.0%***
TOTAL INSIDE BUFFER AREA	**1.71**	**0.61**	**0.60**	**0.71**	**1.18**	**1.29**	**1.80**	**1.74**	**9.65**	**23.6%**
Outside Buffer Area										
Llandudno	0.00	0.00	0.03	0.00	0.05	0.03	0.00	0.08	0.20	0.5%
Cheshire Oaks Designer Outlet, Kinsey Road, Ellesmere Port	0.03	0.03	0.00	0.03	0.03	0.03	0.05	0.00	0.20	0.5%
Liverpool	0.13	0.00	0.00	0.00	0.03	0.00	0.03	0.03	0.21	0.5%
Warrington	0.00	0.03	0.00	0.00	0.00	0.00	0.00	0.08	0.11	0.3%
Other, Outside Buffer Area	0.06	0.00	0.06	0.06	0.14	0.00	0.00	0.03	0.35	0.9%
Internet	1.70	0.94	0.98	1.09	0.50	0.51	1.92	1.82	9.47	23.2%
Home Catalogue	0.25	0.00	0.00	0.06	0.05	0.00	0.05	0.11	0.53	1.3%
TV / Interactive Shopping	0.19	0.19	0.06	0.06	0.00	0.11	0.30	0.11	1.03	2.5%
TOTAL OUTSIDE BUFFER AREA	**2.37**	**1.19**	**1.14**	**1.30**	**0.80**	**0.69**	**2.35**	**2.26**	**12.09**	**29.6%**
OVERALL TOTAL	**7.13**	**3.27**	**3.30**	**4.69**	**3.26**	**4.02**	**8.10**	**7.06**	**40.83**	**100.0%**

NOTES:

(1) The spending patterns are calculated by multiplying the total expenditure on 'other goods' (such as books, CDs, jewellery, glass and china items) in 2010 (Spreadsheet 7, Table B) by the market share (Spreadsheet 8m). The figures in the 'Total' column are the sum of the expenditure on 'other goods' attracted to each centre/store from each zone.

(2) The 'All zones market share' is calculated through dividing the total expenditure on 'other goods' retained by each centre/store, by the total expenditure on 'other goods' in the catchment area.

All monetary values are held constant at 2008 prices.

Spreadsheet 9a - Summary of Capacity for Comparison Goods (Static Retention Rate of 49.4%)

	2010	2016	2021	2026	2010-16 Change	2010-21 Change	2010-26 Change	2016-21 Change	2021-26 Change
Catchment area expenditure retention [1]									
A. Total catchment area expenditure (including SFT) (£m)	431.9	531.4	629.2	739.8	99.5	197.3	307.9	97.8	110.6
B. Current retention level within the catchment area (%)	*49.4%*	*49.4%*	*49.4%*	*49.4%*					
C. Retained expenditure (£m) (=A*B)	213.3	262.5	310.8	365.4	49.1	97.4	152.1	48.3	54.6
Turnover of stores [2]									
D. Turnover of catchment area stores derived from catchment area (£m)	213.3	230.1	244.8	260.3					
E. Improvement in sales densities of stores in catchment area (£m)					16.7	31.5	47.0	14.8	15.5
Special Forms of Trading [3]									
F. Growth in spending on SFT (£m)	0.0	30.5	42.2	55.1					
Commitments [4]									
Broughton Shopping Park Extension (Inc. Tesco Ext., M&S and Retail Parade)		33.0	35.1	37.3					
Retail Warehouse Unit, Flintshire Retail Park Overflow Car Park		6.2	6.6	7.0					
G. Turnover from commitments (£m)		39.2	41.7	44.4	39.2	41.7	44.4	2.5	2.6
H. Residual expenditure (£m) [5]	0.0	-37.3	-18.0	5.7	-37.3	-18.0	5.7	19.3	23.7
Comparison assessment [6]									
Assumed sales density (£/sq.m)	3,650	3,936	4,189	4,454					
I. Floorspace requirement (net sq.m)	0	-9,487	-4,303	1,273	-9,487	-4,303	1,273	5,184	5,576
J. Floorspace requirement (gross sq.m)	0	-13,553	-6,148	1,818	-13,553	-6,148	1,818	7,405	7,966

NOTES:

(1) Catchment area expenditure retention - this is the product of the current market share of the catchment area centres (the cumulative share of the centres within the catchment area) and the total catchment area expenditure including SFT. The market share remains constant in each of the forecast years.
(2) Turnover of stores - this is the turnover of stores within the catchment area that is derived from catchment area expenditure only. We have forecast this turnover to increase by 1.3% per annum between 2010 and 2021, and 1.2% per annum between 2021 and 2026 to account for sales density growth (which is also included as a separate row).
(3) Special Forms of Trading - we have made an allowance for spending on special forms of trading (SFT, i.e. outdoor markets, Internet and catalogue shopping) to increase year on year.
(4) Commitments - this is the turnover of commitments for new comparison floorspace in the catchment area that is derived from catchment area expenditure only.
(5) Residual expenditure - the product of the total available expenditure minus the deductions for the existing centres turnover, growth in spending on SFT and commitments.
(6) Comparison assessment - the residual expenditure is converted to a comparison floorspace requirement using a sales density estimate of £3,650/sq.m, which is forecast to increase by 1.3% per annum between 2010 and 2021, and 1.2% per annum between 2021 and 2026. 70% net to gross ratio assumed.

All monetary values are held constant at 2008 prices.

Spreadsheet 9b - Summary of Capacity for Comparison Goods (Increased Retention Rate: from 49.4% at 2010 to 55.0% by 2021)

	2010	2016	2021	2026	2010-16 Change	2010-21 Change	2010-26 Change	2016-21 Change	2021-26 Change
Catchment area expenditure retention (1)									
A. Total catchment area expenditure (including SFT) (£m)	431.9	531.4	629.2	739.8	99.5	197.3	307.9	97.8	110.6
B. Current retention level within the catchment area (%)	*49.4%*	*55.0%*	*55.0%*	*55.0%*					
C. Retained expenditure (£m) (=A*B)	213.3	292.3	346.1	406.9	79.0	132.7	193.6	53.8	60.8
Turnover of stores (2)									
D. Turnover of catchment area stores derived from catchment area (£m)	213.3	230.1	244.8	260.3					
E. Improvement in sales densities of stores in catchment area (£m)					16.7	31.5	47.0	14.8	15.5
Special Forms of Trading (3)									
F. Growth in spending on SFT (£m)	0.0	30.5	42.2	55.1					
Commitments (4)									
Broughton Shopping Park Extension (Inc. Tesco Ext., M&S and Retail Parade)		33.0	35.1	37.3					
Retail Warehouse Unit, Flintshire Retail Park Overflow Car Park		6.2	6.6	7.0					
G. Turnover from commitments (£m)		39.2	41.7	44.4	39.2	41.7	44.4	2.5	2.6
H. Residual expenditure (£m) (5)	0.0	-7.5	17.3	47.2	-7.5	17.3	47.2	24.8	29.9
Comparison assessment (6)									
Assumed sales density (£/sq.m)	3,650	3,936	4,189	4,454					
I. Floorspace requirement (net sq.m)	0	-1,912	4,125	10,594	-1,912	4,125	10,594	6,037	6,469
J. Floorspace requirement (gross sq.m)	0	-2,732	5,893	15,134	-2,732	5,893	15,134	8,625	9,241

NOTES:
(1) Catchment area expenditure retention - this is the product of the current market share of the catchment area centres (the cumulative share of the centres within the catchment area) and the total catchment area expenditure including SFT. The market share increases from 49.4% at 2010 to 55.0% by 2016.
(2) Turnover of stores - this is the turnover of stores within the catchment area that is derived from catchment area expenditure only. We have forecast this turnover to increase by 1.3% per annum between 2010 and 2021, and 1.2% per annum between 2021 and 2026 to account for sales density growth (which is also included as a separate row).
(3) Special Forms of Trading - we have made an allowance for spending on special forms of trading (SFT, i.e. outdoor markets, Internet and catalogue shopping) to increase year on year.
(4) Commitments - this is the turnover of commitments for new comparison floorspace in the catchment area that is derived from catchment area expenditure only.
(5) Residual expenditure - the product of the total available expenditure minus the deductions for the existing turnover of stores within the catchment area, growth in spending on SFT and commitments.
(6) Comparison assessment - the residual expenditure is converted to a comparison floorspace requirement using a sales density estimate of £3,650/sq.m, which is forecast to increase by 1.3% per annum between 2010 and 2021, and 1.2% per annum between 2021 and 2026. 70% net to gross ratio assumed.

All monetary values are held constant at 2008 prices.

APPENDIX 4

Convenience Retail Capacity Spreadsheets

Spreadsheet 10 - Definition of Zones

Zone	Postcode Sectors	Local Authority[1]
Zone 1	CH6 6 CH8 7 CH8 8 CH8 9 LL18 6 LL19 8 LL19 9	**Flintshire**
Zone 2	CH7 6	**Flintshire**
Zone 3	CH6 5	**Flintshire**
Zone 4	CH7 1 CH7 5 LL17 0 (part)	**Flintshire** / Denbighshire
Zone 5	CH7 4 LL11 3 (part) LL11 5 (part) LL12 0 (part) LL12 9 (part)	**Flintshire** / Denbighshire
Zone 6	CH7 2 CH7 3	**Flintshire**
Zone 7	CH5 1 CH5 2 (part) CH5 4 CH64 5 (part)	**Flintshire**
Zone 8	CHA 5 CH1 6 (part) CH4 0 CH4 8 (part) CH4 9 (part) CH5 3	**Flintshire**

NOTES:
(1) The predominant local authority in each zone is highlighted in bold (ie.the local authority in which the majority of the populated area of the zone is located).

Spreadsheet 11 - Population Projections

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	All Zones Total
Population 2008	27,003	11,619	12,741	16,614	11,723	14,929	31,520	25,751	151,900
Population 2010	27,115	11,667	12,794	16,683	11,772	14,991	31,651	25,858	152,530
Population 2016	27,394	11,787	12,925	16,854	11,893	15,145	31,976	26,123	154,097
Population 2021	27,575	11,865	13,011	16,966	11,971	15,245	32,188	26,297	155,119
Population 2026	27,630	11,889	13,037	17,000	11,995	15,276	32,252	26,349	155,429
Change in population 2010 - 2016									
Numeric change	279	120	131	171	121	154	325	266	1,567
Percentage change	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%
Change in population 2016 - 2021									
Numeric change	182	78	86	112	79	100	212	173	1,022
Percentage change	0.7%	0.7%	0.7%	0.7%	0.7%	0.7%	0.7%	0.7%	0.7%
Change in population 2021 - 2026									
Numeric change	55	24	26	34	24	31	64	53	310
Percentage change	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%
Change in population 2010 - 2026									
Numeric change	515	222	243	317	224	285	602	492	2,899
Percentage change	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%

NOTES:
(1) Population data were sourced from Oxford Economics 2010 via MapInfo Anysite 8.8.1 (mid-year 2008). The population in each zone was projected forward to the base year and forecast years using population multipliers derived from the Welsh Assembly Government's 2008-based Local Authority Population Projections for Wales.
(2) The population multiplier has been calculated for the predominant local authority in each zone (highlighted in **bold** in Spreadsheet 10) and has been applied to the total population within that zone.

Spreadsheet 12 - Convenience Goods Expenditure (per capita)

Year	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
	£	£	£	£	£	£	£	£
2008	1,705	1,742	1,714	1,740	1,738	1,718	1,679	1,690
2010	1,661	1,697	1,669	1,695	1,693	1,673	1,635	1,646
2016	1,717	1,754	1,726	1,752	1,750	1,730	1,691	1,702
2021	1,773	1,812	1,783	1,810	1,808	1,787	1,746	1,758
2026	1,832	1,872	1,841	1,869	1,867	1,846	1,804	1,816

NOTES:
(1) 2008-based per capita convenience expenditure data were sourced from Oxford Economics 2010 via MapInfo Anysite 8.8.1.
(2) The 2008-based per capita convenience expenditure data were projected forward to the base year and forecast years using the midpoint of the forecasts provided by Pitney Bowes Business Insight, as set out in its Retail Expenditure Guide 2010/2011 (Table 3.5, September 2010), and Experian in its Retail Planner Briefing Note 8.1 (Figure 1, August 2010). The forecasts that we have used are as shown in the following table:

Per Capita Convenience Expenditure Growth Forecasts (2008 - 2026)

	Annual Growth Rates		
Year	Experian	PBBI	RTP
2008 - 2009	-2.9%	-2.7%	-2.8%
2009 - 2010	0.3%	0.1%	0.2%
2010 - 2011	0.0%	-0.5%	-0.3%
2011 - 2012	0.4%	0.1%	0.3%
2012 - 2013	0.8%	0.5%	0.7%
2013 - 2014	0.8%	1.1%	1.0%
2014 - 2015	0.8%	1.0%	0.9%
2015 - 2016	0.8%	0.9%	0.9%
2016 - 2017	0.8%	0.5%	0.7%
2017 - 2018	0.9%	0.4%	0.7%
2018 - 2019	0.9%	0.4%	0.7%
2019 -2026	0.9%	0.4%	0.7%

All monetary values are held constant at 2008 prices.

Spreadsheet 13 - Total Convenience Goods Expenditure and Expenditure Growth

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	All Zones Total
	£m	£m	£m	£m	£m	£m	£m	£m	£m
Total expenditure 2010	**45.03**	**19.79**	**21.36**	**28.27**	**19.93**	**25.08**	**51.76**	**42.56**	**253.78**
Spending on SFT in 2010 of average of 1.3%	0.69	0.19	0.00	0.48	0.39	0.20	0.59	0.85	**3.38**
Total expenditure excluding SFT 2010	44.34	19.61	21.36	27.79	19.54	24.89	51.17	41.71	**250.40**
Total expenditure 2016	**47.03**	**20.68**	**22.31**	**29.53**	**20.81**	**26.20**	**54.06**	**44.46**	**265.08**
Spending on SFT in 2016 of 4.8%	2.26	0.99	1.07	1.42	1.00	1.26	2.59	2.13	**12.72**
Total expenditure excluding SFT 2016	44.77	19.68	21.24	28.11	19.81	24.94	51.47	42.32	**252.36**
Total expenditure 2021	**48.90**	**21.50**	**23.20**	**30.71**	**21.64**	**27.24**	**56.21**	**46.22**	**275.62**
Spending on SFT in 2021 of 5.1%	2.47	1.09	1.17	1.55	1.09	1.38	2.84	2.33	**13.92**
Total expenditure excluding SFT 2021	46.43	20.41	22.02	29.16	20.55	25.87	53.37	43.89	**261.70**
Total expenditure 2026	**50.61**	**22.25**	**24.01**	**31.78**	**22.40**	**28.20**	**58.18**	**47.84**	**285.27**
Spending on SFT in 2026 of 5.4%	2.71	1.19	1.28	1.70	1.20	1.51	3.11	2.56	**15.26**
Total expenditure excluding SFT 2026	47.91	21.06	22.72	30.08	21.20	26.69	55.07	45.28	**270.01**
Growth in total expenditure 2010 - 2016	2.01	0.88	0.95	1.26	0.89	1.12	2.31	1.90	**11.30**
Growth in total expenditure 2016 - 2021	1.87	0.82	0.89	1.17	0.83	1.04	2.15	1.77	**10.54**
Growth in total expenditure 2021 - 2026	1.71	0.75	0.81	1.07	0.76	0.95	1.97	1.62	**9.64**
Growth in total expenditure 2010 - 2026	5.59	2.46	2.65	3.51	2.47	3.11	6.42	5.28	**31.49**

NOTES:

(1) The figures in the above table are the product of multiplying the data presented in Spreadsheet 11 (population) by Spreadsheet 12 (per capita convenience goods expenditure), and are in millions of pounds (£m).

(2) The total expenditure includes a proportion of expenditure on Special Forms of Trading (SFT) (i.e. Internet shopping and market stalls). The proportion of expenditure on SFT in 2010 is derived from the telephone survey of households and varies between the different zones, ranging from 0.0% of expenditure in Zone 3 to 3.3% of expenditure in Zone 5. For each of the forecast years, we have assumed a proportion of expenditure spent on SFT in each zone based on the projections provided by Experian in Appendix 3 of its Retail Planner Briefing Note 8.1 (August 2010), although we have halved Experian's projections, for the reasons set out in Section 3 of our main report. Therefore, we have assumed that the proportion of expenditure spent on SFT in each zone will be 4.8% in 2016, 5.1% in 2021 and 5.4% in 2026

All monetary values are held constant at 2008 prices.

Spreadsheet 14 - Convenience Goods Spending Patterns in 2010 as a Percentage Across the Catchment Area Zones

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
	%	%	%	%	%	%	%	%
Inside Catchment Area								
Zone 1								
Tesco, Whitford Street, Holywell Town Centre	37.88	1.42	2.10	2.14	0.48	0.16	0.00	0.00
Lidl, Coleshill Street, Holywell Town Centre	6.21	0.48	0.00	0.00	0.00	0.00	0.00	0.00
Iceland, High Street, Holywell Town Centre	6.25	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Co-op, North Road, Holywell Town Centre	3.26	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other, Holywell Town Centre	2.63	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other, Zone 1	1.94	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Zone 1	***58.18***	***1.91***	***2.10***	***2.14***	***0.48***	***0.16***	***0.00***	***0.00***
Zone 2								
Spar, Mercia Drive, Mynydd Isa	0.00	2.78	0.00	0.00	0.00	0.00	0.00	0.00
Other, Zone 2	0.00	0.31	0.00	0.00	0.00	0.00	0.07	0.00
Total Zone 2	***0.00***	***3.09***	***0.00***	***0.00***	***0.00***	***0.00***	***0.07***	***0.00***
Zone 3								
Sainsbury's, Flintshire Retail Park, Flint Town Centre	8.60	2.33	35.00	1.71	0.00	0.16	1.00	0.00
Iceland, Church Street, Flint Town Centre	0.41	0.00	12.63	0.00	0.00	0.00	0.00	0.00
Aldi, Chester Street, Flint Town Centre	1.62	0.00	6.93	0.00	0.00	0.00	1.27	0.00
Netto, Flintshire Retail Park, Flint Town Centre	1.35	0.95	6.48	0.00	0.00	0.00	0.38	0.00
Co-op, Chester Road, Flint Town Centre	0.53	0.00	2.66	0.00	0.00	0.00	0.00	0.00
Farmfoods, Flintshire Retail Park, Flint Town Centre	0.57	0.42	1.67	0.00	0.00	0.00	0.00	0.00
Other, Flint Town Centre	0.26	0.68	10.89	0.00	0.19	0.16	0.53	0.08
Other, Zone 3	0.00	0.00	0.00	0.29	0.00	0.00	0.00	0.00
Total Zone 3	***13.34***	***4.37***	***76.25***	***1.99***	***0.19***	***0.32***	***3.18***	***0.08***
Zone 4								
Tesco, Ponterwyl, Mold Town Centre	4.88	34.90	6.82	45.72	21.72	14.38	1.62	2.00
Aldi, Chester Street, Mold Town Centre	0.00	6.78	0.00	7.80	4.16	3.25	0.19	0.17
Co-op, Ambrose Lloyd Centre, Mold Town Centre	0.22	2.21	0.00	12.44	4.83	0.00	0.00	0.00
Iceland, New Street, Mold Town Centre	0.53	2.12	0.00	3.32	1.06	1.52	0.00	0.23
Lidl, Denbigh Road, Mold	0.00	1.85	0.00	1.59	1.16	2.50	0.00	0.00
Farmfoods, Chester Road, Mold Town Centre	0.32	1.10	0.00	0.77	1.65	1.13	0.00	0.25
Other, Mold Town Centre	0.00	5.86	0.26	7.03	2.34	0.33	0.00	0.08
Other, Zone 4	0.00	0.00	0.00	0.84	0.00	0.00	0.00	0.00
Total Zone 4	***5.94***	***54.83***	***7.07***	***79.53***	***36.91***	***23.11***	***1.82***	***2.73***
Zone 5								
Co-op, Queen Street, Leeswood	0.00	0.00	0.00	0.00	3.61	0.00	0.00	0.00
Spar, High Street, Caergwrle	0.00	0.00	0.00	0.00	2.07	0.00	0.00	0.00
Other, Zone 5	0.00	0.00	0.00	0.00	4.18	0.00	0.00	0.00
Total Zone 5	***0.00***	***0.00***	***0.00***	***0.00***	***9.86***	***0.00***	***0.00***	***0.00***
Zone 6								
Co-op, Brunswick Road, Buckley Town Centre	0.00	2.27	0.00	0.34	0.19	21.05	0.18	0.08
Spar, Brunswick Road, Buckley Town Centre	0.00	0.42	0.00	0.00	0.00	3.49	0.00	0.00
Other, Buckley Town Centre	0.00	2.14	0.00	0.39	0.00	8.17	0.00	0.75
Other, Zone 6	0.00	0.00	0.00	0.00	0.00	0.32	0.00	0.08
Total Zone 6	***0.00***	***4.83***	***0.00***	***0.72***	***0.19***	***33.04***	***0.18***	***0.91***
Zone 7								
Asda, Aston Road, Queensferry District Centre	8.23	14.93	5.95	3.55	2.81	18.18	35.66	18.51
Morrisons, Connah's Quay Shopping Centre, Ffordd Llanarth	1.83	1.89	2.84	0.67	0.49	1.57	21.23	0.31
Co-op, High Street, Connah's Quay District Centre	0.00	0.42	0.00	0.00	0.00	0.00	6.50	0.00
Iceland, Chester Road West, Shotton Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	3.83	0.00
Lidl, Deeside Retail Park, Chester Road East, Shotton	0.00	0.42	0.00	0.00	0.00	0.41	2.40	0.86
Other, Connah's Quay District Centre	0.00	0.00	0.00	0.34	0.00	0.00	2.52	0.00
Other, Shotton Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	1.83	0.00
Other, Queensferry District Centre	0.19	0.42	0.00	0.34	0.00	0.00	0.22	0.00
Other, Zone 7	0.00	0.00	0.00	0.00	0.00	0.00	3.09	0.17
Total Zone 7	***10.25***	***18.08***	***8.78***	***4.91***	***3.30***	***20.16***	***77.29***	***19.85***
Zone 8								
Tesco Extra, Broughton Shopping Park, Broughton Road, Chester	1.06	4.77	3.10	1.25	5.04	15.35	9.98	39.47
Morrisons, High Street, Saltney District Centre	0.22	1.42	0.00	0.67	3.48	4.83	0.83	13.72
Co-op, St. Davids Park, Ewloe Village Centre	0.00	0.00	0.00	0.00	0.00	1.03	0.08	2.71
Co-op, The Highway, Ewloe Village Centre	0.00	0.42	0.00	0.00	0.00	0.00	0.00	2.94
Other, Saltney District Centre	0.00	0.00	0.00	0.00	0.00	0.32	0.07	2.43
Other, Zone 8	0.00	0.42	0.00	0.00	0.00	0.00	0.24	3.56
Total Zone 8	***1.29***	***7.03***	***3.10***	***1.93***	***8.52***	***21.53***	***11.20***	***64.82***
TOTAL INSIDE CATCHMENT AREA	**88.99**	**94.15**	**97.31**	**91.22**	**59.45**	**98.32**	**93.74**	**88.39**
Inside Buffer Area								
Buffer 1								
Morrisons, Marsh Road, Rhyl Town Centre	3.05	0.00	0.44	0.34	0.00	0.00	0.19	0.00
Sainsbury's, Rhyl Road, Rhuddlan, Rhyl	1.74	0.00	0.00	0.68	0.00	0.00	0.00	0.00
Other, Buffer 1	3.33	0.00	0.44	0.34	0.00	0.00	0.15	0.56
Total Buffer 1	***8.12***	***0.00***	***0.88***	***1.36***	***0.00***	***0.00***	***0.34***	***0.56***
Buffer 2								
Other, Buffer 2	0.00	0.00	0.00	0.00	0.00	0.00	0.09	0.00
Total Buffer 2	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.09***	***0.00***
Buffer 3								
Other, Buffer 3	0.43	0.00	0.00	0.49	0.48	0.00	0.00	0.23
Total Buffer 3	***0.43***	***0.00***	***0.00***	***0.49***	***0.48***	***0.00***	***0.00***	***0.23***
Buffer 4								
Other, Buffer 4	0.00	0.00	0.00	0.78	0.97	0.00	0.00	0.00
Total Buffer 4	***0.00***	***0.00***	***0.00***	***0.78***	***0.97***	***0.00***	***0.00***	***0.00***
Buffer 5								
Sainsbury's, Plas Coch Retail Park, Wrexham	0.00	2.38	0.00	1.01	11.81	0.00	0.19	0.46
Asda, Holt Road, Eagles Meadow, Wrexham	0.00	0.47	0.44	0.34	5.72	0.00	0.15	0.54
Iceland, Dodds Lane, Gwersyllt Village Centre	0.00	0.00	0.00	0.00	3.86	0.00	0.00	0.00
Tesco Extra, Crescent Road, Wrexham	0.00	0.00	0.00	0.00	3.31	0.00	0.00	0.23
Co-op, Dodds Lane, Gwersyllt Village Centre	0.00	0.00	0.00	0.00	3.18	0.00	0.00	0.00
Lidl, Mold Road, Wrexham	0.00	0.00	0.00	0.00	3.00	0.00	0.00	0.00
Other, Wrexham Town Centre	0.09	0.00	0.00	0.68	2.56	0.00	0.00	0.33
Other, Buffer 5	0.00	0.42	0.00	0.34	2.01	0.00	0.00	0.08
Total Buffer 5	***0.09***	***3.27***	***0.44***	***2.37***	***35.44***	***0.00***	***0.34***	***1.65***
Buffer 6								
Sainsbury's, Caldy Valley Road, Boughton Heath, Chester	0.00	0.48	0.61	0.15	0.00	0.00	0.19	2.70
Marks & Spencer, Foregate Street, Chester City Centre	0.09	0.00	0.77	0.92	0.00	0.16	0.97	1.18
Tesco, Hartford Way, Sealand Road, Chester	0.00	0.20	0.00	0.00	0.00	0.32	0.72	1.22
Morrisons, Mill Lane, Upton, Chester	0.00	0.47	0.00	0.00	0.00	0.41	1.03	0.23
Other, Chester City Centre	0.31	0.00	0.00	0.00	0.38	0.00	0.27	1.12
Other, Buffer 6	0.00	0.00	0.00	0.69	0.00	0.00	0.19	0.50
Total Buffer 6	***0.40***	***1.16***	***1.38***	***1.75***	***0.38***	***0.89***	***3.37***	***6.95***
Buffer 7								
Other, Buffer 7	0.00	0.00	0.00	0.00	0.00	0.00	0.34	0.00
Total Buffer 7	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.34***	***0.00***
TOTAL INSIDE BUFFER AREA	**9.05**	**4.43**	**2.69**	**6.74**	**37.27**	**0.89**	**4.49**	**9.38**
Outside Buffer Area								
Other, Outside Buffer Area	0.43	0.47	0.00	0.34	1.34	0.00	0.64	0.23
Internet	1.53	0.95	0.00	1.70	1.94	0.79	1.13	2.00
TOTAL OUTSIDE BUFFER AREA	**1.96**	**1.42**	**0.00**	**2.04**	**3.29**	**0.79**	**1.78**	**2.22**
OVERALL TOTAL	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**

Spreadsheet 15 - Convenience Goods Spending Patterns in 2010 Across the Catchment Area Zones

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Total[1]	All Zones Market Share[2]
	£m	£m	£m	£m	£m	£m	£m	£m	£m	%
Inside Catchment Area										
Zone 1										
Tesco, Whitford Street, Holywell Town Centre	17.05	0.28	0.45	0.61	0.10	0.04	0.00	0.00	18.53	7.3%
Lidl, Coleshill Street, Holywell Town Centre	2.80	0.10	0.00	0.00	0.00	0.00	0.00	0.00	2.89	1.1%
Iceland, High Street, Holywell Town Centre	2.82	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.82	1.1%
Co-op, North Road, Holywell Town Centre	1.47	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.47	0.6%
Other, Holywell Town Centre	1.19	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.19	0.5%
Other, Zone 1	0.87	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.87	0.3%
Total Zone 1	***26.20***	***0.38***	***0.45***	***0.61***	***0.10***	***0.04***	***0.00***	***0.00***	***27.77***	***10.9%***
Zone 2										
Spar, Mercia Drive, Mynydd Isa	0.00	0.55	0.00	0.00	0.00	0.00	0.00	0.00	0.55	0.2%
Other, Zone 2	0.00	0.06	0.00	0.00	0.00	0.00	0.04	0.00	0.10	0.0%
Total Zone 2	***0.00***	***0.61***	***0.00***	***0.00***	***0.00***	***0.00***	***0.04***	***0.00***	***0.65***	***0.3%***
Zone 3										
Sainsbury's, Flintshire Retail Park, Flint Town Centre	3.87	0.46	7.48	0.48	0.00	0.04	0.52	0.00	12.85	5.1%
Iceland, Church Street, Flint Town Centre	0.18	0.00	2.70	0.00	0.00	0.00	0.00	0.00	2.88	1.1%
Aldi, Chester Street, Flint Town Centre	0.73	0.00	1.48	0.00	0.00	0.00	0.65	0.00	2.86	1.1%
Netto, Flintshire Retail Park, Flint Town Centre	0.61	0.19	1.38	0.00	0.00	0.00	0.20	0.00	2.38	0.9%
Co-op, Chester Road, Flint Town Centre	0.24	0.00	0.57	0.00	0.00	0.00	0.00	0.00	0.81	0.3%
Farmfoods, Flintshire Retail Park, Flint Town Centre	0.26	0.08	0.36	0.00	0.00	0.00	0.00	0.00	0.69	0.3%
Other, Flint Town Centre	0.12	0.13	2.33	0.00	0.04	0.04	0.27	0.04	2.96	1.2%
Other, Zone 3	0.00	0.00	0.00	0.08	0.00	0.00	0.00	0.00	0.08	0.0%
Total Zone 3	***6.01***	***0.87***	***16.29***	***0.56***	***0.04***	***0.08***	***1.65***	***0.04***	***25.52***	***10.1%***
Zone 4										
Tesco, Ponterwyl, Mold Town Centre	2.20	6.91	1.46	12.93	4.33	3.61	0.84	0.85	33.11	13.0%
Aldi, Chester Street, Mold Town Centre	0.00	1.34	0.00	2.21	0.83	0.82	0.10	0.07	5.36	2.1%
Co-op, Ambrose Lloyd Centre, Mold Town Centre	0.10	0.44	0.00	3.52	0.96	0.00	0.00	0.00	5.02	2.0%
Iceland, New Street, Mold Town Centre	0.24	0.42	0.00	0.94	0.21	0.38	0.00	0.10	2.29	0.9%
Lidl, Denbigh Road, Mold	0.00	0.37	0.00	0.45	0.23	0.63	0.00	0.00	1.67	0.7%
Farmfoods, Chester Road, Mold Town Centre	0.14	0.22	0.00	0.22	0.33	0.28	0.00	0.11	1.30	0.5%
Other, Mold Town Centre	0.00	1.16	0.05	1.99	0.47	0.08	0.00	0.04	3.79	1.5%
Other, Zone 4	0.00	0.00	0.00	0.24	0.00	0.00	0.00	0.00	0.24	0.1%
Total Zone 4	***2.68***	***10.85***	***1.51***	***22.48***	***7.35***	***5.80***	***0.94***	***1.16***	***52.77***	***20.8%***
Zone 5										
Co-op, Queen Street, Leeswood	0.00	0.00	0.00	0.00	0.72	0.00	0.00	0.00	0.72	0.3%
Spar, High Street, Caergwrle	0.00	0.00	0.00	0.00	0.41	0.00	0.00	0.00	0.41	0.2%
Other, Zone 5	0.00	0.00	0.00	0.00	0.83	0.00	0.00	0.00	0.83	0.3%
Total Zone 5	***0.00***	***0.00***	***0.00***	***0.00***	***1.97***	***0.00***	***0.00***	***0.00***	***1.97***	***0.8%***
Zone 6										
Co-op, Brunswick Road, Buckley Town Centre	0.00	0.45	0.00	0.10	0.04	5.28	0.09	0.04	5.99	2.4%
Spar, Brunswick Road, Buckley Town Centre	0.00	0.08	0.00	0.00	0.00	0.88	0.00	0.00	0.96	0.4%
Other, Buckley Town Centre	0.00	0.42	0.00	0.11	0.00	2.05	0.00	0.32	2.90	1.1%
Other, Zone 6	0.00	0.00	0.00	0.00	0.00	0.08	0.00	0.04	0.12	0.0%
Total Zone 6	***0.00***	***0.96***	***0.00***	***0.20***	***0.04***	***8.29***	***0.09***	***0.39***	***9.97***	***3.9%***
Zone 7										
Asda, Aston Road, Queensferry District Centre	3.71	2.96	1.27	1.00	0.56	4.56	18.46	7.88	40.39	15.9%
Morrisons, Connah's Quay Shopping Centre, Ffordd Llanarth	0.82	0.38	0.61	0.19	0.10	0.39	10.99	0.13	13.61	5.4%
Co-op, High Street, Connah's Quay District Centre	0.00	0.08	0.00	0.00	0.00	0.00	3.36	0.00	3.45	1.4%
Iceland, Chester Road West, Shotton Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	1.98	0.00	1.98	0.8%
Lidl, Deeside Retail Park, Chester Road East, Shotton	0.00	0.08	0.00	0.00	0.00	0.10	1.24	0.36	1.79	0.7%
Other, Connah's Quay District Centre	0.00	0.00	0.00	0.10	0.00	0.00	1.31	0.00	1.40	0.6%
Other, Shotton Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.95	0.00	0.95	0.4%
Other, Queensferry District Centre	0.09	0.08	0.00	0.10	0.00	0.00	0.12	0.00	0.38	0.2%
Other, Zone 7	0.00	0.00	0.00	0.00	0.00	0.00	1.60	0.07	1.67	0.7%
Total Zone 7	***4.61***	***3.58***	***1.88***	***1.39***	***0.66***	***5.06***	***40.00***	***8.45***	***65.62***	***25.9%***
Zone 8										
Tesco Extra, Broughton Shopping Park, Broughton Road, Chester	0.48	0.94	0.66	0.35	1.00	3.85	5.16	16.80	29.26	11.5%
Morrisons, High Street, Saltney District Centre	0.10	0.28	0.00	0.19	0.69	1.21	0.43	5.84	8.74	3.4%
Co-op, St. Davids Park, Ewloe Village Centre	0.00	0.00	0.00	0.00	0.00	0.26	0.04	1.15	1.45	0.6%
Co-op, The Highway, Ewloe Village Centre	0.00	0.08	0.00	0.00	0.00	0.00	0.00	1.25	1.34	0.5%
Other, Saltney District Centre	0.00	0.00	0.00	0.00	0.00	0.08	0.04	1.03	1.15	0.5%
Other, Zone 8	0.00	0.08	0.00	0.00	0.00	0.00	0.13	1.52	1.72	0.7%
Total Zone 8	***0.58***	***1.39***	***0.66***	***0.55***	***1.70***	***5.40***	***5.79***	***27.59***	***43.66***	***17.2%***
TOTAL INSIDE CATCHMENT AREA	**40.07**	**18.64**	**20.78**	**25.79**	**11.85**	**24.66**	**48.52**	**37.62**	**227.92**	**89.8%**
Inside Buffer Area										
Buffer 1										
Morrisons, Marsh Road, Rhyl Town Centre	1.38	0.00	0.09	0.10	0.00	0.00	0.10	0.00	1.66	0.7%
Sainsbury's, Rhyl Road, Rhuddlan, Rhyl	0.78	0.00	0.00	0.19	0.00	0.00	0.00	0.00	0.98	0.4%
Other, Buffer 1	1.50	0.00	0.09	0.10	0.00	0.00	0.08	0.24	2.00	0.8%
Total Buffer 1	***3.66***	***0.00***	***0.19***	***0.38***	***0.00***	***0.00***	***0.18***	***0.24***	***4.64***	***1.8%***
Buffer 2										
Other, Buffer 2	0.00	0.00	0.00	0.00	0.00	0.00	0.05	0.00	0.05	0.0%
Total Buffer 2	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.05***	***0.00***	***0.05***	***0.0%***
Buffer 3										
Other, Buffer 3	0.20	0.00	0.00	0.14	0.10	0.00	0.00	0.10	0.53	0.2%
Total Buffer 3	***0.20***	***0.00***	***0.00***	***0.14***	***0.10***	***0.00***	***0.00***	***0.10***	***0.53***	***0.2%***
Buffer 4										
Other, Buffer 4	0.00	0.00	0.00	0.22	0.19	0.00	0.00	0.00	0.41	0.2%
Total Buffer 4	***0.00***	***0.00***	***0.00***	***0.22***	***0.19***	***0.00***	***0.00***	***0.00***	***0.41***	***0.2%***
Buffer 5										
Sainsbury's, Plas Coch Retail Park, Wrexham	0.00	0.47	0.00	0.29	2.35	0.00	0.10	0.20	3.41	1.3%
Asda, Holt Road, Eagles Meadow, Wrexham	0.00	0.09	0.09	0.10	1.14	0.00	0.08	0.23	1.73	0.7%
Iceland, Dodds Lane, Gwersyllt Village Centre	0.00	0.00	0.00	0.00	0.77	0.00	0.00	0.00	0.77	0.3%
Tesco Extra, Crescent Road, Wrexham	0.00	0.00	0.00	0.00	0.66	0.00	0.00	0.10	0.76	0.3%
Co-op, Dodds Lane, Gwersyllt Village Centre	0.00	0.00	0.00	0.00	0.63	0.00	0.00	0.00	0.63	0.2%
Lidl, Mold Road, Wrexham	0.00	0.00	0.00	0.00	0.60	0.00	0.00	0.00	0.60	0.2%
Other, Wrexham Town Centre	0.04	0.00	0.00	0.19	0.51	0.00	0.00	0.14	0.88	0.3%
Other, Buffer 5	0.00	0.08	0.00	0.10	0.40	0.00	0.00	0.04	0.62	0.2%
Total Buffer 5	***0.04***	***0.65***	***0.09***	***0.67***	***7.06***	***0.00***	***0.18***	***0.70***	***9.39***	***3.7%***
Buffer 6										
Sainsbury's, Caldy Valley Road, Boughton Heath, Chester	0.00	0.10	0.13	0.04	0.00	0.00	0.10	1.15	1.52	0.6%
Marks & Spencer, Foregate Street, Chester City Centre	0.04	0.00	0.17	0.26	0.00	0.04	0.50	0.50	1.51	0.6%
Tesco, Hartford Way, Sealand Road, Chester	0.00	0.04	0.00	0.00	0.00	0.08	0.37	0.52	1.01	0.4%
Morrisons, Mill Lane, Upton, Chester	0.00	0.09	0.00	0.00	0.00	0.10	0.53	0.10	0.82	0.3%
Other, Chester City Centre	0.14	0.00	0.00	0.00	0.08	0.00	0.14	0.48	0.83	0.3%
Other, Buffer 6	0.00	0.00	0.00	0.19	0.00	0.00	0.10	0.21	0.50	0.2%
Total Buffer 6	***0.18***	***0.23***	***0.29***	***0.49***	***0.08***	***0.22***	***1.74***	***2.96***	***6.20***	***2.4%***
Buffer 7										
Other, Buffer 7	0.00	0.00	0.00	0.00	0.00	0.00	0.18	0.00	0.18	0.1%
Total Buffer 7	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.00***	***0.18***	***0.00***	***0.18***	***0.1%***
TOTAL INSIDE BUFFER AREA	**4.07**	**0.88**	**0.58**	**1.91**	**7.43**	**0.22**	**2.32**	**3.99**	**21.40**	**8.4%**
Outside Buffer Area										
Other, Outside Buffer Area	0.20	0.09	0.00	0.10	0.27	0.00	0.33	0.10	1.08	0.4%
Internet	0.69	0.19	0.00	0.48	0.39	0.20	0.59	0.85	3.38	1.3%
TOTAL OUTSIDE BUFFER AREA	**0.88**	**0.28**	**0.00**	**0.58**	**0.65**	**0.20**	**0.92**	**0.95**	**4.46**	**1.8%**
OVERALL TOTAL	**45.03**	**19.79**	**21.36**	**28.27**	**19.93**	**25.08**	**51.76**	**42.56**	**253.78**	**100.0%**

NOTES:
(1) The spending patterns are calculated by multiplying the total convenience goods expenditure including SFT in 2010 (Spreadsheet 13) by the market share (Spreadsheet 14). The figures in the 'Total' column are the sum of the expenditure attracted to each centre/store from each zone.
(2) The 'All Zones Market Share' is calculated by dividing the total expenditure retained by each centre by the total expenditure in the catchment area.

All monetary values are held constant at 2008 prices.

Spreadsheet 16a - Summary of Capacity for Convenience Goods (Static Retention Rate: 89.8%)

	2010	2016	2021	2026	2010-16 Change	2010-21 Change	2010-26 Change	2016-21 Change	2021-26 Change
Catchment area expenditure retention (1)									
A. Total catchment area expenditure (including SFT) (£m)	253.8	265.1	275.6	285.3	11.3	21.8	31.5	10.5	9.6
B. Current retention level within the catchment area (%)	*89.8%*	*89.8%*	*89.8%*	*89.8%*					
C. Retained expenditure (£m) (=A*B)	227.9	238.1	247.5	256.2	10.2	19.6	28.3	9.5	8.7
Turnover of stores (2)									
D. Turnover of catchment area stores derived from catchment area (£m)	227.9	231.5	235.0	238.5					
E. Improvement in sales densities of stores in catchment area (£m)					3.5	7.0	10.6	3.5	3.5
Special Forms of Trading (3)									
F. Growth in spending on SFT (£m)	0.0	9.3	10.5	11.9	9.3	10.5	11.9	1.2	1.3
Commitments (4)									
Broughton Shopping Park Extension (Inc. Tesco Ext., M&S and Retail Parade)		4.5	4.5	4.6					
G. Turnover from commitments (£m)		4.5	4.5	4.6	4.5	4.5	4.6	0.1	0.1
H. Residual expenditure (£m) (5)	0.0	-7.2	-2.5	1.2	-7.2	-2.5	1.2	4.7	3.7
Convenience assessment (6)									
Assumed sales density (£/sq.m)	10,170	10,328	10,484	10,642					
I. Floorspace requirement (net sq.m)	0	-698	-238	114	-698	-238	114	460	352
J. Floorspace requirement (gross sq.m)	0	-1,074	-366	175	-1,074	-366	175	708	541

NOTES:
(1) Catchment area expenditure retention - this is the product of the current market share of the catchment area centres (the cumulative share of the centres within the catchment area) and the total catchment area expenditure including SFT. The market share remains constant in each of the forecast years.
(2) Turnover of stores - this is the turnover of stores within the catchment area that is derived from catchment area expenditure only. We have forecast this turnover to increase by 0.3% per annum between 2010 and 2026 to account for sales density growth (which is also included as a separate row).
(3) Special Forms of Trading - we have made an allowance for spending on special forms of trading (SFT, i.e. outdoor markets, and internet shopping) to increase year on year.
(4) Commitments - this is the turnover of commitments for new convenience floorspace in the catchment area that is derived from catchment area expenditure only.
(5) Residual expenditure - the product of the total available expenditure minus the deductions for the existing turnover of stores within the catchment area, growth in spending on SFT and commitments.
(6) Convenience assessment - the residual expenditure is converted to a convenience floorspace requirement using a sales density estimate of £10,170/sq.m at 2010, which is forecast to increase by 0.3% per annum between 2010 and 2026. 65% net to gross ratio assumed.

All monetary values are held constant at 2008 prices.

Spreadsheet 16b - Summary of Capacity for Convenience Goods (Increased Retention Rate: from 89.8% at 2010 to 92.0% by 2021)

	2010	2016	2021	2026	2010-16 Change	2010-21 Change	2010-26 Change	2016-21 Change	2021-26 Change
Catchment area expenditure retention [1]									
A. Total catchment area expenditure (including SFT) (£m)	253.8	265.1	275.6	285.3	11.3	21.8	31.5	10.5	9.6
B. Current retention level within the catchment area (%)	*89.8%*	*90.6%*	*91.3%*	*92.0%*					
C. Retained expenditure (£m) (=A*B)	227.9	240.2	251.7	262.4	12.3	23.8	34.5	11.4	10.8
Turnover of stores [2]									
D. Turnover of catchment area stores derived from catchment area (£m)	227.9	231.5	235.0	238.5					
E. Improvement in sales densities of stores in catchment area (£m)					3.5	7.0	10.6	3.5	3.5
Special Forms of Trading [3]									
F. Growth in spending on SFT (£m)	0.0	9.3	10.5	11.9	9.3	10.5	11.9	1.2	1.3
Commitments [4]									
Broughton Shopping Park Extension (Inc. Tesco Ext., M&S and Retail Parade)		4.5	4.5	4.6					
G. Turnover from commitments (£m)		4.5	4.5	4.6	4.5	4.5	4.6	0.1	0.1
H. Residual expenditure (£m) [5]	0.0	-5.0	1.7	7.5	-5.0	1.7	7.5	6.7	5.8
Convenience assessment [6]									
Assumed sales density (£/sq.m)	10,170	10,328	10,484	10,642					
I. Floorspace requirement (net sq.m)	0	-487	158	700	-487	158	700	645	543
J. Floorspace requirement (gross sq.m)	0	-750	243	1,078	-750	243	1,078	992	835

NOTES:
(1) Catchment area expenditure retention - this is the product of the current market share of the catchment area centres (the cumulative share of the centres within the catchment area) and the total catchment area expenditure including SFT. The market share increases from 89.8% at 2010 to 92.0% by 2026.
(2) Turnover of stores - this is the turnover of stores within the catchment area that is derived from catchment area expenditure only. We have forecast this turnover to increase by 0.3% per annum between 2010 and 2026 to account for sales density growth (which is also included as a separate row).
(3) Special Forms of Trading - we have made an allowance for spending on special forms of trading (SFT, i.e. outdoor markets, and internet shopping) to increase year on year.
(4) Commitments - this is the turnover of commitments for new convenience floorspace in the catchment area that is derived from catchment area expenditure only.
(5) Residual expenditure - the product of the total available expenditure minus the deductions for the existing turnover of stores within the catchment area, growth in spending on SFT and commitments.
(6) Convenience assessment - the residual expenditure is converted to a convenience floorspace requirement using a sales density estimate of £10,170/sq.m at 2010, which is forecast to increase by 0.3% per annum between 2010 and 2026. 65% net to gross ratio assumed.

All monetary values are held constant at 2008 prices.

Spreadsheet 16c - Summary of Capacity for Convenience Goods in Zone 6 (Increased Localised Retention Rate: from 33.0% at 2010 to 60.0% by 2016)

	2010	2016	2021	2026	2010-16 Change	2010-21 Change	2010-26 Change	2016-21 Change	2021-26 Change
Zone 6 expenditure retention (1)									
A. Total Zone 6 expenditure (including SFT) (£m)	25.1	26.2	27.2	28.2	1.1	2.2	3.1	1.0	1.0
B. Current localised retention level within Zone 6 (%)	*33.0%*	*60.0%*	*60.0%*	*60.0%*					
C. Retained expenditure (£m) (=A*B)	8.3	15.7	16.3	16.9	7.4	8.1	8.6	0.6	0.6
Turnover of stores (2)									
D. Turnover of Zone 6 stores derived from catchment area (£m)	8.3	8.4	8.5	8.7					
E. Improvement in sales densities of stores in Zone 6 (£m)					0.1	0.3	0.4	0.1	0.1
Special Forms of Trading (3)									
F. Growth in spending on SFT (£m)	0.0	1.1	1.2	1.3	1.1	1.2	1.3	0.1	0.1
Commitments (4)									
Broughton Retail Park Extension (Inc. Tesco Ext., M&S and Retail Parade)		0.6	0.6	0.6					
G. Turnover from commitments (£m)		0.6	0.6	0.6	0.6	0.6	0.6	0.0	0.0
H. Residual expenditure (£m) (5)	0.0	5.7	6.0	6.3	5.7	6.0	6.3	0.4	0.3

NOTES:

(1) Zone 6 expenditure retention - this is the product of the current market share of the catchment area centres (the cumulative share of the centres within the catchment area) and the total catchment area expenditure including SFT. The market share of Zone 6 increases from 33.0% at 2010 to 60.0% by 2016.

(2) Turnover of stores - this is the turnover of stores within Zone 6 that is derived from catchment area expenditure only. We have forecast this turnover to increase by 0.3% per annum between 2010 and 2026 to account for sales density growth (which is also included as a separate row).

(3) Special Forms of Trading - we have made an allowance for spending on special forms of trading (SFT, i.e. outdoor markets, and internet shopping) to increase year on year.

(4) Commitments - this is the turnover of commitments for new convenience floorspace in the catchment area that is derived from Zone 6 expenditure only.

(5) Residual expenditure - the product of the total available expenditure minus the deductions for the existing turnover of stores within Zone 6, growth in spending on SFT and commitments.

All monetary values are held constant at 2008 prices.

APPENDIX 5

Benchmark Analysis Tables

Table A5.1 Benchmark and Survey-based Comparison Goods Turnover Estimates at 2010

Centre/Retail Destination	Comparison Sales Area Floorspace (1) sq.m	Benchmark Comparison Sales Density (2) £ per sq.m	Benchmark Comparison Turnover (3) £m	Estimate of Proportion of Turnover Drawn from Catchment Area (4) %	Benchmark Comparison Turnover drawn from Catchment Area (5) £m	Survey-derived Comparison Turnover drawn from Catchment Area (6) £m	Over / Under-trading (7) £m	Over / Under-trading (8) %
Mold Town Centre	12,200	4,000	48.8	90%	43.9	41.8	-2.1	-5%
Flint Town Centre	11,070	2,620	29.0	92%	26.8	21.1	-5.6	-21%
Holywell Town Centre	3,050	3,660	11.2	85%	9.5	7.9	-1.5	-16%
Buckley Town Centre	3,790	2,350	8.9	94%	8.4	7.2	-1.1	-14%
Shotton Town Centre	3,110	2,310	7.2	95%	6.8	5.5	-1.4	-20%
Queensferry District Centre	4,710	6,360	30.0	77%	23.1	17.1	-6.0	-26%
Connah's Quay District Centre	1,510	2,590	3.9	90%	3.5	5.0	1.5	42%
Saltney District Centre	1,660	3,910	6.5	64%	4.2	1.1	-3.1	-74%
Broughton Shopping Park	20,670	5,190	107.3	70%	75.1	76.3	1.2	2%
Total	**61,770**		**252.7**		**201.2**	**183.0**	**-18.3**	**-9%**

NOTES:

(1) Comparison sales area floorspace - sales area floorspace used for the sale of comparison goods estimated from the sales area floorspace and operator survey data provided by Flintshire County Council.

(2) Benchmark comparison sales density - the average comparison sales density within each defined centre, and at Broughton Shopping Park, including comaprison floorspace in supermarkets/food superstores.

(3) Benchmark comparison turnover - the average benchmark comparison turnover of each centre, assuming company average comparison goods sales density estimates for the main foodstore operators derived from Verdict's UK Food & Grocery Retailers 2010 report and a comparison sales density for all other operators of £3,600 per sq.m in Mold, £2,300 per sq.m in all other centres; and £4,800 per sq.m in Broughton Shopping Park.

(4) Estimate of proportion of turnover drawn from catchment area - this is proportion of the total comparison turnover of each centre which is drawn from catchment area expenditure only.

(5) Our estimate of the benchmark comparison turnover drawn from the catchment area, assuming that 75 per cent of the total turnover of the main foodstores is drawn from catchment area expenditure only (excepting the Morrisons in Saltney for which we assume that 50 per cent of the turnover is drawn from the catchment area), and that 95 per cent of the total turnover of all other operators is drawn from the catchment area.

(6) The comparison turnover identified from the results of the household survey, which is derived from catchment area expenditure only.

(7) The survey derived turnover estimate minus the benchmark turnover drawn from the catchment area.

(8) The over / under-trading expressed as a percentage of the benchmark comparison turnover drawn from the catchment area.

All monetary values are held constant at 2008 prices.

Table A5.2 Benchmark and Survey-based Convenience Goods Turnover Estimates at 201(

Centre/Retail Destination	Convenience Sales Area Floorspace (1) sq.m	Benchmark Convenience Sales Density (2) £ per sq.m	Benchmark Convenience Turnover (3) £m	Estimate of Proportion of Turnover Drawn from Catchment Area (4) %	Benchmark Convenience Turnover drawn from Catchment Area (5) £m	Survey-derived Comparison Turnover drawn from Catchment Area (6) £m	Over / Under-trading (7) £m	Over / Under-trading (8) %
Mold Town Centre	5,729	8,450	48.4	78%	37.8	50.9	13.0	34%
Flint Town Centre	11,070	3,030	33.5	83%	27.8	25.4	-2.4	-9%
Holywell Town Centre	3,050	10,370	31.6	84%	26.6	26.9	0.2	1%
Buckley Town Centre	3,790	2,090	7.9	79%	6.3	9.9	3.6	58%
Shotton Town Centre	3,110	1,510	4.7	95%	4.5	2.9	-1.5	-34%
Queensferry District Centre	4,710	13,860	65.3	76%	49.3	40.8	-8.5	-17%
Connah's Quay District Centre	1,510	9,340	14.1	76%	10.7	4.8	-5.8	-55%
Saltney District Centre	1,660	19,320	32.1	53%	17.0	9.9	-7.1	-42%
Total	**34,629**		**237.7**		**180.0**	**171.5**	**-8.5**	**-5%**

NOTES:

(1) Convenience sales area floorspace - sales area floorspace used for the sale of convenience goods estimated from the sales area floorspace and operator survey data provided by Flintshire County Council.
(2) Benchmark convenience sales density - the average convenience sales density within each defined centre, and at Broughton Shopping Park.
(3) Benchmark convenience turnover - the average benchmark convenience turnover of each centre, assuming company average convenience goods sales density estimates for the main foodstore operators derived from Verdict's UK Food & Grocery Retailers 2010 report and a convenience sales density for all other operators of £2,500 per sq.m.
(4) Estimate of proportion of turnover drawn from catchment area - this is proportion of the total convenience turnover of each centre which is drawn from catchment area expenditure only.
(5) Benchmark convenience turnover drawn from catchment area - our estimate of the benchmark convenience turnover drawn from the catchment area, assuming that 75 per cent of the total turnover of the main foodstores is drawn from catchment area expenditure only (excepting the Morrisons in Saltney for which we assume that 50 per cent of the turnover is drawn from the catchment area), and that 95 per cent of the total turnover of all other operators is drawn from the catchment area.
(6) The convenience turnover identified from the results of the household survey, which is derived from catchment area expenditure only.
(7) The survey derived turnover estimate minus the benchmark turnover drawn from the catchment area.
(8) The over / under-trading expressed as a percentage of the benchmark convenience turnover drawn from the catchment area.

All monetary values are held constant at 2008 prices.