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BLACK COUNTRY CENTRES STUDY 2020

Volume 3: Quantitative Modelling

For

The Black Country Authorities Comprising:
City of Wolverhampton Council
Dudley Metropolitan Borough Council
Sandwell Metropolitan Borough Council
Walsall Council

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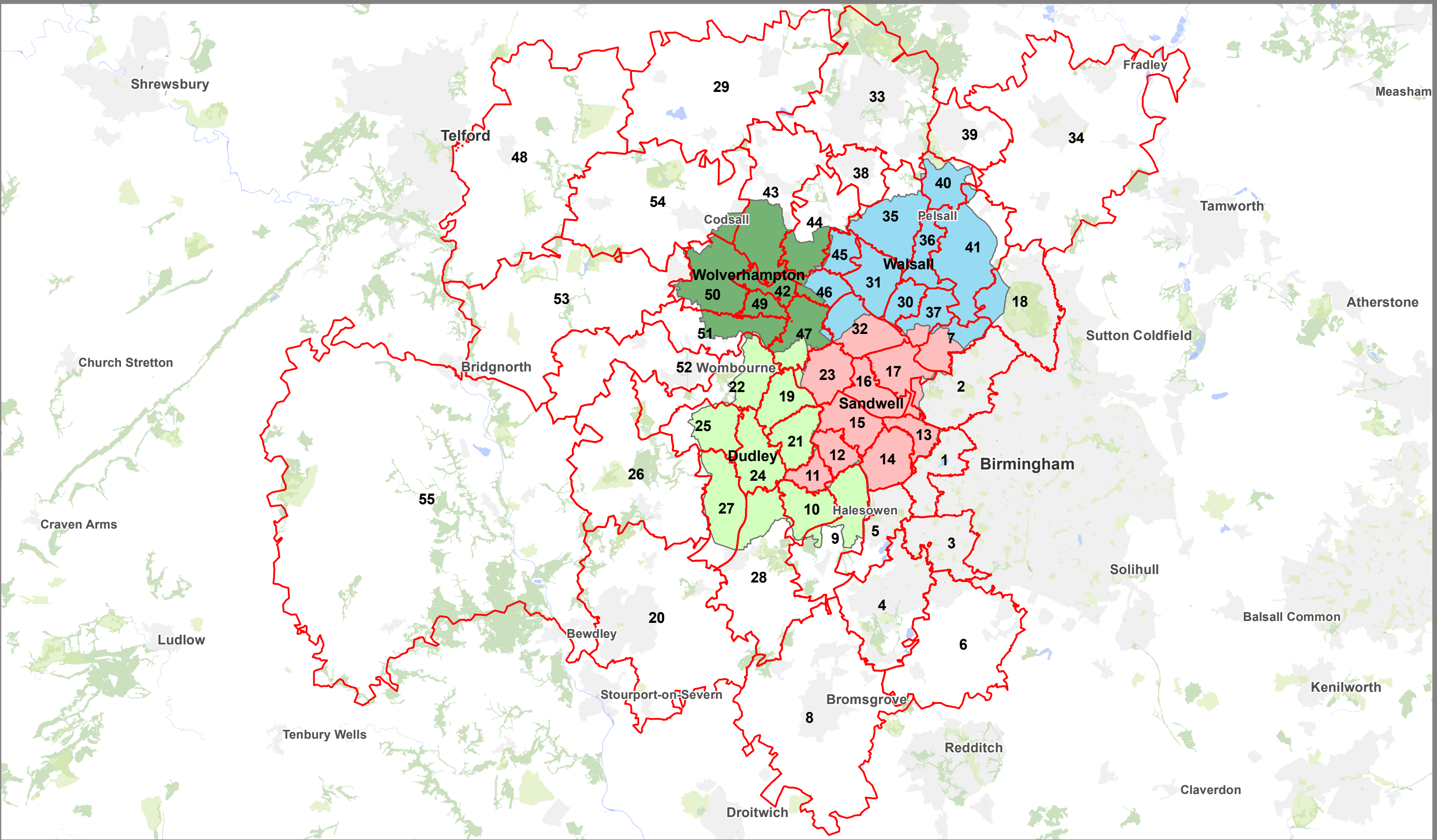
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Volume 3: Quantitative Modelling

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Appendix 1: Study Area

Black Country Zone Map



**Appendix 2: Population and Expenditure:
Convenience Goods**

TABLE 1: EXPERIAN BUSINESS STRATEGIES - BASE YEAR (2019) POPULATION & PROJECTIONS (to 2038) GROWTH 2019 to 2038 (%)

| ZONE: | 2019 | 2024 | 2029 | 2034 | 2038 | 2019-2029 | 2029-2038 | 2019-2038 |
|-------------------|------------------|------------------|------------------|------------------|------------------|-------------|-------------|-------------|
| Zone 1 | 74,963 | 78,416 | 81,293 | 83,937 | 86,163 | 8.4% | 6.0% | 14.9% |
| Zone 2 | 134,340 | 139,039 | 143,617 | 147,896 | 151,349 | 6.9% | 5.4% | 12.7% |
| Zone 3 | 76,305 | 78,505 | 81,204 | 83,316 | 84,782 | 6.4% | 4.4% | 11.1% |
| Zone 4 | 92,302 | 95,139 | 97,910 | 100,529 | 102,539 | 6.1% | 4.7% | 11.1% |
| Zone 5 | 41,050 | 42,319 | 43,566 | 44,693 | 45,667 | 6.1% | 4.8% | 11.2% |
| Zone 6 | 38,326 | 39,375 | 40,566 | 41,540 | 42,302 | 5.8% | 4.3% | 10.4% |
| Zone 7 | 30,464 | 31,204 | 31,932 | 32,547 | 33,041 | 4.8% | 3.5% | 8.5% |
| Zone 8 | 55,264 | 57,020 | 58,716 | 60,443 | 61,773 | 6.2% | 5.2% | 11.8% |
| Zone 9 | 24,903 | 25,208 | 25,447 | 25,675 | 25,907 | 2.2% | 1.8% | 4.0% |
| Zone 10 | 37,741 | 38,153 | 38,547 | 38,898 | 39,321 | 2.1% | 2.0% | 4.2% |
| Zone 11 | 17,940 | 18,522 | 19,054 | 19,537 | 19,919 | 6.2% | 4.5% | 11.0% |
| Zone 12 | 24,987 | 25,752 | 26,542 | 27,258 | 27,863 | 6.2% | 5.0% | 11.5% |
| Zone 13 | 24,909 | 26,201 | 27,511 | 28,819 | 29,934 | 10.4% | 8.8% | 20.2% |
| Zone 14 | 64,497 | 66,691 | 68,551 | 70,505 | 72,060 | 6.3% | 5.1% | 11.7% |
| Zone 15 | 31,297 | 32,675 | 33,965 | 35,161 | 36,153 | 8.5% | 6.4% | 15.5% |
| Zone 16 | 31,696 | 33,028 | 34,308 | 35,535 | 36,479 | 8.2% | 6.3% | 15.1% |
| Zone 17 | 32,812 | 34,091 | 35,182 | 36,152 | 36,908 | 7.2% | 4.9% | 12.5% |
| Zone 18 | 57,596 | 58,714 | 59,859 | 60,953 | 61,690 | 3.9% | 3.1% | 7.1% |
| Zone 19 | 34,575 | 35,256 | 36,021 | 36,876 | 37,635 | 4.2% | 4.5% | 8.8% |
| Zone 20 | 70,130 | 71,286 | 72,269 | 73,160 | 73,862 | 3.1% | 2.2% | 5.3% |
| Zone 21 | 36,325 | 37,129 | 37,843 | 38,737 | 39,473 | 4.2% | 4.3% | 8.7% |
| Zone 22 | 35,743 | 36,242 | 36,686 | 36,942 | 37,139 | 2.6% | 1.2% | 3.9% |
| Zone 23 | 46,972 | 48,930 | 50,753 | 52,615 | 54,157 | 8.0% | 6.7% | 15.3% |
| Zone 24 | 44,696 | 45,547 | 46,395 | 47,412 | 48,226 | 3.8% | 3.9% | 7.9% |
| Zone 25 | 29,312 | 29,672 | 29,967 | 30,115 | 30,217 | 2.2% | 0.8% | 3.1% |
| Zone 26 | 8,391 | 8,473 | 8,532 | 8,583 | 8,592 | 1.7% | 0.7% | 2.4% |
| Zone 27 | 52,215 | 52,815 | 53,389 | 53,838 | 54,139 | 2.2% | 1.4% | 3.7% |
| Zone 28 | 31,629 | 32,243 | 32,764 | 33,223 | 33,602 | 3.6% | 2.6% | 6.2% |
| Zone 29 | 15,615 | 15,879 | 16,103 | 16,250 | 16,329 | 3.1% | 1.4% | 4.6% |
| Zone 30 | 28,204 | 29,366 | 30,576 | 31,850 | 32,926 | 8.4% | 7.7% | 16.7% |
| Zone 31 | 42,212 | 43,878 | 45,362 | 46,950 | 48,326 | 7.5% | 6.5% | 14.5% |
| Zone 32 | 50,248 | 52,289 | 54,197 | 56,054 | 57,608 | 7.9% | 6.3% | 14.6% |
| Zone 33 | 81,936 | 83,274 | 84,419 | 85,519 | 86,363 | 3.0% | 2.3% | 5.4% |
| Zone 34 | 46,387 | 47,308 | 48,117 | 48,843 | 49,423 | 3.7% | 2.7% | 6.5% |
| Zone 35 | 53,902 | 55,323 | 56,606 | 57,742 | 58,681 | 5.0% | 3.7% | 8.9% |
| Zone 36 | 18,016 | 18,448 | 18,788 | 19,095 | 19,343 | 4.3% | 3.0% | 7.4% |
| Zone 37 | 22,160 | 22,840 | 23,440 | 23,984 | 24,381 | 5.8% | 4.0% | 10.0% |
| Zone 38 | 18,953 | 19,259 | 19,568 | 19,901 | 20,140 | 3.2% | 2.9% | 6.3% |
| Zone 39 | 30,899 | 31,567 | 32,114 | 32,586 | 33,020 | 3.9% | 2.8% | 6.9% |
| Zone 40 | 16,849 | 17,212 | 17,600 | 17,913 | 18,155 | 4.5% | 3.2% | 7.8% |
| Zone 41 | 27,573 | 27,990 | 28,388 | 28,762 | 29,043 | 3.0% | 2.3% | 5.3% |
| Zone 42 | 17,569 | 18,161 | 18,795 | 19,441 | 19,940 | 7.0% | 6.1% | 13.5% |
| Zone 43 | 62,665 | 64,560 | 66,472 | 68,338 | 69,968 | 6.1% | 5.3% | 11.7% |
| Zone 44 | 36,714 | 37,436 | 38,160 | 38,845 | 39,331 | 3.9% | 3.1% | 7.1% |
| Zone 45 | 26,653 | 27,402 | 28,122 | 28,688 | 29,215 | 5.5% | 3.9% | 9.6% |
| Zone 46 | 22,636 | 23,429 | 24,145 | 24,843 | 25,423 | 6.7% | 5.3% | 12.3% |
| Zone 47 | 50,231 | 51,431 | 52,632 | 53,757 | 54,727 | 4.8% | 4.0% | 9.0% |
| Zone 48 | 10,910 | 11,153 | 11,352 | 11,496 | 11,580 | 4.1% | 2.0% | 6.1% |
| Zone 49 | 18,044 | 18,684 | 19,313 | 19,968 | 20,477 | 7.0% | 6.0% | 13.5% |
| Zone 50 | 64,204 | 65,679 | 67,215 | 68,605 | 69,619 | 4.7% | 3.6% | 8.4% |
| Zone 51 | 35,524 | 36,490 | 37,192 | 37,885 | 38,521 | 4.7% | 3.6% | 8.4% |
| Zone 52 | 16,357 | 16,555 | 16,777 | 16,973 | 17,103 | 2.6% | 1.9% | 4.6% |
| Zone 53 | 18,219 | 18,656 | 19,060 | 19,401 | 19,717 | 4.6% | 3.4% | 8.2% |
| Zone 54 | 30,805 | 31,375 | 31,919 | 32,340 | 32,652 | 3.6% | 2.3% | 6.0% |
| Zone 55 | 27,997 | 28,635 | 29,063 | 29,334 | 29,530 | 3.8% | 1.6% | 5.5% |
| Study Area | 2,172,862 | 2,231,924 | 2,287,884 | 2,340,258 | 2,382,434 | 5.3% | 4.1% | 9.6% |

Source: EXPERIAN BUSINESS STRATEGIES

Notes: The base year (2019) population figures have been sourced directly from Experian's 'Retail Area Planner' Reports for each study zone using LSH's (Experian-based) MMG3 Geographic Information System (GIS). The base year figures are based on ONS (mid-year) population figures. The projections for zones are derived from Experian's revised 'demographic component model'; these projections take into account mid-year age and gender estimates and project the population forward year-on-year based on Government population projections for local authority areas in England. The yearly components of population change that are taken into account are the birth rate (0-4 age band), ageing, net migration, death rates, etc. The 2038 population figure is based on growth trends between 2019 and 2037.

TABLE 2: REVISED CONVENIENCE GOODS EXPENDITURE PER CAPITA FORECASTS (excluding SFT)

| | 2019 | 2019 | 2024 | 2029 | 2034 | 2038 |
|--|---------------|------------------------------------|---------------|---------------|---------------|---------------|
| | (incl SFT) | EXCLUDING SPECIAL FORMS OF TRADING | | | | |
| | | 4.0% | 4.9% | 5.4% | 5.7% | 5.9% |
| EXPERIAN - SPECIAL FORMS OF TRADING (%): | | 1.8% | 2.2% | 2.4% | 2.6% | 2.7% |
| REVISED SPECIAL FORMS OF TRADING (%): | | | | | | |
| Zone 1 | £1,902 | £1,868 | £1,869 | £1,874 | £1,881 | £1,887 |
| Zone 2 | £1,841 | £1,808 | £1,810 | £1,815 | £1,821 | £1,827 |
| Zone 3 | £2,126 | £2,088 | £2,090 | £2,095 | £2,103 | £2,109 |
| Zone 4 | £2,014 | £1,978 | £1,979 | £1,985 | £1,992 | £1,998 |
| Zone 5 | £1,921 | £1,887 | £1,888 | £1,893 | £1,900 | £1,906 |
| Zone 6 | £2,189 | £2,150 | £2,152 | £2,157 | £2,165 | £2,172 |
| Zone 7 | £2,202 | £2,163 | £2,165 | £2,170 | £2,178 | £2,185 |
| Zone 8 | £2,230 | £2,190 | £2,192 | £2,198 | £2,206 | £2,213 |
| Zone 9 | £2,270 | £2,229 | £2,231 | £2,237 | £2,245 | £2,252 |
| Zone 10 | £2,136 | £2,097 | £2,099 | £2,105 | £2,112 | £2,119 |
| Zone 11 | £1,981 | £1,945 | £1,947 | £1,952 | £1,959 | £1,965 |
| Zone 12 | £2,052 | £2,015 | £2,017 | £2,022 | £2,029 | £2,035 |
| Zone 13 | £1,631 | £1,602 | £1,603 | £1,607 | £1,613 | £1,618 |
| Zone 14 | £1,968 | £1,932 | £1,934 | £1,939 | £1,946 | £1,952 |
| Zone 15 | £1,982 | £1,946 | £1,948 | £1,953 | £1,960 | £1,966 |
| Zone 16 | £1,840 | £1,806 | £1,808 | £1,813 | £1,819 | £1,825 |
| Zone 17 | £1,983 | £1,948 | £1,949 | £1,955 | £1,962 | £1,968 |
| Zone 18 | £2,463 | £2,419 | £2,421 | £2,428 | £2,436 | £2,444 |
| Zone 19 | £1,978 | £1,943 | £1,944 | £1,950 | £1,957 | £1,963 |
| Zone 20 | £2,258 | £2,217 | £2,219 | £2,225 | £2,233 | £2,240 |
| Zone 21 | £1,913 | £1,878 | £1,880 | £1,885 | £1,892 | £1,897 |
| Zone 22 | £2,207 | £2,167 | £2,169 | £2,175 | £2,183 | £2,189 |
| Zone 23 | £1,891 | £1,857 | £1,859 | £1,864 | £1,870 | £1,876 |
| Zone 24 | £2,030 | £1,994 | £1,995 | £2,001 | £2,008 | £2,014 |
| Zone 25 | £2,319 | £2,278 | £2,279 | £2,286 | £2,294 | £2,301 |
| Zone 26 | £2,591 | £2,545 | £2,547 | £2,554 | £2,563 | £2,571 |
| Zone 27 | £2,215 | £2,176 | £2,177 | £2,183 | £2,191 | £2,198 |
| Zone 28 | £2,264 | £2,223 | £2,225 | £2,231 | £2,239 | £2,246 |
| Zone 29 | £2,448 | £2,404 | £2,406 | £2,412 | £2,421 | £2,429 |
| Zone 30 | £1,822 | £1,789 | £1,790 | £1,795 | £1,802 | £1,807 |
| Zone 31 | £1,797 | £1,764 | £1,766 | £1,771 | £1,777 | £1,782 |
| Zone 32 | £1,900 | £1,866 | £1,868 | £1,873 | £1,879 | £1,885 |
| Zone 33 | £2,182 | £2,143 | £2,145 | £2,150 | £2,158 | £2,165 |
| Zone 34 | £2,299 | £2,258 | £2,260 | £2,266 | £2,274 | £2,281 |
| Zone 35 | £1,966 | £1,931 | £1,932 | £1,938 | £1,945 | £1,951 |
| Zone 36 | £2,154 | £2,115 | £2,117 | £2,123 | £2,130 | £2,137 |
| Zone 37 | £2,212 | £2,172 | £2,174 | £2,180 | £2,188 | £2,195 |
| Zone 38 | £2,150 | £2,111 | £2,113 | £2,119 | £2,127 | £2,133 |
| Zone 39 | £2,186 | £2,146 | £2,148 | £2,154 | £2,162 | £2,168 |
| Zone 40 | £2,109 | £2,071 | £2,073 | £2,079 | £2,086 | £2,093 |
| Zone 41 | £2,252 | £2,212 | £2,214 | £2,220 | £2,228 | £2,235 |
| Zone 42 | £1,856 | £1,822 | £1,824 | £1,829 | £1,835 | £1,841 |
| Zone 43 | £1,909 | £1,874 | £1,876 | £1,881 | £1,888 | £1,894 |
| Zone 44 | £2,075 | £2,037 | £2,039 | £2,045 | £2,052 | £2,058 |
| Zone 45 | £2,135 | £2,096 | £2,098 | £2,104 | £2,112 | £2,118 |
| Zone 46 | £1,937 | £1,902 | £1,904 | £1,909 | £1,916 | £1,922 |
| Zone 47 | £1,954 | £1,919 | £1,921 | £1,926 | £1,933 | £1,939 |
| Zone 48 | £2,643 | £2,595 | £2,597 | £2,604 | £2,614 | £2,622 |
| Zone 49 | £1,779 | £1,747 | £1,749 | £1,754 | £1,760 | £1,765 |
| Zone 50 | £2,097 | £2,059 | £2,061 | £2,066 | £2,074 | £2,080 |
| Zone 51 | £2,121 | £2,083 | £2,085 | £2,091 | £2,098 | £2,105 |
| Zone 52 | £2,326 | £2,284 | £2,286 | £2,292 | £2,300 | £2,307 |
| Zone 53 | £2,330 | £2,288 | £2,290 | £2,297 | £2,305 | £2,312 |
| Zone 54 | £2,209 | £2,169 | £2,171 | £2,177 | £2,185 | £2,191 |
| Zone 55 | £2,569 | £2,522 | £2,524 | £2,531 | £2,540 | £2,548 |
| STUDY AREA AVERAGE: | £2,106 | £2,068 | £2,070 | £2,075 | £2,083 | £2,089 |

Source: Average spend per capita estimates (2017 prices) are derived from Experian 'Retail Area Planner' Reports using the MMG3 GIS and the year-on-year expenditure growth forecasts have been informed by the latest Retail Planner Briefing Note 16 published by Experian Business Strategies (December 2018).

Notes: An allowance has been made for the market share of retail expenditure per capita on non-store sales (SFT - including mail order and Internet shopping) at the base year informed by the household survey-derived market shares for SFT. Forecast growth in SFT is based on the year-on-year forecasts published by Experian Business Strategies in the most recent Retail Planner Briefing Note 16 (December 2018).

TABLE 3: TOTAL AVAILABLE CONVENIENCE GOODS EXPENDITURE, BASE YEAR (2019) TO 2038 (£m) GROWTH 2019 to 2038 (%)

| | 2019 | 2019 | 2024 | 2029 | 2034 | 2038 | 2019- | 2029- | 2019- |
|--------------------|----------------|------------------------------------|----------------|----------------|----------------|----------------|-------------|-------------|--------------|
| | (incl SFT) | EXCLUDING SPECIAL FORMS OF TRADING | | | | | 2029 | 2038 | 2038 |
| Zone 1 | 142.6 | 140.0 | 146.6 | 152.4 | 157.9 | 162.6 | 8.8% | 6.7% | 16.1% |
| Zone 2 | 247.4 | 242.9 | 251.6 | 260.6 | 269.4 | 276.5 | 7.3% | 6.1% | 13.8% |
| Zone 3 | 162.2 | 159.3 | 164.1 | 170.2 | 175.2 | 178.8 | 6.8% | 5.1% | 12.3% |
| Zone 4 | 185.9 | 182.6 | 188.3 | 194.3 | 200.3 | 204.9 | 6.5% | 5.4% | 12.2% |
| Zone 5 | 78.9 | 77.4 | 79.9 | 82.5 | 84.9 | 87.0 | 6.5% | 5.5% | 12.4% |
| Zone 6 | 83.9 | 82.4 | 84.7 | 87.5 | 89.9 | 91.9 | 6.2% | 5.0% | 11.5% |
| Zone 7 | 67.1 | 65.9 | 67.5 | 69.3 | 70.9 | 72.2 | 5.2% | 4.2% | 9.6% |
| Zone 8 | 123.3 | 121.0 | 125.0 | 129.1 | 133.3 | 136.7 | 6.6% | 5.9% | 12.9% |
| Zone 9 | 56.5 | 55.5 | 56.2 | 56.9 | 57.6 | 58.3 | 2.5% | 2.5% | 5.1% |
| Zone 10 | 80.6 | 79.1 | 80.1 | 81.1 | 82.2 | 83.3 | 2.5% | 2.7% | 5.3% |
| Zone 11 | 35.5 | 34.9 | 36.1 | 37.2 | 38.3 | 39.1 | 6.6% | 5.2% | 12.2% |
| Zone 12 | 51.3 | 50.3 | 51.9 | 53.7 | 55.3 | 56.7 | 6.6% | 5.7% | 12.7% |
| Zone 13 | 40.6 | 39.9 | 42.0 | 44.2 | 46.5 | 48.4 | 10.8% | 9.5% | 21.4% |
| Zone 14 | 126.9 | 124.6 | 129.0 | 132.9 | 137.2 | 140.7 | 6.7% | 5.8% | 12.9% |
| Zone 15 | 62.0 | 60.9 | 63.6 | 66.3 | 68.9 | 71.1 | 8.9% | 7.2% | 16.7% |
| Zone 16 | 58.3 | 57.3 | 59.7 | 62.2 | 64.7 | 66.6 | 8.6% | 7.0% | 16.3% |
| Zone 17 | 65.1 | 63.9 | 66.5 | 68.8 | 70.9 | 72.6 | 7.6% | 5.6% | 13.6% |
| Zone 18 | 141.9 | 139.3 | 142.1 | 145.3 | 148.5 | 150.8 | 4.3% | 3.7% | 8.2% |
| Zone 19 | 68.4 | 67.2 | 68.6 | 70.2 | 72.2 | 73.9 | 4.6% | 5.2% | 10.0% |
| Zone 20 | 158.3 | 155.5 | 158.2 | 160.8 | 163.4 | 165.5 | 3.4% | 2.9% | 6.4% |
| Zone 21 | 69.5 | 68.2 | 69.8 | 71.3 | 73.3 | 74.9 | 4.5% | 5.0% | 9.8% |
| Zone 22 | 78.9 | 77.5 | 78.6 | 79.8 | 80.6 | 81.3 | 3.0% | 1.9% | 5.0% |
| Zone 23 | 88.8 | 87.2 | 90.9 | 94.6 | 98.4 | 101.6 | 8.4% | 7.4% | 16.5% |
| Zone 24 | 90.7 | 89.1 | 90.9 | 92.8 | 95.2 | 97.1 | 4.2% | 4.6% | 9.0% |
| Zone 25 | 68.0 | 66.8 | 67.6 | 68.5 | 69.1 | 69.5 | 2.6% | 1.5% | 4.1% |
| Zone 26 | 21.7 | 21.4 | 21.6 | 21.8 | 22.0 | 22.1 | 2.0% | 1.4% | 3.4% |
| Zone 27 | 115.7 | 113.6 | 115.0 | 116.6 | 118.0 | 119.0 | 2.6% | 2.1% | 4.8% |
| Zone 28 | 71.6 | 70.3 | 71.8 | 73.1 | 74.4 | 75.5 | 4.0% | 3.2% | 7.3% |
| Zone 29 | 38.2 | 37.5 | 38.2 | 38.8 | 39.3 | 39.7 | 3.5% | 2.1% | 5.7% |
| Zone 30 | 51.4 | 50.5 | 52.6 | 54.9 | 57.4 | 59.5 | 8.8% | 8.4% | 17.9% |
| Zone 31 | 75.8 | 74.5 | 77.5 | 80.3 | 83.4 | 86.1 | 7.8% | 7.2% | 15.7% |
| Zone 32 | 95.5 | 93.8 | 97.7 | 101.5 | 105.4 | 108.6 | 8.2% | 7.0% | 15.8% |
| Zone 33 | 178.8 | 175.6 | 178.6 | 181.5 | 184.6 | 187.0 | 3.4% | 3.0% | 6.5% |
| Zone 34 | 106.7 | 104.7 | 106.9 | 109.0 | 111.1 | 112.7 | 4.1% | 3.4% | 7.6% |
| Zone 35 | 106.0 | 104.1 | 106.9 | 109.7 | 112.3 | 114.5 | 5.4% | 4.4% | 10.0% |
| Zone 36 | 38.8 | 38.1 | 39.1 | 39.9 | 40.7 | 41.3 | 4.7% | 3.6% | 8.5% |
| Zone 37 | 49.0 | 48.1 | 49.7 | 51.1 | 52.5 | 53.5 | 6.2% | 4.7% | 11.2% |
| Zone 38 | 40.8 | 40.0 | 40.7 | 41.5 | 42.3 | 43.0 | 3.6% | 3.6% | 7.4% |
| Zone 39 | 67.5 | 66.3 | 67.8 | 69.2 | 70.4 | 71.6 | 4.3% | 3.5% | 8.0% |
| Zone 40 | 35.5 | 34.9 | 35.7 | 36.6 | 37.4 | 38.0 | 4.8% | 3.8% | 8.9% |
| Zone 41 | 62.1 | 61.0 | 62.0 | 63.0 | 64.1 | 64.9 | 3.3% | 3.0% | 6.4% |
| Zone 42 | 32.6 | 32.0 | 33.1 | 34.4 | 35.7 | 36.7 | 7.4% | 6.8% | 14.7% |
| Zone 43 | 119.6 | 117.5 | 121.1 | 125.0 | 129.0 | 132.5 | 6.5% | 6.0% | 12.8% |
| Zone 44 | 76.2 | 74.8 | 76.3 | 78.0 | 79.7 | 81.0 | 4.3% | 3.8% | 8.2% |
| Zone 45 | 56.9 | 55.9 | 57.5 | 59.2 | 60.6 | 61.9 | 5.9% | 4.6% | 10.7% |
| Zone 46 | 43.8 | 43.1 | 44.6 | 46.1 | 47.6 | 48.9 | 7.0% | 6.0% | 13.5% |
| Zone 47 | 98.2 | 96.4 | 98.8 | 101.4 | 103.9 | 106.1 | 5.2% | 4.7% | 10.1% |
| Zone 48 | 28.8 | 28.3 | 29.0 | 29.6 | 30.0 | 30.4 | 4.4% | 2.7% | 7.2% |
| Zone 49 | 32.1 | 31.5 | 32.7 | 33.9 | 35.1 | 36.1 | 7.4% | 6.7% | 14.7% |
| Zone 50 | 134.6 | 132.2 | 135.4 | 138.9 | 142.3 | 144.8 | 5.1% | 4.3% | 9.5% |
| Zone 51 | 75.4 | 74.0 | 76.1 | 77.8 | 79.5 | 81.1 | 5.1% | 4.3% | 9.6% |
| Zone 52 | 38.0 | 37.4 | 37.8 | 38.5 | 39.0 | 39.5 | 2.9% | 2.6% | 5.6% |
| Zone 53 | 42.5 | 41.7 | 42.7 | 43.8 | 44.7 | 45.6 | 5.0% | 4.1% | 9.3% |
| Zone 54 | 68.0 | 66.8 | 68.1 | 69.5 | 70.7 | 71.6 | 4.0% | 3.0% | 7.1% |
| Zone 55 | 71.9 | 70.6 | 72.3 | 73.6 | 74.5 | 75.2 | 4.2% | 2.3% | 6.6% |
| STUDY AREA: | 4,506.5 | 4,425.3 | 4,546.6 | 4,670.4 | 4,791.6 | 4,890.2 | 5.5% | 4.7% | 10.5% |

**Appendix 3: Convenience Goods Market Shares
(including SFT)**

TABLE 6: OTHER TOP UP FOOD PURCHASES - 2018 MARKET SHARE ANALYSIS (%)
Including In-store Shoppers and other Special Forms of Trading

Table with columns: LOCAL PLANNING AUTHORITY, CENTRE TYPE, Zone 1-30, and CORE ZONES. Rows are categorized by Local Planning Authority: Wolverhampton, Dudley, Sandwell, Walsall, and All Other Centres Outside BCLA Area. Each row lists a centre and provides market share percentages for 30 zones and core zones. Includes a GRAND TOTAL row at the bottom.

**Appendix 4: Convenience Goods Turnover
(excluding SFT)**

**Appendix 5A: Convenience Goods Capacity:
City of Wolverhampton**

TABLE 1: REVISED FORECAST CONVENIENCE GOODS TURNOVER (£m) - ALLOW FOR INFLOW FROM OUTSIDE STUDY AREA

| LPA | CENTRE TYPE | | Estimated 'Inflow' from Outside Study Area | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|--------------------------|---------------|--|---------------|---------------|---------------|---------------|---------------|
| Wolverhampton | | | | | | | | |
| | Strategic Centre | Wolverhampton | 0% | £142.9 | £146.8 | £150.8 | £154.7 | £157.9 |
| | Town Centre | Bilston | 0% | £73.9 | £75.9 | £78.0 | £80.0 | £81.6 |
| | | Wednesfield | 0% | £4.6 | £4.7 | £4.8 | £5.0 | £5.1 |
| | District & Local Centres | | 0% | £128.7 | £132.2 | £135.8 | £139.3 | £142.2 |
| | Out-of-Centre | | 0% | £237.4 | £243.9 | £250.6 | £257.1 | £262.4 |
| City of Wolverhampton Council Area | | | | £587.5 | £603.6 | £620.0 | £636.1 | £649.2 |

TABLE 2: COMMITTED CONVENIENCE FLOORSPACE

| CENTRE | PLANNING REF | SCHEME | Gross Floorspace (sq m) | Net Floorspace (sq m) | Sales Density 2019 (£ per sqm) | Turnover (£m) | | | | |
|--|----------------|---|-------------------------|-----------------------|--------------------------------|---------------|--------------|--------------|--------------|--------------|
| | | | | | | 2019 | 2024 | 2029 | 2034 | 2038 |
| [1] Wolverhampton - City Centre | 17/01102/OUT | Westside Leisure - Outline application for leisure (Class D2), food and drink (Class A3), hotel (Class C1), retail (Class A1), drinking establishments (Class A4), multi-storey car park and public realm Land At Salop Street/Peel Street/Pitt Street/School Street And Ring Road St Marks Wolverhampton | 14,392 | 651 | 10,000 | £6.5 | £6.6 | £6.8 | £6.9 | £7.0 |
| [2] Wolverhampton - Edge-of-City Centre | 16/00598/PAOTH | Interchange: Railway Station - Wolverhampton Railway Station Railway Drive City Centre Wolverhampton West Midlands WV1 1LE | 825 | 144 | 10,000 | £1.4 | £1.5 | £1.5 | £1.5 | £1.6 |
| [3] Blakenhall District Centre (Dudley Road) | 18/00132/FUL | Community Centre: Proposed part change of use from industrial building to form 4 Retail units. | 314 | 110 | 2,000 | £0.2 | £0.2 | £0.2 | £0.2 | £0.2 |
| [4] Wolverhampton - Out-of-Centre | 13/00871/FUL | Pountney Street, unit shops - Proposed change of use of the existing basement area to create a mixed use development | 1,098 | 384 | 5,000 | £1.9 | £2.0 | £2.0 | £2.0 | £2.1 |
| [5] Wolverhampton - Out-of-Centre | 16/00678/FUL | Aldi Portobello: Land Between New Street South Street Portobello Wolverhampton West Midlands. | 1,505 | 878 | 11,000 | £9.7 | £9.9 | £10.1 | £10.3 | £10.4 |
| TOTAL | | | 18,134 | 2,167 | | £19.8 | £20.2 | £20.6 | £21.0 | £21.3 |

Notes:

- [1] Assumed that of the maximum amount of A1 Class space permitted is 1,800sqm gross. Of this the the convenience /comparison split will be 50% / 50%
- [2] Four small commercial outlets (falling within any combination of Class A1, A3, A4 and A5). These units are to be 100 sqm, 120 sqm, 150 sqm, 170 sqm and 285 sqm (totalling 825 sqm GEA). On this basis assumed that A1, A3, A4 & A5 will be split equally (825/4=206.3sqm). It is assumed that for the A1 component this is likely to comprise convenience goods only. The gross to net applied for the convenience goods element is 70%.
- [3] Assumed that of the total floorspace 314 sqm permitted the convenience /comparison split will be 50% / 50% and the gross to net ratio applied is 70%.
- [4] Assumed that of the total permitted floorspace of 1,098 sqm the convenience /comparison split will be 50% / 50%. It is also assumed that 1,098sqm represents a gross figure and therefore netted down using a gross to net factor of 70%.
- [5] Assumed up to 1,254sqm convenience; 251sqm max sales area for comparison goods. Assumed this is gross and on this basis netted down by 70%.

TABLE 3: CITY OF WOLVERHAMPTON COUNCIL AREA - CONVENIENCE GOODS CAPACITY ASSESSMENT

Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|---------|---------|---------|---------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £587.5 | £603.6 | £620.0 | £636.1 | £649.2 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £587.5 | 599.9 | 612.0 | 624.3 | 634.4 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £3.7 | £8.0 | £11.7 | £14.8 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £20.2 | £20.6 | £21.0 | £21.3 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | - | -£16.5 | -£12.6 | -£9.2 | -£6.5 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £12,500 | £12,765 | £13,022 | £13,285 | £13,498 |
| (ii) Net Floorspace Capacity (sq m): | - | -1,293 | -965 | -696 | -484 |
| (iii) Assumed Net / Gross Floorspace Ratio: | 70% | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | - | -1,847 | -1,379 | -994 | -691 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £7,000 | £7,148 | £7,292 | £7,439 | £7,559 |
| (ii) Net Floorspace Capacity (sq m): | - | -2,308 | -1,724 | -1,242 | -864 |
| (iii) Assumed Net / Gross Floorspace Ratio: | 70% | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | - | -3,298 | -2,463 | -1,775 | -1,234 |

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
- STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
- STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
- STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
- STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
- STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Netto, Co-Op, Budegens, etc.).

TABLE 4: CITY OF WOLVERHAMPTON COUNCIL: STRATEGIC CENTRE: WOLVERHAMPTON - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|---------|---------|---------|---------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £142.9 | £146.8 | £150.8 | £154.7 | £157.9 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £142.9 | 145.9 | 148.8 | 151.9 | 154.3 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £0.9 | £1.9 | £2.9 | £3.6 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £8.1 | £8.3 | £8.5 | £8.6 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | -£7.2 | -£6.3 | -£5.6 | -£5.0 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £12,500 | £12,765 | £13,022 | £13,285 | £13,498 |
| (ii) Net Floorspace Capacity (sq m): | - | -566 | -487 | -421 | -370 |
| (iii) Assumed Net / Gross Floorspace Ratio: | | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | | -809 | -695 | -602 | -528 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £7,000 | £7,148 | £7,292 | £7,439 | £7,559 |
| (ii) Net Floorspace Capacity (sq m): | - | -1,011 | -869 | -762 | -660 |
| (iii) Assumed Net / Gross Floorspace Ratio: | | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | | -1,445 | -1,242 | -1,074 | -943 |

Notes:
STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Netto, Co-Op, Budegens, etc.).

TABLE 5: CITY OF WOLVERHAMPTON COUNCIL: TOWN CENTRE: BILSTON - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|---------|---------|---------|---------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £73.9 | £75.9 | £78.0 | £80.0 | £81.6 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £73.9 | 75.4 | 77.0 | 78.5 | 79.8 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £0.5 | £1.0 | £1.5 | £1.9 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £0.0 | £0.0 | £0.0 | £0.0 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | £0.5 | £1.0 | £1.5 | £1.9 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £12,500 | £12,765 | £13,022 | £13,285 | £13,498 |
| (ii) Net Floorspace Capacity (sq m): | - | 36 | 77 | 111 | 138 |
| (iii) Assumed Net / Gross Floorspace Ratio: | | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | | 52 | 110 | 159 | 197 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £7,000 | £7,148 | £7,292 | £7,439 | £7,559 |
| (ii) Net Floorspace Capacity (sq m): | - | 65 | 138 | 199 | 246 |
| (iii) Assumed Net / Gross Floorspace Ratio: | | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | | 92 | 197 | 284 | 352 |

Notes:
STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Netto, Co-Op, Budegens, etc.).

TABLE 6: CITY OF WOLVERHAMPTON COUNCIL: TOWN CENTRE: WEDNESFIELD - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|---------|---------|---------|---------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £4.6 | £4.7 | £4.8 | £5.0 | £5.1 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £4.6 | 4.7 | 4.8 | 4.9 | 5.0 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £0.0 | £0.1 | £0.1 | £0.1 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £0.0 | £0.0 | £0.0 | £0.0 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | £0.0 | £0.1 | £0.1 | £0.1 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £12,500 | £12,765 | £13,022 | £13,285 | £13,498 |
| (ii) Net Floorspace Capacity (sq m): | - | 2 | 5 | 7 | 9 |
| (iii) Assumed Net / Gross Floorspace Ratio: | | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | | 3 | 7 | 10 | 12 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £7,000 | £7,148 | £7,292 | £7,439 | £7,559 |
| (ii) Net Floorspace Capacity (sq m): | - | 4 | 9 | 12 | 15 |
| (iii) Assumed Net / Gross Floorspace Ratio: | | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | | 6 | 12 | 18 | 22 |

Notes:
STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Netto, Co-Op, Budegens, etc.).

TABLE 7: CITY OF WOLVERHAMPTON COUNCIL: DISTRICT & LOCAL CENTRES - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|---------|---------|---------|---------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £128.7 | £132.2 | £135.8 | £139.3 | £142.2 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £128.7 | 131.4 | 134.0 | 136.8 | 139.0 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £0.8 | £1.8 | £2.6 | £3.2 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £0.2 | £0.2 | £0.2 | £0.2 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | £0.6 | £1.5 | £2.3 | £3.0 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £12,500 | £12,765 | £13,022 | £13,285 | £13,498 |
| (ii) Net Floorspace Capacity (sq m): | - | 45 | 117 | 176 | 223 |
| (iii) Assumed Net / Gross Floorspace Ratio: | - | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | - | 65 | 167 | 252 | 318 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £7,000 | £7,148 | £7,292 | £7,439 | £7,559 |
| (ii) Net Floorspace Capacity (sq m): | - | 81 | 209 | 315 | 397 |
| (iii) Assumed Net / Gross Floorspace Ratio: | - | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | - | 116 | 299 | 449 | 568 |

Notes:
STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Netto, Co-Op, Budegens, etc.).

TABLE 8: CITY OF WOLVERHAMPTON COUNCIL: OUT-OF-CENTRE LOCATIONS - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|---------|---------|---------|---------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £237.4 | £243.9 | £250.6 | £257.1 | £262.4 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £237.4 | 242.5 | 247.3 | 252.3 | 256.4 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £1.5 | £3.2 | £4.7 | £6.0 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £11.8 | £12.1 | £12.3 | £12.5 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | -£10.3 | -£8.8 | -£7.6 | -£6.5 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £12,500 | £12,765 | £13,022 | £13,285 | £13,498 |
| (ii) Net Floorspace Capacity (sq m): | - | -810 | -878 | -589 | -483 |
| (iii) Assumed Net / Gross Floorspace Ratio: | - | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | - | -1,157 | -988 | -812 | -690 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £7,000 | £7,148 | £7,292 | £7,439 | £7,559 |
| (ii) Net Floorspace Capacity (sq m): | - | -1,446 | -1,210 | -1,016 | -863 |
| (iii) Assumed Net / Gross Floorspace Ratio: | - | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | - | -2,066 | -1,729 | -1,451 | -1,232 |

Notes:
STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Netto, Co-Op, Budegens, etc.).

TABLE 9: CITY OF WOLVERHAMPTON COUNCIL: SUMMARY TABLE - CONVENIENCE GOODS CAPACITY ASSESSMENT FOR NEW SUPERSTORE FORMAT FLOORSPACE (NET SQ M)
Assume Equilibrium at Base Year and Constant Market Shares

| CENTRE TYPE | | STORE FORMAT | | | | | | | |
|--|---------------|----------------------------|---------------|--------------|--------------|---|---------------|---------------|--------------|
| | | Foodstore Format (sqm net) | | | | Local Supermarket/ Deep Discounter Format (sqm net) | | | |
| | | 2024 | 2029 | 2034 | 2038 | 2024 | 2029 | 2034 | 2038 |
| Residual Expenditure (after Commitments) (£m) | | -£16.5 | -£12.6 | -£9.2 | -£6.5 | -£16.5 | -£12.6 | -£9.2 | -£6.5 |
| Strategic Centre | Wolverhampton | -566 | -487 | -421 | -370 | -1,011 | -869 | -752 | -660 |
| Town Centre | Bilston | 36 | 77 | 111 | 138 | 65 | 138 | 199 | 246 |
| | Wednesfield | 2 | 5 | 7 | 9 | 4 | 9 | 12 | 15 |
| District & Local Centres | | 45 | 117 | 176 | 223 | 81 | 209 | 315 | 397 |
| Out-of-Centre | | -810 | -678 | -569 | -483 | -1,446 | -1,210 | -1,016 | -863 |
| CITY OF WOLVERHAMPTON COUNCIL AREA | | -1,293 | -965 | -696 | -484 | -2,308 | -1,724 | -1,242 | -864 |

**Appendix 5B: Convenience Goods Capacity:
Dudley MBC**

TABLE 1: REVISED FORECAST CONVENIENCE GOODS TURNOVER (£m) - ALLOW FOR INFLOW FROM OUTSIDE STUDY AREA

| LPA | CENTRE TYPE | Estimated 'Inflow' from Outside Study Area | 2019 | 2024 | 2029 | 2034 | 2038 | |
|------------------------|--------------------------|--|--------|---------------|---------------|---------------|---------------|---------------|
| Dudley | Strategic Centre | Brierley Hill- Traditional High Street | 0% | £34.2 | £35.1 | £36.1 | £37.0 | £37.8 |
| | | Brierley Hill- Merry Hill | 0% | £39.9 | £41.0 | £42.2 | £43.2 | £44.1 |
| | Town Centre | Dudley | 0% | £26.8 | £27.6 | £28.3 | £29.1 | £29.7 |
| | | Stourbridge | 0% | £101.1 | £103.9 | £106.7 | £109.5 | £111.7 |
| | | Halesowen | 0% | £55.2 | £56.7 | £58.3 | £59.8 | £61.0 |
| | District & Local Centres | | 0% | £146.9 | £150.9 | £155.0 | £159.1 | £162.3 |
| Out-of-Centre | | 0% | £287.8 | £295.7 | £303.8 | £311.7 | £318.1 | |
| Dudley MBC Area | | | | £692.0 | £711.0 | £730.4 | £749.3 | £764.7 |

TABLE 2: COMMITTED CONVENIENCE FLOORSPACE

| CENTRE | PLANNING REF | SCHEME | Gross Floorspace (sq m) | Net Floorspace (sq m) | Sales Density 2019 (£ per sqm) | Turnover (£m) | | | | |
|--------------------------------|--------------|--|-------------------------|-----------------------|--------------------------------|---------------|--------------|--------------|--------------|--------------|
| | | | | | | 2019 | 2024 | 2029 | 2034 | 2038 |
| [1] Dudley-Town Centre | P18/0590 | Demolition, remodelling and remediation; redevelopment to allow: retail, service and leisure accommodation (use classes A1, A2, A3, A4, A5, D2); student accommodation (Use Class C2); dwelling houses (C3); hotel accommodation (C1); offices (B1a); non-residential institution uses (D1); car showroom (su1 genera) taxi rank; public space; highways, access and pedestrian connectivity works; car parking; landscaping; associated works (outline, all matters reserved) | 2,322 | 1,625 | 8,000 | £13.0 | £13.3 | £13.5 | £13.8 | £14.0 |
| [2] Lye-Out-of-Centre | P15/0845 | Former Clarkson Place Unit, Thorns Road, Lye, DY5 2LD; Erection of retail store (A1) with associated car parking and landscaping. | 1,805 | 1,003 | 11,000 | £11.0 | £11.3 | £11.5 | £11.7 | £11.9 |
| [3] Kingswinford-Out-of-Centre | P16/1461 | Former Ibstock Brick Ltd Stallings lane. Outline application for mixed use development comprising residential (C3); Retail (A1); Leisure (D2) ad a Public House (A4). | 7,205 | 2,522 | 10,000 | £25.2 | £25.8 | £26.3 | £26.8 | £27.2 |
| [4] Wollescote-Out-of-Centre | P16/1653 | Former Hare and Hounds PH, Wynnall Lane, erection of an A1 Retail Store (Co-op). | 365 | 233 | 10,000 | £2.3 | £2.4 | £2.4 | £2.5 | £2.5 |
| TOTAL | | | 11,697 | 5,383 | | £51.6 | £52.7 | £53.7 | £54.8 | £55.7 |

- Notes:
- [1] A1 shops (food): maximum 2,322 sqm, netted down by 70%.
 - [2] Planning Statement accompanying application provides 1805 sq m of gross A1 retail floorspace and some 1,254 sq m net. The net floorspace figure is broken down into 1,003 sqm net convenience goods and 251 sqm net for comparison goods.
 - [3] Indicative masterplan accompanying application shows 7,205 sqm gross area proposed for retail. It is assumed that of the total permitted gross floorspace of 7,205 sqm the convenience /comparison split will be 50% / 50%. This is thereafter netted down using a gross to net factor of 70%.
 - [4] Planning Statement accompanying application provides 365 sq m of gross A1 retail floorspace and some 233 sq m net. It is assumed that the net floorspace proposed is for convenience goods only.

TABLE 3: DUDLEY MBC AREA - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|---------|---------------|---------------|---------------|---------------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £692.0 | £711.0 | £730.4 | £749.3 | £764.7 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £692.0 | 706.7 | 720.9 | 735.5 | 747.3 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £4.3 | £9.4 | £13.8 | £17.4 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £52.7 | £53.7 | £54.8 | £55.7 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | -£48.4 | -£44.3 | -£41.0 | -£38.3 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £12,500 | £12,765 | £13,022 | £13,285 | £13,498 |
| (ii) Net Floorspace Capacity (sq m): | - | -3,788 | -3,402 | -3,085 | -2,835 |
| (iii) Assumed Net / Gross Floorspace Ratio: | 70% | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | - | -5,412 | -4,861 | -4,407 | -4,050 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £7,000 | £7,148 | £7,292 | £7,439 | £7,559 |
| (ii) Net Floorspace Capacity (sq m): | - | -6,765 | -6,076 | -5,509 | -5,063 |
| (iii) Assumed Net / Gross Floorspace Ratio: | 70% | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | - | -9,664 | -8,680 | -7,870 | -7,233 |

- Notes:
- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
 - STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
 - STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
 - STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
 - STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
 - STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Netto, Co-Op, Budegens, etc.).

TABLE 4: DUDLEY MBC AREA STRATEGIC CENTRE: BRIERLEY HILL (Incorporating Traditional High St+ Merry Hill) - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|-------------|-------------|-------------|-------------|-------------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £74.1 | £76.2 | £78.2 | £80.3 | £81.9 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £74.1 | 75.7 | 77.2 | 78.8 | 80.1 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £0.5 | £1.0 | £1.5 | £1.9 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £0.0 | £0.0 | £0.0 | £0.0 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | £0.5 | £1.0 | £1.5 | £1.5 | £1.9 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £12,500 | £12,765 | £13,022 | £13,285 | £13,498 |
| (ii) Net Floorspace Capacity (sq m): | - | 36 | 76 | 112 | 138 |
| (iii) Assumed Net / Gross Floorspace Ratio: | - | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | - | 52 | 111 | 159 | 198 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £7,000 | £7,148 | £7,292 | £7,439 | £7,559 |
| (ii) Net Floorspace Capacity (sq m): | - | 65 | 139 | 199 | 247 |
| (iii) Assumed Net / Gross Floorspace Ratio: | - | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | - | 93 | 198 | 285 | 353 |

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
- STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
- STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
- STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
- STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
- STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Netto, Co-Op, Budgens, etc.).

TABLE 5: DUDLEY MBC AREA : TOWN CENTRE: DUDLEY - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|---------------|---------------|---------------|---------------|---------------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £26.8 | £27.6 | £28.3 | £29.1 | £29.7 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £26.8 | 27.4 | 28.0 | 28.5 | 29.0 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £0.2 | £0.4 | £0.5 | £0.7 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £13.3 | £13.5 | £13.8 | £14.0 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | -£13.1 | -£13.2 | -£13.3 | -£13.4 | -£13.4 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £12,500 | £12,765 | £13,022 | £13,285 | £13,498 |
| (ii) Net Floorspace Capacity (sq m): | - | -1,027 | -1,012 | -1,000 | -990 |
| (iii) Assumed Net / Gross Floorspace Ratio: | - | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | - | -1,467 | -1,446 | -1,428 | -1,415 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £7,000 | £7,148 | £7,292 | £7,439 | £7,559 |
| (ii) Net Floorspace Capacity (sq m): | - | -1,834 | -1,807 | -1,785 | -1,768 |
| (iii) Assumed Net / Gross Floorspace Ratio: | - | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | - | -2,620 | -2,582 | -2,551 | -2,526 |

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
- STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
- STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
- STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
- STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
- STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Netto, Co-Op, Budgens, etc.).

TABLE 6: DUDLEY MBC AREA : TOWN CENTRE: STOURBRIDGE - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|-------------|-------------|-------------|-------------|-------------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £101.1 | £103.9 | £106.7 | £109.5 | £111.7 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £101.1 | 103.2 | 105.3 | 107.4 | 109.2 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £0.6 | £1.4 | £2.0 | £2.5 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £0.0 | £0.0 | £0.0 | £0.0 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | £0.6 | £1.4 | £2.0 | £2.0 | £2.5 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £12,500 | £12,765 | £13,022 | £13,285 | £13,498 |
| (ii) Net Floorspace Capacity (sq m): | - | 49 | 106 | 152 | 189 |
| (iii) Assumed Net / Gross Floorspace Ratio: | - | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | - | 71 | 151 | 217 | 270 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £7,000 | £7,148 | £7,292 | £7,439 | £7,559 |
| (ii) Net Floorspace Capacity (sq m): | - | 88 | 169 | 232 | 337 |
| (iii) Assumed Net / Gross Floorspace Ratio: | - | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | - | 126 | 270 | 388 | 481 |

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
- STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
- STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
- STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
- STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
- STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Netto, Co-Op, Budgens, etc.).

TABLE 7: DUDLEY MBC AREA : TOWN CENTRE: HALESOWEN - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|---------|---------|---------|---------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £55.2 | £56.7 | £58.3 | £59.8 | £61.0 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £55.2 | 56.4 | 57.5 | 58.7 | 59.6 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £0.3 | £0.8 | £1.1 | £1.4 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £0.0 | £0.0 | £0.0 | £0.0 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | £0.3 | £0.8 | £1.1 | £1.4 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £12,500 | £12,765 | £13,022 | £13,285 | £13,498 |
| (ii) Net Floorspace Capacity (sq m): | - | 27 | 58 | 83 | 103 |
| (iii) Assumed Net / Gross Floorspace Ratio: | | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | | 39 | 83 | 119 | 147 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £7,000 | £7,148 | £7,292 | £7,439 | £7,559 |
| (ii) Net Floorspace Capacity (sq m): | - | 48 | 103 | 148 | 184 |
| (iii) Assumed Net / Gross Floorspace Ratio: | | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | | 69 | 147 | 212 | 263 |

Notes:
STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Netto, Co-Op, Budegens, etc.).

TABLE 8: DUDLEY MBC AREA : DISTRICT & LOCAL CENTRES - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|---------|---------|---------|---------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £146.9 | £150.9 | £155.0 | £159.1 | £162.3 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £146.9 | 150.0 | 153.0 | 156.1 | 158.6 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £0.9 | £2.0 | £2.9 | £3.7 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £0.0 | £0.0 | £0.0 | £0.0 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | £0.9 | £2.0 | £2.9 | £3.7 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £12,500 | £12,765 | £13,022 | £13,285 | £13,498 |
| (ii) Net Floorspace Capacity (sq m): | - | 72 | 154 | 221 | 274 |
| (iii) Assumed Net / Gross Floorspace Ratio: | | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | | 103 | 220 | 316 | 392 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £7,000 | £7,148 | £7,292 | £7,439 | £7,559 |
| (ii) Net Floorspace Capacity (sq m): | - | 128 | 275 | 395 | 490 |
| (iii) Assumed Net / Gross Floorspace Ratio: | | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | | 183 | 392 | 564 | 699 |

Notes:
STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Netto, Co-Op, Budegens, etc.).

TABLE 9: DUDLEY MBC AREA : OUT-OF-CENTRE LOCATIONS - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|---------|---------|---------|---------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £287.8 | £295.7 | £303.8 | £311.7 | £318.1 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £287.8 | 293.9 | 299.9 | 305.9 | 310.8 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £1.8 | £3.9 | £5.8 | £7.3 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £39.4 | £40.2 | £41.0 | £41.7 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | -£37.6 | -£36.3 | -£35.2 | -£34.4 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £12,500 | £12,765 | £13,022 | £13,285 | £13,498 |
| (ii) Net Floorspace Capacity (sq m): | - | -2,946 | -2,785 | -2,653 | -2,549 |
| (iii) Assumed Net / Gross Floorspace Ratio: | | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | | -4,208 | -3,979 | -3,790 | -3,642 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £7,000 | £7,148 | £7,292 | £7,439 | £7,559 |
| (ii) Net Floorspace Capacity (sq m): | - | -5,260 | -4,974 | -4,738 | -4,552 |
| (iii) Assumed Net / Gross Floorspace Ratio: | | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | | -7,514 | -7,105 | -6,768 | -6,503 |

Notes:
STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Netto, Co-Op, Budegens, etc.).

TABLE 10: DUDLEY MBC AREA: SUMMARY TABLE - CONVENIENCE GOODS CAPACITY ASSESSMENT FOR NEW SUPERSTORE FORMAT FLOORSPACE (NET SQ M)
Assume Equilibrium at Base Year and Constant Market Shares

| CENTRE TYPE | STORE FORMAT | STORE FORMAT | | | | | | | |
|--|---|----------------------------|---------------|---------------|---------------|---|---------------|---------------|---------------|
| | | Foodstore Format (sqm net) | | | | Local Supermarket/ Deep Discounter Format (sqm net) | | | |
| | | 2024 | 2029 | 2034 | 2038 | 2024 | 2029 | 2034 | 2038 |
| Residual Expenditure (after Commitments) (£m) | | -£48.4 | -£44.3 | -£41.0 | -£38.3 | -£48.4 | -£44.3 | -£41.0 | -£38.3 |
| Strategic Centre | Brierley Hill (Traditional High St +Merry Hill) | 36 | 78 | 112 | 138 | 65 | 139 | 199 | 247 |
| Town Centre | Dudley | -1,027 | -1,012 | -1,000 | -990 | -1,834 | -1,807 | -1,785 | -1,768 |
| | Stourbridge | 49 | 106 | 152 | 189 | 88 | 189 | 272 | 337 |
| | Halesowen | 27 | 58 | 83 | 103 | 48 | 103 | 148 | 184 |
| District & Local Centres | | 72 | 154 | 221 | 274 | 128 | 275 | 395 | 490 |
| Out-of-Centre | | -2,946 | -2,785 | -2,653 | -2,549 | -5,260 | -4,974 | -4,738 | -4,552 |
| DUDLEY MBC AREA | | -3,788 | -3,402 | -3,085 | -2,835 | -6,765 | -6,076 | -5,509 | -5,063 |

**Appendix 5C: Convenience Goods Capacity:
Sandwell MBC**

TABLE 1: REVISED FORECAST CONVENIENCE GOODS TURNOVER (£m) - ALLOW FOR INFLOW FROM OUTSIDE STUDY AREA

| LPA | CENTRE TYPE | Estimated 'Inflow' from Outside Study Area | 2019 | 2024 | 2029 | 2034 | 2038 | |
|----------|--------------------------|--|------|--------|---------------|---------------|---------------|---------------|
| Sandwell | Strategic Centre | West Bromwich | 0% | £85.8 | £88.2 | £90.6 | £92.9 | £94.9 |
| | Town Centre | Blackheath | 0% | £49.7 | £51.1 | £52.5 | £53.9 | £55.0 |
| | | Cradley Heath | 0% | £58.0 | £59.6 | £61.2 | £62.8 | £64.1 |
| | | Great Bridge | 0% | £85.0 | £87.3 | £89.7 | £92.0 | £93.9 |
| | | Oldbury | 0% | £51.9 | £53.4 | £54.8 | £56.2 | £57.4 |
| | | Wednesbury | 0% | £33.8 | £34.8 | £35.7 | £36.6 | £37.4 |
| | District & Local Centres | Cape Hill | 0% | £57.8 | £59.4 | £61.0 | £62.6 | £63.9 |
| | | Bearwood | 0% | £30.8 | £31.7 | £32.5 | £33.4 | £34.1 |
| | Out-of-Centre | | 0% | £190.1 | £195.3 | £200.6 | £205.8 | £210.0 |
| | Sandwell MBC Area | | | | £734.3 | £754.4 | £775.0 | £795.1 |

TABLE 2: COMMITTED CONVENIENCE FLOORSPACE

| CENTRE | PLANNING REF | SCHEME | Gross Floorspace (sq m) | Net Floorspace (sq m) | Sales Density 2019 (£ per sqm) | Turnover (£m) | | | | |
|--|--------------|---|-------------------------|-----------------------|--------------------------------|---------------|--------------|--------------|--------------|--------------|
| | | | | | | 2019 | 2024 | 2029 | 2034 | 2038 |
| [1] West Bromwich-Town Centre | DC/13/56479 | 3 Bull Street West Bromwich Ringway West Bromwich B70 6EU. mixed use development including retail, restaurant and five apartments. | 300 | 210 | 4,000 | £0.8 | £0.9 | £0.9 | £0.9 | £0.9 |
| [2] West Bromwich-Town Centre | DC/16/59740 | Proposed mixed use development consisting of 4 No. ground floor commercial units with 49 No. apartments above with undercover car parking to rear and cycle and refuse storage Car Park Victoria Street West Bromwich | 295 | 103 | 4,000 | £0.4 | £0.4 | £0.4 | £0.4 | £0.4 |
| [3] West Bromwich-Edge of Town Centre | DC/18/62210 | Staples Limited Tildasley Street West Bromwich B70 9SJ. Proposed variation of condition 1 of planning permission DC/18/62210 (Proposed change of use to supermarket (Class A1), external alterations including new store access, loading bay extension, trolley bay canopy, and alterations to car park and landscaping) to remove loading bay extension and replace with rear access ramp and new ramp to customer service entrance. | 1,973 | 1,052 | 11,000 | £11.6 | £11.8 | £12.1 | £12.3 | £12.5 |
| [4] Great Bridge-Town Centre | DC/15/58596 | 87 Whitehall road and land adjacent to West Bromwich, Great Bridge. 2 No. retail units with 2 No. two bedroom flats above and two storey building comprising of 8 No. two bedroom flats with associated parking. | 150 | 105 | 4,000 | £0.4 | £0.4 | £0.4 | £0.4 | £0.5 |
| [5] Oldbury Town Centre-Edge of | DC/17/61306 | 9 Oldbury Green Retail Park Oldbury Ringway Oldbury B69 3DD. Proposed installation of mezzanine floor. | 465 | 326 | 10,000 | £3.3 | £3.3 | £3.4 | £3.5 | £3.5 |
| [6] Cradley Heath - Town Centre | DC/17/61336 | Land Adj 149 Halesowen Road Cradley Heath B64 6HX. Proposed 2 storey building comprising of 3 shops at ground floor with 2 No. one bedroom flats above and associated parking (revised application - DC/17/60463). | 128 | 90 | 4,000 | £0.4 | £0.4 | £0.4 | £0.4 | £0.4 |
| [7] Wednesbury Out-of-Centre | DC/15/57967 | Johal Supersave 90 Oxford Street Wednesbury WS10 0PY - replacement shop with five apartments above | 203 | 142 | 4,000 | £0.6 | £0.6 | £0.6 | £0.6 | £0.6 |
| [8] Smethwick Local Centre - Town Centre | DC/15/58733 | Site Of 2 To 4 Cape Hill Smethwick. Proposed three storey development comprising of 3 No. retail units at ground floor and 6 No. 2 bed apartments at first and second floor. | 202 | 141 | 4,000 | £0.6 | £0.6 | £0.6 | £0.6 | £0.6 |
| [9] Smethwick Local Centre - Town Centre | DC/17/60690 | Proposed construction of a ground floor retail unit, first floor showroom with exterior rear display area and 2 No. 2 bed loft apartments at second floor with balconies and associated car parking and bin storage to rear. Land Adjacent To 3-5 St Pauls Road Smethwick | 340 | 238 | 4,000 | £1.0 | £1.0 | £1.0 | £1.0 | £1.0 |
| [10] Tipton Local Centre-In-Centre | DC/17/60958 | Lidl UK & Car Repairs & Testing Centre 119 Horseley Heath Tipton DY4 7AH. Demolition of existing buildings and proposed construction of a replacement foodstore with associated access, parking, cycle parking, landscaping, and associated works. | 262 | 183 | 11,000 | £2.0 | £2.1 | £2.1 | £2.1 | £2.2 |
| TOTAL | | | 4,318 | 2,590 | | £21.0 | £21.4 | £21.8 | £22.3 | £22.6 |

Notes:

- [1] Assumed gross to net ratio of 70% and that all the floorspace is for convenience goods.
- [2] Assumed gross to net ratio of 70% and that 50% of the floorspace is for A1 convenience goods and that 50% is for A3 uses.
- [3] A1&3 application, as per planning and retail statement net sales area of 1,315. It is assumed that of this 80% of all the floorspace is for convenience good and that remainder 20% is for convenience goods.
- [4] Assumed gross to net ratio of 70% and that all the floorspace is for convenience goods.
- [5] Assumed gross to net ratio of 70% and that all the floorspace is for convenience goods.
- [6] Assumed gross to net ratio of 70% and that all the floorspace is for convenience goods.
- [7] Assumed gross to net ratio of 70% and that all the floorspace is for convenience goods.
- [8] Assumed gross to net ratio of 70% and that all the floorspace is for convenience goods.
- [9] Assumed gross to net ratio of 70% and that all the floorspace is for convenience goods.
- [10] Assumed gross to net ratio of 70% and that all of the net additional floorspace proposed is for convenience goods.

TABLE 3: SANDWELL MBC AREA - CONVENIENCE GOODS CAPACITY ASSESSMENT

Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|---------|---------------|---------------|--------------|--------------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £734.3 | £754.4 | £775.0 | £795.1 | £811.4 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £734.3 | 749.8 | 765.0 | 780.4 | 792.9 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £4.6 | £10.0 | £14.7 | £18.5 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £21.4 | £21.8 | £22.3 | £22.6 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | -£16.8 | -£11.8 | -£7.6 | -£4.1 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £12,500 | £12,765 | £13,022 | £13,285 | £13,498 |
| (ii) Net Floorspace Capacity (sq m): | - | -1,316 | -909 | -672 | -507 |
| (iii) Assumed Net / Gross Floorspace Ratio: | | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | | -1,882 | -1,298 | -916 | -738 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £7,000 | £7,148 | £7,292 | £7,439 | £7,559 |
| (ii) Net Floorspace Capacity (sq m): | - | -2,353 | -1,622 | -1,021 | -847 |
| (iii) Assumed Net / Gross Floorspace Ratio: | | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | | -3,362 | -2,318 | -1,458 | -1,202 |

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
- STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
- STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
- STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
- STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
- STEP 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Netto, Co-Op, Budgens, etc.).

TABLE 4: SANDWELL MBC AREA STRATEGIC CENTRE: WEST BROMWICH - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|---------|---------------|---------------|---------------|---------------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £85.8 | £88.2 | £90.6 | £92.9 | £94.9 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £85.8 | 87.7 | 89.4 | 91.2 | 92.7 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £0.5 | £1.2 | £1.7 | £2.2 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £13.1 | £13.4 | £13.6 | £13.8 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | -£12.6 | -£12.2 | -£11.9 | -£11.7 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £12,500 | £12,765 | £13,022 | £13,285 | £13,498 |
| (ii) Net Floorspace Capacity (sq m): | - | -864 | -836 | -897 | -965 |
| (iii) Assumed Net / Gross Floorspace Ratio: | - | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | - | -1,406 | -1,337 | -1,281 | -1,237 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £7,000 | £7,148 | £7,292 | £7,439 | £7,559 |
| (ii) Net Floorspace Capacity (sq m): | - | -1,757 | -1,872 | -1,801 | -1,546 |
| (iii) Assumed Net / Gross Floorspace Ratio: | - | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | - | -2,510 | -2,388 | -2,288 | -2,209 |

Notes:
 STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
 STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
 STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
 STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
 STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
 STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Netto, Co-Op, Budgens, etc.).

TABLE 5: SANDWELL MBC AREA : TOWN CENTRE: BLACKHEATH - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|---------|-------------|-------------|-------------|-------------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £49.7 | £51.1 | £52.5 | £53.9 | £55.0 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £49.7 | 50.8 | 51.8 | 52.9 | 53.7 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £0.3 | £0.7 | £1.0 | £1.3 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £0.0 | £0.0 | £0.0 | £0.0 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | £0.3 | £0.7 | £1.0 | £1.3 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £12,500 | £12,765 | £13,022 | £13,285 | £13,498 |
| (ii) Net Floorspace Capacity (sq m): | - | 24 | 52 | 75 | 93 |
| (iii) Assumed Net / Gross Floorspace Ratio: | - | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | - | 35 | 74 | 107 | 133 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £7,000 | £7,148 | £7,292 | £7,439 | £7,559 |
| (ii) Net Floorspace Capacity (sq m): | - | 43 | 93 | 134 | 166 |
| (iii) Assumed Net / Gross Floorspace Ratio: | - | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | - | 62 | 133 | 191 | 237 |

Notes:
 STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
 STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
 STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
 STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
 STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
 STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Netto, Co-Op, Budgens, etc.).

TABLE 6: SANDWELL MBC AREA : TOWN CENTRE: CRADLEY HEATH - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|---------|-------------|-------------|-------------|-------------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £58.0 | £59.6 | £61.2 | £62.8 | £64.1 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £58.0 | 59.3 | 60.5 | 61.7 | 62.7 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £0.4 | £0.8 | £1.2 | £1.5 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £0.4 | £0.4 | £0.4 | £0.4 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | £0.0 | £0.4 | £0.8 | £1.1 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £12,500 | £12,765 | £13,022 | £13,285 | £13,498 |
| (ii) Net Floorspace Capacity (sq m): | - | 0 | 32 | 59 | 80 |
| (iii) Assumed Net / Gross Floorspace Ratio: | - | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | - | 0 | 46 | 84 | 114 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £7,000 | £7,148 | £7,292 | £7,439 | £7,559 |
| (ii) Net Floorspace Capacity (sq m): | - | -1 | 57 | 105 | 142 |
| (iii) Assumed Net / Gross Floorspace Ratio: | - | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | - | -1 | 82 | 150 | 203 |

Notes:
 STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
 STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
 STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
 STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
 STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
 STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Netto, Co-Op, Budgens, etc.).

TABLE 7: SANDWELL MBC AREA : TOWN CENTRE: GREAT BRIDGE - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|---------|---------|---------|---------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £85.0 | £87.3 | £89.7 | £92.0 | £93.9 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £85.0 | 86.8 | 88.6 | 90.3 | 91.8 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £0.5 | £1.2 | £1.7 | £2.1 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £0.4 | £0.4 | £0.4 | £0.5 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | £0.1 | £0.7 | £1.3 | £1.7 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £12,500 | £12,765 | £13,022 | £13,285 | £13,498 |
| (ii) Net Floorspace Capacity (sq m): | - | 8 | 55 | 94 | 125 |
| (iii) Assumed Net / Gross Floorspace Ratio: | - | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | - | 11 | 79 | 135 | 179 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £7,000 | £7,148 | £7,292 | £7,439 | £7,559 |
| (ii) Net Floorspace Capacity (sq m): | - | 14 | 93 | 169 | 223 |
| (iii) Assumed Net / Gross Floorspace Ratio: | - | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | - | 20 | 141 | 241 | 319 |

Notes:
STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Netto, Co-Op, Budgens, etc.).

TABLE 8: SANDWELL MBC AREA : TOWN CENTRE: OLDBURY - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|---------|---------|---------|---------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £51.9 | £53.4 | £54.8 | £56.2 | £57.4 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £51.9 | 53.0 | 54.1 | 55.2 | 56.1 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £0.3 | £0.7 | £1.0 | £1.3 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £3.3 | £3.4 | £3.5 | £3.5 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | £-3.0 | £-2.7 | £-2.4 | £-2.2 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £12,500 | £12,765 | £13,022 | £13,285 | £13,498 |
| (ii) Net Floorspace Capacity (sq m): | - | -235 | -206 | -182 | -163 |
| (iii) Assumed Net / Gross Floorspace Ratio: | - | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | - | -336 | -294 | -260 | -234 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £7,000 | £7,148 | £7,292 | £7,439 | £7,559 |
| (ii) Net Floorspace Capacity (sq m): | - | -420 | -368 | -325 | -292 |
| (iii) Assumed Net / Gross Floorspace Ratio: | - | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | - | -599 | -526 | -465 | -417 |

Notes:
STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Netto, Co-Op, Budgens, etc.).

TABLE 9: SANDWELL MBC AREA : TOWN CENTRE: WEDNESBURY - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|---------|---------|---------|---------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £33.8 | £34.8 | £35.7 | £36.6 | £37.4 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £33.8 | 34.6 | 35.3 | 36.0 | 36.5 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £0.2 | £0.5 | £0.7 | £0.9 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £0.0 | £0.0 | £0.0 | £0.0 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | £0.2 | £0.5 | £0.7 | £0.9 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £12,500 | £12,765 | £13,022 | £13,285 | £13,498 |
| (ii) Net Floorspace Capacity (sq m): | - | 17 | 35 | 51 | 63 |
| (iii) Assumed Net / Gross Floorspace Ratio: | - | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | - | 24 | 51 | 73 | 90 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £7,000 | £7,148 | £7,292 | £7,439 | £7,559 |
| (ii) Net Floorspace Capacity (sq m): | - | 30 | 63 | 91 | 113 |
| (iii) Assumed Net / Gross Floorspace Ratio: | - | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | - | 42 | 90 | 130 | 161 |

Notes:
STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Netto, Co-Op, Budgens, etc.).

TABLE 10: SANDWELL MBC AREA : TOWN CENTRE: CAPE HILL - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|---------|---------|---------|---------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £57.8 | £59.4 | £61.0 | £62.6 | £63.9 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £57.8 | £9.0 | £60.2 | £61.4 | £62.4 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £0.4 | £0.8 | £1.2 | £1.5 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £0.0 | £0.0 | £0.0 | £0.0 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | £0.4 | £0.8 | £1.2 | £1.5 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £12,500 | £12,765 | £13,022 | £13,285 | £13,498 |
| (ii) Net Floorspace Capacity (sq m): | - | 26 | 60 | 67 | 108 |
| (iii) Assumed Net / Gross Floorspace Ratio: | - | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | - | 40 | 86 | 124 | 154 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £7,000 | £7,148 | £7,292 | £7,439 | £7,559 |
| (ii) Net Floorspace Capacity (sq m): | - | 50 | 103 | 155 | 193 |
| (iii) Assumed Net / Gross Floorspace Ratio: | - | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | - | 72 | 154 | 222 | 275 |

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
- STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
- STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
- STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
- STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
- STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Netto, Co-Op, Budgens, etc.).

TABLE 11: SANDWELL MBC AREA : TOWN CENTRE: BEARWOOD - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|---------|---------|---------|---------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £30.8 | £31.7 | £32.5 | £33.4 | £34.1 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £30.8 | £1.5 | £32.1 | £32.8 | £33.3 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £0.2 | £0.4 | £0.6 | £0.8 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £0.0 | £0.0 | £0.0 | £0.0 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | £0.2 | £0.4 | £0.6 | £0.8 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £12,500 | £12,765 | £13,022 | £13,285 | £13,498 |
| (ii) Net Floorspace Capacity (sq m): | - | 15 | 32 | 46 | 58 |
| (iii) Assumed Net / Gross Floorspace Ratio: | - | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | - | 22 | 46 | 66 | 82 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £7,000 | £7,148 | £7,292 | £7,439 | £7,559 |
| (ii) Net Floorspace Capacity (sq m): | - | 27 | 58 | 83 | 103 |
| (iii) Assumed Net / Gross Floorspace Ratio: | - | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | - | 38 | 82 | 118 | 147 |

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
- STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
- STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
- STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
- STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
- STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Netto, Co-Op, Budgens, etc.).

TABLE 12: SANDWELL MBC AREA : DISTRICT & LOCAL CENTRES - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|---------|---------|---------|---------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £91.2 | £93.7 | £96.3 | £98.7 | £100.8 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £91.2 | 93.1 | 95.0 | 96.9 | 98.5 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £0.6 | £1.2 | £1.8 | £2.3 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £3.6 | £3.7 | £3.8 | £3.8 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | £3.0 | £2.4 | £1.9 | £1.5 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £12,500 | £12,765 | £13,022 | £13,285 | £13,498 |
| (ii) Net Floorspace Capacity (sq m): | - | -238 | -187 | -148 | -113 |
| (iii) Assumed Net / Gross Floorspace Ratio: | - | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | - | -340 | -268 | -208 | -161 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £7,000 | £7,148 | £7,292 | £7,439 | £7,559 |
| (ii) Net Floorspace Capacity (sq m): | - | -425 | -335 | -260 | -201 |
| (iii) Assumed Net / Gross Floorspace Ratio: | - | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | - | -608 | -478 | -371 | -287 |

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
- STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
- STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
- STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
- STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
- STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Netto, Co-Op, Budgens, etc.).

TABLE 13: SANDWELL MBC AREA : OUT-OF-CENTRE LOCATIONS - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|---------|---------|---------|---------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £190.1 | £195.3 | £200.6 | £205.8 | £210.0 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £190.1 | 194.1 | 198.0 | 202.0 | 205.2 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £1.2 | £2.6 | £3.8 | £4.8 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £0.6 | £0.6 | £0.6 | £0.6 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | £0.6 | £2.0 | £3.2 | £4.2 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £12,500 | £12,765 | £13,022 | £13,285 | £13,498 |
| (ii) Net Floorspace Capacity (sq m): | - | 47 | 153 | 241 | 305 |
| (iii) Assumed Net / Gross Floorspace Ratio: | | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | | 68 | 219 | 344 | 442 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £7,000 | £7,148 | £7,292 | £7,439 | £7,559 |
| (ii) Net Floorspace Capacity (sq m): | - | 85 | 274 | 430 | 552 |
| (iii) Assumed Net / Gross Floorspace Ratio: | | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | | 121 | 391 | 614 | 789 |

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEP 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Netto, Co-Op, Budgens, etc.).

TABLE 14: SANDWELL MBC AREA: SUMMARY TABLE - CONVENIENCE GOODS CAPACITY ASSESSMENT FOR NEW SUPERSTORE FORMAT FLOORSPACE (NET SQ M)
Assume Equilibrium at Base Year and Constant Market Shares

| CENTRE TYPE | | STORE FORMAT | | | | | | | |
|--|-----------------------|----------------------------|---------------|--------------|--------------|---|---------------|---------------|--------------|
| | | Foodstore Format (sqm net) | | | | Local Supermarket/ Deep Discounter Format (sqm net) | | | |
| | | 2024 | 2029 | 2034 | 2038 | 2024 | 2029 | 2034 | 2038 |
| Residual Expenditure (after Commitments) (£m) | | -£16.8 | -£11.8 | -£7.6 | -£4.1 | -£16.8 | -£11.8 | -£7.6 | -£4.1 |
| Strategic Centre | West Bromwich | -984 | -936 | -897 | -866 | -1,757 | -1,672 | -1,601 | -1,546 |
| Town Centre | Blackheath | 24 | 52 | 75 | 93 | 43 | 93 | 134 | 166 |
| | Cradley Heath | 0 | 32 | 59 | 80 | -1 | 57 | 105 | 142 |
| | Great Bridge | 8 | 55 | 94 | 125 | 14 | 99 | 169 | 223 |
| | Oldbury | -235 | -206 | -182 | -163 | -420 | -368 | -325 | -292 |
| | Wednesbury | 17 | 35 | 51 | 63 | 30 | 63 | 91 | 113 |
| | Cape Hill Bearwood | 28 15 | 60 32 | 87 46 | 108 58 | 50 27 | 108 58 | 155 83 | 193 103 |
| District & Local Centres | | -238 | -187 | -146 | -113 | -425 | -335 | -260 | -201 |
| Out-of-Centre | | 47 | 153 | 241 | 309 | 85 | 274 | 430 | 552 |
| SANDWELL MBC AREA | | -1,318 | -909 | -572 | -307 | -2,353 | -1,622 | -1,021 | -547 |

**Appendix 5D: Convenience Goods Capacity:
Walsall Council**

TABLE 1: REVISED FORECAST CONVENIENCE GOODS TURNOVER (£m) - ALLOW FOR INFLOW FROM OUTSIDE STUDY AREA

| LPA | CENTRE TYPE | | Estimated 'Inflow' from Outside Study Area | 2019 | 2024 | 2029 | 2034 | 2038 |
|--------------------------|------------------|------------|--|---------------|---------------|---------------|---------------|---------------|
| Walsall | Strategic Centre | Walsall | 0% | £97.9 | £100.6 | £103.3 | £106.0 | £108.2 |
| | Town Centre | Bloxwich | 0% | £41.8 | £42.9 | £44.1 | £45.3 | £46.2 |
| | | Brownhills | 0% | £61.1 | £62.7 | £64.4 | £66.1 | £67.5 |
| | | Aldridge | 0% | £58.4 | £60.0 | £61.6 | £63.2 | £64.5 |
| | | Willenhall | 0% | £59.3 | £61.0 | £62.6 | £64.3 | £65.6 |
| | Darlaston | 0% | £41.2 | £42.3 | £43.5 | £44.6 | £45.5 | |
| District & Local Centres | | 0% | £34.6 | £35.6 | £36.5 | £37.5 | £38.2 | |
| Out-of-Centre | | 0% | £110.6 | £113.7 | £116.8 | £119.8 | £122.2 | |
| Walsall MBC Area | | | | £504.9 | £518.8 | £532.9 | £546.7 | £558.0 |

TABLE 2: COMMITTED CONVENIENCE FLOORSPACE

| CENTRE | PLANNING REF | SCHEME | Gross Floorpace (sq m) | Net Floorpace (sq m) | Sales Density 2019 (£ per sqm) | Turnover (£m) | | | | |
|-------------------------------------|--------------|---|------------------------|----------------------|--------------------------------|---------------|-------------|-------------|-------------|-------------|
| | | | | | | 2019 | 2024 | 2029 | 2034 | 2038 |
| [1] Willenhall TownCentre-In-Centre | 18/0438 | Proposed demolition of existing class A1 retail (Budgens) store. Erection of new class A1 retail store (Aldi) with associated amendments to access, car parking, servicing, landscaping. Improvement works to the existing small retail | 1,831 | 195 | 11,000 | £2.1 | £2.2 | £2.2 | £2.3 | £2.3 |
| TOTAL | | | 1,831 | 195 | | £2.1 | £2.2 | £2.2 | £2.3 | £2.3 |

Notes:
[1] The net additional floorpace proposed is 278sqm gross (Existing: 1,553 sqm and proposed 1,831 sqm); the applied gross to net ratio of 70% and that all of this space is for convenience goods.

TABLE 3: WALSALL MBC AREA - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|---------|---------|---------|---------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £504.9 | £518.8 | £532.9 | £546.7 | £558.0 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £504.9 | 515.6 | 526.0 | 536.6 | 545.3 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £3.2 | £6.9 | £10.1 | £12.7 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £2.2 | £2.2 | £2.3 | £2.3 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | £1.0 | £4.7 | £7.8 | £10.4 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorpace (£ per sq m): | £12,500 | £12,765 | £13,022 | £13,285 | £13,498 |
| (ii) Net Floorpace Capacity (sq m): | - | 76 | 357 | 589 | 771 |
| (iii) Assumed Net / Gross Floorpace Ratio: | | 70% | 70% | 70% | 70% |
| (iv) Gross Floorpace Capacity (sq m): | | 108 | 510 | 841 | 1,102 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorpace (£ per sq m): | £7,000 | £7,148 | £7,292 | £7,439 | £7,559 |
| (ii) Net Floorpace Capacity (sq m): | - | 135 | 638 | 1,052 | 1,377 |
| (iii) Assumed Net / Gross Floorpace Ratio: | | 70% | 70% | 70% | 70% |
| (iv) Gross Floorpace Capacity (sq m): | | 193 | 911 | 1,502 | 1,967 |

Notes:
STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorpace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Netto, Co-Op, Budgens, etc.).

TABLE 4: WALSALL MBC AREA STRATEGIC CENTRE: WALSALL - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|---------|---------|---------|---------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £97.9 | £100.6 | £103.3 | £106.0 | £108.2 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £97.9 | 100.0 | 102.0 | 104.1 | 105.7 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £0.6 | £1.3 | £2.0 | £2.5 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £0.0 | £0.0 | £0.0 | £0.0 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | £0.6 | £1.3 | £2.0 | £2.5 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £12,500 | £12,765 | £13,022 | £13,285 | £13,498 |
| (ii) Net Floorspace Capacity (sq m): | - | 48 | 102 | 147 | 183 |
| (iii) Assumed Net / Gross Floorspace Ratio: | | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | | 68 | 146 | 211 | 261 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £7,000 | £7,148 | £7,292 | £7,439 | £7,559 |
| (ii) Net Floorspace Capacity (sq m): | - | 86 | 183 | 263 | 326 |
| (iii) Assumed Net / Gross Floorspace Ratio: | | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | | 122 | 261 | 376 | 466 |

Notes:
 STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
 STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
 STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
 STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
 STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
 STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Netto, Co-Op, Budgens, etc.).

TABLE 5: WALSALL MBC AREA TOWN CENTRE: BLOXWICH - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|---------|---------|---------|---------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £41.8 | £42.9 | £44.1 | £45.3 | £46.2 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £41.8 | 42.7 | 43.5 | 44.4 | 45.1 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £0.3 | £0.6 | £0.8 | £1.1 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £0.0 | £0.0 | £0.0 | £0.0 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | £0.3 | £0.6 | £0.8 | £1.1 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £12,500 | £12,765 | £13,022 | £13,285 | £13,498 |
| (ii) Net Floorspace Capacity (sq m): | - | 20 | 44 | 63 | 78 |
| (iii) Assumed Net / Gross Floorspace Ratio: | | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | | 29 | 62 | 90 | 111 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £7,000 | £7,148 | £7,292 | £7,439 | £7,559 |
| (ii) Net Floorspace Capacity (sq m): | - | 37 | 76 | 112 | 139 |
| (iii) Assumed Net / Gross Floorspace Ratio: | | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | | 52 | 112 | 161 | 199 |

Notes:
 STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
 STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
 STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
 STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
 STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
 STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Netto, Co-Op, Budgens, etc.).

TABLE 6: WALSALL MBC AREA TOWN CENTRE: BROWNHILLS - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|---------|---------|---------|---------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £61.1 | £62.7 | £64.4 | £66.1 | £67.5 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £61.1 | 62.4 | 63.6 | 64.9 | 65.9 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £0.4 | £0.8 | £1.2 | £1.5 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £0.0 | £0.0 | £0.0 | £0.0 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | £0.4 | £0.8 | £1.2 | £1.5 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £12,500 | £12,765 | £13,022 | £13,285 | £13,498 |
| (ii) Net Floorspace Capacity (sq m): | - | 30 | 64 | 92 | 114 |
| (iii) Assumed Net / Gross Floorspace Ratio: | | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | | 43 | 91 | 131 | 163 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £7,000 | £7,148 | £7,292 | £7,439 | £7,559 |
| (ii) Net Floorspace Capacity (sq m): | - | 83 | 114 | 164 | 204 |
| (iii) Assumed Net / Gross Floorspace Ratio: | | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | | 76 | 163 | 235 | 291 |

Notes:
 STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
 STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
 STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
 STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
 STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
 STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Netto, Co-Op, Budgens, etc.).

TABLE 6: WALSALL MBC AREA : TOWN CENTRE: ALDRIDGE - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|---------|---------|---------|---------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £58.4 | £60.0 | £61.6 | £63.2 | £64.5 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £58.4 | 59.6 | 60.8 | 62.0 | 63.0 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £0.4 | £0.8 | £1.2 | £1.5 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £0.0 | £0.0 | £0.0 | £0.0 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | £0.4 | £0.8 | £1.2 | £1.5 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £12,500 | £12,765 | £13,022 | £13,285 | £13,498 |
| (ii) Net Floorspace Capacity (sq m): | - | 29 | 61 | 88 | 109 |
| (iii) Assumed Net / Gross Floorspace Ratio: | | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | | 41 | 87 | 126 | 156 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £7,000 | £7,148 | £7,292 | £7,439 | £7,559 |
| (ii) Net Floorspace Capacity (sq m): | - | 51 | 109 | 157 | 195 |
| (iii) Assumed Net / Gross Floorspace Ratio: | | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | | 73 | 156 | 224 | 278 |

Notes:
STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Netto, Co-Op, Budgens, etc.).

TABLE 7: WALSALL MBC AREA : TOWN CENTRE: WILLENHALL - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|---------|---------|---------|---------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £59.3 | £61.0 | £62.6 | £64.3 | £65.6 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £59.3 | 60.6 | 61.8 | 63.1 | 64.1 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £0.4 | £0.8 | £1.2 | £1.5 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £2.2 | £2.2 | £2.3 | £2.3 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | -£1.8 | -£1.4 | -£1.1 | -£0.8 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £12,500 | £12,765 | £13,022 | £13,285 | £13,498 |
| (ii) Net Floorspace Capacity (sq m): | - | -142 | -109 | -82 | -60 |
| (iii) Assumed Net / Gross Floorspace Ratio: | | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | | -203 | -156 | -117 | -86 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £7,000 | £7,148 | £7,292 | £7,439 | £7,559 |
| (ii) Net Floorspace Capacity (sq m): | - | -254 | -195 | -146 | -108 |
| (iii) Assumed Net / Gross Floorspace Ratio: | | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | | -363 | -278 | -209 | -154 |

Notes:
STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Netto, Co-Op, Budgens, etc.).

TABLE 8: WALSALL MBC AREA : TOWN CENTRE: DARLSTON CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|---------|---------|---------|---------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £41.2 | £42.3 | £43.5 | £44.6 | £45.5 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £41.2 | 42.1 | 42.9 | 43.8 | 44.5 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £0.3 | £0.6 | £0.8 | £1.0 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £0.0 | £0.0 | £0.0 | £0.0 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | £0.3 | £0.6 | £0.8 | £1.0 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £12,500 | £12,765 | £13,022 | £13,285 | £13,498 |
| (ii) Net Floorspace Capacity (sq m): | - | 20 | 43 | 62 | 77 |
| (iii) Assumed Net / Gross Floorspace Ratio: | | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | | 29 | 62 | 89 | 110 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £7,000 | £7,148 | £7,292 | £7,439 | £7,559 |
| (ii) Net Floorspace Capacity (sq m): | - | 36 | 77 | 111 | 137 |
| (iii) Assumed Net / Gross Floorspace Ratio: | | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | | 51 | 110 | 158 | 196 |

Notes:
STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Netto, Co-Op, Budgens, etc.).

TABLE 9: WALSALL MBC AREA : DISTRICT & LOCAL CENTRES - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|---------|---------|---------|---------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £34.6 | £35.6 | £36.5 | £37.5 | £38.2 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £34.6 | 35.3 | 36.1 | 36.8 | 37.4 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £0.2 | £0.5 | £0.7 | £0.9 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £0.0 | £0.0 | £0.0 | £0.0 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | £0.2 | £0.5 | £0.7 | £0.9 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £12,500 | £12,765 | £13,022 | £13,285 | £13,498 |
| (ii) Net Floorspace Capacity (sq m): | - | 17 | 36 | 52 | 65 |
| (iii) Assumed Net / Gross Floorspace Ratio: | | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | | 24 | 52 | 74 | 92 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £7,000 | £7,148 | £7,292 | £7,439 | £7,559 |
| (ii) Net Floorspace Capacity (sq m): | - | 30 | 65 | 93 | 115 |
| (iii) Assumed Net / Gross Floorspace Ratio: | | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | | 43 | 92 | 133 | 165 |

Notes:
 STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
 STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
 STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
 STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
 STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
 STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Netto, Co-Op, Budgens, etc.).

TABLE 10: WALSALL MBC AREA : OUT-OF-CENTRE LOCATIONS - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|---------|---------|---------|---------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £110.6 | £113.7 | £116.8 | £119.8 | £122.2 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £110.6 | 113.0 | 115.2 | 117.6 | 119.5 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £0.7 | £1.5 | £2.2 | £2.8 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £0.0 | £0.0 | £0.0 | £0.0 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | £0.7 | £1.5 | £2.2 | £2.8 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £12,500 | £12,765 | £13,022 | £13,285 | £13,498 |
| (ii) Net Floorspace Capacity (sq m): | - | 54 | 116 | 167 | 206 |
| (iii) Assumed Net / Gross Floorspace Ratio: | | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | | 77 | 165 | 238 | 295 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £7,000 | £7,148 | £7,292 | £7,439 | £7,559 |
| (ii) Net Floorspace Capacity (sq m): | - | 97 | 207 | 297 | 369 |
| (iii) Assumed Net / Gross Floorspace Ratio: | | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | | 138 | 295 | 425 | 527 |

Notes:
 STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
 STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
 STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
 STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
 STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
 STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Netto, Co-Op, Budgens, etc.).

TABLE 9: WALSALL MBC AREA : SUMMARY TABLE - CONVENIENCE GOODS CAPACITY ASSESSMENT FOR NEW SUPERSTORE FORMAT FLOORSPACE (NET SQ M)
Assume Equilibrium at Base Year and Constant Market Shares

| CENTRE TYPE | STORE FORMAT | | | | | | | | |
|--|----------------------------|-------------|-------------|--------------|---|-------------|-------------|--------------|--------------|
| | Foodstore Format (sqm net) | | | | Local Supermarket/ Deep Discounter Format (sqm net) | | | | |
| | 2024 | 2029 | 2034 | 2038 | 2024 | 2029 | 2034 | 2038 | |
| Residual Expenditure (after Commitments) (£m) | £1.0 | £4.7 | £7.8 | £10.4 | £1.0 | £4.7 | £7.8 | £10.4 | |
| Strategic Centre | Walsall | 48 | 102 | 147 | 183 | 86 | 183 | 263 | 326 |
| Town Centre | Bloxwich | 20 | 44 | 63 | 78 | 37 | 78 | 112 | 139 |
| | Brownhills | 30 | 64 | 92 | 114 | 53 | 114 | 164 | 204 |
| | Aldridge | 29 | 61 | 86 | 109 | 51 | 109 | 157 | 195 |
| | Willenhall | -142 | -109 | -82 | -60 | -254 | -195 | -146 | -108 |
| | Darlaston | 20 | 43 | 62 | 77 | 36 | 77 | 111 | 137 |
| District & Local Centres | | 17 | 36 | 52 | 65 | 30 | 65 | 93 | 115 |
| Out-of-Centre | | 54 | 116 | 167 | 206 | 97 | 207 | 297 | 369 |
| WALSALL MBC AREA | | 76 | 357 | 589 | 771 | 135 | 638 | 1,052 | 1,377 |

**Appendix 6: Population and Expenditure:
Comparison Goods**

TABLE 1: EXPERIAN BUSINESS STRATEGIES - BASE YEAR (2019) POPULATION & PROJECTIONS (to 2038) GROWTH 2019 to 2038 (%)

| ZONE: | 2019 | 2024 | 2029 | 2034 | 2038 | 2019-2029 | 2029-2038 | 2019-2038 |
|-------------------|------------------|------------------|------------------|------------------|------------------|-------------|-------------|-------------|
| Zone 1 | 74,963 | 78,416 | 81,293 | 83,937 | 86,163 | 8.4% | 6.0% | 14.9% |
| Zone 2 | 134,340 | 139,039 | 143,617 | 147,896 | 151,349 | 6.9% | 5.4% | 12.7% |
| Zone 3 | 76,305 | 78,505 | 81,204 | 83,316 | 84,782 | 6.4% | 4.4% | 11.1% |
| Zone 4 | 92,302 | 95,139 | 97,910 | 100,529 | 102,539 | 6.1% | 4.7% | 11.1% |
| Zone 5 | 41,050 | 42,319 | 43,566 | 44,693 | 45,667 | 6.1% | 4.8% | 11.2% |
| Zone 6 | 38,326 | 39,375 | 40,566 | 41,540 | 42,302 | 5.8% | 4.3% | 10.4% |
| Zone 7 | 30,464 | 31,204 | 31,932 | 32,547 | 33,041 | 4.8% | 3.5% | 8.5% |
| Zone 8 | 55,264 | 57,020 | 58,716 | 60,443 | 61,773 | 6.2% | 5.2% | 11.8% |
| Zone 9 | 24,903 | 25,208 | 25,447 | 25,675 | 25,907 | 2.2% | 1.8% | 4.0% |
| Zone 10 | 37,741 | 38,153 | 38,547 | 38,898 | 39,321 | 2.1% | 2.0% | 4.2% |
| Zone 11 | 17,940 | 18,522 | 19,054 | 19,537 | 19,919 | 6.2% | 4.5% | 11.0% |
| Zone 12 | 24,987 | 25,752 | 26,542 | 27,258 | 27,863 | 6.2% | 5.0% | 11.5% |
| Zone 13 | 24,909 | 26,201 | 27,511 | 28,819 | 29,934 | 10.4% | 8.8% | 20.2% |
| Zone 14 | 64,497 | 66,691 | 68,551 | 70,505 | 72,060 | 6.3% | 5.1% | 11.7% |
| Zone 15 | 31,297 | 32,675 | 33,965 | 35,161 | 36,153 | 8.5% | 6.4% | 15.5% |
| Zone 16 | 31,696 | 33,028 | 34,308 | 35,535 | 36,479 | 8.2% | 6.3% | 15.1% |
| Zone 17 | 32,812 | 34,091 | 35,182 | 36,152 | 36,908 | 7.2% | 4.9% | 12.5% |
| Zone 18 | 57,596 | 58,714 | 59,859 | 60,953 | 61,690 | 3.9% | 3.1% | 7.1% |
| Zone 19 | 34,575 | 35,256 | 36,021 | 36,876 | 37,635 | 4.2% | 4.5% | 8.8% |
| Zone 20 | 70,130 | 71,286 | 72,269 | 73,160 | 73,862 | 3.1% | 2.2% | 5.3% |
| Zone 21 | 36,325 | 37,129 | 37,843 | 38,737 | 39,473 | 4.2% | 4.3% | 8.7% |
| Zone 22 | 35,743 | 36,242 | 36,686 | 36,942 | 37,139 | 2.6% | 1.2% | 3.9% |
| Zone 23 | 46,972 | 48,930 | 50,753 | 52,615 | 54,157 | 8.0% | 6.7% | 15.3% |
| Zone 24 | 44,696 | 45,547 | 46,395 | 47,412 | 48,226 | 3.8% | 3.9% | 7.9% |
| Zone 25 | 29,312 | 29,672 | 29,967 | 30,115 | 30,217 | 2.2% | 0.8% | 3.1% |
| Zone 26 | 8,391 | 8,473 | 8,532 | 8,583 | 8,592 | 1.7% | 0.7% | 2.4% |
| Zone 27 | 52,215 | 52,815 | 53,389 | 53,838 | 54,139 | 2.2% | 1.4% | 3.7% |
| Zone 28 | 31,629 | 32,243 | 32,764 | 33,223 | 33,602 | 3.6% | 2.6% | 6.2% |
| Zone 29 | 15,615 | 15,879 | 16,103 | 16,250 | 16,329 | 3.1% | 1.4% | 4.6% |
| Zone 30 | 28,204 | 29,366 | 30,576 | 31,850 | 32,926 | 8.4% | 7.7% | 16.7% |
| Zone 31 | 42,212 | 43,878 | 45,362 | 46,950 | 48,326 | 7.5% | 6.5% | 14.5% |
| Zone 32 | 50,248 | 52,289 | 54,197 | 56,054 | 57,608 | 7.9% | 6.3% | 14.6% |
| Zone 33 | 81,936 | 83,274 | 84,419 | 85,519 | 86,363 | 3.0% | 2.3% | 5.4% |
| Zone 34 | 46,387 | 47,308 | 48,117 | 48,843 | 49,423 | 3.7% | 2.7% | 6.5% |
| Zone 35 | 53,902 | 55,323 | 56,606 | 57,742 | 58,681 | 5.0% | 3.7% | 8.9% |
| Zone 36 | 18,016 | 18,448 | 18,788 | 19,095 | 19,343 | 4.3% | 3.0% | 7.4% |
| Zone 37 | 22,160 | 22,840 | 23,440 | 23,984 | 24,381 | 5.8% | 4.0% | 10.0% |
| Zone 38 | 18,953 | 19,259 | 19,568 | 19,901 | 20,140 | 3.2% | 2.9% | 6.3% |
| Zone 39 | 30,899 | 31,567 | 32,114 | 32,586 | 33,020 | 3.9% | 2.8% | 6.9% |
| Zone 40 | 16,849 | 17,212 | 17,600 | 17,913 | 18,155 | 4.5% | 3.2% | 7.8% |
| Zone 41 | 27,573 | 27,990 | 28,388 | 28,762 | 29,043 | 3.0% | 2.3% | 5.3% |
| Zone 42 | 17,569 | 18,161 | 18,795 | 19,441 | 19,940 | 7.0% | 6.1% | 13.5% |
| Zone 43 | 62,665 | 64,560 | 66,472 | 68,338 | 69,968 | 6.1% | 5.3% | 11.7% |
| Zone 44 | 36,714 | 37,436 | 38,160 | 38,845 | 39,331 | 3.9% | 3.1% | 7.1% |
| Zone 45 | 26,653 | 27,402 | 28,122 | 28,688 | 29,215 | 5.5% | 3.9% | 9.6% |
| Zone 46 | 22,636 | 23,429 | 24,145 | 24,843 | 25,423 | 6.7% | 5.3% | 12.3% |
| Zone 47 | 50,231 | 51,431 | 52,632 | 53,757 | 54,727 | 4.8% | 4.0% | 9.0% |
| Zone 48 | 10,910 | 11,153 | 11,352 | 11,496 | 11,580 | 4.1% | 2.0% | 6.1% |
| Zone 49 | 18,044 | 18,684 | 19,313 | 19,968 | 20,477 | 7.0% | 6.0% | 13.5% |
| Zone 50 | 64,204 | 65,679 | 67,215 | 68,605 | 69,619 | 4.7% | 3.6% | 8.4% |
| Zone 51 | 35,524 | 36,490 | 37,192 | 37,885 | 38,521 | 4.7% | 3.6% | 8.4% |
| Zone 52 | 16,357 | 16,555 | 16,777 | 16,973 | 17,103 | 2.6% | 1.9% | 4.6% |
| Zone 53 | 18,219 | 18,656 | 19,060 | 19,401 | 19,717 | 4.6% | 3.4% | 8.2% |
| Zone 54 | 30,805 | 31,375 | 31,919 | 32,340 | 32,652 | 3.6% | 2.3% | 6.0% |
| Zone 55 | 27,997 | 28,635 | 29,063 | 29,334 | 29,530 | 3.8% | 1.6% | 5.5% |
| Study Area | 2,172,862 | 2,231,924 | 2,287,884 | 2,340,258 | 2,382,434 | 5.3% | 4.1% | 9.6% |

Source: EXPERIAN BUSINESS STRATEGIES

Notes: The base year (2019) population figures have been sourced directly from Experian's 'Retail Area Planner' Reports for each study zone using LSH's (Experian-based) MMG3 Geographic Information System (GIS). The base year figures are based on ONS (mid-year) population figures. The projections for zones are derived from Experian's revised 'demographic component model'; these projections take into account mid-year age and gender estimates and project the population forward year-on-year based on Government population projections for local authority areas in England. The yearly components of population change that are taken into account are the birth rate (0-4 age band), ageing, net migration, death rates, etc. The 2038 population figure is based on growth trends between 2019 and 2037.

TABLE 2: REVISED COMPARISON GOODS EXPENDITURE PER CAPITA FORECASTS (excluding SFT)

| | 2019 | 2019 | 2024 | 2029 | 2034 | 2038 |
|--|---------------|------------------------------------|---------------|---------------|---------------|---------------|
| | (incl SFT) | EXCLUDING SPECIAL FORMS OF TRADING | | | | |
| EXPERIAN - SPECIAL FORMS OF TRADING (%): | | 17.9% | 20.4% | 21.4% | 21.6% | 21.8% |
| REVISED SPECIAL FORMS OF TRADING (%): | | 19.4% | 22.1% | 23.2% | 23.4% | 23.6% |
| Zone 1 | £3,089 | £2,490 | £2,817 | £3,255 | £3,799 | £4,297 |
| Zone 2 | £2,810 | £2,265 | £2,563 | £2,961 | £3,456 | £3,909 |
| Zone 3 | £3,418 | £2,755 | £3,117 | £3,601 | £4,204 | £4,755 |
| Zone 4 | £3,115 | £2,511 | £2,840 | £3,281 | £3,830 | £4,332 |
| Zone 5 | £2,746 | £2,214 | £2,504 | £2,894 | £3,378 | £3,820 |
| Zone 6 | £3,663 | £2,953 | £3,340 | £3,860 | £4,505 | £5,096 |
| Zone 7 | £3,647 | £2,940 | £3,325 | £3,842 | £4,485 | £5,073 |
| Zone 8 | £4,035 | £3,252 | £3,679 | £4,251 | £4,962 | £5,612 |
| Zone 9 | £3,875 | £3,124 | £3,534 | £4,083 | £4,766 | £5,391 |
| Zone 10 | £3,441 | £2,773 | £3,137 | £3,625 | £4,231 | £4,786 |
| Zone 11 | £2,862 | £2,307 | £2,610 | £3,016 | £3,520 | £3,981 |
| Zone 12 | £2,882 | £2,323 | £2,628 | £3,036 | £3,544 | £4,009 |
| Zone 13 | £2,521 | £2,032 | £2,299 | £2,656 | £3,100 | £3,507 |
| Zone 14 | £2,846 | £2,294 | £2,595 | £2,998 | £3,500 | £3,959 |
| Zone 15 | £2,831 | £2,282 | £2,581 | £2,983 | £3,482 | £3,938 |
| Zone 16 | £2,473 | £1,993 | £2,255 | £2,606 | £3,041 | £3,440 |
| Zone 17 | £2,710 | £2,185 | £2,471 | £2,856 | £3,333 | £3,770 |
| Zone 18 | £4,629 | £3,731 | £4,221 | £4,877 | £5,693 | £6,439 |
| Zone 19 | £2,963 | £2,389 | £2,702 | £3,122 | £3,644 | £4,122 |
| Zone 20 | £3,633 | £2,928 | £3,312 | £3,827 | £4,467 | £5,053 |
| Zone 21 | £2,654 | £2,140 | £2,421 | £2,797 | £3,265 | £3,692 |
| Zone 22 | £3,560 | £2,870 | £3,246 | £3,751 | £4,378 | £4,952 |
| Zone 23 | £2,657 | £2,142 | £2,423 | £2,800 | £3,268 | £3,696 |
| Zone 24 | £3,051 | £2,460 | £2,783 | £3,215 | £3,753 | £4,245 |
| Zone 25 | £4,120 | £3,321 | £3,756 | £4,340 | £5,066 | £5,730 |
| Zone 26 | £4,787 | £3,859 | £4,365 | £5,043 | £5,887 | £6,658 |
| Zone 27 | £3,682 | £2,968 | £3,358 | £3,880 | £4,529 | £5,122 |
| Zone 28 | £3,915 | £3,156 | £3,570 | £4,125 | £4,815 | £5,446 |
| Zone 29 | £4,301 | £3,467 | £3,922 | £4,532 | £5,290 | £5,983 |
| Zone 30 | £2,954 | £2,381 | £2,694 | £3,113 | £3,633 | £4,110 |
| Zone 31 | £2,510 | £2,023 | £2,288 | £2,644 | £3,086 | £3,491 |
| Zone 32 | £2,542 | £2,049 | £2,318 | £2,678 | £3,126 | £3,536 |
| Zone 33 | £3,515 | £2,833 | £3,205 | £3,703 | £4,323 | £4,889 |
| Zone 34 | £4,145 | £3,341 | £3,780 | £4,367 | £5,098 | £5,766 |
| Zone 35 | £2,844 | £2,292 | £2,593 | £2,996 | £3,498 | £3,956 |
| Zone 36 | £3,470 | £2,797 | £3,164 | £3,656 | £4,268 | £4,827 |
| Zone 37 | £3,635 | £2,930 | £3,315 | £3,830 | £4,471 | £5,056 |
| Zone 38 | £3,517 | £2,835 | £3,207 | £3,705 | £4,325 | £4,892 |
| Zone 39 | £3,614 | £2,913 | £3,295 | £3,807 | £4,444 | £5,027 |
| Zone 40 | £3,245 | £2,616 | £2,959 | £3,419 | £3,991 | £4,514 |
| Zone 41 | £3,869 | £3,119 | £3,528 | £4,076 | £4,758 | £5,382 |
| Zone 42 | £2,569 | £2,071 | £2,343 | £2,707 | £3,159 | £3,573 |
| Zone 43 | £2,709 | £2,184 | £2,470 | £2,854 | £3,331 | £3,768 |
| Zone 44 | £3,138 | £2,530 | £2,861 | £3,306 | £3,859 | £4,365 |
| Zone 45 | £3,252 | £2,621 | £2,965 | £3,426 | £3,999 | £4,524 |
| Zone 46 | £2,695 | £2,172 | £2,457 | £2,839 | £3,314 | £3,749 |
| Zone 47 | £2,737 | £2,206 | £2,496 | £2,884 | £3,366 | £3,808 |
| Zone 48 | £4,761 | £3,837 | £4,341 | £5,016 | £5,855 | £6,622 |
| Zone 49 | £2,382 | £1,920 | £2,172 | £2,509 | £2,929 | £3,313 |
| Zone 50 | £3,418 | £2,755 | £3,117 | £3,601 | £4,203 | £4,754 |
| Zone 51 | £3,473 | £2,799 | £3,167 | £3,659 | £4,271 | £4,831 |
| Zone 52 | £4,157 | £3,351 | £3,791 | £4,380 | £5,112 | £5,782 |
| Zone 53 | £4,108 | £3,311 | £3,746 | £4,328 | £5,052 | £5,714 |
| Zone 54 | £3,803 | £3,065 | £3,468 | £4,006 | £4,677 | £5,290 |
| Zone 55 | £4,279 | £3,449 | £3,902 | £4,509 | £5,263 | £5,953 |
| STUDY AREA AVERAGE: | £3,350 | £2,700 | £3,055 | £3,530 | £4,120 | £4,660 |

Source: Average spend per capita estimates (2017 prices) are derived from Experian 'Retail Area Planner' Reports using the MMG3 GIS and the year-on-year expenditure growth forecasts have been informed by the latest Retail Planner Briefing Note 16 published by Experian Business Strategies (December 2018).

Notes: An allowance has been made for the market share of retail expenditure per capita on non-store sales (SFT - including mail order and Internet shopping) at the base year informed by the household survey-derived market shares for SFT. Forecast growth in SFT is based on the year-on-year forecasts published by Experian Business Strategies in the most recent Retail Planner Briefing Note 16 (December 2018).

TABLE 3: TOTAL AVAILABLE COMPARISON GOODS EXPENDITURE, BASE YEAR (2019) TO 2038 (£m) GROWTH 2019 to 2038 (%)

| | 2019 (incl SFT) | 2019 | 2024 | 2029 | 2034 | 2038 | 2019- 2029 | 2029- 2038 | 2019- 2038 |
|--------------------|--------------------|------------------------------------|----------------|----------------|----------------|-----------------|---------------|---------------|---------------|
| | | EXCLUDING SPECIAL FORMS OF TRADING | | | | | | | |
| Zone 1 | 231.6 | 186.7 | 220.9 | 264.6 | 318.9 | 370.3 | 41.7% | 39.9% | 98.3% |
| Zone 2 | 377.5 | 304.3 | 356.3 | 425.2 | 511.1 | 591.6 | 39.7% | 39.1% | 94.4% |
| Zone 3 | 260.8 | 210.3 | 244.7 | 292.5 | 350.3 | 403.1 | 39.1% | 37.8% | 91.7% |
| Zone 4 | 287.5 | 231.7 | 270.2 | 321.3 | 385.1 | 444.2 | 38.6% | 38.3% | 91.7% |
| Zone 5 | 112.7 | 90.9 | 106.0 | 126.1 | 151.0 | 174.5 | 38.7% | 38.4% | 92.0% |
| Zone 6 | 140.4 | 113.2 | 131.5 | 156.6 | 187.1 | 215.6 | 38.3% | 37.7% | 90.5% |
| Zone 7 | 111.1 | 89.5 | 103.8 | 122.7 | 146.0 | 167.6 | 37.0% | 36.6% | 87.2% |
| Zone 8 | 223.0 | 179.7 | 209.8 | 249.6 | 299.9 | 346.7 | 38.9% | 38.9% | 92.9% |
| Zone 9 | 96.5 | 77.8 | 89.1 | 103.9 | 122.4 | 139.7 | 33.6% | 34.4% | 79.5% |
| Zone 10 | 129.9 | 104.7 | 119.7 | 139.7 | 164.6 | 188.2 | 33.5% | 34.7% | 79.8% |
| Zone 11 | 51.3 | 41.4 | 48.3 | 57.5 | 68.8 | 79.3 | 38.8% | 38.0% | 91.6% |
| Zone 12 | 72.0 | 58.0 | 67.7 | 80.6 | 96.6 | 111.7 | 38.8% | 38.6% | 92.4% |
| Zone 13 | 62.8 | 50.6 | 60.2 | 73.1 | 89.4 | 105.0 | 44.4% | 43.7% | 107.4% |
| Zone 14 | 183.6 | 148.0 | 173.1 | 205.5 | 246.8 | 285.3 | 38.9% | 38.8% | 92.8% |
| Zone 15 | 88.6 | 71.4 | 84.3 | 101.3 | 122.4 | 142.4 | 41.8% | 40.5% | 99.3% |
| Zone 16 | 78.4 | 63.2 | 74.5 | 89.4 | 108.1 | 125.5 | 41.5% | 40.4% | 98.6% |
| Zone 17 | 88.9 | 71.7 | 84.3 | 100.5 | 120.5 | 139.1 | 40.1% | 38.5% | 94.1% |
| Zone 18 | 266.6 | 214.9 | 247.8 | 291.9 | 347.0 | 397.2 | 35.8% | 36.1% | 84.8% |
| Zone 19 | 102.5 | 82.6 | 95.3 | 112.5 | 134.4 | 155.1 | 36.2% | 37.9% | 87.8% |
| Zone 20 | 254.8 | 205.4 | 236.1 | 276.6 | 326.8 | 373.2 | 34.7% | 34.9% | 81.7% |
| Zone 21 | 96.4 | 77.7 | 89.9 | 105.8 | 126.5 | 145.8 | 36.2% | 37.7% | 87.5% |
| Zone 22 | 127.2 | 102.6 | 117.6 | 137.6 | 161.7 | 183.9 | 34.2% | 33.7% | 79.3% |
| Zone 23 | 124.8 | 100.6 | 118.6 | 142.1 | 171.9 | 200.2 | 41.2% | 40.9% | 99.0% |
| Zone 24 | 136.4 | 109.9 | 126.7 | 149.2 | 177.9 | 204.7 | 35.7% | 37.2% | 86.2% |
| Zone 25 | 120.8 | 97.3 | 111.5 | 130.1 | 152.6 | 173.2 | 33.6% | 33.1% | 77.9% |
| Zone 26 | 40.2 | 32.4 | 37.0 | 43.0 | 50.5 | 57.2 | 32.9% | 32.9% | 76.7% |
| Zone 27 | 192.3 | 155.0 | 177.3 | 207.1 | 243.8 | 277.3 | 33.6% | 33.9% | 78.9% |
| Zone 28 | 123.8 | 99.8 | 115.1 | 135.2 | 160.0 | 183.0 | 35.4% | 35.4% | 83.3% |
| Zone 29 | 67.2 | 54.1 | 62.3 | 73.0 | 86.0 | 97.7 | 34.8% | 33.9% | 80.5% |
| Zone 30 | 83.3 | 67.2 | 79.1 | 95.2 | 115.7 | 135.3 | 41.7% | 42.2% | 101.5% |
| Zone 31 | 105.9 | 85.4 | 100.4 | 119.9 | 144.9 | 168.7 | 40.5% | 40.7% | 97.6% |
| Zone 32 | 127.7 | 103.0 | 121.2 | 145.2 | 175.3 | 203.7 | 41.0% | 40.3% | 97.8% |
| Zone 33 | 288.0 | 232.2 | 266.9 | 312.6 | 369.7 | 422.3 | 34.7% | 35.1% | 81.9% |
| Zone 34 | 192.3 | 155.0 | 178.8 | 210.1 | 249.0 | 285.0 | 35.6% | 35.6% | 83.9% |
| Zone 35 | 153.3 | 123.6 | 143.5 | 169.6 | 202.0 | 232.1 | 37.3% | 36.9% | 87.9% |
| Zone 36 | 62.5 | 50.4 | 58.4 | 68.7 | 81.5 | 93.4 | 36.3% | 35.9% | 85.3% |
| Zone 37 | 80.6 | 64.9 | 75.7 | 89.8 | 107.2 | 123.3 | 38.3% | 37.3% | 89.9% |
| Zone 38 | 66.7 | 53.7 | 61.8 | 72.5 | 86.1 | 98.5 | 34.9% | 35.9% | 83.4% |
| Zone 39 | 111.7 | 90.0 | 104.0 | 122.3 | 144.8 | 166.0 | 35.8% | 35.8% | 84.4% |
| Zone 40 | 54.7 | 44.1 | 50.9 | 60.2 | 71.5 | 81.9 | 36.5% | 36.2% | 85.9% |
| Zone 41 | 106.7 | 86.0 | 98.8 | 115.7 | 136.9 | 156.3 | 34.6% | 35.1% | 81.8% |
| Zone 42 | 45.1 | 36.4 | 42.5 | 50.9 | 61.4 | 71.3 | 39.8% | 40.1% | 95.9% |
| Zone 43 | 169.8 | 136.8 | 159.5 | 189.7 | 227.7 | 263.6 | 38.6% | 39.0% | 92.7% |
| Zone 44 | 115.2 | 92.9 | 107.1 | 126.2 | 149.9 | 171.7 | 35.9% | 36.1% | 84.9% |
| Zone 45 | 86.7 | 69.9 | 81.3 | 96.4 | 114.7 | 132.2 | 37.9% | 37.2% | 89.1% |
| Zone 46 | 61.0 | 49.2 | 57.6 | 68.6 | 82.3 | 95.3 | 39.4% | 39.0% | 93.8% |
| Zone 47 | 137.5 | 110.8 | 128.4 | 151.8 | 181.0 | 208.4 | 37.0% | 37.3% | 88.0% |
| Zone 48 | 51.9 | 41.9 | 48.4 | 56.9 | 67.3 | 76.7 | 36.0% | 34.7% | 83.2% |
| Zone 49 | 43.0 | 34.6 | 40.6 | 48.5 | 58.5 | 67.8 | 39.9% | 40.0% | 95.8% |
| Zone 50 | 219.4 | 176.9 | 204.7 | 242.0 | 288.4 | 331.0 | 36.8% | 36.7% | 87.1% |
| Zone 51 | 123.4 | 99.4 | 115.6 | 136.1 | 161.8 | 186.1 | 36.8% | 36.7% | 87.1% |
| Zone 52 | 68.0 | 54.8 | 62.8 | 73.5 | 86.8 | 98.9 | 34.1% | 34.6% | 80.4% |
| Zone 53 | 74.8 | 60.3 | 69.9 | 82.5 | 98.0 | 112.7 | 36.7% | 36.6% | 86.8% |
| Zone 54 | 117.1 | 94.4 | 108.8 | 127.9 | 151.2 | 172.7 | 35.4% | 35.1% | 82.9% |
| Zone 55 | 119.8 | 96.6 | 111.7 | 131.0 | 154.4 | 175.8 | 35.7% | 34.1% | 82.0% |
| STUDY AREA: | 7,115.6 | 5,735.8 | 6,657.8 | 7,877.6 | 9,395.7 | 10,808.7 | 37.3% | 37.2% | 88.4% |

**Appendix 7: Comparison Goods Market Shares
(including SFT)**

TABLE 2: CLOTHING & FOOTWEAR - 2019 MARKET SHARE ANALYSIS (%)
Inclusive Internet Showrooms and other Social Points of Purchase

Table with 12 columns for planning authority zones (Zone 1-12) and 12 columns for comparison goods zones (Zone 1-12). Rows include categories like Woollenwear, Dolley, Sandwell, Walsall, and All Other Centres Outside BCLA Area, each with sub-centre details and market share percentages.

**Appendix 8: Comparison Goods Turnover
(excluding SFT)**

TABLE 4: 2020 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)
ALL CONSUMER GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA
Excluding Internet Shopping and other Special Forms of Trading

Table with columns: LOCAL PLANNING AUTHORITY, CENTRE TYPE, and 45 numbered columns (Zone 1 to Zone 45) and a final column labeled 'STUDY AREA'. Rows are organized by Local Planning Authority (Wolverhampton, Dudley, Sandwell, Walsall) and Centre Type (Strategic Centre, Town Centre, District & Local Centres, Out-of-Centre, and All Other Centres Outside BCLA Area). The table contains a dense grid of numerical data representing market share percentages for each zone and study area.

**Appendix 9A: Comparison Goods Capacity:
City of Wolverhampton**

TABLE 1: REVISED FORECAST COMPARISON GOODS TURNOVER (£m) - ALLOW FOR INFLOW FROM OUTSIDE STUDY AREA

| LPA | CENTRE TYPE | Estimated 'Inflow' from Outside Study Area | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|---------------|--|---------------|---------------|-----------------|-----------------|-----------------|
| Wolverhampton | | | | | | | |
| Strategic Centre | Wolverhampton | 5% | £477.8 | £554.6 | £656.2 | £782.7 | £900.4 |
| Town Centre | Bilston | 0% | £60.5 | £70.2 | £83.1 | £99.1 | £114.0 |
| | Wednesfield | 0% | £14.3 | £16.5 | £19.6 | £23.3 | £26.9 |
| District & Local Centres | | 0% | £30.3 | £35.2 | £41.6 | £49.6 | £57.1 |
| Out-of-Centre | | 0% | £186.2 | £216.1 | £255.7 | £305.0 | £350.9 |
| City of Wolverhampton Council Area | | | £769.0 | £892.6 | £1,056.2 | £1,269.7 | £1,449.1 |

TABLE 2: COMMITTED COMPARISON FLOORSPACE

| CENTRE | PLANNING REF | SCHEME | Gross Floorspace (sq m) | Net Floorspace (sq m) | Sales Density 2019 (£ per sqm) | Turnover (£m) | | | | |
|--|--------------|---|-------------------------|-----------------------|--------------------------------|---------------|-------------|-------------|--------------|--------------|
| | | | | | | 2019 | 2024 | 2029 | 2034 | 2038 |
| [1] Wolverhampton - City Centre | 17/01102/OUT | Westside Leisure - Outline application for leisure (Class D2), food and drink (Class A3), hotel (Class C1), retail (Class A1), drinking establishments (Class A4), multi-storey car park and public realm Land At Salop Street/Peel Street/Pitt Street/School Street And Ring Road St Marks Wolverhampton | 14,392 | 651 | 4,000 | £2.6 | £3.0 | £3.6 | £4.3 | £4.9 |
| [2] Blakenhall District Centre (Dudley Road) | 18/00132/FUL | Community Centre: Proposed part change of use from Industrial building to form 4 Retail units. | 314 | 110 | 2,000 | £0.2 | £0.3 | £0.3 | £0.4 | £0.4 |
| [3] Wolverhampton - OTC | 19/00349/FUL | Installation of 697sqm mezzanine and elevational changes to Unit F. St Johns Retail Park Church Street City Centre Wolverhampton West Midlands WV2 4SJ | 697 | 488 | 3,000 | £1.5 | £1.7 | £2.0 | £2.4 | £2.7 |
| [4] Wolverhampton - OTC | 13/00871/FUL | Pountney Street, unit shops - Proposed change of use of the existing basement area to create a mixed use development comprising retail units, bar, restaurant, creche and indoor parking Basement Of Former J W Brailthwaite Pountney Street Wolverhampton West Midlands WV2 4HX | 1,098 | 384 | 3,000 | £1.2 | £1.3 | £1.6 | £1.9 | £2.2 |
| [5] Wolverhampton - OTC | 16/00678/FUL | Aldi Portobello: Land Between New Street South Street Portobello Wolverhampton West Midlands. Proposed new Food Retail Store (Use Class A1), with associated car parking, servicing and landscaping (amended proposal following earlier approval). | 1,505 | 176 | 4,000 | £0.7 | £0.8 | £1.0 | £1.1 | £1.3 |
| TOTAL | | | 18,006 | 1,809 | | £6.1 | £7.1 | £8.4 | £10.0 | £11.5 |

Notes:

- [1] Assumed that of the maximum amount of A1 Class space permitted is 1,860sqm gross. Of this the the convenience /comparison split will be 50% / 50% and the gross to net ratio applied is 70%.
- [2] Assumed that of the total floorspace 314 sqm permitted the convenience /comparison split will be 50% / 50% and the gross to net ratio applied is 70%.
- [3] Assumed that the 697sqm is a gross figure therefore netted down by 70%.
- [4] Assumed that of the total permitted floorspace of 1,098 sqm the convenience /comparison split will be 50% / 50%. It is also assumed that 1,098sqm represents a gross figure and therefore netted down using a gross to net factor of 70%.
- [5] Assumed up to 1,254sqm convenience; 251sqm max sales area for comparison goods. Assumed this is gross and on this basis netted down by 70%.

TABLE 3: CITY OF WOLVERHAMPTON COUNCIL AREA - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|--------|--------|----------|----------|----------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £769.0 | £892.6 | £1,056.2 | £1,269.7 | £1,449.1 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £769.0 | 893.2 | 1057.8 | 1256.3 | 1441.6 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | -£0.6 | -£1.6 | £3.4 | £7.5 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £7.1 | £8.4 | £10.0 | £11.5 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | -£7.7 | -£10.1 | -£6.6 | -£4.0 |
| STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £6,000 | £6,969 | £8,253 | £9,802 | £11,248 |
| (ii) Net Floorspace Capacity (sq m): | | -1,106 | -1,218 | -676 | -356 |
| (iii) Assumed Net / Gross Floorspace Ratio: | | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | | -1,580 | -1,740 | -965 | -508 |

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
- STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
- STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
- STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
- STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
- STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 4: CITY OF WOLVERHAMPTON COUNCIL: STRATEGIC CENTRE: WOLVERHAMPTON - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|--------|--------|--------|--------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £477.8 | £554.6 | £656.2 | £782.7 | £900.4 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £477.8 | 555.0 | 657.2 | 780.5 | 895.7 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | -£0.4 | -£1.0 | £2.1 | £4.7 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £3.0 | £3.6 | £4.3 | £4.9 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | -£3.4 | -£4.6 | -£2.1 | -£0.2 |
| STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £6,000 | £6,969 | £8,253 | £9,802 | £11,248 |
| (ii) Net Floorspace Capacity (sq m): | - | -485 | -355 | -218 | -19 |
| (iii) Assumed Net / Gross Floorspace Ratio: | | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | | -693 | -792 | -311 | -27 |

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 5: CITY OF WOLVERHAMPTON COUNCIL: TOWN CENTRE: BILSTON - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|--------|--------|--------|--------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £60.5 | £70.2 | £83.1 | £99.1 | £114.0 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £60.5 | 70.2 | 83.2 | 98.8 | 113.4 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £0.0 | -£0.1 | £0.3 | £0.6 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £0.0 | £0.0 | £0.0 | £0.0 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | £0.0 | -£0.1 | £0.3 | £0.6 |
| STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £6,000 | £6,969 | £8,253 | £9,802 | £11,248 |
| (ii) Net Floorspace Capacity (sq m): | - | -6 | -15 | 27 | 53 |
| (iii) Assumed Net / Gross Floorspace Ratio: | | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | | -9 | -22 | 39 | 75 |

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 6: CITY OF WOLVERHAMPTON COUNCIL: TOWN CENTRE: WEDNESFIELD - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|--------|--------|--------|--------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £14.3 | £16.5 | £19.6 | £23.3 | £26.9 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £14.3 | 16.6 | 19.6 | 23.3 | 26.7 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £0.0 | £0.0 | £0.1 | £0.1 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £0.0 | £0.0 | £0.0 | £0.0 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | £0.0 | £0.0 | £0.1 | £0.1 |
| STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £6,000 | £6,969 | £8,253 | £9,802 | £11,248 |
| (ii) Net Floorspace Capacity (sq m): | - | -2 | -4 | 8 | 12 |
| (iii) Assumed Net / Gross Floorspace Ratio: | | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | | -2 | -5 | 9 | 18 |

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 7: CITY OF WOLVERHAMPTON COUNCIL: DISTRICT & LOCAL CENTRES - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|--------|--------|--------|--------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £30.3 | £35.2 | £41.6 | £49.6 | £57.1 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £30.3 | 35.2 | 41.7 | 49.5 | 56.8 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £0.0 | -£0.1 | £0.1 | £0.3 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £0.3 | £0.3 | £0.4 | £0.4 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | -£0.3 | -£0.4 | -£0.2 | -£0.1 |
| STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £6,000 | £6,969 | £8,253 | £9,802 | £11,248 |
| (ii) Net Floorspace Capacity (sq m): | - | -40 | -44 | -23 | -10 |
| (iii) Assumed Net / Gross Floorspace Ratio: | | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | | -57 | -63 | -33 | -15 |

Notes:

STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).

STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.

STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.

STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.

STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).

STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 8: CITY OF WOLVERHAMPTON COUNCIL: OUT-OF-CENTRE LOCATIONS - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|--------|--------|--------|--------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £186.2 | £216.1 | £255.7 | £305.0 | £350.9 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £186.2 | 216.3 | 256.1 | 304.2 | 349.1 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | -£0.1 | -£0.4 | £0.8 | £1.8 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £3.9 | £4.6 | £5.4 | £6.2 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | -£4.0 | -£5.0 | -£4.6 | -£4.4 |
| STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE: | | | | | |
| (i) Estimated Average Sales Density of New Floorspace (£ per sq m): | £6,000 | £6,969 | £8,253 | £9,802 | £11,248 |
| (ii) Net Floorspace Capacity (sq m): | - | -573 | -600 | -469 | -391 |
| (iii) Assumed Net / Gross Floorspace Ratio: | | 70% | 70% | 70% | 70% |
| (iv) Gross Floorspace Capacity (sq m): | | -819 | -857 | -670 | -559 |

Notes:

STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).

STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.

STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.

STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.

STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).

STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 9: SUMMARY TABLE: CITY OF WOLVERHAMPTON COUNCIL- COMPARISON GOODS CAPACITY (NET SQ M)
Assuming Equilibrium at 2019 and Constant Market Shares

| CENTRE TYPE | | 2024 | 2029 | 2034 | 2038 |
|---|---------------|---------------|---------------|-------------|-------------|
| Residual Expenditure (after Commitments) (£m) | | -£7.7 | -£10.1 | -£6.6 | -£4.0 |
| Strategic Centre | Wolverhampton | -485 | -555 | -218 | -19 |
| Town Centre | Bilston | -6 | -15 | 27 | 53 |
| | Wednesfield | -2 | -4 | 6 | 12 |
| District & Local Centres | | -40 | -44 | -23 | -10 |
| Out-of-Centre | | -573 | -600 | -469 | -391 |
| CITY OF WOLVERHAMPTON COUNCIL AREA | | -1,106 | -1,218 | -676 | -356 |

**Appendix 9B: Comparison Goods Capacity:
Dudley MBC**

TABLE 1: REVISED FORECAST COMPARISON GOODS TURNOVER (£m) - ALLOW FOR INFLOW FROM OUTSIDE STUDY AREA

| LPA | CENTRE TYPE | Estimated 'Inflow' from Outside Study Area | 2019 | 2024 | 2029 | 2034 | 2038 |
|--------------------------|------------------|--|-----------------|-----------------|-----------------|-----------------|-----------------|
| Dudley | Strategic Centre | 0% | £22.2 | £25.7 | £30.5 | £36.3 | £41.8 |
| | | 10% | £1,019.6 | £1,183.6 | £1,400.4 | £1,670.3 | £1,921.5 |
| | Town Centre | 0% | £75.8 | £88.0 | £104.1 | £124.2 | £142.8 |
| | | 0% | £76.1 | £88.3 | £104.5 | £124.6 | £143.4 |
| | | 0% | £58.5 | £67.9 | £80.3 | £95.8 | £110.2 |
| District & Local Centres | 0% | £46.3 | £53.8 | £63.6 | £75.9 | £87.3 | |
| Out-of-Centre | 0% | £55.3 | £64.2 | £76.0 | £90.6 | £104.3 | |
| Dudley MBC Area | | | £1,353.8 | £1,571.4 | £1,859.4 | £2,217.7 | £2,551.2 |

TABLE 2: COMMITTED COMPARISON FLOORSPACE

| | CENTRE | PLANNING REF | SCHEME | Gross Floorpace (sq m) | Net Floorpace (sq m) | Sales Density 2019 (£ per sqm) | Turnover (£m) | | | | |
|--------------|----------------------------|--------------|---|------------------------|----------------------|--------------------------------|---------------|--------------|--------------|--------------|--------------|
| | | | | | | | 2019 | 2024 | 2029 | 2034 | 2038 |
| [1] | Dudley - Town Centre | P18/0590 | Demolition, remodelling and remediation; redevelopment to allow: retail, service and leisure accommodation (use classes A1, A2, A3, A4, A5, D2); student accommodation (Use Class C2); dwelling houses (C3); hotel accommodation (C1); offices (B1A). | 4,180 | 2,926 | 4,000 | £11.7 | £13.6 | £16.1 | £19.1 | £21.9 |
| [2] | Lye-Out-of-Centre | P15/0845 | Former Clarkson Place Unit, Thoms Road, Lye, DYS 2LD; Erection of retail | 1,805 | 251 | 4,000 | £1.0 | £1.2 | £1.4 | £1.6 | £1.9 |
| [3] | Kingswinford-Out-of-Centre | P16/1461 | Former Istock Brick Ltd Stallings lane. Outline application for mixed use development comprising residential | 7,205 | 2,522 | 4,000 | £10.1 | £11.7 | £13.9 | £16.5 | £18.9 |
| TOTAL | | | | 13,190 | 5,699 | | £22.8 | £26.5 | £31.4 | £37.2 | £42.7 |

Notes:

- [1] A1 shops (non-food); maximum 4,180 sqm gross netted down by a ratio of 70%.
 [2] Planning Statement accompanying application provides 1805 sq m of gross A1 retail floorpace and some 1,254 sq m net. The net floorpace figure is broken down into 1,003 sqm net convenience goods and 251 sqm net for comparison goods.
 [3] Indicative masterplan accompanying application shows 7,205 sqm gross area proposed for retail. It is assumed that of the total permitted gross floorpace of 7,205 sqm the convenience /comparison split will be 50% / 50%. This is thereafter netted down using a gross to net factor of 70%.

TABLE 3: DUDLEY MBC AREA - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|----------|----------|----------|----------|----------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £1,353.8 | £1,571.4 | £1,859.4 | £2,217.7 | £2,551.2 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £1,353.8 | 1572.5 | 1862.2 | 2211.7 | 2538.0 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | -£1.0 | -£2.8 | £6.0 | £13.2 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £26.5 | £31.4 | £37.2 | £42.7 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | -£27.5 | -£34.2 | -£31.2 | -£29.5 |
| STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE: | | | | | |
| (i) | £6,000 | £6,969 | £8,253 | £9,802 | £11,248 |
| (ii) | | -3,944 | -4,141 | -3,186 | -2,623 |
| (iii) | | 70% | 70% | 70% | 70% |
| (iv) | | -5,634 | -5,915 | -4,552 | -3,746 |

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
 STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
 STEP 3: The forecast residual expenditure capacity (net commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
 STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
 STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
 STEP 6: The 'net' residual expenditure is converted into a net/gross floorpace capacity estimate based on the assumed average sales performance of new (prime) retail floorpace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorpace.

TABLE 4: DUDLEY MBC AREA STRATEGIC CENTRE: BRIERLEY HILL (Incorporating Traditional High St+ Merry Hill) - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|----------|--------------|--------------|-------------|--------------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £1,041.8 | £1,209.3 | £1,430.9 | £1,706.6 | £1,963.2 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £1,041.8 | 1210.1 | 1433.0 | 1702.0 | 1953.1 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | -£0.8 | -£2.2 | £4.6 | £10.2 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £0.0 | £0.0 | £0.0 | £0.0 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | -£0.8 | -£2.2 | £4.6 | £10.2 |
| STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE: | | | | | |
| (i) | £6,000 | £6,969 | £8,253 | £9,802 | £11,248 |
| (ii) | - | -111 | -263 | 472 | 905 |
| (iii) | - | 70% | 70% | 70% | 70% |
| (iv) | - | -159 | -376 | 674 | 1,294 |

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
- STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
- STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
- STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
- STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
- STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 5: DUDLEY MBC AREA : TOWN CENTRE: DUDLEY - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|--------|---------------|---------------|---------------|---------------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £75.8 | £88.0 | £104.1 | £124.2 | £142.8 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £75.8 | 88.0 | 104.3 | 123.8 | 142.1 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | -£0.1 | -£0.2 | £0.3 | £0.7 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £13.6 | £16.1 | £19.1 | £21.9 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | -£13.7 | -£16.3 | -£18.8 | -£21.2 |
| STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE: | | | | | |
| (i) | £6,000 | £6,969 | £8,253 | £9,802 | £11,248 |
| (ii) | - | -1,959 | -1,970 | -1,916 | -1,886 |
| (iii) | - | 70% | 70% | 70% | 70% |
| (iv) | - | -2,798 | -2,814 | -2,738 | -2,693 |

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
- STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
- STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
- STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
- STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
- STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 6: DUDLEY MBC AREA : TOWN CENTRE: STOURBRIDGE - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|--------|--------------|--------------|-------------|-------------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £76.1 | £88.3 | £104.5 | £124.6 | £143.4 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £76.1 | 88.4 | 104.6 | 124.3 | 142.6 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | -£0.1 | -£0.2 | £0.3 | £0.7 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £0.0 | £0.0 | £0.0 | £0.0 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | -£0.1 | -£0.2 | £0.3 | £0.7 |
| STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE: | | | | | |
| (i) | £6,000 | £6,969 | £8,253 | £9,802 | £11,248 |
| (ii) | - | -8 | -19 | 34 | 66 |
| (iii) | - | 70% | 70% | 70% | 70% |
| (iv) | - | -12 | -27 | 49 | 94 |

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
- STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
- STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
- STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
- STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
- STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 7: DUDLEY MBC AREA : TOWN CENTRE: HALESOWEN - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|--------|--------|--------|--------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £58.5 | £67.9 | £80.3 | £95.8 | £110.2 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £58.5 | 67.9 | 80.4 | 95.5 | 109.6 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £0.0 | -£0.1 | £0.3 | £0.6 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £0.0 | £0.0 | £0.0 | £0.0 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | £0.0 | -£0.1 | £0.3 | £0.6 |
| STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE: | | | | | |
| (i) | £6,000 | £6,969 | £8,253 | £9,802 | £11,248 |
| (ii) | - | -6 | -15 | 26 | 51 |
| (iii) | | 70% | 70% | 70% | 70% |
| (iv) | | -9 | -21 | 38 | 73 |

Notes:
STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 8: DUDLEY MBC AREA : DISTRICT & LOCAL CENTRES - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|--------|--------|--------|--------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £46.3 | £53.8 | £63.6 | £75.9 | £87.3 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £46.3 | 53.8 | 63.7 | 75.7 | 86.9 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £0.0 | -£0.1 | £0.2 | £0.5 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £0.0 | £0.0 | £0.0 | £0.0 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | £0.0 | -£0.1 | £0.2 | £0.5 |
| STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE: | | | | | |
| (i) | £6,000 | £6,969 | £8,253 | £9,802 | £11,248 |
| (ii) | - | -5 | -12 | 21 | 40 |
| (iii) | | 70% | 70% | 70% | 70% |
| (iv) | | -7 | -17 | 30 | 58 |

Notes:
STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 9: DUDLEY MBC AREA : OUT-OF-CENTRE LOCATIONS - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|--------|--------|--------|--------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £55.3 | £64.2 | £76.0 | £90.6 | £104.3 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £55.3 | 64.3 | 76.1 | 90.4 | 103.7 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £0.0 | -£0.1 | £0.2 | £0.5 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £12.9 | £15.3 | £18.1 | £20.8 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | -£12.9 | -£15.4 | -£17.9 | -£20.3 |
| STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE: | | | | | |
| (i) | £6,000 | £6,969 | £8,253 | £9,802 | £11,248 |
| (ii) | - | -1,854 | -1,862 | -1,823 | -1,800 |
| (iii) | | 70% | 70% | 70% | 70% |
| (iv) | | -2,649 | -2,661 | -2,605 | -2,572 |

Notes:
STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 10: DUDLEY MBC AREA: SUMMARY TABLE - COMPARISON GOODS CAPACITY (NET SQ M)
Assuming Equilibrium at 2019 and Constant Market Shares

| CENTRE TYPE | 2024 | 2029 | 2034 | 2038 |
|---|---------------|---------------|---------------|---------------|
| Residual Expenditure (after Commitments) (£m) | -£27.5 | -£34.2 | -£31.2 | -£29.5 |
| Strategic Centre | -111 | -263 | 472 | 905 |
| Brierley Hill (1 traditional High St + Merry Hill) | | | | |
| Town Centre | -1,959 | -1,970 | -1,916 | -1,885 |
| Dudley | -8 | -19 | 34 | 66 |
| Stourbridge | -6 | -15 | 26 | 51 |
| Halesowen | | | | |
| District & Local Centres | -5 | -12 | 21 | 40 |
| Out-of-Centre | -1,854 | -1,862 | -1,823 | -1,800 |
| DUDLEY MBC AREA | -3,944 | -4,141 | -3,186 | -2,623 |

**Appendix 9C: Comparison Goods Capacity:
Sandwell MBC**

TABLE 1: REVISED FORECAST COMPARISON GOODS TURNOVER (£m) - ALLOW FOR INFLOW FROM OUTSIDE STUDY AREA

| LPA | CENTRE TYPE | Estimated 'Inflow' from Outside Study Area | 2019 | 2024 | 2029 | 2034 | 2038 |
|--------------------------|--------------------------|--|---------------|-----------------|-----------------|-----------------|--------|
| Sandwell | Strategic Centre | 5% | £205.6 | £238.6 | £282.4 | £336.8 | £387.4 |
| | Town Centre | 0% | £27.1 | £31.5 | £37.2 | £44.4 | £51.1 |
| | | 0% | £6.0 | £7.0 | £8.2 | £9.8 | £11.3 |
| | | 0% | £26.8 | £31.1 | £36.8 | £44.0 | £50.6 |
| | | 0% | £86.0 | £102.2 | £120.9 | £144.2 | £165.8 |
| | | 0% | £32.7 | £38.0 | £45.0 | £53.6 | £61.7 |
| | | 0% | £19.2 | £22.3 | £26.4 | £31.5 | £36.2 |
| | 0% | £24.4 | £28.4 | £33.6 | £40.0 | £46.1 | |
| | District & Local Centres | 0% | £23.6 | £27.4 | £32.4 | £38.6 | £44.4 |
| | Out-of-Centre | 0% | £286.2 | £332.3 | £393.1 | £468.9 | £539.4 |
| Sandwell MBC Area | | £739.7 | £858.7 | £1,016.0 | £1,211.8 | £1,394.0 | |

TABLE 2: COMMITTED COMPARISON FLOORSPACE

| CENTRE | PLANNING REF | SCHEME | Gross Floorpace (sq m) | Net Floorpace (sq m) | Sales Density 2019 (£ per sqm) | Turnover (£m) | | | | |
|---|--------------|---|---|----------------------|--------------------------------|---------------|--------------|--------------|---------------|---------------|
| | | | | | | 2019 | 2024 | 2029 | 2034 | 2038 |
| [1] West Bromwich-Edge-of-Town Centre | DC/18/62210 | Staples Limited Tildasley Street West Bromwich B70 9SU. Proposed variation of condition 1 of planning permission DC/18/62210 (Proposed change of use to supermarket (Class A1), external alterations including new store access, loading bay extension, trolley bay canopy, and alterations to car park and | 1,973 | 263 | 4,000 | £1.1 | £1.2 | £1.4 | £1.7 | £2.0 |
| [2] Great Bridge Town Centre | DC/18/61411 | Poundland Unit 1 Great Bridge Retail Park Great Bridge Street West Bromwich B70 0EN. Proposed installation of new operating floor for | 290 | 203 | 3,000 | £0.6 | £0.7 | £0.8 | £1.0 | £1.1 |
| [3] Oldbury Town Centre-Edge-of-Town Centre | DC/07/48773 | Land Bounded By Bromford Road, West Bromwich Street, Fountain Lane, Oldbury Edge Of Centre. section 73 application to vary conditions 4 and 21 of planning permission DC/03/40338 as amended by DC/06/46890 - Full permission for reclamation and regeneration of former foundry. | 12,077 sqm - open A1 comparison goods and | 8,940 | 4,000 | £35.8 | £41.5 | £49.2 | £58.4 | £67.0 |
| | | | 15,276, restricted A1 comparison goods | 10,693 | 3,000 | £32.1 | £37.3 | £44.1 | £52.4 | £60.1 |
| TOTAL | | | 2,263 | 20,099 | | £69.5 | £80.7 | £95.6 | £113.5 | £130.3 |

Notes:

- [1] Aldi application, as per planning and retail statement net sales area of 1,315. It is assumed that of this 80% of all the floorpace is for convenience good and that remainder 20% is for comparison goods.
 [2] The gross floorpace is 290 sqm to which a gross to net ratio of 70% has been applied.
 [3] Permission for 1,858sqm (health & fitness); 12,077 sqm - open A1 comparison goods and 15,276, restricted A1 comparison goods. A gross to net ratio of 70% as been applied.

TABLE 3: SANDWELL MBC AREA - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|--------|----------|----------|----------|----------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £739.7 | £858.7 | £1,016.0 | £1,211.8 | £1,394.0 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £739.7 | 859.2 | 1017.5 | 1208.5 | 1386.8 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | -£0.6 | -£1.5 | £3.3 | £7.2 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £80.7 | £95.6 | £113.5 | £130.3 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | -£81.3 | -£97.1 | -£110.3 | -£123.1 |
| STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE: | | | | | |
| (i) | £6,000 | £6,969 | £8,253 | £9,802 | £11,248 |
| (ii) | | -£1,662 | -£1,770 | -£1,248 | -£0,940 |
| (iii) | | 70% | 70% | 70% | 70% |
| (iv) | | -£16,661 | -£16,814 | -£16,069 | -£15,629 |

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
 STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
 STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
 STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
 STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
 STEP 6: The 'net' residual expenditure is converted into a net/gross floorpace capacity estimate based on the assumed average sales performance of new (prime) retail floorpace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorpace.

TABLE 4: SANDWELL MBC AREA STRATEGIC CENTRE: WEST BROMWICH - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|--------|--------|--------|--------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £205.6 | £238.6 | £282.4 | £336.8 | £387.4 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £205.6 | 238.8 | 282.8 | 335.9 | 385.4 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | -£0.2 | -£0.4 | £0.9 | £2.0 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £1.2 | £1.4 | £1.7 | £2.0 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | -£1.4 | -£1.9 | -£0.8 | £0.0 |
| STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE: | | | | | |
| (i) | £6,000 | £6,969 | £8,253 | £9,802 | £11,248 |
| (ii) | - | -197 | -227 | -82 | 3 |
| (iii) | | 70% | 70% | 70% | 70% |
| (iv) | | -282 | -325 | -118 | 5 |

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
- STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
- STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
- STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
- STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
- STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 5: SANDWELL MBC AREA : TOWN CENTRE: BLACKHEATH - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|--------|--------|--------|--------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £27.1 | £31.5 | £37.2 | £44.4 | £51.1 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £27.1 | 31.5 | 37.3 | 44.3 | 50.8 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £0.0 | -£0.1 | £0.1 | £0.3 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £0.0 | £0.0 | £0.0 | £0.0 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | £0.0 | -£0.1 | £0.1 | £0.3 |
| STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE: | | | | | |
| (i) | £6,000 | £6,969 | £8,253 | £9,802 | £11,248 |
| (ii) | - | -3 | -7 | 12 | 24 |
| (iii) | | 70% | 70% | 70% | 70% |
| (iv) | | -4 | -10 | 18 | 34 |

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
- STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
- STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
- STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
- STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
- STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 6: SANDWELL MBC AREA : TOWN CENTRE: CRADLEY HEATH - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|--------|--------|--------|--------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £6.0 | £7.0 | £8.2 | £9.8 | £11.3 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £6.0 | 7.0 | 8.2 | 9.8 | 11.2 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £0.0 | £0.0 | £0.0 | £0.1 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £0.0 | £0.0 | £0.0 | £0.0 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | £0.0 | £0.0 | £0.0 | £0.1 |
| STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE: | | | | | |
| (i) | £6,000 | £6,969 | £8,253 | £9,802 | £11,248 |
| (ii) | - | -1 | -2 | 3 | 5 |
| (iii) | | 70% | 70% | 70% | 70% |
| (iv) | | -1 | -2 | 4 | 7 |

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
- STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
- STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
- STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
- STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
- STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 7: SANDWELL MBC AREA : TOWN CENTRE: GREAT BRIDGE - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|--------|--------|--------|--------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £26.8 | £31.1 | £36.8 | £44.0 | £50.6 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £26.8 | 31.2 | 36.9 | 43.8 | 50.3 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £0.0 | -£0.1 | £0.1 | £0.3 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £0.7 | £0.8 | £1.0 | £1.1 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | -£0.7 | -£0.9 | -£0.9 | -£0.9 |
| STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE: | | | | | |
| (i) | £6,000 | £6,969 | £8,253 | £9,802 | £11,248 |
| (ii) | - | -104 | -108 | -89 | -78 |
| (iii) | | 70% | 70% | 70% | 70% |
| (iv) | | -149 | -155 | -128 | -112 |

Notes:
STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 8: SANDWELL MBC AREA : TOWN CENTRE: OLDBURY - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|--------|---------|---------|---------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £88.0 | £102.2 | £120.9 | £144.2 | £165.8 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £88.0 | 102.2 | 121.1 | 143.8 | 165.0 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | -£0.1 | -£0.2 | £0.4 | £0.9 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £78.8 | £93.3 | £110.8 | £127.2 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | -£78.9 | -£93.5 | -£110.4 | -£126.3 |
| STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE: | | | | | |
| (i) | £6,000 | £6,969 | £8,253 | £9,802 | £11,248 |
| (ii) | - | -11,316 | -11,329 | -11,267 | -11,230 |
| (iii) | | 70% | 70% | 70% | 70% |
| (iv) | | -16,165 | -16,184 | -16,095 | -16,043 |

Notes:
STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 9: SANDWELL MBC AREA : TOWN CENTRE: WEDNESBURY - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|--------|--------|--------|--------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £32.7 | £38.0 | £45.0 | £53.6 | £61.7 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £32.7 | 38.0 | 45.0 | 53.5 | 61.4 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £0.0 | -£0.1 | £0.1 | £0.3 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £0.0 | £0.0 | £0.0 | £0.0 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | £0.0 | -£0.1 | £0.1 | £0.3 |
| STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE: | | | | | |
| (i) | £6,000 | £6,969 | £8,253 | £9,802 | £11,248 |
| (ii) | - | -4 | -8 | 15 | 28 |
| (iii) | | 70% | 70% | 70% | 70% |
| (iv) | | -5 | -12 | 21 | 41 |

Notes:
STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 10: SANDWELL MBC AREA : TOWN CENTRE: CAPE HILL - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|--------|--------|--------|--------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £19.2 | £22.3 | £26.4 | £31.5 | £36.2 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £19.2 | 22.3 | 26.4 | 31.4 | 36.0 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £0.0 | £0.0 | £0.1 | £0.2 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £0.0 | £0.0 | £0.0 | £0.0 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | £0.0 | £0.0 | £0.1 | £0.2 |
| STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE: | | | | | |
| (i) | £6,000 | £6,969 | £8,253 | £9,802 | £11,248 |
| (ii) | - | -2 | -5 | 9 | 17 |
| (iii) | | 70% | 70% | 70% | 70% |
| (iv) | | -3 | -7 | 12 | 24 |

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
- STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
- STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
- STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
- STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
- STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 11: SANDWELL MBC AREA : TOWN CENTRE: BEARWOOD - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|--------|--------|--------|--------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £24.4 | £28.4 | £33.6 | £40.0 | £46.1 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £24.4 | 28.4 | 33.6 | 39.9 | 45.8 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £0.0 | -£0.1 | £0.1 | £0.2 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £0.0 | £0.0 | £0.0 | £0.0 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | £0.0 | -£0.1 | £0.1 | £0.2 |
| STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE: | | | | | |
| (i) | £6,000 | £6,969 | £8,253 | £9,802 | £11,248 |
| (ii) | - | -3 | -6 | 11 | 21 |
| (iii) | | 70% | 70% | 70% | 70% |
| (iv) | | -4 | -9 | 16 | 30 |

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
- STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
- STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
- STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
- STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
- STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 12: SANDWELL MBC AREA : DISTRICT & LOCAL CENTRES - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|--------|--------|--------|--------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £23.6 | £27.4 | £32.4 | £38.6 | £44.4 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £23.6 | 27.4 | 32.4 | 38.5 | 44.2 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £0.0 | £0.0 | £0.1 | £0.2 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £0.0 | £0.0 | £0.0 | £0.0 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | £0.0 | £0.0 | £0.1 | £0.2 |
| STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE: | | | | | |
| (i) | £6,000 | £6,969 | £8,253 | £9,802 | £11,248 |
| (ii) | - | -3 | -6 | 11 | 20 |
| (iii) | | 70% | 70% | 70% | 70% |
| (iv) | | -4 | -8 | 15 | 29 |

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
- STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
- STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
- STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
- STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
- STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 13: SANDWELL MBC AREA : OUT-OF-CENTRE LOCATIONS - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|--------|--------|--------|--------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £286.2 | £332.3 | £393.1 | £468.9 | £539.4 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £286.2 | 332.5 | 393.7 | 467.6 | 536.6 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | -£0.2 | -£0.6 | £1.3 | £2.8 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £0.0 | £0.0 | £0.0 | £0.0 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | -£0.2 | -£0.6 | £1.3 | £2.8 |
| STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE: | | | | | |
| (i) | £6,000 | £6,969 | £8,253 | £9,802 | £11,248 |
| (ii) | - | -31 | -72 | 130 | 249 |
| (iii) | | 70% | 70% | 70% | 70% |
| (iv) | | -44 | -103 | 185 | 355 |

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 14: SANDWELL MBC AREA: SUMMARY TABLE - COMPARISON GOODS CAPACITY (NET SQ M)
Assuming Equilibrium at 2019 and Constant Market Shares

| CENTRE TYPE | 2024 | 2029 | 2034 | 2038 |
|--|----------------|----------------|----------------|----------------|
| Residual Expenditure (after Commitments) (£m) | -£81.3 | -£97.1 | -£110.3 | -£123.1 |
| Strategic Centre West Bromwich | -197 | -227 | -82 | 3 |
| Town Centre Blackheath | -3 | -7 | 12 | 24 |
| Cradley Heath | -1 | -2 | 3 | 5 |
| Great Bridge | -104 | -108 | -89 | -78 |
| Oldbury | -11,316 | -11,329 | -11,267 | -11,230 |
| Wednesbury | -4 | -8 | 15 | 28 |
| Cape Hill | -2 | -5 | 9 | 17 |
| Bearwood | -3 | -6 | 11 | 21 |
| District & Local Centres | -3 | -6 | 11 | 20 |
| Out-of-Centre | -31 | -72 | 130 | 249 |
| SANDWELL MBC AREA | -11,662 | -11,770 | -11,248 | -10,940 |

**Appendix 9D: Comparison Goods Capacity:
Walsall Council**

TABLE 1: REVISED FORECAST COMPARISON GOODS TURNOVER (£m) - ALLOW FOR INFLOW FROM OUTSIDE STUDY AREA

| LPA | CENTRE TYPE | Estimated 'Inflow' from Outside Study Area | 2019 | 2024 | 2029 | 2034 | 2038 |
|-------------------------|--------------------------|--|---------------|---------------|---------------|---------------|---------------|
| Walsall | Strategic Centre | 5% | £307.2 | £356.5 | £421.9 | £503.2 | £578.8 |
| | Town Centre | 0% | £25.0 | £29.1 | £34.4 | £41.0 | £47.2 |
| | | 0% | £17.6 | £20.4 | £24.2 | £28.8 | £33.2 |
| | | 0% | £33.4 | £38.7 | £45.8 | £54.6 | £62.8 |
| | | 0% | £24.2 | £28.1 | £33.3 | £39.7 | £45.7 |
| | | 0% | £8.7 | £10.1 | £12.0 | £14.3 | £16.4 |
| | District & Local Centres | 0% | £10.6 | £12.3 | £14.6 | £17.4 | £20.0 |
| Out-of-Centre | 0% | £76.7 | £89.1 | £105.4 | £125.7 | £144.6 | |
| Walsall MBC Area | | | £503.5 | £584.4 | £691.5 | £824.7 | £948.8 |

TABLE 2: COMMITTED COMPARISON FLOORSPACE

| CENTRE | PLANNING REF | SCHEME | Gross Floorpace (sq m) | Net Floorpace (sq m) | Sales Density 2019 (£ per sqm) | Turnover (£m) | | | | |
|--------------|--------------|--------|------------------------|----------------------|--------------------------------|---------------|-------------|-------------|-------------|-------------|
| | | | | | | 2019 | 2024 | 2029 | 2034 | 2038 |
| None | None | None | - | - | - | - | - | - | - | - |
| None | None | None | - | - | - | - | - | - | - | - |
| TOTAL | | | 0 | 0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 | £0.0 |

TABLE 3: WAL SALL MBC AREA - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|--------|--------|--------|--------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £503.5 | £584.4 | £691.5 | £824.7 | £948.8 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽ⁱ⁾ : | £503.5 | 584.8 | 692.5 | 822.5 | 943.8 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | -£0.4 | -£1.0 | £2.2 | £4.9 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £0.0 | £0.0 | £0.0 | £0.0 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | -£0.4 | -£1.0 | £2.2 | £4.9 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE: | | | | | |
| | £6,000 | £6,969 | £8,253 | £9,802 | £11,248 |
| (i) | - | -54 | -127 | 225 | 433 |
| (ii) | | 70% | 70% | 70% | 70% |
| (iii) | | -77 | -181 | 326 | 625 |
| (iv) | | | | | |

Notes:

- STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEP 6: The 'net' residual expenditure is converted into a net/gross floorpace capacity estimate based on the assumed average sales performance of new (prime) retail floorpace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorpace.

TABLE 4: WALSHALL MBC AREA STRATEGIC CENTRE: WALSHALL - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|--------|--------|--------|--------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £307.2 | £356.5 | £421.9 | £503.2 | £578.8 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £307.2 | 356.8 | 422.5 | 501.8 | 575.8 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | -£0.2 | -£0.6 | £1.4 | £3.0 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £0.0 | £0.0 | £0.0 | £0.0 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | -£0.2 | -£0.6 | £1.4 | £3.0 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE: | | | | | |
| (i) | £6,000 | £6,969 | £8,253 | £9,802 | £11,248 |
| (ii) | - | -33 | -78 | 139 | 267 |
| (iii) | | 70% | 70% | 70% | 70% |
| (iv) | | -47 | -111 | 199 | 381 |

Notes:

STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).

STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.

STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.

STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.

STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).

STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 5: WALSHALL MBC AREA TOWN CENTRE: BLOXWICH - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|--------|--------|--------|--------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £25.0 | £29.1 | £34.4 | £41.0 | £47.2 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £25.0 | 29.1 | 34.4 | 40.9 | 47.0 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £0.0 | -£0.1 | £0.1 | £0.2 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £0.0 | £0.0 | £0.0 | £0.0 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | £0.0 | -£0.1 | £0.1 | £0.2 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE: | | | | | |
| (i) | £6,000 | £6,969 | £8,253 | £9,802 | £11,248 |
| (ii) | - | -3 | -6 | 11 | 22 |
| (iii) | | 70% | 70% | 70% | 70% |
| (iv) | | -4 | -9 | 16 | 31 |

Notes:

STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).

STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.

STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.

STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.

STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).

STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 6: WALSHALL MBC AREA TOWN CENTRE: BROWNHILLS - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|--------|--------|--------|--------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £17.6 | £20.4 | £24.2 | £28.8 | £33.2 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £17.6 | 20.5 | 24.2 | 28.8 | 33.0 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £0.0 | £0.0 | £0.1 | £0.2 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £0.0 | £0.0 | £0.0 | £0.0 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | £0.0 | £0.0 | £0.1 | £0.2 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE: | | | | | |
| (i) | £6,000 | £6,969 | £8,253 | £9,802 | £11,248 |
| (ii) | - | -2 | -4 | 9 | 15 |
| (iii) | | 70% | 70% | 70% | 70% |
| (iv) | | -3 | -6 | 11 | 22 |

Notes:

STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).

STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.

STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.

STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.

STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).

STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 6: WALSALL MBC AREA : TOWN CENTRE: ALDRIDGE - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|--------|--------|--------|--------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £33.4 | £38.7 | £45.8 | £54.6 | £62.8 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £33.4 | 38.7 | 45.9 | 54.5 | 62.5 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £0.0 | -£0.1 | £0.1 | £0.3 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £0.0 | £0.0 | £0.0 | £0.0 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | £0.0 | -£0.1 | £0.1 | £0.3 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE: | | | | | |
| (i) | £6,000 | £6,969 | £8,253 | £9,802 | £11,248 |
| (ii) | - | -4 | -8 | 15 | 29 |
| (iii) | | 70% | 70% | 70% | 70% |
| (iv) | | -5 | -12 | 22 | 41 |

Notes:
STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 7: WALSALL MBC AREA : TOWN CENTRE: WILLENHALL - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|--------|--------|--------|--------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £24.2 | £28.1 | £33.3 | £39.7 | £45.7 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £24.2 | 28.1 | 33.3 | 39.6 | 45.4 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £0.0 | -£0.1 | £0.1 | £0.2 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £0.0 | £0.0 | £0.0 | £0.0 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | £0.0 | -£0.1 | £0.1 | £0.2 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE: | | | | | |
| (i) | £6,000 | £6,969 | £8,253 | £9,802 | £11,248 |
| (ii) | - | -3 | -6 | 11 | 21 |
| (iii) | | 70% | 70% | 70% | 70% |
| (iv) | | -4 | -9 | 16 | 30 |

Notes:
STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 8: WALSALL MBC AREA : TOWN CENTRE: DARLSTON - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|--------|--------|--------|--------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £8.7 | £10.1 | £12.0 | £14.3 | £16.4 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £8.7 | 10.1 | 12.0 | 14.3 | 16.4 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £0.0 | £0.0 | £0.0 | £0.1 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £0.0 | £0.0 | £0.0 | £0.0 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | £0.0 | £0.0 | £0.0 | £0.1 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE: | | | | | |
| (i) | £6,000 | £6,969 | £8,253 | £9,802 | £11,248 |
| (ii) | - | -1 | -2 | 4 | 8 |
| (iii) | | 70% | 70% | 70% | 70% |
| (iv) | | -1 | -3 | 6 | 11 |

Notes:
STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 9: WALSALL MBC AREA : DISTRICT & LOCAL CENTRES - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|--------|--------|--------|--------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £10.6 | £12.3 | £14.6 | £17.4 | £20.0 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £10.6 | 12.3 | 14.6 | 17.4 | 19.9 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | £0.0 | £0.0 | £0.0 | £0.1 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £0.0 | £0.0 | £0.0 | £0.0 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | £0.0 | £0.0 | £0.0 | £0.1 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE: | | | | | |
| (i) | £6,000 | £6,969 | £8,253 | £9,802 | £11,248 |
| (ii) | - | -1 | -3 | 5 | 9 |
| (iii) | | 70% | 70% | 70% | 70% |
| (iv) | | -2 | -4 | 7 | 13 |

Notes:
STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 10: WALSALL MBC AREA : OUT-OF-CENTRE LOCATIONS - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

| | 2019 | 2024 | 2029 | 2034 | 2038 |
|---|--------|--------|--------|--------|---------|
| STEP 1: TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m): | £76.7 | £89.1 | £105.4 | £125.7 | £144.6 |
| STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) ⁽¹⁾ : | £76.7 | 89.1 | 105.6 | 125.4 | 143.9 |
| STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m): | - | -£0.1 | -£0.2 | £0.3 | £0.8 |
| STEP 4: TURNOVER OF ALL COMMITTED FLOORSPACE (£m) | - | £0.0 | £0.0 | £0.0 | £0.0 |
| STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: | | -£0.1 | -£0.2 | £0.3 | £0.8 |
| STEP 6: FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE: | | | | | |
| (i) | £6,000 | £6,969 | £8,253 | £9,802 | £11,248 |
| (ii) | - | -8 | -19 | 36 | 67 |
| (iii) | | 70% | 70% | 70% | 70% |
| (iv) | | -12 | -28 | 50 | 95 |

Notes:
STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growth rates informed by the latest Experian Retail Planner Briefing Note 16 (December 2018) and other research evidence.
STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2024.
STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).
STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 9: WALSALL MBC AREA: SUMMARY TABLE - COMPARISON GOODS CAPACITY (NET SQ M)
Assuming Equilibrium at 2019 and Constant Market Shares

| CENTRE TYPE | | 2024 | 2029 | 2034 | 2038 |
|--|------------|--------------|--------------|-------------|-------------|
| Residual Expenditure (after Commitments) (£m) | | -£0.4 | -£1.0 | £2.2 | £4.9 |
| Strategic Centre | Walsall | -33 | -78 | 139 | 267 |
| Town Centre | Bloxwich | -3 | -6 | 11 | 22 |
| | Brownhills | -2 | -4 | 8 | 15 |
| | Aldridge | -4 | -8 | 15 | 29 |
| | Willenhall | -3 | -6 | 11 | 21 |
| | Darlaston | -1 | -2 | 4 | 8 |
| District & Local Centres | -1 | -3 | 5 | 9 | |
| Out-of-Centre | -8 | -19 | 35 | 67 | |
| WALSALL MBC AREA | | -54 | -127 | 228 | 438 |

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