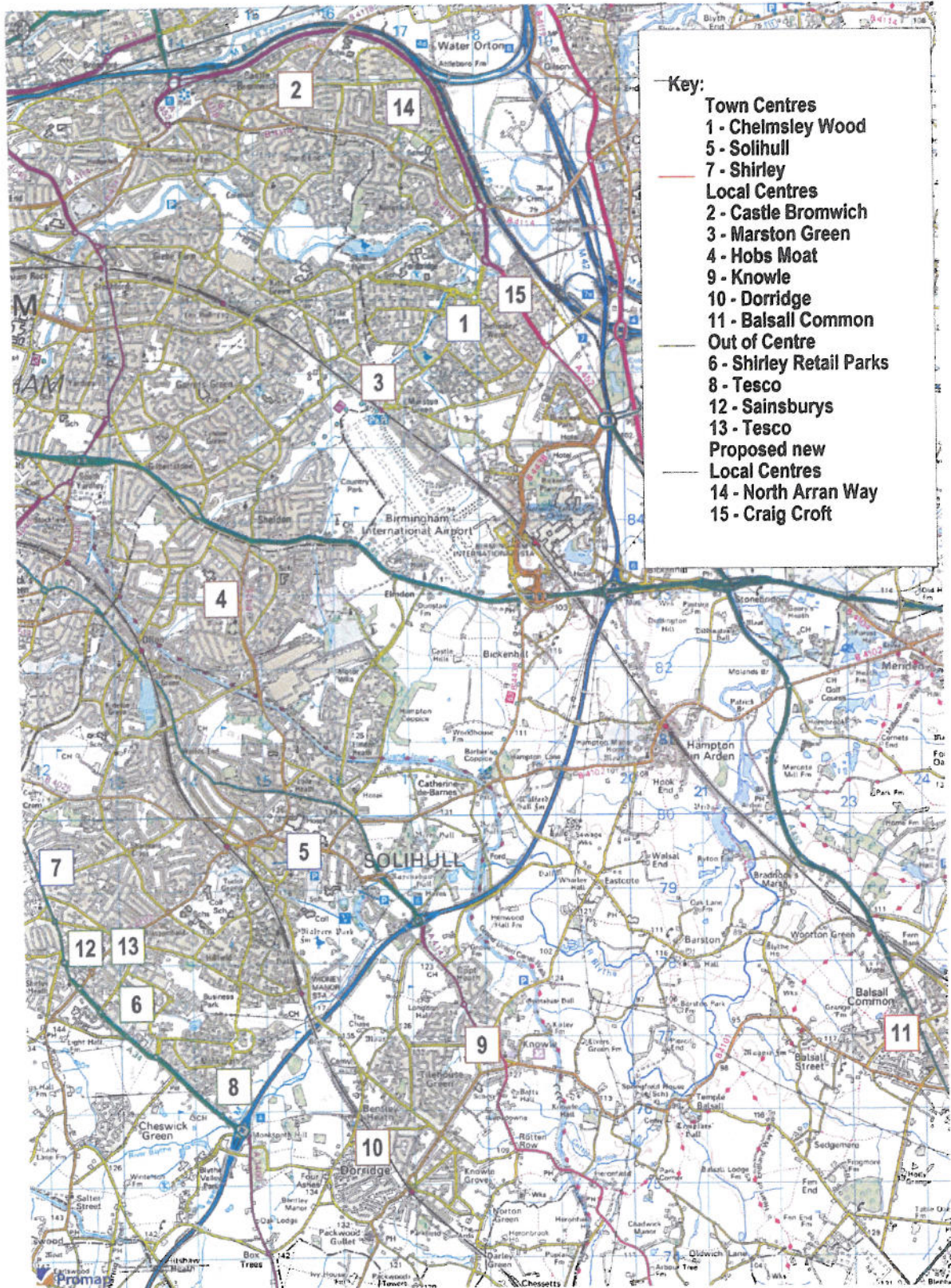


Appendix 1 – Catchment Area Map



- Key:**
- Town Centres**
 - 1 - Chelmsley Wood
 - 5 - Solihull
 - 7 - Shirley
 - Local Centres**
 - 2 - Castle Bromwich
 - 3 - Marston Green
 - 4 - Hobs Moat
 - 9 - Knowle
 - 10 - Dorridge
 - 11 - Balsall Common
 - Out of Centre**
 - 6 - Shirley Retail Parks
 - 8 - Tesco
 - 12 - Sainsburys
 - 13 - Tesco
 - Proposed new Local Centres**
 - 14 - North Arran Way
 - 15 - Craig Croft

Appendix 2 – Solihull RECAP Model



RECAP

The Retail Capacity forecasting Model

| | | | |
|--------------------------|----------------------------------------|---------|---------------------------|
| Project: | Solihull Retail & Leisure Study Update | Number: | 111CC800 |
| Client: | Solihull Borough Council | | |
| Date of Latest Revision: | 19-May-11 | File: | Solihull RECAP Model 2011 |

| | |
|----------------------------|--------------------------------------|
| Retail Locations Modelled: | Solihull Town Centre |
| | Shirley Town Centre |
| | Chelmsley Wood Town Centre |
| | Knowle Local Centre |
| | Non-Town Centre Shopping in Solihull |
| | |

| | | |
|---------------------|---|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Scenarios Modelled: | 1 | Baseline - Market Shares from the Household Interview Survey 2008 adjusted from 2011 due to the new town centre development in Chelmsley Wood. Comparison goods market shares attracted by Solihull Town Centre reduced from 2016 to allow for the proposed new John Lewis department store in Birmingham City Centre. |
| | 2 | As Scenario 1, plus increase in market shares of convenience and comparison goods expenditure attracted by Shirley Town Centre from 2016 as a result of committed new retail development there; and reduction in market shares attracted by other locations. |
| | 3 | As Scenario 2, plus Increase in market shares of comparison goods expenditure attracted by Solihull Town Centre from 2021 as a result of assumed new retail development of circa 10,000 sq m net comparison goods floorspace. |
| | 4 | As Scenario 3 plus further Increase in market shares of comparison goods expenditure attracted by Solihull Town Centre from 2021 as a result of assumed new retail development of circa 20,000 sq m net comparison goods floorspace. |
| | | |
| | | |

Notes:

Catchment Area Population and Expenditure

Table: 1

CATCHMENT AREA POPULATION FORECASTS

| Zone | Postcodes | Base Year | Forecasting Years | | | |
|-------|--------------------------------------------------------------------------------------------------|-----------|-------------------|---------|---------|---------|
| | | 2009 | 2011 | 2016 | 2021 | 2026 |
| 1 | B91 1, B91 2, B91 3 | 32,951 | 33,430 | 34,931 | 36,422 | 37,894 |
| 2 | B28 0, B28 9, B90 1, B90 2, B90 3, B90 4 | 65,210 | 66,030 | 68,114 | 70,204 | 72,289 |
| 3 | B26 1, B27 6, B27 7, B28 8, B92 7, B92 8, B92 9 | 75,771 | 76,354 | 78,117 | 79,903 | 81,652 |
| 4 | B26 2, B26 3, B33 0, B33 8, B33 9, B37 5, B37 7, B46 3 | 82,416 | 83,003 | 84,783 | 86,552 | 88,294 |
| 5 | B34 6, B34 7, B36 0, B36 8, B36 9, B37 6, B46 1 | 72,576 | 73,119 | 74,696 | 76,239 | 77,773 |
| 6 | B8 1, B8 2, B8 3, B9 4, B9 5, B10 0, B10 9, B11 1, B11 2, B12 0, B25 8 | 121,146 | 122,510 | 126,106 | 129,667 | 133,222 |
| 7 | B5 7, B11 3, B11 4, B12 8, B12 9, B13 8, B13 9, B14 7, B15 2, B29 7 | 99,927 | 102,024 | 106,258 | 110,710 | 115,160 |
| 8 | B13 0, B14 4, B14 5, B14 6, B29 6, B30 1, B30 2, B30 3, B31 3, B31 4, B38 0, B38 8, B38 9, B47 5 | 135,577 | 137,160 | 141,327 | 145,441 | 149,549 |
| 9 | B48 7, B94 5, B95 5, B98 9, B47 6 | 21,968 | 22,189 | 22,622 | 23,083 | 23,541 |
| 10 | B92 0, B93 0, B93 8, B93 9, B94 6, CV7 7, B40 1 | 38,310 | 38,755 | 39,773 | 40,830 | 41,877 |
| 11 | CV8 1, CV8 2, CV35 7 | 31,368 | 31,881 | 33,099 | 34,322 | 35,545 |
| | | | | | | |
| | | | | | | |
| | | | | | | |
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| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| TOTAL | | 777,220 | 786,455 | 809,826 | 833,373 | 856,796 |

Sources:

Pitney Bowes - Anysite Report, 6th April 2011

Notes:

Pitney Bowes population forecasts only until 2020. Forecasts for 2021 and 2026 extrapolated by trend projection.

Table: **2**
PER CAPITA EXPENDITURE

| | | | |
|-------------------------------------|----------|-----------------------|----------|
| Per Capita Expenditure in (year): | 2009 | Price Basis (Year): | 2009 |
| Including Special Forms of Trading: | | | |
| Convenience Goods (£): | 1,719.00 | Comparison Goods (£): | 2,832.00 |

GROWTH IN PER CAPITA RETAIL EXPENDITURE:

| | | | |
|--------------------|--------------------------|------------------------|------------------------|
| Convenience Goods: | (0.25) % pa 2009 to 2011 | 0.40 % pa 2009 to 2016 | 0.40 % pa 2009 to 2021 |
| | 0.40 % pa 2009 to 2026 | | |
| Comparison Goods: | 1.80 % pa 2009 to 2011 | 3.70 % pa 2009 to 2016 | 3.80 % pa 2009 to 2021 |
| | 3.80 % pa 2009 to 2026 | | |

| PER CAPITA EXPENDITURE IN | Convenience Goods (£) | | | | | Comparison Goods (£) | | | | |
|---------------------------|-----------------------|-----------------|-----------------|-----------------|-----------------|----------------------|-----------------|-----------------|-----------------|-----------------|
| | 2009 | 2011 | 2016 | 2021 | 2026 | 2009 | 2011 | 2016 | 2021 | 2026 |
| (Including SFT) | 1,719.00 | 1,710.42 | 1,767.71 | 1,803.35 | 1,839.71 | 2,832.00 | 2,934.87 | 3,652.12 | 4,430.59 | 5,338.86 |
| Deduction for SFT (%) | 4.0 | 4.7 | 6.0 | 7.0 | 8.0 | 9.0 | 12.0 | 16.0 | 17.5 | 18.0 |
| Excluding SFT | 1,650.24 | 1,630.03 | 1,661.65 | 1,677.12 | 1,692.53 | 2,577.12 | 2,582.69 | 3,067.78 | 3,655.24 | 4,377.86 |

COMPARISON GOODS PER CAPITA EXPENDITURE BY GOODS TYPE

| Per Capita Comparison Goods Expenditure in 2009 | | | | | | | | | |
|-------------------------------------------------|---------------------|--------------------------|--------------------|----------------------|------------------------|------------------------------|--------------------------------|-----------------------|-------------------|
| | Clothing & footwear | Furniture/ floorcrgs etc | Household Textiles | Household Appliances | Audio-visual equipment | Hardware, DIY, garden prdcts | Chemists, medcl & beauty goods | All other comprsn gds | Total comprsn gds |
| Including SFT (£) | 762 | 248 | 78 | 63 | 350 | 214 | 315 | 802 | 2,832 |
| Per Capita Comparison Goods Expenditure in 2009 | | | | | | | | | |
| Including SFT | 762.00 | 248.00 | 78.00 | 63.00 | 350.00 | 214.00 | 315.00 | 802.00 | 2,832.00 |
| Deduction for SFT (%) | 7.0 | 4.0 | 5.0 | 9.0 | 23.0 | 5.2 | 3.2 | 10.0 | 9.0 |
| Excluding SFT (£) | 708.66 | 238.08 | 74.10 | 57.33 | 269.50 | 202.87 | 304.92 | 721.80 | 2,577.12 |

Sources:

Pitney Bowes Anysite Report. Pitney Bowes/Oxford Economics 'Retail Expenditure Guide 2010/11'. DTZ estimates for SFT based on 'UK e-retail 2010', Verdict Research Limited.

Notes:

Oxford Economics' growth forecasts 2009 to 2020 extrapolated to 2016.

Table: 3

CATCHMENT AREA EXPENDITURE FORECASTS

| Catchment Zone | TOTAL RETAIL EXPENDITURE | | | | | | | | | |
|----------------|--------------------------|----------------|----------------|----------------|----------------|------------------|----------------|----------------|----------------|----------------|
| | CONVENIENCE GOODS | | | | | COMPARISON GOODS | | | | |
| | 2009 (£000) | 2011 (£000) | 2016 (£000) | 2021 (£000) | 2026 (£000) | 2009 (£000) | 2011 (£000) | 2016 (£000) | 2021 (£000) | 2026 (£000) |
| 1 | 54,377 | 54,492 | 58,043 | 61,084 | 64,136 | 84,919 | 86,339 | 107,161 | 133,132 | 165,893 |
| 2 | 107,612 | 107,631 | 113,182 | 117,741 | 122,351 | 168,054 | 170,535 | 208,959 | 256,614 | 316,471 |
| 3 | 125,040 | 124,459 | 129,803 | 134,006 | 138,199 | 195,271 | 197,198 | 239,646 | 292,064 | 357,462 |
| 4 | 136,006 | 135,297 | 140,880 | 145,158 | 149,441 | 212,396 | 214,371 | 260,095 | 316,368 | 386,541 |
| 5 | 119,768 | 119,186 | 124,119 | 127,862 | 131,633 | 187,037 | 188,843 | 229,151 | 278,672 | 340,479 |
| 6 | 199,920 | 199,695 | 209,544 | 217,467 | 225,483 | 312,208 | 316,405 | 386,865 | 473,965 | 583,229 |
| 7 | 164,904 | 166,302 | 176,564 | 185,673 | 194,912 | 257,524 | 263,496 | 325,976 | 404,670 | 504,154 |
| 8 | 223,735 | 223,574 | 234,836 | 243,922 | 253,117 | 349,398 | 354,241 | 433,560 | 531,621 | 654,706 |
| 9 | 36,252 | 36,169 | 37,590 | 38,714 | 39,844 | 56,614 | 57,307 | 69,399 | 84,375 | 103,060 |
| 10 | 63,221 | 63,172 | 66,089 | 68,476 | 70,879 | 98,729 | 100,092 | 122,015 | 149,242 | 183,333 |
| 11 | 51,765 | 51,967 | 54,999 | 57,561 | 60,160 | 80,839 | 82,339 | 101,540 | 125,453 | 155,609 |
| TOTALS | 1,282,600 | 1,281,942 | 1,345,648 | 1,397,665 | 1,450,155 | 2,002,989 | 2,031,166 | 2,484,366 | 3,046,177 | 3,750,937 |

Sources: RECAP Tables 1 and 2

Table: 4

CATCHMENT AREA COMPARISON GOODS EXPENDITURE BY GOODS TYPE IN**2009**

| Catchment Zone | Clothing & footwear (£000) | Furniture/ floorcrgs etc (£000) | Household Textiles (£000) | Household Appliances (£000) | Audio-visual equipment (£000) | Hardware, DIY, garden prdcts (£000) | Chemists, medcl & beauty goods (£000) | All other comprsn gds (£000) | Total comprsn gds (£000) |
|----------------|----------------------------|---------------------------------|---------------------------|-----------------------------|-------------------------------|-------------------------------------|---------------------------------------|------------------------------|--------------------------|
| 1 | 23,351 | 7,845 | 2,442 | 1,889 | 8,880 | 6,685 | 10,047 | 23,784 | 84,919 |
| 2 | 46,212 | 15,525 | 4,832 | 3,738 | 17,574 | 13,229 | 19,884 | 47,069 | 168,054 |
| 3 | 53,696 | 18,040 | 5,615 | 4,344 | 20,420 | 15,372 | 23,104 | 54,692 | 195,271 |
| 4 | 58,405 | 19,622 | 6,107 | 4,725 | 22,211 | 16,720 | 25,130 | 59,488 | 212,396 |
| 5 | 51,432 | 17,279 | 5,378 | 4,161 | 19,559 | 14,724 | 22,130 | 52,385 | 187,037 |
| 6 | 85,851 | 28,842 | 8,977 | 6,945 | 32,649 | 24,577 | 36,940 | 87,443 | 312,208 |
| 7 | 70,814 | 23,791 | 7,405 | 5,729 | 26,930 | 20,272 | 30,470 | 72,127 | 257,524 |
| 8 | 96,078 | 32,278 | 10,046 | 7,773 | 36,538 | 27,505 | 41,340 | 97,859 | 349,398 |
| 9 | 15,568 | 5,230 | 1,628 | 1,259 | 5,920 | 4,457 | 6,698 | 15,857 | 56,614 |
| 10 | 27,149 | 9,121 | 2,839 | 2,196 | 10,325 | 7,772 | 11,681 | 27,652 | 98,729 |
| 11 | 22,229 | 7,468 | 2,324 | 1,798 | 8,454 | 6,364 | 9,565 | 22,641 | 80,839 |
| TOTALS | 550,785 | 185,041 | 57,592 | 44,558 | 209,461 | 157,676 | 236,990 | 560,997 | 2,002,989 |

Sources: RECAP Tables 1 and 2

Scenario 1

Solihull Town Centre

Table: 5
CONVENIENCE GOODS MARKET SHARES IN

2009

| 2009 Allocations to | | | |
|-----------------------------------------|-----------------------|--------------------|------------------|
| Solihull Town Centre | | | |
| Indicated by household interview survey | | | |
| Zones | Main Food | Top-up convenience | WEIGHTED AVERAGE |
| | Q2 | Q5 | |
| | Expenditure weighting | | |
| | 75 (%) | 25 (%) | 100 (%) |
| 1 | 45.0 | 42.5 | 44.4 |
| 2 | 10.8 | 12.3 | 11.2 |
| 3 | 15.1 | 11.2 | 14.1 |
| 4 | 7.8 | 3.9 | 6.8 |
| 5 | 0.7 | 1.4 | 0.9 |
| 6 | 1.1 | 3.3 | 1.7 |
| 7 | 6.0 | 3.3 | 5.3 |
| 8 | 4.0 | 3.0 | 3.8 |
| 9 | 4.3 | 3.3 | 4.1 |
| 10 | 34.0 | 16.0 | 29.5 |
| 11 | 1.1 | 1.1 | 1.1 |
| | | | |
| | | | |
| | | | |
| | | | |

Sources: Household Interview Survey.
 Expenditure weighting by DTZ.

Table: 6
COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN

2009

| 2009 Allocations to | | | | | | | | | |
|-----------------------------------------|-----------------------|--------------------------|--------------------|----------------------|------------------------|--------------------------------|--------------------------------|--------------------------|------------------|
| Solihull Town Centre | | | | | | | | | |
| Indicated by Household Interview Survey | | | | | | | | | |
| Zones | Clothing & footwear | Furniture/ floorcrgs etc | Household Textiles | Household Appliances | Audio-visual equipment | Hardware, DIY, garden products | Chemists, medcl & beauty goods | All other comparison gds | WEIGHTED AVERAGE |
| | Q6 | Q7 | Q8 | Q9 | Q10 | Q11 | Q12 | Q13 | |
| | Expenditure weighting | | | | | | | | |
| | 708.66 (%) | 238.08 (%) | 74.10 (%) | 57.33 (%) | 269.50 (%) | 202.87 (%) | 304.92 (%) | 721.80 (%) | 2,577.26 (%) |
| 1 | 87.3 | 28.4 | 61.2 | 30.8 | 39.6 | 41.7 | 76.3 | 85.7 | 69.5 |
| 2 | 61.2 | 18.0 | 40.8 | 18.0 | 15.5 | 24.8 | 22.0 | 55.8 | 41.9 |
| 3 | 67.2 | 17.9 | 36.7 | 18.2 | 28.0 | 23.7 | 40.5 | 59.6 | 47.9 |
| 4 | 38.1 | 8.2 | 22.2 | 8.3 | 14.2 | 10.9 | 11.3 | 35.2 | 25.6 |
| 5 | 11.1 | 2.2 | 7.0 | 3.7 | 4.0 | 4.6 | 4.0 | 11.8 | 8.1 |
| 6 | 11.1 | 6.1 | 8.3 | 2.8 | 6.1 | 6.3 | 5.4 | 10.9 | 8.7 |
| 7 | 11.8 | 6.4 | 5.6 | 9.1 | 9.2 | 9.2 | 5.5 | 9.4 | 9.2 |
| 8 | 15.0 | 8.5 | 14.6 | 7.2 | 8.6 | 8.6 | 10.9 | 15.6 | 12.7 |
| 9 | 20.2 | 4.9 | 23.3 | 8.8 | 12.0 | 6.0 | 10.1 | 16.9 | 14.5 |
| 10 | 75.0 | 28.8 | 61.9 | 29.4 | 38.0 | 37.5 | 39.4 | 84.5 | 61.0 |
| 11 | 11.4 | 7.5 | 8.8 | 6.3 | 11.6 | 2.7 | 4.5 | 9.1 | 8.7 |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |

Sources: Household interview Survey.
 RECAP Table 2 for expenditure weights.

Table: 7

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

| | | | | | | | | | | |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------|--------------------|----------------------|------|----------------------------------|------------------|----------|----------|------|------|
| Scenario: | 1 | Location: | Solihull Town Centre | | | | | | | |
| Baseline - Market Shares from the Household Interview Survey 2008 adjusted from 2011 due to the new town centre development in Chelmsley Wood. Comparison goods market shares attracted by Solihull Town Centre reduced from 2016 to allow for the proposed new John Lewis department store in Birmingham City Centre. | | | | | | | | | | |
| Market shares correction factors: | | Convenience Goods: | | | 100% of survey indicated figures | | | | | |
| | | Comparison Goods: | | | 100% of survey indicated figures | | | | | |
| Catchment Zone | PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED | | | | | | | | | |
| | CONVENIENCE GOODS | | | | | COMPARISON GOODS | | | | |
| | 2009 (%) | 2011 (%) | 2016 (%) | 2021 | 2026 | 2009 (%) | 2011 (%) | 2016 (%) | 2021 | 2026 |
| 1 | 44 | 44 | 44 | 44 | 44 | 70 | 70 | 70 | 70 | 70 |
| 2 | 11 | 11 | 11 | 11 | 11 | 42 | 42 | 42 | 42 | 42 |
| 3 | 14 | 13 | 13 | 13 | 13 | 48 | 47 | 46 | 46 | 46 |
| 4 | 7 | 5 | 5 | 5 | 5 | 26 | 24 | 22 | 22 | 22 |
| 5 | 1 | 1 | 1 | 1 | 1 | 8 | 8 | 7 | 7 | 7 |
| 6 | 2 | 2 | 2 | 2 | 2 | 9 | 9 | 8 | 8 | 8 |
| 7 | 5 | 5 | 5 | 5 | 5 | 9 | 9 | 7 | 7 | 7 |
| 8 | 4 | 4 | 4 | 4 | 4 | 13 | 13 | 11 | 11 | 11 |
| 9 | 4 | 4 | 4 | 4 | 4 | 15 | 15 | 14 | 14 | 14 |
| 10 | 30 | 30 | 30 | 30 | 30 | 61 | 61 | 61 | 61 | 61 |
| 11 | 1 | 1 | 1 | 1 | 1 | 9 | 9 | 9 | 9 | 9 |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |

Sources: RECAP Model.
DTZ for market share corrections.

Table: 8
COMPARISON GOODS SALES BY GOODS TYPE IN 2009

| Catchment Zones | Sales in Solihull Town Centre | | | | | | | |
|-----------------|-------------------------------|---------------------------------|---------------------------|-----------------------------|-------------------------------|---------------------------------------|---------------------------------------|---------------------------------|
| | By Comparison Goods Type. | | | | | | | |
| 2009 | Clothing & footwear (£000) | Furniture/ floorcrgs etc (£000) | Household Textiles (£000) | Household Appliances (£000) | Audio-visual equipment (£000) | Hardware, DIY, garden products (£000) | Chemists, medcl & beauty goods (£000) | All other comparison gds (£000) |
| 1 | 20,385 | 2,228 | 1,494 | 582 | 3,517 | 2,788 | 7,666 | 20,383 |
| 2 | 28,282 | 2,795 | 1,971 | 673 | 2,724 | 3,281 | 4,374 | 26,264 |
| 3 | 36,084 | 3,229 | 2,061 | 791 | 5,718 | 3,643 | 9,357 | 32,596 |
| 4 | 22,252 | 1,609 | 1,356 | 392 | 3,154 | 1,822 | 2,840 | 20,940 |
| 5 | 5,709 | 380 | 376 | 154 | 782 | 677 | 885 | 6,181 |
| 6 | 9,529 | 1,759 | 745 | 194 | 1,992 | 1,548 | 1,995 | 9,531 |
| 7 | 8,356 | 1,523 | 415 | 521 | 2,478 | 1,865 | 1,676 | 6,780 |
| 8 | 14,412 | 2,744 | 1,467 | 560 | 3,142 | 2,365 | 4,506 | 15,266 |
| 9 | 3,145 | 256 | 379 | 111 | 710 | 267 | 677 | 2,680 |
| 10 | 20,362 | 2,627 | 1,757 | 646 | 3,923 | 2,915 | 4,603 | 23,366 |
| 11 | 2,534 | 560 | 205 | 113 | 981 | 172 | 430 | 2,060 |
| TOTALS | 171,050 | 19,710 | 12,226 | 4,737 | 29,120 | 21,344 | 39,009 | 166,048 |
| MARKET SHARES | 31% | 11% | 21% | 11% | 14% | 14% | 16% | 30% |

Sources: RECAP Model.

Table: 9
FORECAST RETAIL SALES

| Scenario: | 1 | | Location: Solihull Town Centre | | | | | | | |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------|-------------|--------------------------------|---------|---------|------------------|-------------|-------------|---------|---------|
| Baseline - Market Shares from the Household Interview Survey 2008 adjusted from 2011 due to the new town centre development in Chelmsley Wood. Comparison goods market shares attracted by Solihull Town Centre reduced from 2016 to allow for the proposed new John Lewis department store in Birmingham City Centre. | | | | | | | | | | |
| Catchment zone | RETAIL SALES BY CATCHMENT ZONE | | | | | COMPARISON GOODS | | | | |
| | CONVENIENCE GOODS | | | | | | | | | |
| | 2009 (£000) | 2011 (£000) | 2016 (£000) | 2021 | 2026 | 2009 (£000) | 2011 (£000) | 2016 (£000) | 2021 | 2026 |
| 1 | 23,926 | 23,976 | 25,539 | 26,877 | 28,220 | 59,443 | 60,437 | 75,012 | 93,192 | 116,125 |
| 2 | 11,837 | 11,839 | 12,450 | 12,952 | 13,459 | 70,583 | 71,625 | 87,763 | 107,778 | 132,918 |
| 3 | 17,506 | 16,180 | 16,874 | 17,421 | 17,966 | 93,730 | 92,683 | 110,237 | 134,349 | 164,432 |
| 4 | 9,520 | 6,765 | 7,044 | 7,258 | 7,472 | 55,223 | 51,449 | 57,221 | 69,601 | 85,039 |
| 5 | 1,198 | 1,192 | 1,241 | 1,279 | 1,316 | 14,963 | 15,107 | 16,041 | 19,507 | 23,834 |
| 6 | 3,998 | 3,994 | 4,191 | 4,349 | 4,510 | 28,099 | 28,476 | 30,949 | 37,917 | 46,658 |
| 7 | 8,245 | 8,315 | 8,828 | 9,284 | 9,746 | 23,177 | 23,715 | 22,818 | 28,327 | 35,291 |
| 8 | 8,949 | 8,943 | 9,393 | 9,757 | 10,125 | 45,422 | 46,051 | 47,692 | 58,478 | 72,018 |
| 9 | 1,450 | 1,447 | 1,504 | 1,549 | 1,594 | 8,492 | 8,596 | 9,716 | 11,813 | 14,428 |
| 10 | 18,966 | 18,951 | 19,827 | 20,543 | 21,264 | 60,225 | 61,056 | 74,429 | 91,037 | 111,833 |
| 11 | 518 | 520 | 550 | 576 | 602 | 7,276 | 7,410 | 9,139 | 11,291 | 14,005 |
| TOTALS | 106,114 | 102,122 | 107,441 | 111,843 | 116,272 | 466,632 | 466,607 | 541,016 | 663,291 | 816,581 |

Sources: RECAP Model.

Table: 10

'BENCHMARK' SALES CAPACITY OF EXISTING MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN 2009

| Store | Net Floorspace (sq m) | Convenience Goods Allocation (%) | Net convnce Goods Floorspace (sq m) | Convenience Goods sales Density (£ per sq m) | Convenience Goods sales (£000) |
|-------------------------------------------------------|-----------------------|----------------------------------|-------------------------------------|----------------------------------------------|--------------------------------|
| Marks & Spencer 37 Mill Lane, Solihull B91 3AT | 1,719 | 93 | 1,599 | 10,823 | 17,302 |
| Morrisons Warwick Road, Solihull B91 3BQ | 2,178 | 85 | 1,851 | 17,091 | 31,642 |
| J Sainsbury Poplar Way, , Solihull B91 3BX | 1,992 | 85 | 1,693 | 12,973 | 21,966 |
| Other conveninece goods shops in Solihull Town Centre | 1,635 | 100 | 1,635 | 6,000 | 9,810 |
| | | | | | |
| | | | | | |
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| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| ALL STORES | 7,524 | | 6,778 | 11,909 | 80,721 |

Sources: IGD, DTZ, Verdict Research.

Table: 11

'BENCHMARK' SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS

| CONVENIENCE GOODS | | | | | |
|-------------------------------|-------------------------|----------------------------------|--------------------------------|-----------------------------------------|-------------------------|
| Store/Scheme | Net Floorspace (sq m) | Convenience Goods Allocation (%) | Net Conv Gds Floorspace (sq m) | Conv Goods Sales Density (£ p sq m net) | Conv Goods Sales (£000) |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| ALL STORES | - | | - | #DIV/0! | - |
| COMPARISON GOODS | | | | | |
| Store/Scheme | Gross Floorspace (sq m) | Net to Gross Ratio (%) | Net Floorspace (sq m) | Sales Density (£ p sq m net) | Sales (£000) |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| ALL STORES AND SCHEMES | - | | - | #DIV/0! | - |

Sources: DTZ, based on Verdict Research and Retail Rankings.

Table: 12

FORECAST RETAIL CAPACITY

| Scenario: | 1 | Location: | Solihull Town Centre | | | | | | | |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|-----------|----------------------|---------|------------------|-------------------|---------|-----------|---------|---------|
| sted from 2011 due to the new town centre development in Chelmsley Wood. Comparison goods market shares attracted by Solihull Town Centre reduced from 2016 to allow for th | | | | | | | | | | |
| Growth in sales per sq m from shop floorspace existing in | | | | | 2009 | Comparison Goods: | | 1.50 % pa | 2011 to | 2026 |
| CONVENIENCE GOODS | | | | | COMPARISON GOODS | | | | | |
| | 2009 | 2011 | 2016 | 2021 | 2026 | 2009 | 2011 | 2016 | 2021 | 2026 |
| Residents' Spending £000 | 106,114 | 102,122 | 107,441 | 111,843 | 116,272 | 466,632 | 466,607 | 541,016 | 663,291 | 816,581 |
| Plus visitors' spending (%) | - | - | - | - | - | 2.5 | 2.5 | 2.0 | 2.0 | 2.0 |
| Total spending (£000) | 106,114 | 102,122 | 107,441 | 111,843 | 116,272 | 478,298 | 478,272 | 551,836 | 676,557 | 832,913 |
| Existing shop floorspace (sq m net) | 6,778 | 6,778 | 6,778 | 6,778 | 6,778 | 79,261 | 79,261 | 79,261 | 79,261 | 79,261 |
| Sales per sq m net (£) | 15,655 | 11,909 | 11,909 | 11,909 | 11,909 | 6,034 | 6,034 | 6,501 | 7,003 | 7,544 |
| Sales from extg flrspace (£000) | 106,114 | 80,721 | 80,721 | 80,721 | 80,721 | 478,298 | 478,298 | 515,263 | 555,084 | 597,983 |
| Available spending to support new shops (£000) | 0 | 21,401 | 26,721 | 31,122 | 35,551 | 0 | (26) | 36,574 | 121,472 | 234,929 |
| Less sales capacity of committed new floorspace (£000) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Net available spending for new shops (£000) | 0 | 21,401 | 26,721 | 31,122 | 35,551 | 0 | (26) | 36,574 | 121,472 | 234,929 |
| Sales per sq m net in new shops (£) | 14,000 | 14,000 | 14,000 | 14,000 | 14,000 | 5,000 | 5,000 | 5,386 | 5,803 | 6,251 |
| Capacity for new shop flrspace (sq m net) | 0 | 1,529 | 1,909 | 2,223 | 2,539 | 0 | (5) | 6,790 | 20,934 | 37,582 |
| Market Share of Catchment Area Expenditure | 8.3% | 8.0% | 8.0% | 8.0% | 8.0% | 23.3% | 23.0% | 21.8% | 21.8% | 21.8% |

Sources: RECAP Model.
Market shares adjustments by DTZ.

Notes: Excludes vacant floorspace.

Scenario 1

Shirley Town Centre

Table: **13**
CONVENIENCE GOODS MARKET SHARES IN 2009

| 2009 Allocations to | | | |
|-----------------------------------------|-----------------------|-----------------------------|---------------------|
| Shirley Town Centre | | | |
| Indicated by household interview survey | | | |
| Zones | Main Food Q2 | Top-up convenience Q5 | WEIGHTED AVERAGE |
| | Expenditure weighting | | |
| | 75 (%) | 25 (%) | 100 (%) |
| 1 | 5.8 | 11.7 | 7.3 |
| 2 | 16.2 | 17.7 | 16.6 |
| 3 | 2.6 | 1.3 | 2.3 |
| 4 | 1.9 | 2.6 | 2.1 |
| 5 | 0.7 | 0.0 | 0.5 |
| 6 | 3.3 | 0.6 | 2.6 |
| 7 | 5.3 | 2.0 | 4.5 |
| 8 | 0.5 | 0.5 | 0.5 |
| 9 | 3.3 | 2.2 | 3.0 |
| 10 | 1.0 | 5.0 | 2.0 |
| 11 | 0.0 | 0.0 | 0.0 |
| | | | |
| | | | |
| | | | |
| | | | |

Sources: Household Interview Survey.
 Expenditure weighting by DTZ.

Table: **14**
COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2009

| 2009 Allocations to | | | | | | | | | |
|-----------------------------------------|---------------------------|--------------------------------|--------------------------|----------------------------|-------------------------------|---------------------------------------|----------------------------------------|---------------------------------|------------------|
| Shirley Town Centre | | | | | | | | | |
| Indicated by Household Interview Survey | | | | | | | | | |
| Zones | Clothing & footwear Q6 | Furniture/ floorcrgs etc Q7 | Household Textiles Q8 | Household Appliances Q9 | Audio-visual equipment Q10 | Hardware, DIY, garden products Q11 | Chemists, medici & beauty goods Q12 | All other comparison gds Q13 | WEIGHTED AVERAGE |
| | Expenditure weighting | | | | | | | | |
| | 708.66 (%) | 238.08 (%) | 74.10 (%) | 57.33 (%) | 269.50 (%) | 202.87 (%) | 304.92 (%) | 721.80 (%) | 2,577.26 (%) |
| 1 | 1.8 | 4.5 | 6.1 | 1.9 | 5.2 | 6.5 | 4.2 | 1.2 | 3.0 |
| 2 | 9.5 | 10.1 | 5.1 | 7.2 | 5.8 | 12.4 | 40.2 | 9.3 | 12.8 |
| 3 | 1.5 | 2.8 | 2.5 | 2.3 | 5.1 | 2.2 | 2.7 | 0.0 | 1.8 |
| 4 | 0.0 | 1.0 | 1.6 | 1.5 | 2.7 | 0.7 | 1.3 | 0.0 | 0.7 |
| 5 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| 6 | 1.2 | 2.6 | 0.8 | 1.4 | 0.8 | 0.0 | 1.2 | 0.0 | 0.8 |
| 7 | 0.7 | 3.2 | 0.0 | 0.0 | 1.0 | 2.5 | 0.7 | 3.1 | 1.7 |
| 8 | 1.2 | 1.7 | 0.6 | 3.0 | 2.6 | 2.9 | 2.1 | 0.8 | 1.5 |
| 9 | 2.4 | 4.9 | 1.4 | 7.5 | 5.3 | 6.0 | 5.6 | 2.8 | 3.8 |
| 10 | 0.0 | 5.5 | 1.2 | 0.0 | 1.3 | 1.1 | 1.1 | 1.4 | 1.3 |
| 11 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |

Sources: Household Interview Survey.
 RECAP Table 2 for expenditure weights.

Table: 15

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

| | | | | | | | | | | |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------|--------------------|---------------------|----------|----------------------------------|------------------|----------|----------|----------|----------|
| Scenario: | 1 | Location: | Shirley Town Centre | | | | | | | |
| Baseline - Market Shares from the Household Interview Survey 2008 adjusted from 2011 due to the new town centre development in Chelmsley Wood. Comparison goods market shares attracted by Solihull Town Centre reduced from 2016 to allow for the proposed new John Lewis department store in Birmingham City Centre. | | | | | | | | | | |
| Market shares correction factors: | | Convenience Goods: | | | 100% of survey indicated figures | | | | | |
| | | Comparison Goods: | | | 100% of survey indicated figures | | | | | |
| Catchment Zone | PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED | | | | | | | | | |
| | CONVENIENCE GOODS | | | | | COMPARISON GOODS | | | | |
| | 2009 (%) | 2011 (%) | 2016 (%) | 2021 (%) | 2026 (%) | 2009 (%) | 2011 (%) | 2016 (%) | 2021 (%) | 2026 (%) |
| 1 | 7 | 7 | 7 | 7 | 7 | 3 | 3 | 3 | 3 | 3 |
| 2 | 17 | 17 | 17 | 17 | 17 | 13 | 13 | 13 | 13 | 13 |
| 3 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 |
| 4 | 2 | 2 | 2 | 2 | 2 | 1 | 1 | 1 | 1 | 1 |
| 5 | 1 | 1 | 1 | 1 | 1 | 0 | 0 | 0 | 0 | 0 |
| 6 | 3 | 3 | 3 | 3 | 3 | 1 | 1 | 1 | 1 | 1 |
| 7 | 4 | 4 | 4 | 4 | 4 | 2 | 2 | 2 | 2 | 2 |
| 8 | 1 | 1 | 1 | 1 | 1 | 2 | 2 | 2 | 2 | 2 |
| 9 | 3 | 3 | 3 | 3 | 3 | 4 | 4 | 4 | 4 | 4 |
| 10 | 2 | 2 | 2 | 2 | 2 | 1 | 1 | 1 | 1 | 1 |
| 11 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |

Sources: RECAP Model.
DTZ for market share corrections.

Table: 16

COMPARISON GOODS SALES BY GOODS TYPE IN 2009

| Catchment Zones | Sales in Shirley Town Centre | | | | | | | |
|-----------------|------------------------------|--------------------------------|---------------------------|-----------------------------|-------------------------------|---------------------------------------|---------------------------------------|---------------------------------|
| | By Comparison Goods Type. | | | | | | | |
| | Clothing & footwear (£000) | Furniture/floorcrgs etc (£000) | Household Textiles (£000) | Household Appliances (£000) | Audio-visual equipment (£000) | Hardware, DIY, garden products (£000) | Chemists, medcl & beauty goods (£000) | All other comparison gds (£000) |
| 1 | 420 | 353 | 149 | 36 | 462 | 435 | 422 | 285 |
| 2 | 4,390 | 1,568 | 246 | 269 | 1,019 | 1,640 | 7,993 | 4,377 |
| 3 | 805 | 505 | 140 | 100 | 1,041 | 338 | 624 | 0 |
| 4 | 0 | 196 | 98 | 71 | 600 | 117 | 327 | 0 |
| 5 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 6 | 1,030 | 750 | 72 | 97 | 261 | 0 | 443 | 0 |
| 7 | 496 | 761 | 0 | 0 | 269 | 507 | 213 | 2,236 |
| 8 | 1,153 | 549 | 60 | 233 | 950 | 798 | 868 | 783 |
| 9 | 374 | 256 | 23 | 94 | 314 | 267 | 375 | 444 |
| 10 | 0 | 502 | 34 | 0 | 134 | 85 | 128 | 387 |
| 11 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| TOTALS | 8,668 | 5,440 | 822 | 901 | 5,051 | 4,188 | 11,394 | 8,513 |
| MARKET SHARES | 2% | 3% | 1% | 2% | 2% | 3% | 5% | 2% |

Sources: RECAP Model.

Table: 17

FORECAST RETAIL SALES

| Scenario: | 1 | | Location: Shirley Town Centre | | | | | | | |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------|-------------|-------------------------------|-------------|-------------|------------------|-------------|-------------|-------------|-------------|
| Baseline - Market Shares from the Household Interview Survey 2008 adjusted from 2011 due to the new town centre development in Chelmsley Wood. Comparison goods market shares attracted by Solihull Town Centre reduced from 2016 to allow for the proposed new John Lewis department store in Birmingham City Centre. | | | | | | | | | | |
| Catchment zone | RETAIL SALES BY CATCHMENT ZONE | | | | | | | | | |
| | CONVENIENCE GOODS | | | | | COMPARISON GOODS | | | | |
| | 2009 (£000) | 2011 (£000) | 2016 (£000) | 2021 (£000) | 2026 (£000) | 2009 (£000) | 2011 (£000) | 2016 (£000) | 2021 (£000) | 2026 (£000) |
| 1 | 3,806 | 3,814 | 4,063 | 4,276 | 4,490 | 2,548 | 2,590 | 3,215 | 3,994 | 4,977 |
| 2 | 18,294 | 18,297 | 19,241 | 20,016 | 20,800 | 21,847 | 22,170 | 27,165 | 33,360 | 41,141 |
| 3 | 2,501 | 2,489 | 2,596 | 2,680 | 2,764 | 3,905 | 3,944 | 4,793 | 5,841 | 7,149 |
| 4 | 2,720 | 2,706 | 2,818 | 2,903 | 2,989 | 2,124 | 2,144 | 2,601 | 3,164 | 3,865 |
| 5 | 1,198 | 1,192 | 1,241 | 1,279 | 1,316 | 0 | 0 | 0 | 0 | 0 |
| 6 | 5,998 | 5,991 | 6,286 | 6,524 | 6,764 | 3,122 | 3,164 | 3,869 | 4,740 | 5,832 |
| 7 | 6,596 | 6,652 | 7,063 | 7,427 | 7,796 | 5,150 | 5,270 | 6,520 | 8,093 | 10,083 |
| 8 | 2,237 | 2,236 | 2,348 | 2,439 | 2,531 | 6,988 | 7,085 | 8,671 | 10,632 | 13,094 |
| 9 | 1,088 | 1,085 | 1,128 | 1,161 | 1,195 | 2,265 | 2,292 | 2,776 | 3,375 | 4,122 |
| 10 | 1,264 | 1,263 | 1,322 | 1,370 | 1,418 | 987 | 1,001 | 1,220 | 1,492 | 1,833 |
| 11 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| TOTALS | 45,702 | 45,726 | 48,105 | 50,075 | 52,063 | 48,936 | 49,659 | 60,829 | 74,692 | 92,098 |

Sources: RECAP Model.

Table: 18

**'BENCHMARK' SALES CAPACITY OF EXISTING
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN 2009**

| Store | Net Floorspace (sq m) | Convenience Goods Allocation (%) | Net convnce Goods Floorspace (sq m) | Convenience Goods sales Density (£ per sq m) | Convenience Goods sales (£000) |
|-----------------------------------------------------------------|-----------------------------|-------------------------------------------|----------------------------------------------|-------------------------------------------------------|--------------------------------------|
| Morrisons 281 Stratford Road, Shirley, Solihull B90 3AR | 1,858 | 85 | 1,579 | 17,091 | 26,993 |
| M&S Simply Food 177 Stratford Road, Shirley, Birmingham B90 3AX | 428 | 92 | 394 | 10,823 | 4,262 |
| M&S Simply Food 457 Stratford Road, Shirley, Birmingham B90 4AA | 111 | 100 | 111 | 10,823 | 1,201 |
| Iceland 267-271 Stratford Road, Shirley, Solihull B90 3AL | 471 | 93 | 438 | 6,826 | 2,990 |
| Aldi 240-244 Stratford Road, Shirley, Solihull B90 3AR | 987 | 67 | 661 | 7,073 | 4,677 |
| Other convenience goods shops in Shirley Town Centre | 1,215 | 100 | 1,215 | 5,000 | 6,075 |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| ALL STORES | 5,070 | | 4,398 | 10,503 | 46,198 |

Sources: IGD, DTZ, Verdict Research.

Table: 19

'BENCHMARK' SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS

| CONVENIENCE GOODS | | | | | |
|------------------------------------------------------------------------------|-------------------------------|-------------------------------------------|--------------------------------------|-----------------------------------------------|-------------------------------|
| Store/Scheme | Net Floorspace (sq m) | Convenience Goods Allocation (%) | Net Conv Gds Floorspace (sq m) | Conv Goods Sales Density (£ p sq m net) | Conv Goods Sales (£000) |
| Asda - Shirley Advance/Parkgate, Stratford road/Haslucks Green Road, Shirley | 4,112 | 60 | 2,467 | 14,124 | 34,847 |
| | | | | | |
| | | | | | |
| | | | | | |
| ALL STORES | 4,112 | | 2,467 | 14,124 | 34,847 |
| COMPARISON GOODS | | | | | |
| Store/Scheme | Gross Floorspace (sq m) | Net to Gross Ratio (%) | Net Floorspace (sq m) | Sales Density (£ p sq m net) | Sales (£000) |
| Asda - Shirley Advance/Parkgate, Stratford road/Haslucks Green Road, Shirley | n/a | n/a | 1,645 | 7,263 | 11,946 |
| Shirley Advance/Parkgate, Stratford road/Haslucks Green Road, Shirley | n/a | n/a | 5,587 | 4,250 | 23,745 |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| ALL STORES AND SCHEMES | - | | 7,232 | 4,935 | 35,691 |

Sources: DTZ, based on Verdict Research and Retail Rankings.

Notes: The Parkgate scheme has been included as a commitment, because the recent refusal of planning permission was only on the grounds of parking provision, and the principle of a retail development of approximately this scale accords with Council policy.

Table: 20

FORECAST RETAIL CAPACITY

| Scenario: 1 | | Location: Shirley Town Centre | | | | | | | | |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|-------------------------------|----------|----------|----------|------------------------------------------|--------|----------|----------|---------|
| sted from 2011 due to the new town centre development in Chelmsley Wood. Comparison goods market shares attracted by Solihull Town Centre reduced from 2016 to allow for th | | | | | | | | | | |
| Growth in sales per sq m from shop floorspace existing in | | | | | | Comparison Goods: 1.50 % pa 2011 to 2026 | | | | |
| | CONVENIENCE GOODS | | | | | COMPARISON GOODS | | | | |
| | 2009 | 2011 | 2016 | 2021 | 2026 | 2009 | 2011 | 2016 | 2021 | 2026 |
| Residents' Spending £000 | 45,702 | 45,726 | 48,105 | 50,075 | 52,063 | 48,936 | 49,659 | 60,829 | 74,692 | 92,098 |
| Plus visitors' spending (%) | - | - | - | - | - | - | - | - | - | - |
| Total spending (£000) | 45,702 | 45,726 | 48,105 | 50,075 | 52,063 | 48,936 | 49,659 | 60,829 | 74,692 | 92,098 |
| Existing shop floorspace (sq m net) | 4,398 | 4,398 | 4,398 | 4,398 | 4,398 | 10,424 | 10,424 | 8,920 | 8,920 | 8,920 |
| Sales per sq m net (£) | 10,391 | 10,503 | 10,503 | 10,503 | 10,503 | 4,695 | 4,695 | 5,058 | 5,448 | 5,870 |
| Sales from extg flrspce (£000) | 45,702 | 46,198 | 46,198 | 46,198 | 46,198 | 48,936 | 48,936 | 45,112 | 48,598 | 52,354 |
| Available spending to support new shops (£000) | 0 | (472) | 1,907 | 3,877 | 5,865 | 0 | 723 | 15,717 | 26,093 | 39,744 |
| Less sales capacity of committed new floorspace (£000) | 0 | 0 | 34,847 | 34,847 | 34,847 | 0 | 0 | 38,449 | 41,421 | 44,622 |
| Net available spending for new shops (£000) | 0 | (472) | (32,939) | (30,970) | (28,981) | 0 | 723 | (22,732) | (15,327) | (4,878) |
| Sales per sq m net in new shops (£) | 14,000 | 14,000 | 14,000 | 14,000 | 14,000 | 4,500 | 4,500 | 4,848 | 5,222 | 5,626 |
| Capacity for new shop flrspc (sq m net) | 0 | (34) | (2,353) | (2,212) | (2,070) | 0 | 161 | (4,689) | (2,935) | (867) |
| Market Share of Catchment Area Expenditure | 3.6% | 3.6% | 3.6% | 3.6% | 3.6% | 2.4% | 2.4% | 2.4% | 2.5% | 2.5% |

Sources: RECAP Model.

Notes: Excludes smaller vacant shops.

Scenario 1
Chelmsley Wood Town Centre

Table: 21
CONVENIENCE GOODS MARKET SHARES IN 2009

| 2009 Allocations to | | | |
|-----------------------------------------|-----------------------|--------------------|------------------|
| Chelmsley Wood Town Centre | | | |
| Indicated by household interview survey | | | |
| Zones | Main Food | Top-up convenience | WEIGHTED AVERAGE |
| | Q2 | Q5 | |
| | Expenditure weighting | | |
| | 75 (%) | 25 (%) | 100 (%) |
| 1 | 0.0 | 0.0 | 0.0 |
| 2 | 0.0 | 0.0 | 0.0 |
| 3 | 0.0 | 0.0 | 0.0 |
| 4 | 4.5 | 7.8 | 5.3 |
| 5 | 5.7 | 5.7 | 5.7 |
| 6 | 0.6 | 1.1 | 0.7 |
| 7 | 0.0 | 0.0 | 0.0 |
| 8 | 0.0 | 0.0 | 0.0 |
| 9 | 1.1 | 0.0 | 0.8 |
| 10 | 0.0 | 0.0 | 0.0 |
| 11 | 1.1 | 0.0 | 0.8 |

Sources: Household Interview Survey.
 Expenditure weighting by DTZ.

Table: 22
COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2009

| 2009 Allocations to | | | | | | | | | |
|-----------------------------------------|-----------------------|--------------------------|--------------------|----------------------|------------------------|--------------------------------|--------------------------------|--------------------------|------------------|
| Chelmsley Wood Town Centre | | | | | | | | | |
| Indicated by Household Interview Survey | | | | | | | | | |
| Zones | Clothing & footwear | Furniture/ floorcrgs etc | Household Textiles | Household Appliances | Audio-visual equipment | Hardware, DIY, garden products | Chemists, medcl & beauty goods | All other comparison gds | WEIGHTED AVERAGE |
| | Q6 | Q7 | Q8 | Q9 | Q10 | Q11 | Q12 | Q13 | |
| | Expenditure weighting | | | | | | | | |
| | 708.66 (%) | 238.08 (%) | 74.10 (%) | 57.33 (%) | 269.50 (%) | 202.87 (%) | 304.92 (%) | 721.80 (%) | 2,577.26 (%) |
| 1 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 1.2 | 0.3 |
| 2 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.8 | 0.0 | 0.1 |
| 3 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.7 | 0.0 | 0.1 |
| 4 | 5.8 | 4.1 | 7.1 | 5.3 | 3.5 | 8.7 | 18.0 | 9.5 | 8.1 |
| 5 | 6.8 | 2.2 | 10.0 | 7.4 | 4.0 | 10.1 | 8.9 | 9.2 | 7.4 |
| 6 | 0.0 | 0.9 | 1.5 | 0.7 | 0.0 | 0.7 | 1.2 | 0.0 | 0.3 |
| 7 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| 8 | 0.0 | 0.8 | 0.0 | 0.0 | 0.7 | 0.0 | 0.0 | 0.0 | 0.1 |
| 9 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| 10 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| 11 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |

Sources: Household Interview Survey.
 RECAP Table 2 for expenditure weights.

Table: 23

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

| | | | | | | | | | | |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------|--------------------|----------------------------|----------|----------|------------------|----------------------------------|----------|----------|----------|
| Scenario: | 1 | Location: | Chelmsley Wood Town Centre | | | | | | | |
| Baseline - Market Shares from the Household Interview Survey 2008 adjusted from 2011 due to the new town centre development in Chelmsley Wood. Comparison goods market shares attracted by Solihull Town Centre reduced from 2016 to allow for the proposed new John Lewis department store in Birmingham City Centre. | | | | | | | | | | |
| Market shares correction factors: | | Convenience Goods: | | | | | 100% of survey indicated figures | | | |
| | | Comparison Goods: | | | | | 100% of survey indicated figures | | | |
| Catchment Zone | PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED | | | | | | | | | |
| | CONVENIENCE GOODS | | | | | COMPARISON GOODS | | | | |
| | 2009 (%) | 2011 (%) | 2016 (%) | 2021 (%) | 2026 (%) | 2009 (%) | 2011 (%) | 2016 (%) | 2021 (%) | 2026 (%) |
| 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 2 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 3 | 0 | 2 | 2 | 2 | 2 | 0 | 1 | 1 | 1 | 1 |
| 4 | 5 | 25 | 25 | 25 | 25 | 8 | 15 | 15 | 15 | 15 |
| 5 | 6 | 10 | 10 | 10 | 10 | 7 | 10 | 10 | 10 | 10 |
| 6 | 1 | 2 | 2 | 2 | 2 | 0 | 0 | 0 | 0 | 0 |
| 7 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 8 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 9 | 1 | 1 | 1 | 1 | 1 | 0 | 0 | 0 | 0 | 0 |
| 10 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 11 | 1 | 1 | 1 | 1 | 1 | 0 | 0 | 0 | 0 | 0 |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |

Sources: RECAP Model.
DTZ for market share corrections.

Table: 24
COMPARISON GOODS SALES BY GOODS TYPE IN 2009

| Catchment Zones | 2009 Sales in Chelmsley Wood Town Centre | | | | | | | |
|-----------------|------------------------------------------|---------------------------------|---------------------------|-----------------------------|-------------------------------|---------------------------------------|---------------------------------------|---------------------------------|
| | By Comparison Goods Type: | | | | | | | |
| | Clothing & footwear (£000) | Furniture/ floorcrgs etc (£000) | Household Textiles (£000) | Household Appliances (£000) | Audio-visual equipment (£000) | Hardware, DIY, garden products (£000) | Chemists, medcl & beauty goods (£000) | All other comparison gds (£000) |
| 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 285 |
| 2 | 0 | 0 | 0 | 0 | 0 | 0 | 159 | 0 |
| 3 | 0 | 0 | 0 | 0 | 0 | 0 | 162 | 0 |
| 4 | 3,387 | 804 | 434 | 250 | 777 | 1,455 | 4,523 | 5,651 |
| 5 | 3,497 | 380 | 538 | 308 | 782 | 1,487 | 1,970 | 4,819 |
| 6 | 0 | 260 | 135 | 49 | 0 | 172 | 443 | 0 |
| 7 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 8 | 0 | 258 | 0 | 0 | 256 | 0 | 0 | 0 |
| 9 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 10 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 11 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| TOTALS | 6,885 | 1,702 | 1,106 | 607 | 1,816 | 3,114 | 7,257 | 10,756 |
| MARKET SHARES | 1% | 1% | 2% | 1% | 1% | 2% | 3% | 2% |

Sources: RECAP Model.

Table: 25
FORECAST RETAIL SALES

| Scenario: | 1 | | Location: Chelmsley Wood Town Centre | | | | | | | |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------|-------------|--------------------------------------|-------------|-------------|------------------|-------------|-------------|-------------|-------------|
| Baseline - Market Shares from the Household Interview Survey 2008 adjusted from 2011 due to the new town centre development in Chelmsley Wood. Comparison goods market shares attracted by Solihull Town Centre reduced from 2016 to allow for the proposed new John Lewis department store in Birmingham City Centre. | | | | | | | | | | |
| Catchment zone | RETAIL SALES BY CATCHMENT ZONE | | | | | COMPARISON GOODS | | | | |
| | CONVENIENCE GOODS | | | | | | | | | |
| | 2009 (£000) | 2011 (£000) | 2016 (£000) | 2021 (£000) | 2026 (£000) | 2009 (£000) | 2011 (£000) | 2016 (£000) | 2021 (£000) | 2026 (£000) |
| 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 2 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 3 | 0 | 2,489 | 2,596 | 2,680 | 2,764 | 0 | 1,972 | 2,396 | 2,921 | 3,575 |
| 4 | 6,800 | 33,824 | 35,220 | 36,289 | 37,360 | 16,992 | 32,156 | 39,014 | 47,455 | 57,981 |
| 5 | 7,186 | 11,919 | 12,412 | 12,786 | 13,163 | 13,093 | 18,884 | 22,915 | 27,867 | 34,048 |
| 6 | 1,999 | 3,994 | 4,191 | 4,349 | 4,510 | 0 | 0 | 0 | 0 | 0 |
| 7 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 8 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 9 | 363 | 362 | 376 | 387 | 398 | 0 | 0 | 0 | 0 | 0 |
| 10 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 11 | 518 | 520 | 550 | 576 | 602 | 0 | 0 | 0 | 0 | 0 |
| TOTALS | 16,866 | 53,107 | 55,345 | 57,068 | 58,797 | 30,084 | 53,012 | 64,326 | 78,243 | 95,604 |

Sources: RECAP Model.

Table: 26

**'BENCHMARK' SALES CAPACITY OF EXISTING
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN 2009**

| Store | Net Floorspace (sq m) | Convenience Goods Allocation (%) | Net convnce Goods Floorspace (sq m) | Convenience Goods sales Density (£ per sq m) | Convenience Goods sales (£000) |
|----------------------------------------------------------------------|-----------------------------|-------------------------------------------|----------------------------------------------|-------------------------------------------------------|--------------------------------------|
| Asda, 341 Bosworth Drive, Chelmsley Wood, B37 5EX | 4,193 | 65 | 2,725 | 14,124 | 38,494 |
| Co-op, Unit 3 Chestnut Walk, Chelmsley Wood, Birmingham B37 5TT | 1,083 | 85 | 920 | 9,368 | 8,623 |
| Iceland - Unit 79 Cedar Walk, Chelmsley Wood Shopping Centre B37 5TU | 396 | 93 | 368 | 6,826 | 2,514 |
| Other conveninece goods shops in Chelmsley Wood Town Centre | 533 | 100 | 533 | 5,000 | 2,665 |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| ALL STORES | 6,205 | | 4,547 | 11,501 | 52,296 |

Sources: IGD, DTZ, Verdict Research.

Table: 27

'BENCHMARK' SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS

| CONVENIENCE GOODS | | | | | |
|-------------------------------|-------------------------------|-------------------------------------------|--------------------------------------|-----------------------------------------------|-------------------------------|
| Store/Scheme | Net Floorspace (sq m) | Convenience Goods Allocation (%) | Net Conv Gds Floorspace (sq m) | Conv Goods Sales Density (£ p sq m net) | Conv Goods Sales (£000) |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| ALL STORES | - | | - | #DIV/0! | - |
| COMPARISON GOODS | | | | | |
| Store/Scheme | Gross Floorspace (sq m) | Net to Gross Ratio (%) | Net Floorspace (sq m) | Sales Density (£ p sq m net) | Sales (£000) |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| ALL STORES AND SCHEMES | - | | - | #DIV/0! | - |

Sources: DTZ, based on Verdict Research and Retail Rankings.

Table: 28

FORECAST RETAIL CAPACITY

| Scenario: 1 | | Location: Chelmsley Wood Town Centre | | | | | | | | |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|--------------------------------------|--------|--------|-------------------------------------------|------------------|---------|--------|--------|--------|
| sted from 2011 due to the new town centre development in Chelmsley Wood. Comparison goods market shares attracted by Solihull Town Centre reduced from 2016 to allow for th | | | | | | | | | | |
| Growth in sales per sq m from shop floorspace existing in 2009 | | | | | Comparison Goods: 1.50 % pa 2011* to 2026 | | | | | |
| | CONVENIENCE GOODS | | | | | COMPARISON GOODS | | | | |
| | 2009 | 2011 | 2016 | 2021 | 2026 | 2009 | 2011 | 2016 | 2021 | 2026 |
| Residents' Spending £000 | 16,866 | 53,107 | 55,345 | 57,068 | 58,797 | 30,084 | 53,012 | 64,326 | 78,243 | 95,604 |
| Plus visitors' spending (%) | - | - | - | - | - | - | - | - | - | - |
| Total spending (£000) | 16,866 | 53,107 | 55,345 | 57,068 | 58,797 | 30,084 | 53,012 | 64,326 | 78,243 | 95,604 |
| Existing shop floorspace (sq m net) | 1,822 | 4,547 | 4,547 | 4,547 | 4,547 | 8,254 | 12,568 | 12,568 | 12,568 | 12,568 |
| Sales per sq m net (£) | 9,258 | 11,501 | 11,501 | 11,501 | 11,501 | 3,645 | 4,374 | 4,712 | 5,076 | 5,469 |
| Sales from extg flrspace (£000) | 16,866 | 52,296 | 52,296 | 52,296 | 52,296 | 30,084 | 54,975 | 59,224 | 63,801 | 68,732 |
| Available spending to support new shops (£000) | 0 | 811 | 3,049 | 4,772 | 6,501 | 0 | (1,963) | 5,102 | 14,442 | 26,872 |
| Less sales capacity of committed new floorspace (£000) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Net available spending for new shops (£000) | 0 | 811 | 3,049 | 4,772 | 6,501 | 0 | (1,963) | 5,102 | 14,442 | 26,872 |
| Sales per sq m net in new shops (£) | 14,000 | 14,000 | 14,000 | 14,000 | 14,000 | 4,500 | 4,500 | 4,848 | 5,222 | 5,626 |
| Capacity for new shop flrspace (sq m net) | 0 | 58 | 218 | 341 | 464 | 0 | (436) | 1,052 | 2,765 | 4,776 |
| Market Share of Catchment Area Expenditure | 1.3% | 4.1% | 4.1% | 4.1% | 4.1% | 1.5% | 2.6% | 2.6% | 2.6% | 2.5% |

Sources: RECAP Model.

Notes: Excludes vacant floorspace.

Scenario 1

Knowle Local Centre

Table: 29

CONVENIENCE GOODS MARKET SHARES IN

2009

| 2009 Allocations to | | | |
|-----------------------------------------|-----------------------|-----------------------------|---------------------|
| Knowle Local Centre | | | |
| Indicated by household interview survey | | | |
| Zones | Main Food Q2 | Top-up convenience Q5 | WEIGHTED AVERAGE |
| | Expenditure weighting | | |
| | 75 (%) | 25 (%) | 100 (%) |
| 1 | 1.7 | 3.3 | 2.1 |
| 2 | 0.8 | 0.8 | 0.8 |
| 3 | 1.3 | 1.3 | 1.3 |
| 4 | 0.0 | 0.6 | 0.2 |
| 5 | 0.0 | 0.7 | 0.2 |
| 6 | 1.1 | 1.1 | 1.1 |
| 7 | 0.7 | 0.0 | 0.5 |
| 8 | 0.5 | 0.0 | 0.4 |
| 9 | 0.0 | 0.0 | 0.0 |
| 10 | 22.0 | 25.0 | 22.8 |
| 11 | 0.0 | 1.1 | 0.3 |
| | | | |
| | | | |
| | | | |
| | | | |

Sources: Household Interview Survey.
Expenditure weighting by DTZ.

Table: 30

COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN

2009

| 2009 Allocations to | | | | | | | | | |
|-----------------------------------------|------------------------------|-----------------------------------|-----------------------------|-------------------------------|----------------------------------|------------------------------------------|------------------------------------------|------------------------------------|---------------------|
| Knowle Local Centre | | | | | | | | | |
| Indicated by Household Interview Survey | | | | | | | | | |
| Zones | Clothing & footwear Q6 | Furniture/ floorcrgs etc Q7 | Household Textiles Q8 | Household Appliances Q9 | Audio-visual equipment Q10 | Hardware, DIY, garden products Q11 | Chemists, medcl & beauty goods Q12 | All other comparison gds Q13 | WEIGHTED AVERAGE |
| | Expenditure weighting | | | | | | | | |
| | 708.66 (%) | 238.08 (%) | 74.10 (%) | 57.33 (%) | 269.50 (%) | 202.87 (%) | 304.92 (%) | 721.80 (%) | 2,577.26 (%) |
| 1 | 0.9 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.8 | 0.0 | 0.3 |
| 2 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.8 | 0.0 | 0.1 |
| 3 | 0.0 | 0.9 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 1.0 | 0.4 |
| 4 | 0.0 | 0.0 | 0.0 | 0.0 | 0.9 | 0.0 | 0.0 | 0.0 | 0.1 |
| 5 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| 6 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| 7 | 0.7 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.2 |
| 8 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| 9 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| 10 | 0.0 | 2.7 | 0.0 | 0.0 | 1.3 | 9.1 | 21.3 | 1.4 | 4.0 |
| 11 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 1.1 | 0.0 | 0.1 |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |

Sources: Household Interview Survey.
RECAP Table 2 for expenditure weights.

Table: 31

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

| | | | | | | | | | | |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------|----------|--------------------|---------------------|----------|------------------|----------------------------------|----------|----------|----------|
| Scenario: | 1 | | Location: | Knowle Local Centre | | | | | | |
| Baseline - Market Shares from the Household Interview Survey 2008 adjusted from 2011 due to the new town centre development in Chelmsley Wood. Comparison goods market shares attracted by Solihull Town Centre reduced from 2016 to allow for the proposed new John Lewis department store in Birmingham City Centre. | | | | | | | | | | |
| Market shares correction factors: | | | Convenience Goods: | | | | 100% of survey indicated figures | | | |
| | | | Comparison Goods: | | | | 150% of survey indicated figures | | | |
| Catchment Zone | PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED | | | | | | | | | |
| | CONVENIENCE GOODS | | | | | COMPARISON GOODS | | | | |
| | 2009 (%) | 2011 (%) | 2016 (%) | 2021 (%) | 2026 (%) | 2009 (%) | 2011 (%) | 2016 (%) | 2021 (%) | 2026 (%) |
| 1 | 2 | 2 | 2 | 2 | 2 | 1 | 1 | 1 | 1 | 1 |
| 2 | 1 | 1 | 1 | 1 | 1 | 0 | 0 | 0 | 0 | 0 |
| 3 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| 4 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 5 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 6 | 1 | 1 | 1 | 1 | 1 | 0 | 0 | 0 | 0 | 0 |
| 7 | 1 | 1 | 1 | 1 | 1 | 0 | 0 | 0 | 0 | 0 |
| 8 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 9 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 10 | 23 | 23 | 23 | 23 | 23 | 6 | 6 | 6 | 6 | 6 |
| 11 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |

Sources: RECAP Model.
DTZ for market share corrections.

Table: 32

COMPARISON GOODS SALES BY GOODS TYPE IN 2009

| Catchment Zones | 2009 Sales in Knowle Local Centre | | | | | | | |
|-----------------|-----------------------------------|--------------------------------|---------------------------|-----------------------------|-------------------------------|---------------------------------------|---------------------------------------|---------------------------------|
| | By Comparison Goods Type: | | | | | | | |
| | Clothing & footwear (£000) | Furniture/floorcrgs etc (£000) | Household Textiles (£000) | Household Appliances (£000) | Audio-visual equipment (£000) | Hardware, DIY, garden products (£000) | Chemists, medcl & beauty goods (£000) | All other comparison gds (£000) |
| 1 | 315 | 0 | 0 | 0 | 0 | 0 | 121 | 0 |
| 2 | 0 | 0 | 0 | 0 | 0 | 0 | 239 | 0 |
| 3 | 0 | 244 | 0 | 0 | 0 | 0 | 0 | 820 |
| 4 | 0 | 0 | 0 | 0 | 300 | 0 | 0 | 0 |
| 5 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 6 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 7 | 744 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 8 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 9 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 10 | 0 | 369 | 0 | 0 | 201 | 1,061 | 3,732 | 581 |
| 11 | 0 | 0 | 0 | 0 | 0 | 0 | 158 | 0 |
| TOTALS | 1,059 | 613 | 0 | 0 | 501 | 1,061 | 4,249 | 1,401 |
| MARKET SHARES | 0% | 0% | 0% | 0% | 0% | 1% | 2% | 0% |

Sources: RECAP Model.

Table: 33

FORECAST RETAIL SALES

| Scenario: | 1 | | Location: Knowle Local Centre | | | | | | | |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------|-------------|-------------------------------|-------------|-------------|------------------|-------------|-------------|-------------|-------------|
| Baseline - Market Shares from the Household Interview Survey 2008 adjusted from 2011 due to the new town centre development in Chelmsley Wood. Comparison goods market shares attracted by Solihull Town Centre reduced from 2016 to allow for the proposed new John Lewis department store in Birmingham City Centre. | | | | | | | | | | |
| Catchment zone | RETAIL SALES BY CATCHMENT ZONE | | | | | COMPARISON GOODS | | | | |
| | CONVENIENCE GOODS | | | | | | | | | |
| | 2009 (£000) | 2011 (£000) | 2016 (£000) | 2021 (£000) | 2026 (£000) | 2009 (£000) | 2011 (£000) | 2016 (£000) | 2021 (£000) | 2026 (£000) |
| 1 | 1,088 | 1,090 | 1,161 | 1,222 | 1,283 | 849 | 863 | 1,072 | 1,331 | 1,659 |
| 2 | 1,076 | 1,076 | 1,132 | 1,177 | 1,224 | 0 | 0 | 0 | 0 | 0 |
| 3 | 1,250 | 1,245 | 1,298 | 1,340 | 1,382 | 1,953 | 1,972 | 2,396 | 2,921 | 3,575 |
| 4 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 5 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 6 | 1,999 | 1,997 | 2,095 | 2,175 | 2,255 | 0 | 0 | 0 | 0 | 0 |
| 7 | 1,649 | 1,663 | 1,766 | 1,857 | 1,949 | 0 | 0 | 0 | 0 | 0 |
| 8 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 9 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 10 | 14,541 | 14,529 | 15,200 | 15,749 | 16,302 | 5,924 | 6,006 | 7,321 | 8,954 | 11,000 |
| 11 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| TOTALS | 21,603 | 21,600 | 22,652 | 23,520 | 24,394 | 8,726 | 8,841 | 10,789 | 13,206 | 16,234 |

Sources: RECAP Model.

Table: 34

'BENCHMARK' SALES CAPACITY OF EXISTING MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN 2009

| Store | Net Floorspace (sq m) | Convenience Goods Allocation (%) | Net convnce Goods Floorspace (sq m) | Convenience Goods sales Density (£ per sq m) | Convenience Goods sales (£000) |
|----------------------------------------------------------|-----------------------|----------------------------------|-------------------------------------|----------------------------------------------|--------------------------------|
| Tesco Metro 40-44 St Johns Way, Knowle, Solihull B93 0LE | 557 | 95 | 529 | 13,500 | 7,144 |
| One Stop (Tesco) 1656 High Street, Knowle, B93 0NA | 148 | 95 | 141 | 13,500 | 1,898 |
| Other conveninece goods shops in Knowle District Centre | 870 | 100 | 870 | 4,500 | 3,915 |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| ALL STORES | 1,575 | | 1,540 | 8,415 | 12,957 |

Sources: IGD, DTZ, Verdict Research.

Table: 35

'BENCHMARK' SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS

| CONVENIENCE GOODS | | | | | |
|-------------------------------|-------------------------|----------------------------------|--------------------------------|-----------------------------------------|-------------------------|
| Store/Scheme | Net Floorspace (sq m) | Convenience Goods Allocation (%) | Net Conv Gds Floorspace (sq m) | Conv Goods Sales Density (£ p sq m net) | Conv Goods Sales (£000) |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| ALL STORES | - | | - | #DIV/0! | - |
| COMPARISON GOODS | | | | | |
| Store/Scheme | Gross Floorspace (sq m) | Net to Gross Ratio (%) | Net Floorspace (sq m) | Sales Density (£ p sq m net) | Sales (£000) |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| ALL STORES AND SCHEMES | - | | - | #DIV/0! | - |

Sources: DTZ, based on Verdict Research and Retail Rankings.

Table: 36

FORECAST RETAIL CAPACITY

| Scenario: 1 | | Location: Knowle Local Centre | | | | | | | | | |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|-------------------------------|--------|--------|--------|-------------------|-----------|--------|---------|--------|------|
| sted from 2011 due to the new town centre development in Chelmsley Wood. Comparison goods market shares attracted by Solihull Town Centre reduced from 2016 to allow for th | | | | | | | | | | | |
| Growth in sales per sq m from shop floorspace existing in | 2009 | | | | | Comparison Goods: | 1.50 % pa | | 2011 to | | 2026 |
| | CONVENIENCE GOODS | | | | | COMPARISON GOODS | | | | | |
| | 2009 | 2011 | 2016 | 2021 | 2026 | 2009 | 2011 | 2016 | 2021 | 2026 | |
| Residents' Spending £000 | 21,603 | 21,600 | 22,652 | 23,520 | 24,394 | 8,726 | 8,841 | 10,789 | 13,206 | 16,234 | |
| Plus visitors' spending (%) | - | - | - | - | - | - | - | - | - | - | |
| Total spending (£000) | 21,603 | 21,600 | 22,652 | 23,520 | 24,394 | 8,726 | 8,841 | 10,789 | 13,206 | 16,234 | |
| Existing shop floorspace (sq m net) | 1,540 | 1,540 | 1,540 | 1,540 | 1,540 | 3,245 | 3,245 | 3,245 | 3,245 | 3,245 | |
| Sales per sq m net (£) | 14,030 | 8,415 | 8,415 | 8,415 | 8,415 | 2,689 | 2,689 | 2,897 | 3,120 | 3,362 | |
| Sales from extg flrspace (£000) | 21,603 | 12,957 | 12,957 | 12,957 | 12,957 | 8,726 | 8,726 | 9,400 | 10,126 | 10,909 | |
| Available spending to support new shops (£000) | 0 | 8,644 | 9,696 | 10,563 | 11,438 | 0 | 115 | 1,389 | 3,080 | 5,324 | |
| Less sales capacity of committed new floorspace (£000) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | |
| Net available spending for new shops (£000) | 0 | 8,644 | 9,696 | 10,563 | 11,438 | 0 | 115 | 1,389 | 3,080 | 5,324 | |
| Sales per sq m net in new shops (£) | 11,681 | 11,681 | 11,681 | 11,681 | 11,681 | 3,750 | 3,750 | 4,040 | 4,352 | 4,688 | |
| Capacity for new shop flrspace (sq m net) | 0 | 740 | 830 | 904 | 979 | 0 | 31 | 344 | 708 | 1,136 | |
| Market Share of Catchment Area Expenditure | 1.7% | 1.7% | 1.7% | 1.7% | 1.7% | 0.4% | 0.4% | 0.4% | 0.4% | 0.4% | |

Sources: RECAP Model.

Notes: Excludes vacant floorspace.
Waitrose sales density assumed for new convenience goods floorspace.

Scenario 1

Non-Town Centre Shopping in Solihull

Table: **37**
CONVENIENCE GOODS MARKET SHARES IN 2009

| 2009 Allocations to | | | |
|---------------------------------------------|-----------------|-----------------------------|---------------------|
| Non-Town Centre Shopping in Solihull | | | |
| Indicated by household interview survey | | | |
| Zones | Main Food Q2 | Top-up convenience Q5 | WEIGHTED AVERAGE |
| Expenditure weighting | | | |
| | 75 (%) | 25 (%) | 100 (%) |
| 1 | 38.3 | 13.3 | 32.1 |
| 2 | 57.7 | 30.8 | 51.0 |
| 3 | 17.8 | 8.6 | 15.5 |
| 4 | 18.8 | 4.5 | 15.2 |
| 5 | 42.9 | 23.6 | 38.1 |
| 6 | 4.4 | 1.1 | 3.6 |
| 7 | 4.0 | 2.0 | 3.5 |
| 8 | 6.0 | 2.0 | 5.0 |
| 9 | 17.4 | 9.8 | 15.5 |
| 10 | 23.0 | 10.0 | 19.8 |
| 11 | 2.2 | 3.3 | 2.5 |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

Sources: Household Interview Survey.
Expenditure weighting by DTZ.

Table: **38**
COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2009

| 2009 Allocations to | | | | | | | | | |
|---------------------------------------------|------------------------------|-----------------------------------|-----------------------------|-------------------------------|----------------------------------|------------------------------------------|------------------------------------------|------------------------------------|---------------------|
| Non-Town Centre Shopping in Solihull | | | | | | | | | |
| Indicated by Household Interview Survey | | | | | | | | | |
| Zones | Clothing & footwear Q6 | Furniture/ floorcrgs etc Q7 | Household Textiles Q8 | Household Appliances Q9 | Audio-visual equipment Q10 | Hardware, DIY, garden products Q11 | Chemists, medci & beauty goods Q12 | All other comparison gds Q13 | WEIGHTED AVERAGE |
| Expenditure weighting | | | | | | | | | |
| | 708.66 (%) | 238.08 (%) | 74.10 (%) | 57.33 (%) | 269.50 (%) | 202.87 (%) | 304.92 (%) | 721.80 (%) | 2,577.26 (%) |
| 1 | 0.9 | 42.0 | 17.3 | 64.4 | 54.2 | 50.0 | 15.3 | 2.4 | 18.1 |
| 2 | 2.6 | 44.9 | 29.6 | 69.4 | 71.8 | 55.2 | 18.1 | 4.7 | 22.6 |
| 3 | 0.0 | 44.3 | 16.7 | 53.8 | 41.5 | 36.3 | 5.4 | 2.0 | 14.2 |
| 4 | 0.0 | 14.4 | 10.3 | 21.1 | 20.4 | 11.6 | 3.3 | 1.9 | 6.1 |
| 5 | 0.9 | 9.0 | 9.0 | 11.1 | 13.0 | 22.0 | 3.2 | 0.0 | 5.1 |
| 6 | 1.2 | 10.5 | 3.8 | 14.6 | 13.0 | 7.7 | 3.0 | 0.0 | 4.1 |
| 7 | 0.0 | 11.7 | 4.7 | 12.4 | 15.3 | 4.2 | 2.1 | 0.0 | 3.7 |
| 8 | 0.0 | 16.9 | 3.8 | 23.4 | 20.5 | 10.9 | 1.6 | 1.6 | 5.8 |
| 9 | 3.6 | 18.0 | 9.6 | 18.8 | 22.7 | 21.4 | 3.4 | 2.8 | 8.6 |
| 10 | 1.1 | 28.8 | 20.2 | 58.8 | 50.6 | 33.0 | 5.3 | 1.4 | 13.8 |
| 11 | 0.0 | 1.5 | 0.0 | 3.8 | 1.4 | 0.0 | 0.0 | 1.5 | 0.8 |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |

Sources: Household Interview Survey.
RECAP Table 2 for expenditure weights.

Table: 39

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

| | | | | | | | | | | |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------|--------------------|--------------------------------------|----------|-----------------------------------|------------------|----------|----------|----------|----------|
| Scenario: | 1 | Location: | Non-Town Centre Shopping in Solihull | | | | | | | |
| Baseline - Market Shares from the Household Interview Survey 2008 adjusted from 2011 due to the new town centre development in Chelmsley Wood. Comparison goods market shares attracted by Solihull Town Centre reduced from 2016 to allow for the proposed new John Lewis department store in Birmingham City Centre. | | | | | | | | | | |
| Market shares correction factors: | | Convenience Goods: | | | 100 % of survey indicated figures | | | | | |
| | | Comparison Goods: | | | 100 % of survey indicated figures | | | | | |
| Catchment Zone | PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED | | | | | | | | | |
| | CONVENIENCE GOODS | | | | | COMPARISON GOODS | | | | |
| | 2009 (%) | 2011 (%) | 2016 (%) | 2021 (%) | 2026 (%) | 2009 (%) | 2011 (%) | 2016 (%) | 2021 (%) | 2026 (%) |
| 1 | 32 | 32 | 32 | 32 | 32 | 18 | 18 | 18 | 18 | 18 |
| 2 | 51 | 51 | 51 | 51 | 51 | 23 | 23 | 23 | 23 | 23 |
| 3 | 16 | 15 | 15 | 15 | 15 | 14 | 14 | 14 | 14 | 14 |
| 4 | 15 | 7 | 7 | 7 | 7 | 6 | 4 | 4 | 4 | 4 |
| 5 | 38 | 36 | 36 | 36 | 36 | 5 | 4 | 4 | 4 | 4 |
| 6 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 |
| 7 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 |
| 8 | 5 | 5 | 5 | 5 | 5 | 6 | 6 | 6 | 6 | 6 |
| 9 | 16 | 16 | 16 | 16 | 16 | 9 | 9 | 9 | 9 | 9 |
| 10 | 20 | 20 | 20 | 20 | 20 | 14 | 14 | 14 | 14 | 14 |
| 11 | 2 | 2 | 2 | 2 | 2 | 1 | 1 | 1 | 1 | 1 |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |

Sources: RECAP Model.
DTZ for market share corrections.

Table: 40

COMPARISON GOODS SALES BY GOODS TYPE IN 2009

| Catchment Zones | Sales in Non-Town Centre Shopping in Solihull | | | | | | | |
|-----------------|-----------------------------------------------|--------------------------------|---------------------------|-----------------------------|-------------------------------|---------------------------------------|---------------------------------------|---------------------------------|
| | By Comparison Goods Type | | | | | | | |
| | Clothing & footwear (£000) | Furniture/floorcrgs etc (£000) | Household Textiles (£000) | Household Appliances (£000) | Audio-visual equipment (£000) | Hardware, DIY, garden products (£000) | Chemists, medci & beauty goods (£000) | All other comparison gds (£000) |
| 1 | 210 | 3,295 | 422 | 1,217 | 4,813 | 3,342 | 1,537 | 571 |
| 2 | 1,202 | 6,971 | 1,430 | 2,595 | 12,618 | 7,303 | 3,599 | 2,212 |
| 3 | 0 | 7,992 | 938 | 2,337 | 8,474 | 5,580 | 1,248 | 1,094 |
| 4 | 0 | 2,826 | 629 | 997 | 4,531 | 1,940 | 829 | 1,130 |
| 5 | 463 | 1,555 | 484 | 462 | 2,543 | 3,239 | 708 | 0 |
| 6 | 1,030 | 3,028 | 341 | 1,014 | 4,244 | 1,892 | 1,108 | 0 |
| 7 | 0 | 2,784 | 348 | 710 | 4,120 | 851 | 640 | 0 |
| 8 | 0 | 5,455 | 382 | 1,819 | 7,490 | 2,998 | 661 | 1,566 |
| 9 | 560 | 941 | 156 | 237 | 1,344 | 954 | 228 | 444 |
| 10 | 299 | 2,627 | 573 | 1,291 | 5,224 | 2,565 | 619 | 387 |
| 11 | 0 | 112 | 0 | 68 | 118 | 0 | 0 | 340 |
| TOTALS | 3,764 | 37,585 | 5,704 | 12,747 | 55,521 | 30,664 | 11,178 | 7,744 |
| MARKET SHARES | 1% | 20% | 10% | 29% | 27% | 19% | 5% | 1% |

Sources: RECAP Model.

Table: 41

FORECAST RETAIL SALES

| Scenario: | 1 | | | | | | | | | |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------|-------------|-------------|-------------|-------------|------------------|-------------|-------------|-------------|-------------|
| Location: | Non-Town Centre Shopping in Solihull | | | | | | | | | |
| Baseline - Market Shares from the Household Interview Survey 2008 adjusted from 2011 due to the new town centre development in Chelmsley Wood. Comparison goods market shares attracted by Solihull Town Centre reduced from 2016 to allow for the proposed new John Lewis department store in Birmingham City Centre. | | | | | | | | | | |
| Catchment zone | RETAIL SALES BY CATCHMENT ZONE | | | | | COMPARISON GOODS | | | | |
| | CONVENIENCE GOODS | | | | | | | | | |
| | 2009 (£000) | 2011 (£000) | 2016 (£000) | 2021 (£000) | 2026 (£000) | 2009 (£000) | 2011 (£000) | 2016 (£000) | 2021 (£000) | 2026 (£000) |
| 1 | 17,401 | 17,437 | 18,574 | 19,547 | 20,524 | 15,285 | 15,541 | 19,289 | 23,964 | 29,861 |
| 2 | 54,882 | 54,892 | 57,723 | 60,048 | 62,399 | 38,652 | 39,223 | 48,060 | 59,021 | 72,788 |
| 3 | 20,006 | 18,669 | 19,470 | 20,101 | 20,730 | 27,338 | 27,608 | 33,550 | 40,889 | 50,045 |
| 4 | 20,401 | 9,471 | 9,862 | 10,161 | 10,461 | 12,744 | 8,575 | 10,404 | 12,655 | 15,462 |
| 5 | 45,512 | 42,907 | 44,683 | 46,030 | 47,368 | 9,352 | 7,554 | 9,166 | 11,147 | 13,619 |
| 6 | 7,997 | 7,988 | 8,382 | 8,699 | 9,019 | 12,488 | 12,656 | 15,475 | 18,959 | 23,329 |
| 7 | 6,596 | 6,652 | 7,063 | 7,427 | 7,796 | 10,301 | 10,540 | 13,039 | 16,187 | 20,166 |
| 8 | 11,187 | 11,179 | 11,742 | 12,196 | 12,656 | 20,964 | 21,254 | 26,014 | 31,897 | 39,282 |
| 9 | 5,800 | 5,787 | 6,014 | 6,194 | 6,375 | 5,095 | 5,158 | 6,246 | 7,594 | 9,275 |
| 10 | 12,644 | 12,634 | 13,218 | 13,695 | 14,176 | 13,822 | 14,013 | 17,082 | 20,894 | 25,667 |
| 11 | 1,035 | 1,039 | 1,100 | 1,151 | 1,203 | 808 | 823 | 1,015 | 1,255 | 1,556 |
| TOTALS | 203,462 | 188,655 | 197,829 | 205,250 | 212,727 | 166,850 | 162,945 | 199,340 | 244,460 | 301,050 |

Sources: RECAP Model.

Table: 42

**'BENCHMARK' SALES CAPACITY OF EXISTING
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN 2009**

| Store | Net Floorspace (sq m) | Convenience Goods Allocation (%) | Net convnce Goods Floorspace (sq m) | Convenience Goods sales Density (£ per sq m) | Convenience Goods sales (£000) |
|--------------------------------------------------------------------|-----------------------------|-------------------------------------------|----------------------------------------------|-------------------------------------------------------|--------------------------------------|
| Morrisons 20 Hurst Lane, Castle Bromwich, B34 7HR | 3,167 | 80 | 2,534 | 17,091 | 43,302 |
| J Sainsbury 545 Stratford Road, Shirley, B90 4AJ | 5,414 | 71 | 3,844 | 12,973 | 49,867 |
| Co-op, Unit 2, Farmhouse Way, Shelley Crescent, Monkspath, B90 4EH | 426 | 85 | 362 | 9,368 | 3,390 |
| Tesco Extra 1505 Stratford Road, Monkspath, Shirley, B90 4EN | 5,243 | 63 | 3,303 | 13,500 | 44,592 |
| Co-op 8 till 8 Kenilworth Road, , Balsall Common CV7 7EU | 399 | 95 | 380 | 9,368 | 3,555 |
| Co-op 245-349 Chester Road, Castle Bromwich | 580 | 95 | 551 | 9,368 | 5,160 |
| Aldi 280 Chester Road, Castle Bromwich, B36 0LB | 836 | 67 | 560 | 7,073 | 3,962 |
| Michaels Food Market 117 Hobs Moat Road, Solihull B92 | 241 | 100 | 241 | 5,000 | 1,204 |
| Tesco 21-35 Stratford Road, Solihull B90 3LU | 1,427 | 90 | 1,284 | 13,500 | 17,338 |
| | | | | | |
| | | | | | |
| | | | | | |
| ALL STORES | 17,733 | | 13,058 | 13,200 | 172,369 |

Sources: IGD, VOA (for Morrisons), DTZ, Verdict Research.

Table: 43

'BENCHMARK' SALES CAPACITY OF EXISTING RETAIL WAREHOUSES & SUPERSTORES

| Store | Gross Flrspace (sq m) | Net Flrspace (sq m) | Date of sales densities: | |
|------------------------------------------------------------------------------------------|--------------------------|------------------------|---------------------------------------|-------------------------|
| | | | Sales Density 2009 (£/sqm net#) | 2009 Sales (£000) |
| Net to gross ratio: 90 %* | | | | |
| SOLIHULL GATE RETAIL PARK, SHIRLEY: | | | | |
| Currys, Unit 1 | 2,826 | 2,450 | 5,679 | 13,914 |
| Starplan Bedrooms, Unit 2 | 945 | 851 | 2,000 | 1,701 |
| Furniture Village, Unit 3 (1) | 1,720 | 1,548 | n/a | 5,216 |
| SOLIHULL RETAIL PARK, SHIRLEY: | | | | |
| B&Q, Unit A (2) | 3,912 | 3,735 | 1,468 | 5,483 |
| Harveys, Unit B (3) | 2,854 | 2,497 | n/a | 1,273 |
| Vacant, Unit C1 | 2,960 | 2,864 | 2,250 | 6,444 |
| Vacant, Unit C2 | 835 | 752 | 2,500 | 1,879 |
| SCS Furniture, Unit D1 | 1,425 | 1,283 | 1,770 | 2,270 |
| Carpetright, Unit D2 | 1,055 | 950 | 1,114 | 1,058 |
| Hobbycraft, Unit D3 (1) | 1,058 | 952 | n/a | 2,310 |
| Halfords (exc vehicle repair workshop), Unit E (4) | 1,469 | 1,389 | 1,679 | 2,332 |
| Pets at Home, Unit F (1) | 735 | 554 | n/a | 2,205 |
| Leo Longlands Clearance Outlet (furniture), Unit G1 | 1,427 | 1,219 | 1,250 | 1,524 |
| Mothercare, Unit G2 (1) | 1,782 | 1,507 | n/a | 1,715 |
| Ponden Home / Bensons Beds, Unit G3 (1) | 875 | 657 | n/a | 711 |
| SEARS RETAIL PARK, SHIRLEY: | | | | |
| Homebase | 7,249 | 6,692 | 1,213 | 8,117 |
| Argos (1) | 1,869 | n/a | n/a | 6,783 |
| Boots | 2,033 | 1,422 | 7,000 | 9,954 |
| JJB Sports (1) | 1,157 | 1,041 | n/a | 1,707 |
| Toys R Us | 5,024 | 4,019 | 2,488 | 9,999 |
| Comet | 3,437 | 2,893 | 6,883 | 19,913 |
| Habitat | 1,822 | 1,667 | 1,424 | 2,374 |
| Magnet Kitchens | 525 | 473 | 2,389 | 1,129 |
| Multyork | 996 | 896 | n/a | 813 |
| STRATFORD WAY, SHIRLEY: | | | | |
| PC World, 498 Stratford Road (5) | 2,418 | 1,676 | 4,651 | 7,795 |
| Porcelanosa, 600 Stratford Road | 1,658 | 1,492 | 1,114 | 1,662 |
| OTHER RETAIL WAREHOUSES IN SOLIHULL BOROUGH: | | | | |
| Halfords, Castle Bromwich (4) | 1,254 | 1,129 | 1,679 | 1,895 |
| Others | n/a | 1,923 | 2,500 | 4,808 |
| COMPARISON GOODS IN SUPERSTORES & LARGE SUPERMARKETS: | | | | |
| Morrisons 20 Hurst Lane, Castle Bromwich, B34 7HR | | 633 | 7,288 | 4,616 |
| J Sainsbury 545 Stratford Road, Shirley, B90 4AJ | | 1,570 | 7,481 | 11,746 |
| Tesco Extra 1505 Stratford Road, Monkspath, Shirley, B90 4EN | | 1,940 | 7,456 | 14,464 |
| Tesco 21-35 Stratford Road, Solihull B90 3LU | | 143 | 7,456 | 1,064 |
| TOTALS Trading at the date of the Household Interview Survey of Shopping Patterns | | | | |
| | 55,320 | 52,815 | 3,008 | 158,872 |

Sources: UK Retail Rankings 2011*, Mintel, with VAT added for compatibility with expenditure.
 Floorspace figures from VOA Rating List 2010 valuations.
 DTZ estimates. Verdict Research Limited.

Notes: ** Unless otherwise indicated by figures from the VOA Rating List 2010
 # Includes VAT at 15% for compatibility with the 2009 expenditure
 (1) Sales based on average sales per outlet
 (2) B&Q Sales density estimated as £1,906 per sq m net, but 23% excluded as non-retail (trade) sales
 (3) Based on average sales per outlet for Steinhoff UK x 1.5 (owing to the large size of this store)
 (4) Halfords sales density estimated as £2,798 per sq m net, but 40% excluded as non-retail (vehicle related) sales
 (5) DSG Electricals UK estimated as £6,202 per sq m net, but 25% excluded as non-retail (trade) sales

'BENCHMARK' SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS

| CONVENIENCE GOODS | | | | | |
|-------------------------------|-------------------------------|-------------------------------------------|--------------------------------------|-----------------------------------------------|-------------------------------|
| Store/Scheme | Net Floorspace (sq m) | Convenience Goods Allocation (%) | Net Conv Gds Floorspace (sq m) | Conv Goods Sales Density (£ p sq m net) | Conv Goods Sales (£000) |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| ALL STORES | - | | - | #DIV/0! | - |
| COMPARISON GOODS | | | | | |
| Store/Scheme | Gross Floorspace (sq m) | Net to Gross Ratio (%) | Net Floorspace (sq m) | Sales Density (£ p sq m net) | Sales (£000) |
| B&Q, Monkspath (1) | 14,959 | n/a | 12,715 | 1,468 | 18,666 |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| ALL STORES AND SCHEMES | 14,959 | | 12,715 | 1,468 | 18,666 |

Sources: Solihull BC, DTZ, based on 'UK Retail Rankings 2011', Mintel.
 Notes: (1) B&Q Sales density estimated as £1,906 per sq m net, but 23% excluded as non-retail (trade) sales

Table: 45

FORECAST RETAIL CAPACITY

| Scenario: 1 | | Location: Non-Town Centre Shopping in Solihull | | | | | | | | |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|------------------------------------------------|---------|---------|------------------------------------------|------------------|---------|---------|---------|---------|
| sted from 2011 due to the new town centre development in Chelmsley Wood. Comparison goods market shares attracted by Solihull Town Centre reduced from 2016 to allow for th | | | | | | | | | | |
| Growth in sales per sq m from shop floorspace existing in | | | | | Comparison Goods: 1.50 % pa 2011 to 2026 | | | | | |
| | CONVENIENCE GOODS | | | | | COMPARISON GOODS | | | | |
| | 2009 | 2011 | 2016 | 2021 | 2026 | 2009 | 2011 | 2016 | 2021 | 2026 |
| Residents' Spending £000 | 203,462 | 188,655 | 197,829 | 205,250 | 212,727 | 166,850 | 162,945 | 199,340 | 244,460 | 301,050 |
| Plus visitors' spending (%) | - | - | - | - | - | - | - | - | - | - |
| Total spending (£000) | 203,462 | 188,655 | 197,829 | 205,250 | 212,727 | 166,850 | 162,945 | 199,340 | 244,460 | 301,050 |
| Existing shop floorspace (sq m net) | 13,058 | 13,058 | 13,058 | 13,058 | 13,058 | 52,815 | 52,815 | 52,815 | 52,815 | 52,815 |
| Sales per sq m net (£) | 15,581 | 13,200 | 13,200 | 13,200 | 13,200 | 3,159 | 3,008 | 3,319 | 3,576 | 3,852 |
| Sales from extg flrspace (£000) | 203,462 | 172,369 | 172,369 | 172,369 | 172,369 | 166,850 | 158,872 | 175,303 | 188,851 | 203,446 |
| Available spending to support new shops (£000) | 0 | 16,286 | 25,461 | 32,881 | 40,358 | 0 | 4,072 | 24,037 | 55,609 | 97,604 |
| Less sales capacity of committed new floorspace (£000) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 20,108 | 21,662 | 23,336 |
| Net available spending for new shops (£000) | 0 | 16,286 | 25,461 | 32,881 | 40,358 | 0 | 4,072 | 3,929 | 33,947 | 74,268 |
| Sales per sq m net in new shops (£) | 14,000 | 14,000 | 14,000 | 14,000 | 14,000 | 3,250 | 3,250 | 3,501 | 3,772 | 4,063 |
| Capacity for new shop flrspace (sq m net) | 0 | 1,163 | 1,819 | 2,349 | 2,883 | 0 | 1,253 | 1,122 | 9,000 | 18,278 |
| Market Share of Catchment Area Expenditure | 15.9% | 14.7% | 14.7% | 14.7% | 14.7% | 8.3% | 8.0% | 8.0% | 8.0% | 8.0% |

Sources: RECAP Model.

Notes: Assumes existing B&Q store is converted to general bulky goods retail warehouses after the permitted new B&Q warehouse has opened.

Scenario 2

Solihull Town Centre

Table: 46

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

| Scenario: | | 2 | | Location: | | Solihull Town Centre | | | | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------|--------------------|----------|-----------|----------------------------------|----------------------|----------|----------|----------|----------|
| As Scenario 1, plus increase in market shares of convenience and comparison goods expenditure attracted by Shirley Town Centre from 2016 as a result of committed new retail development there; and reduction in market shares attracted by other locations. | | | | | | | | | | |
| Market shares adjustment factors: | | Convenience Goods: | | | 100% of survey indicated figures | | | | | |
| | | Comparison Goods: | | | 100% of survey indicated figures | | | | | |
| Catchment Zone | PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED | | | | | | | | | |
| | CONVENIENCE GOODS | | | | | COMPARISON GOODS | | | | |
| | 2009 (%) | 2011 (%) | 2016 (%) | 2021 (%) | 2026 (%) | 2009 (%) | 2011 (%) | 2016 (%) | 2021 (%) | 2026 (%) |
| 1 | 44 | 44 | 42 | 42 | 42 | 70 | 70 | 70 | 70 | 70 |
| 2 | 11 | 11 | 7 | 7 | 7 | 42 | 42 | 41 | 41 | 41 |
| 3 | 14 | 13 | 13 | 13 | 13 | 48 | 47 | 46 | 46 | 46 |
| 4 | 7 | 5 | 5 | 5 | 5 | 26 | 24 | 22 | 22 | 22 |
| 5 | 1 | 1 | 1 | 1 | 1 | 8 | 8 | 7 | 7 | 7 |
| 6 | 2 | 2 | 2 | 2 | 2 | 9 | 9 | 8 | 8 | 8 |
| 7 | 5 | 5 | 5 | 5 | 5 | 9 | 9 | 7 | 7 | 7 |
| 8 | 4 | 4 | 4 | 4 | 4 | 13 | 13 | 11 | 11 | 11 |
| 9 | 4 | 4 | 4 | 4 | 4 | 15 | 15 | 14 | 14 | 14 |
| 10 | 30 | 30 | 30 | 30 | 30 | 61 | 61 | 61 | 61 | 61 |
| 11 | 1 | 1 | 1 | 1 | 1 | 9 | 9 | 9 | 9 | 9 |

Sources: RECAP Model.
DTZ for market share adjustments.

Table: 47

FORECAST RETAIL SALES

| Scenario: | | 2 | | Location: | | Solihull Town Centre | | | | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------|-------------|-------------|-------------|-------------|----------------------|-------------|-------------|-------------|-------------|
| As Scenario 1, plus increase in market shares of convenience and comparison goods expenditure attracted by Shirley Town Centre from 2016 as a result of committed new retail development there; and reduction in market shares attracted by other locations. | | | | | | | | | | |
| Catchment zone | RETAIL SALES BY CATCHMENT ZONE | | | | | | | | | |
| | CONVENIENCE GOODS | | | | | COMPARISON GOODS | | | | |
| | 2009 (£000) | 2011 (£000) | 2016 (£000) | 2021 (£000) | 2026 (£000) | 2009 (£000) | 2011 (£000) | 2016 (£000) | 2021 (£000) | 2026 (£000) |
| 1 | 23,926 | 23,976 | 24,378 | 25,655 | 26,937 | 59,443 | 60,437 | 75,012 | 93,192 | 116,125 |
| 2 | 11,837 | 11,839 | 7,923 | 8,242 | 8,565 | 70,583 | 71,625 | 85,673 | 105,212 | 129,753 |
| 3 | 17,506 | 16,180 | 16,874 | 17,421 | 17,966 | 93,730 | 92,683 | 110,237 | 134,349 | 164,432 |
| 4 | 9,520 | 6,765 | 7,044 | 7,258 | 7,472 | 55,223 | 51,449 | 57,221 | 69,601 | 85,039 |
| 5 | 1,198 | 1,192 | 1,241 | 1,279 | 1,316 | 14,963 | 15,107 | 16,041 | 19,507 | 23,834 |
| 6 | 3,998 | 3,994 | 4,191 | 4,349 | 4,510 | 28,099 | 28,476 | 30,949 | 37,917 | 46,658 |
| 7 | 8,245 | 8,315 | 8,828 | 9,284 | 9,746 | 23,177 | 23,715 | 22,818 | 28,327 | 35,291 |
| 8 | 8,949 | 8,943 | 9,393 | 9,757 | 10,125 | 45,422 | 46,051 | 47,692 | 58,478 | 72,018 |
| 9 | 1,450 | 1,447 | 1,504 | 1,549 | 1,594 | 8,492 | 8,596 | 9,716 | 11,813 | 14,428 |
| 10 | 18,966 | 18,951 | 19,827 | 20,543 | 21,264 | 60,225 | 61,056 | 74,429 | 91,037 | 111,833 |
| 11 | 518 | 520 | 550 | 576 | 602 | 7,276 | 7,410 | 9,139 | 11,291 | 14,005 |
| TOTALS | 106,114 | 102,122 | 101,753 | 105,912 | 110,095 | 466,632 | 466,607 | 538,926 | 660,725 | 813,416 |

Sources: RECAP Model.

Table: 48

FORECAST RETAIL CAPACITY

| Scenario: 2 | | Location: Solihull Town Centre | | | | | | | | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|--------------------------------|---------|---------|------------------------------------------|------------------|---------|---------|---------|---------|
| As Scenario 1, plus increase in market shares of convenience and comparison goods expenditure attracted by Shirley Town Centre from 2016 as a result of committed new retail development there: and reduction in market shares attracted by other locations. | | | | | | | | | | |
| Growth in sales per sq m from shop floorspace existing in | | | | | Comparison Goods: 1.50 % pa 2011 to 2026 | | | | | |
| | CONVENIENCE GOODS | | | | | COMPARISON GOODS | | | | |
| | 2009 | 2011 | 2016 | 2021 | 2026 | 2009 | 2011 | 2016 | 2021 | 2026 |
| Residents' Spending £000 | 106,114 | 102,122 | 101,753 | 105,912 | 110,095 | 466,632 | 466,607 | 538,926 | 660,725 | 813,416 |
| Plus visitors' spending (%) | - | - | - | - | - | 2.5 | 2.5 | 2.0 | 2.0 | 2.0 |
| Total spending (£000) | 106,114 | 102,122 | 101,753 | 105,912 | 110,095 | 478,298 | 478,272 | 549,705 | 673,939 | 829,685 |
| Existing shop floorspace (sq m net) | 6,778 | 6,778 | 6,778 | 6,778 | 6,778 | 79,261 | 79,261 | 79,261 | 79,261 | 79,261 |
| Sales per sq m net (£) | 15,655 | 11,909 | 11,909 | 11,909 | 11,909 | 6,034 | 6,034 | 6,501 | 7,003 | 7,544 |
| Sales from extg flrspsc (£000) | 106,114 | 80,721 | 80,721 | 80,721 | 80,721 | 478,298 | 478,298 | 515,263 | 555,084 | 597,983 |
| Available spending to support new shops (£000) | 0 | 21,401 | 21,032 | 25,191 | 29,374 | 0 | (26) | 34,442 | 118,855 | 231,701 |
| Less sales capacity of committed new floorspace (£000) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Net available spending for new shops (£000) | 0 | 21,401 | 21,032 | 25,191 | 29,374 | 0 | (26) | 34,442 | 118,855 | 231,701 |
| Sales per sq m net in new shops (£) | 14,000 | 14,000 | 14,000 | 14,000 | 14,000 | 5,000 | 5,000 | 5,386 | 5,803 | 6,251 |
| Capacity for new shop flrspsc (sq m net) | 0 | 1,529 | 1,502 | 1,799 | 2,098 | 0 | (5) | 6,394 | 20,483 | 37,065 |
| Market Share of Catchment Area Expenditure | 8.3% | 8.0% | 7.6% | 7.6% | 7.6% | 23.3% | 23.0% | 21.7% | 21.7% | 21.7% |

Sources: RECAP Model.

Notes: Excludes vacant floorspace.

Scenario 2

Shirley Town Centre

Table: 49

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

| Scenario: | 2 | Location: | Shirley Town Centre | | | | | | | | | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------|--------------------|---------------------|----------|----------|------------------|----------------------------------|----------|----------|----------|--|--|
| As Scenario 1, plus increase in market shares of convenience and comparison goods expenditure attracted by Shirley Town Centre from 2016 as a result of committed new retail development there; and reduction in market shares attracted by other locations. | | | | | | | | | | | | |
| Market shares adjustment factors: | | Convenience Goods: | | | | | 100% of survey indicated figures | | | | | |
| | | Comparison Goods: | | | | | 100% of survey indicated figures | | | | | |
| Catchment Zone | PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED | | | | | | | | | | | |
| | CONVENIENCE GOODS | | | | | COMPARISON GOODS | | | | | | |
| | 2009 (%) | 2011 (%) | 2016 (%) | 2021 (%) | 2026 (%) | 2009 (%) | 2011 (%) | 2016 (%) | 2021 (%) | 2026 (%) | | |
| 1 | 7 | 7 | 14 | 14 | 14 | 3 | 3 | 4 | 4 | 4 | | |
| 2 | 17 | 17 | 37 | 37 | 37 | 13 | 13 | 18 | 18 | 18 | | |
| 3 | 2 | 2 | 3 | 3 | 3 | 2 | 2 | 3 | 3 | 3 | | |
| 4 | 2 | 2 | 3 | 3 | 3 | 1 | 1 | 1 | 1 | 1 | | |
| 5 | 1 | 1 | 1 | 1 | 1 | 0 | 0 | 0 | 0 | 0 | | |
| 6 | 3 | 3 | 4 | 4 | 4 | 1 | 1 | 1 | 1 | 1 | | |
| 7 | 4 | 4 | 5 | 5 | 5 | 2 | 2 | 3 | 3 | 3 | | |
| 8 | 1 | 1 | 1 | 1 | 1 | 2 | 2 | 3 | 3 | 3 | | |
| 9 | 3 | 3 | 4 | 4 | 4 | 4 | 4 | 5 | 5 | 5 | | |
| 10 | 2 | 2 | 3 | 3 | 3 | 1 | 1 | 1 | 1 | 1 | | |
| 11 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | | |

Sources: RECAP Model.
DTZ for market share adjustments.

Table: 50

FORECAST RETAIL SALES

| Scenario: | 2 | Location: | Shirley Town Centre | | | | | | | | | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------|---------------|---------------------|---------------|---------------|------------------|---------------|---------------|----------------|----------------|--|--|
| As Scenario 1, plus increase in market shares of convenience and comparison goods expenditure attracted by Shirley Town Centre from 2016 as a result of committed new retail development there; and reduction in market shares attracted by other locations. | | | | | | | | | | | | |
| Catchment zone | RETAIL SALES BY CATCHMENT ZONE | | | | | | | | | | | |
| | CONVENIENCE GOODS | | | | | COMPARISON GOODS | | | | | | |
| | 2009 (£000) | 2011 (£000) | 2016 (£000) | 2021 (£000) | 2026 (£000) | 2009 (£000) | 2011 (£000) | 2016 (£000) | 2021 (£000) | 2026 (£000) | | |
| 1 | 3,806 | 3,814 | 8,126 | 8,552 | 8,979 | 2,548 | 2,590 | 4,286 | 5,325 | 6,636 | | |
| 2 | 18,294 | 18,297 | 41,877 | 43,564 | 45,270 | 21,847 | 22,170 | 37,613 | 46,190 | 56,965 | | |
| 3 | 2,501 | 2,489 | 3,894 | 4,020 | 4,146 | 3,905 | 3,944 | 7,189 | 8,762 | 10,724 | | |
| 4 | 2,720 | 2,706 | 4,226 | 4,355 | 4,483 | 2,124 | 2,144 | 2,601 | 3,164 | 3,865 | | |
| 5 | 1,198 | 1,192 | 1,241 | 1,279 | 1,316 | 0 | 0 | 0 | 0 | 0 | | |
| 6 | 5,998 | 5,991 | 8,382 | 8,699 | 9,019 | 3,122 | 3,164 | 3,869 | 4,740 | 5,832 | | |
| 7 | 6,596 | 6,652 | 8,828 | 9,284 | 9,746 | 5,150 | 5,270 | 9,779 | 12,140 | 15,125 | | |
| 8 | 2,237 | 2,236 | 2,348 | 2,439 | 2,531 | 6,988 | 7,085 | 13,007 | 15,949 | 19,641 | | |
| 9 | 1,088 | 1,085 | 1,504 | 1,549 | 1,594 | 2,265 | 2,292 | 3,470 | 4,219 | 5,153 | | |
| 10 | 1,264 | 1,263 | 1,983 | 2,054 | 2,126 | 987 | 1,001 | 1,220 | 1,492 | 1,833 | | |
| 11 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | | |
| TOTALS | 45,702 | 45,726 | 82,409 | 85,794 | 89,211 | 48,936 | 49,659 | 83,034 | 101,981 | 125,774 | | |

Sources: RECAP Model.

Table: 51

FORECAST RETAIL CAPACITY

| Scenario: 2 | | Location: Shirley Town Centre | | | | | | | | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|-------------------------------|--------|--------|------------------------------------------|------------------|--------|--------|---------|---------|
| As Scenario 1, plus increase in market shares of convenience and comparison goods expenditure attracted by Shirley Town Centre from 2016 as a result of committed new retail development there; and reduction in market shares attracted by other locations. | | | | | | | | | | |
| Growth in sales per sq m from shop floorspace existing in | | | | | Comparison Goods: 1.50 % pa 2011 to 2026 | | | | | |
| | CONVENIENCE GOODS | | | | | COMPARISON GOODS | | | | |
| | 2009 | 2011 | 2016 | 2021 | 2026 | 2009 | 2011 | 2016 | 2021 | 2026 |
| Residents' Spending £000 | 45,702 | 45,726 | 82,409 | 85,794 | 89,211 | 48,936 | 49,659 | 83,034 | 101,981 | 125,774 |
| Plus visitors' spending (%) | - | - | - | - | - | - | - | - | - | - |
| Total spending (£000) | 45,702 | 45,726 | 82,409 | 85,794 | 89,211 | 48,936 | 49,659 | 83,034 | 101,981 | 125,774 |
| Existing shop floorspace (sq m net) | 4,398 | 4,398 | 4,398 | 4,398 | 4,398 | 10,424 | 10,424 | 8,920 | 8,920 | 8,920 |
| Sales per sq m net (£) | 10,391 | 10,503 | 10,503 | 10,503 | 10,503 | 4,695 | 4,695 | 5,058 | 5,448 | 5,870 |
| Sales from extg flrspace (£000) | 45,702 | 46,198 | 46,198 | 46,198 | 46,198 | 48,936 | 48,936 | 45,112 | 48,598 | 52,354 |
| Available spending to support new shops (£000) | 0 | (472) | 36,211 | 39,596 | 43,013 | 0 | 723 | 37,922 | 53,383 | 73,420 |
| Less sales capacity of committed new floorspace (£000) | 0 | 0 | 34,847 | 34,847 | 34,847 | 0 | 0 | 38,449 | 41,421 | 44,622 |
| Net available spending for new shops (£000) | 0 | (472) | 1,365 | 4,749 | 8,166 | 0 | 723 | (527) | 11,962 | 28,798 |
| Sales per sq m net in new shops (£) | 14,000 | 14,000 | 14,000 | 14,000 | 14,000 | 4,500 | 4,500 | 4,848 | 5,222 | 5,626 |
| Capacity for new shop flrspace (sq m net) | 0 | (34) | 97 | 339 | 583 | 0 | 161 | (109) | 2,291 | 5,119 |
| Market Share of Catchment Area Expenditure | 3.6% | 3.6% | 6.1% | 6.1% | 6.2% | 2.4% | 2.4% | 3.3% | 3.3% | 3.4% |

Sources: RECAP Model.

Notes: Excludes vacant floorspace.

Scenario 2

Chelmsley Wood Town Centre

Table: 52

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

| Scenario: | 2 | Location: | Chelmsley Wood Town Centre | | | | | | | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------|--------------------|----------------------------------|----------|----------|------------------|----------|----------|----------|----------|
| As Scenario 1, plus increase in market shares of convenience and comparison goods expenditure attracted by Shirley Town Centre from 2016 as a result of committed new retail development there; and reduction in market shares attracted by other locations. | | | | | | | | | | |
| Market shares adjustment factors: | | Convenience Goods: | 100% of survey indicated figures | | | | | | | |
| | | Comparison Goods: | 100% of survey indicated figures | | | | | | | |
| Catchment Zone | PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED | | | | | | | | | |
| | CONVENIENCE GOODS | | | | | COMPARISON GOODS | | | | |
| | 2009 (%) | 2011 (%) | 2016 (%) | 2021 (%) | 2026 (%) | 2009 (%) | 2011 (%) | 2016 (%) | 2021 (%) | 2026 (%) |
| 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 2 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 3 | 0 | 2 | 2 | 2 | 2 | 0 | 1 | 1 | 1 | 1 |
| 4 | 5 | 25 | 24 | 24 | 24 | 8 | 15 | 15 | 15 | 15 |
| 5 | 6 | 10 | 10 | 10 | 10 | 7 | 10 | 10 | 10 | 10 |
| 6 | 1 | 2 | 2 | 2 | 2 | 0 | 0 | 0 | 0 | 0 |
| 7 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 8 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 9 | 1 | 1 | 1 | 1 | 1 | 0 | 0 | 0 | 0 | 0 |
| 10 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 11 | 1 | 1 | 1 | 1 | 1 | 0 | 0 | 0 | 0 | 0 |

Sources: RECAP Model.
DTZ for market share adjustments.

Table: 53

FORECAST RETAIL SALES

| Scenario: | 2 | Location: | Chelmsley Wood Town Centre | | | | | | | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------|---------------|----------------------------|---------------|---------------|------------------|---------------|---------------|---------------|---------------|
| As Scenario 1, plus increase in market shares of convenience and comparison goods expenditure attracted by Shirley Town Centre from 2016 as a result of committed new retail development there; and reduction in market shares attracted by other locations. | | | | | | | | | | |
| Catchment zone | RETAIL SALES BY CATCHMENT ZONE | | | | | | | | | |
| | CONVENIENCE GOODS | | | | | COMPARISON GOODS | | | | |
| | 2009 (£000) | 2011 (£000) | 2016 (£000) | 2021 (£000) | 2026 (£000) | 2009 (£000) | 2011 (£000) | 2016 (£000) | 2021 (£000) | 2026 (£000) |
| 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 2 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 3 | 0 | 2,489 | 2,596 | 2,680 | 2,764 | 0 | 1,972 | 2,396 | 2,921 | 3,575 |
| 4 | 6,800 | 33,824 | 33,811 | 34,838 | 35,866 | 16,992 | 32,156 | 39,014 | 47,455 | 57,981 |
| 5 | 7,186 | 11,919 | 12,412 | 12,786 | 13,163 | 13,093 | 18,884 | 22,915 | 27,867 | 34,048 |
| 6 | 1,999 | 3,994 | 4,191 | 4,349 | 4,510 | 0 | 0 | 0 | 0 | 0 |
| 7 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 8 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 9 | 363 | 362 | 376 | 387 | 398 | 0 | 0 | 0 | 0 | 0 |
| 10 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 11 | 518 | 520 | 550 | 576 | 602 | 0 | 0 | 0 | 0 | 0 |
| TOTALS | 16,866 | 53,107 | 53,936 | 55,616 | 57,303 | 30,084 | 53,012 | 64,326 | 78,243 | 95,604 |

Sources: RECAP Model.

Table: 54

FORECAST RETAIL CAPACITY

| Scenario: 2 | | Location: Chelmsley Wood Town Centre | | | | | | | | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|--------------------------------------|--------|--------|--------|-----------------------------|---------|----------|--------|--------|
| As Scenario 1, plus increase in market shares of convenience and comparison goods expenditure attracted by Shirley Town Centre from 2016 as a result of committed new retail development there; and reduction in market shares attracted by other locations. | | | | | | | | | | |
| Growth in sales per sq m from shop floorspace existing in | | | | | 2009 | Comparison Goods: 1.50 % pa | | 20011 to | | 2026 |
| | CONVENIENCE GOODS | | | | | COMPARISON GOODS | | | | |
| | 2009 | 2011 | 2016 | 2021 | 2026 | 2009 | 2011 | 2016 | 2021 | 2026 |
| Residents' Spending £000 | 16,866 | 53,107 | 53,936 | 55,616 | 57,303 | 30,084 | 53,012 | 64,326 | 78,243 | 95,604 |
| Plus visitors' spending (%) | - | - | - | - | - | - | - | - | - | - |
| Total spending (£000) | 16,866 | 53,107 | 53,936 | 55,616 | 57,303 | 30,084 | 53,012 | 64,326 | 78,243 | 95,604 |
| Existing shop floorspace (sq m net) | 1,822 | 4,547 | 4,547 | 4,547 | 4,547 | 8,254 | 12,568 | 12,568 | 12,568 | 12,568 |
| Sales per sq m net (£) | 9,258 | 11,501 | 11,501 | 11,501 | 11,501 | 3,645 | 4,374 | 4,712 | 5,076 | 5,469 |
| Sales from extg flrspace (£000) | 16,866 | 52,296 | 52,296 | 52,296 | 52,296 | 30,084 | 54,975 | 59,224 | 63,801 | 68,732 |
| Available spending to support new shops (£000) | 0 | 811 | 1,640 | 3,320 | 5,007 | 0 | (1,963) | 5,102 | 14,442 | 26,872 |
| Less sales capacity of committed new floorspace (£000) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Net available spending for new shops (£000) | 0 | 811 | 1,640 | 3,320 | 5,007 | 0 | (1,963) | 5,102 | 14,442 | 26,872 |
| Sales per sq m net in new shops (£) | 14,000 | 14,000 | 14,000 | 14,000 | 14,000 | 4,500 | 4,500 | 4,848 | 5,222 | 5,626 |
| Capacity for new shop flrspace (sq m net) | 0 | 58 | 117 | 237 | 358 | 0 | (436) | 1,052 | 2,765 | 4,776 |
| Market Share of Catchment Area Expenditure | 1.3% | 4.1% | 4.0% | 4.0% | 4.0% | 1.5% | 2.6% | 2.6% | 2.6% | 2.5% |

Sources: RECAP Model.

Notes: Excludes vacant floorspace.

Scenario 2

Non-Town Centre Shopping in Solihull

Table: 55

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

| Scenario: 2 | | Location: Non-Town Centre Shopping in Solihull | | | | | | | | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------|------------------------------------------------|----------|----------|----------------------------------|------------------|----------|----------|----------|----------|
| As Scenario 1, plus increase in market shares of convenience and comparison goods expenditure attracted by Shirley Town Centre from 2016 as a result of committed new retail development there; and reduction in market shares attracted by other locations. | | | | | | | | | | |
| Market shares adjustment factors: | | Convenience Goods: | | | 100% of survey indicated figures | | | | | |
| | | Comparison Goods: | | | 100% of survey indicated figures | | | | | |
| Catchment Zone | PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED | | | | | | | | | |
| | CONVENIENCE GOODS | | | | | COMPARISON GOODS | | | | |
| | 2009 (%) | 2011 (%) | 2016 (%) | 2021 (%) | 2026 (%) | 2009 (%) | 2011 (%) | 2016 (%) | 2021 (%) | 2026 (%) |
| 1 | 32 | 32 | 28 | 28 | 28 | 18 | 18 | 17 | 17 | 17 |
| 2 | 51 | 51 | 35 | 35 | 35 | 23 | 23 | 21 | 21 | 21 |
| 3 | 16 | 15 | 15 | 15 | 15 | 14 | 14 | 13 | 13 | 13 |
| 4 | 15 | 7 | 7 | 7 | 7 | 6 | 4 | 4 | 4 | 4 |
| 5 | 38 | 36 | 36 | 36 | 36 | 5 | 4 | 4 | 4 | 4 |
| 6 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 |
| 7 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 |
| 8 | 5 | 5 | 5 | 5 | 5 | 6 | 6 | 6 | 6 | 6 |
| 9 | 16 | 16 | 15 | 15 | 15 | 9 | 9 | 9 | 9 | 9 |
| 10 | 20 | 20 | 19 | 19 | 19 | 14 | 14 | 14 | 14 | 14 |
| 11 | 2 | 2 | 2 | 2 | 2 | 1 | 1 | 1 | 1 | 1 |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |

Sources: RECAP Model.
DTZ for market share adjustments.

Table: 56

FORECAST RETAIL SALES

| Scenario: 2 | | Location: Non-Town Centre Shopping in Solihull | | | | | | | | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------|------------------------------------------------|----------------|----------------|----------------|------------------|----------------|----------------|----------------|----------------|
| As Scenario 1, plus increase in market shares of convenience and comparison goods expenditure attracted by Shirley Town Centre from 2016 as a result of committed new retail development there; and reduction in market shares attracted by other locations. | | | | | | | | | | |
| Catchment zone | RETAIL SALES BY CATCHMENT ZONE | | | | | | | | | |
| | CONVENIENCE GOODS | | | | | COMPARISON GOODS | | | | |
| | 2009 (£000) | 2011 (£000) | 2016 (£000) | 2021 (£000) | 2026 (£000) | 2009 (£000) | 2011 (£000) | 2016 (£000) | 2021 (£000) | 2026 (£000) |
| 1 | 17,401 | 17,437 | 16,252 | 17,104 | 17,958 | 15,285 | 15,541 | 18,217 | 22,632 | 28,202 |
| 2 | 54,882 | 54,892 | 39,614 | 41,209 | 42,823 | 38,652 | 39,223 | 43,881 | 53,889 | 66,459 |
| 3 | 20,006 | 18,669 | 19,470 | 20,101 | 20,730 | 27,338 | 27,608 | 31,154 | 37,968 | 46,470 |
| 4 | 20,401 | 9,471 | 9,862 | 10,161 | 10,461 | 12,744 | 8,575 | 10,404 | 12,655 | 15,462 |
| 5 | 45,512 | 42,907 | 44,683 | 46,030 | 47,388 | 9,352 | 7,554 | 9,166 | 11,147 | 13,619 |
| 6 | 7,997 | 7,988 | 8,382 | 8,699 | 9,019 | 12,488 | 12,656 | 15,475 | 18,959 | 23,329 |
| 7 | 6,596 | 6,652 | 7,063 | 7,427 | 7,796 | 10,301 | 10,540 | 13,039 | 16,187 | 20,166 |
| 8 | 11,187 | 11,179 | 11,742 | 12,196 | 12,656 | 20,964 | 21,254 | 26,014 | 31,897 | 39,282 |
| 9 | 5,800 | 5,787 | 5,638 | 5,807 | 5,977 | 5,095 | 5,158 | 6,246 | 7,594 | 9,275 |
| 10 | 12,644 | 12,634 | 12,557 | 13,010 | 13,467 | 13,822 | 14,013 | 17,082 | 20,894 | 25,667 |
| 11 | 1,035 | 1,039 | 1,100 | 1,151 | 1,203 | 808 | 823 | 1,015 | 1,255 | 1,556 |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| TOTALS | 203,462 | 188,655 | 176,362 | 182,896 | 189,478 | 166,850 | 162,945 | 191,693 | 235,076 | 289,487 |

Sources: RECAP Model.

Table: 57

FORECAST RETAIL CAPACITY

| Scenario: 2 | | Location: Non-Town Centre Shopping in Solihull | | | | | | | | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|------------------------------------------------|---------|---------|------------------------------------------|------------------|---------|---------|---------|---------|
| As Scenario 1, plus increase in market shares of convenience and comparison goods expenditure attracted by Shirley Town Centre from 2016 as a result of committed new retail development there; and reduction in market shares attracted by other locations. | | | | | | | | | | |
| Growth in sales per sq m from shop floorspace existing in | | | | | Comparison Goods: 1.50 % pa 2008 to 2026 | | | | | |
| | CONVENIENCE GOODS | | | | | COMPARISON GOODS | | | | |
| | 2009 | 2011 | 2016 | 2021 | 2026 | 2009 | 2011 | 2016 | 2021 | 2026 |
| Residents' Spending £000 | 203,462 | 188,655 | 176,362 | 182,896 | 189,478 | 166,850 | 162,945 | 191,693 | 235,076 | 289,487 |
| Plus visitors' spending (%) | - | - | - | - | - | - | - | - | - | - |
| Total spending (£000) | 203,462 | 188,655 | 176,362 | 182,896 | 189,478 | 166,850 | 162,945 | 191,693 | 235,076 | 289,487 |
| Existing shop floorspace (sq m net) | 13,058 | 13,058 | 13,058 | 13,058 | 13,058 | 52,815 | 52,815 | 52,815 | 52,815 | 52,815 |
| Sales per sq m net (£) | 15,581 | 13,200 | 13,200 | 13,200 | 13,200 | 3,159 | 3,008 | 3,319 | 3,576 | 3,852 |
| Sales from extg flrspsc (£000) | 203,462 | 172,369 | 172,369 | 172,369 | 172,369 | 166,850 | 158,872 | 175,303 | 188,851 | 203,446 |
| Available spending to support new shops (£000) | 0 | 16,286 | 3,993 | 10,527 | 17,109 | 0 | 4,072 | 16,390 | 46,225 | 86,041 |
| Less sales capacity of committed new floorspace (£000) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 20,108 | 21,662 | 23,336 |
| Net available spending for new shops (£000) | 0 | 16,286 | 3,993 | 10,527 | 17,109 | 0 | 4,072 | (3,718) | 24,563 | 62,705 |
| Sales per sq m net in new shops (£) | 14,000 | 14,000 | 14,000 | 14,000 | 14,000 | 3,250 | 3,250 | 3,501 | 3,772 | 4,063 |
| Capacity for new shop flrspsc (sq m net) | 0 | 1,163 | 285 | 752 | 1,222 | 0 | 1,253 | (1,062) | 6,512 | 15,432 |
| Market Share of Catchment Area Expenditure | 15.9% | 14.7% | 13.1% | 13.1% | 13.1% | 8.3% | 8.0% | 7.7% | 7.7% | 7.7% |

Sources: RECAP Model.

Notes: Excludes vacant floorspace.

Scenario 3

Solihull Town Centre

Table: 58

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

| Scenario: 3 Location: Solihull Town Centre | | | | | | | | | | |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------|----------|----------|----------|----------------------------------|------------------|----------|----------|----------|----------|
| As Scenario 2, plus Increase in market shares of comparison goods expenditure attracted by Solihull Town Centre from 2021 as a result of assumed new retail development of circa 10,000 sq m net comparison goods floorspace. | | | | | | | | | | |
| Market shares adjustment factors: | | | | | 100% of survey indicated figures | | | | | |
| Convenience Goods: | | | | | 100% of survey indicated figures | | | | | |
| Comparison Goods: | | | | | 100% of survey indicated figures | | | | | |
| Catchment Zone | PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED | | | | | | | | | |
| | CONVENIENCE GOODS | | | | | COMPARISON GOODS | | | | |
| | 2009 (%) | 2011 (%) | 2016 (%) | 2021 (%) | 2026 (%) | 2009 (%) | 2011 (%) | 2016 (%) | 2021 (%) | 2026 (%) |
| 1 | 44 | 44 | 42 | 42 | 42 | 70 | 70 | 70 | 72 | 72 |
| 2 | 11 | 11 | 7 | 7 | 7 | 42 | 42 | 41 | 43 | 43 |
| 3 | 14 | 13 | 13 | 13 | 13 | 48 | 47 | 46 | 47 | 47 |
| 4 | 7 | 5 | 5 | 5 | 5 | 26 | 24 | 22 | 23 | 23 |
| 5 | 1 | 1 | 1 | 1 | 1 | 8 | 8 | 7 | 7 | 7 |
| 6 | 2 | 2 | 2 | 2 | 2 | 9 | 9 | 8 | 8 | 8 |
| 7 | 5 | 5 | 5 | 5 | 5 | 9 | 9 | 7 | 7 | 7 |
| 8 | 4 | 4 | 4 | 4 | 4 | 13 | 13 | 11 | 11 | 11 |
| 9 | 4 | 4 | 4 | 4 | 4 | 15 | 15 | 14 | 14 | 14 |
| 10 | 30 | 30 | 30 | 30 | 30 | 61 | 61 | 61 | 63 | 63 |
| 11 | 1 | 1 | 1 | 1 | 1 | 9 | 9 | 9 | 9 | 9 |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |

Sources: RECAP Model.
DTZ for market share adjustments.

Table: 59

FORECAST RETAIL SALES

| Scenario: 3 Location: Solihull Town Centre | | | | | | | | | | |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------|----------------|----------------|----------------|----------------|------------------|----------------|----------------|----------------|----------------|
| As Scenario 2, plus Increase in market shares of comparison goods expenditure attracted by Solihull Town Centre from 2021 as a result of assumed new retail development of circa 10,000 sq m net comparison goods floorspace. | | | | | | | | | | |
| Catchment zone | RETAIL SALES BY CATCHMENT ZONE | | | | | | | | | |
| | CONVENIENCE GOODS | | | | | COMPARISON GOODS | | | | |
| | 2009 (£000) | 2011 (£000) | 2016 (£000) | 2021 (£000) | 2026 (£000) | 2009 (£000) | 2011 (£000) | 2016 (£000) | 2021 (£000) | 2026 (£000) |
| 1 | 23,926 | 23,976 | 24,378 | 25,655 | 26,937 | 59,443 | 60,437 | 75,012 | 95,855 | 119,443 |
| 2 | 11,837 | 11,839 | 7,923 | 8,242 | 8,565 | 70,583 | 71,625 | 85,673 | 110,344 | 136,082 |
| 3 | 17,506 | 16,180 | 16,874 | 17,421 | 17,966 | 93,730 | 92,683 | 110,237 | 137,270 | 168,007 |
| 4 | 9,520 | 6,765 | 7,044 | 7,258 | 7,472 | 55,223 | 51,449 | 57,221 | 72,765 | 88,904 |
| 5 | 1,198 | 1,192 | 1,241 | 1,279 | 1,316 | 14,963 | 15,107 | 16,041 | 19,507 | 23,834 |
| 6 | 3,998 | 3,994 | 4,191 | 4,349 | 4,510 | 28,099 | 28,476 | 30,949 | 37,917 | 46,658 |
| 7 | 8,245 | 8,315 | 8,828 | 9,284 | 9,746 | 23,177 | 23,715 | 22,818 | 28,327 | 35,291 |
| 8 | 8,949 | 8,943 | 9,393 | 9,757 | 10,125 | 45,422 | 46,051 | 47,692 | 58,478 | 72,018 |
| 9 | 1,450 | 1,447 | 1,504 | 1,549 | 1,594 | 8,492 | 8,596 | 9,716 | 11,813 | 14,428 |
| 10 | 18,966 | 18,951 | 19,827 | 20,543 | 21,264 | 60,225 | 61,056 | 74,429 | 94,022 | 115,500 |
| 11 | 518 | 520 | 550 | 576 | 602 | 7,276 | 7,410 | 9,139 | 11,291 | 14,005 |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| TOTALS | 106,114 | 102,122 | 101,753 | 105,912 | 110,095 | 466,632 | 466,607 | 538,926 | 677,589 | 834,170 |

Sources: RECAP Model.

Table: 60

FORECAST RETAIL CAPACITY

| Scenario: 3 | | Location: Solihull Town Centre | | | | | | | | |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|--------------------------------|---------|---------|------------------------------------------|------------------|---------|---------|---------|---------|
| As Scenario 2, plus Increase in market shares of comparison goods expenditure attracted by Solihull Town Centre from 2021 as a result of assumed new retail development of circa 10,000 sq m net comparison goods floorspace. | | | | | | | | | | |
| Growth in sales per sq m from shop floorspace existing in 2009 | | | | | Comparison Goods: 1.50 % pa 2011 to 2026 | | | | | |
| | CONVENIENCE GOODS | | | | | COMPARISON GOODS | | | | |
| | 2009 | 2011 | 2016 | 2021 | 2026 | 2009 | 2011 | 2016 | 2021 | 2026 |
| Residents' Spending £000 | 106,114 | 102,122 | 101,753 | 105,912 | 110,095 | 466,632 | 466,607 | 538,926 | 677,589 | 834,170 |
| Plus visitors' spending (%) | - | - | - | - | - | 2.5 | 2.5 | 2.0 | 2.0 | 2.0 |
| Total spending (£000) | 106,114 | 102,122 | 101,753 | 105,912 | 110,095 | 478,298 | 478,272 | 549,705 | 691,140 | 850,854 |
| Existing shop floorspace (sq m net) | 6,778 | 6,778 | 6,778 | 6,778 | 6,778 | 79,261 | 79,261 | 79,261 | 79,261 | 79,261 |
| Sales per sq m net (£) | 15,655 | 11,909 | 11,909 | 11,909 | 11,909 | 6,034 | 6,034 | 6,501 | 7,003 | 7,544 |
| Sales from extg flrspace (£000) | 106,114 | 80,721 | 80,721 | 80,721 | 80,721 | 478,298 | 478,298 | 515,263 | 555,084 | 597,983 |
| Available spending to support new shops (£000) | 0 | 21,401 | 21,032 | 25,191 | 29,374 | 0 | (26) | 34,442 | 136,056 | 252,870 |
| Less sales capacity of committed new floorspace (£000) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Net available spending for new shops (£000) | 0 | 21,401 | 21,032 | 25,191 | 29,374 | 0 | (26) | 34,442 | 136,056 | 252,870 |
| Sales per sq m net in new shops (£) | 14,000 | 14,000 | 14,000 | 14,000 | 14,000 | 5,000 | 5,000 | 5,386 | 5,803 | 6,251 |
| Capacity for new shop flrspace (sq m net) | 0 | 1,529 | 1,502 | 1,799 | 2,098 | 0 | (5) | 6,394 | 23,447 | 40,452 |
| Market Share of Catchment Area Expenditure | 8.3% | 8.0% | 7.6% | 7.6% | 7.6% | 23.3% | 23.0% | 21.7% | 22.2% | 22.2% |

Sources: RECAP Model.

Notes: Excludes vacant floorspace.

Scenario 3

Non-Town Centre Shopping in Solihull

Table: 61

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

| Scenario: | | Location: Non-Town Centre Shopping in Solihull | | | | | | | | | |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------|------------------------------------------------|----------|----------|----------|------------------|----------------------------------|----------|----------|----------|--|
| As Scenario 2, plus Increase in market shares of comparison goods expenditure attracted by Solihull Town Centre from 2021 as a result of assumed new retail development of circa 10,000 sq m net comparison goods floorspace. | | | | | | | | | | | |
| Market shares adjustment factors: | | Convenience Goods: | | | | | 100% of survey indicated figures | | | | |
| | | Comparison Goods: | | | | | 100% of survey indicated figures | | | | |
| Catchment Zone | PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED | | | | | | | | | | |
| | CONVENIENCE GOODS | | | | | COMPARISON GOODS | | | | | |
| | 2009 (%) | 2011 (%) | 2016 (%) | 2021 (%) | 2026 (%) | 2009 (%) | 2011 (%) | 2016 (%) | 2021 (%) | 2026 (%) | |
| 1 | 32 | 32 | 28 | 28 | 28 | 18 | 18 | 17 | 16 | 16 | |
| 2 | 51 | 51 | 35 | 35 | 35 | 23 | 23 | 21 | 20 | 20 | |
| 3 | 16 | 15 | 15 | 15 | 15 | 14 | 14 | 13 | 12 | 12 | |
| 4 | 15 | 7 | 7 | 7 | 7 | 6 | 4 | 4 | 4 | 4 | |
| 5 | 38 | 36 | 36 | 36 | 36 | 5 | 4 | 4 | 4 | 4 | |
| 6 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | |
| 7 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | |
| 8 | 5 | 5 | 5 | 5 | 5 | 6 | 6 | 6 | 6 | 6 | |
| 9 | 16 | 16 | 15 | 15 | 15 | 9 | 9 | 9 | 9 | 9 | |
| 10 | 20 | 20 | 19 | 19 | 19 | 14 | 14 | 14 | 13 | 13 | |
| 11 | 2 | 2 | 2 | 2 | 2 | 1 | 1 | 1 | 1 | 1 | |

Sources: RECAP Model.
DTZ for market share adjustments.

Table: 62

FORECAST RETAIL SALES

| Scenario: | | Location: Non-Town Centre Shopping in Solihull | | | | | | | | | |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------|------------------------------------------------|-------------|-------------|-------------|------------------|-------------|-------------|-------------|-------------|--|
| As Scenario 2, plus Increase in market shares of comparison goods expenditure attracted by Solihull Town Centre from 2021 as a result of assumed new retail development of circa 10,000 sq m net comparison goods floorspace. | | | | | | | | | | | |
| Catchment zone | RETAIL SALES BY CATCHMENT ZONE | | | | | | | | | | |
| | CONVENIENCE GOODS | | | | | COMPARISON GOODS | | | | | |
| | 2009 (£000) | 2011 (£000) | 2016 (£000) | 2021 (£000) | 2026 (£000) | 2009 (£000) | 2011 (£000) | 2016 (£000) | 2021 (£000) | 2026 (£000) | |
| 1 | 17,401 | 17,437 | 16,252 | 17,104 | 17,958 | 15,285 | 15,541 | 18,217 | 21,301 | 26,543 | |
| 2 | 54,882 | 54,892 | 39,614 | 41,209 | 42,823 | 38,652 | 39,223 | 43,881 | 51,323 | 63,294 | |
| 3 | 20,006 | 18,669 | 19,470 | 20,101 | 20,730 | 27,338 | 27,608 | 31,154 | 35,048 | 42,895 | |
| 4 | 20,401 | 9,471 | 9,862 | 10,161 | 10,461 | 12,744 | 8,575 | 10,404 | 12,655 | 15,462 | |
| 5 | 45,512 | 42,907 | 44,683 | 46,030 | 47,388 | 9,352 | 7,554 | 9,166 | 11,147 | 13,619 | |
| 6 | 7,997 | 7,988 | 8,382 | 8,699 | 9,019 | 12,488 | 12,656 | 15,475 | 18,959 | 23,329 | |
| 7 | 6,596 | 6,652 | 7,063 | 7,427 | 7,796 | 10,301 | 10,540 | 13,039 | 16,187 | 20,166 | |
| 8 | 11,187 | 11,179 | 11,742 | 12,196 | 12,656 | 20,964 | 21,254 | 26,014 | 31,897 | 39,282 | |
| 9 | 5,800 | 5,787 | 5,638 | 5,807 | 5,977 | 5,095 | 5,158 | 6,246 | 7,594 | 9,275 | |
| 10 | 12,644 | 12,634 | 12,557 | 13,010 | 13,467 | 13,822 | 14,013 | 17,082 | 19,401 | 23,833 | |
| 11 | 1,035 | 1,039 | 1,100 | 1,151 | 1,203 | 808 | 823 | 1,015 | 1,255 | 1,556 | |
| TOTALS | 203,462 | 188,655 | 176,362 | 182,896 | 189,478 | 166,850 | 162,945 | 191,693 | 226,766 | 279,256 | |

Sources: RECAP Model.

Table: 63

FORECAST RETAIL CAPACITY

| Scenario: 3 | | Location: Non-Town Centre Shopping in Solihull | | | | | | | | |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|------------------------------------------------|---------|---------|------------------------------------------|------------------|---------|---------|---------|---------|
| As Scenario 2, plus Increase in market shares of comparison goods expenditure attracted by Solihull Town Centre from 2021 as a result of assumed new retail development of circa 10,000 sq m net comparison goods floorspace. | | | | | | | | | | |
| Growth in sales per sq m from shop floorspace existing in | | | | | Comparison Goods: 1.50 % pa 2008 to 2026 | | | | | |
| | CONVENIENCE GOODS | | | | | COMPARISON GOODS | | | | |
| | 2009 | 2011 | 2016 | 2021 | 2026 | 2009 | 2011 | 2016 | 2021 | 2026 |
| Residents' Spending £000 | 203,462 | 188,655 | 176,362 | 182,896 | 189,478 | 166,850 | 162,945 | 191,693 | 226,766 | 279,256 |
| Plus visitors' spending (%) | - | - | - | - | - | - | - | - | - | - |
| Total spending (£000) | 203,462 | 188,655 | 176,362 | 182,896 | 189,478 | 166,850 | 162,945 | 191,693 | 226,766 | 279,256 |
| Existing shop floorspace (sq m net) | 13,058 | 13,058 | 13,058 | 13,058 | 13,058 | 52,815 | 52,815 | 52,815 | 52,815 | 52,815 |
| Sales per sq m net (£) | 15,581 | 13,200 | 13,200 | 13,200 | 13,200 | 3,159 | 3,008 | 3,319 | 3,576 | 3,852 |
| Sales from extg flrspace (£000) | 203,462 | 172,369 | 172,369 | 172,369 | 172,369 | 166,850 | 158,872 | 175,303 | 188,851 | 203,446 |
| Available spending to support new shops (£000) | 0 | 16,286 | 3,993 | 10,527 | 17,109 | 0 | 4,072 | 16,390 | 37,914 | 75,809 |
| Less sales capacity of committed new floorspace (£000) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 20,108 | 21,662 | 23,336 |
| Net available spending for new shops (£000) | 0 | 16,286 | 3,993 | 10,527 | 17,109 | 0 | 4,072 | (3,718) | 16,252 | 52,473 |
| Sales per sq m net in new shops (£) | 14,000 | 14,000 | 14,000 | 14,000 | 14,000 | 3,250 | 3,250 | 3,501 | 3,772 | 4,063 |
| Capacity for new shop flrspace (sq m net) | 0 | 1,163 | 285 | 752 | 1,222 | 0 | 1,253 | (1,062) | 4,309 | 12,914 |
| Market Share of Catchment Area Expenditure | 15.9% | 14.7% | 13.1% | 13.1% | 13.1% | 8.3% | 8.0% | 7.7% | 7.4% | 7.4% |

Sources: RECAP Model.

Notes: Excludes vacant floorspace.

Scenario 4

Solihull Town Centre

Table: 64

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

| Scenario: 4 | | Location: Solihull Town Centre | | | | | | | | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------|--------------------------------|----------|----------|----------|------------------|----------------------------------|----------|----------|----------|
| As Scenario 3 plus further Increase in market shares of comparison goods expenditure attracted by Solihull Town Centre from 2021 as a result of assumed new retail development of circa 20,000 sq m net comparison goods floorspace. | | | | | | | | | | |
| Market shares adjustment factors: | | Convenience Goods: | | | | | 100% of survey indicated figures | | | |
| | | Comparison Goods: | | | | | 100% of survey indicated figures | | | |
| Catchment Zone | PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED | | | | | | | | | |
| | CONVENIENCE GOODS | | | | | COMPARISON GOODS | | | | |
| | 2009 (%) | 2011 (%) | 2016 (%) | 2021 (%) | 2026 (%) | 2009 (%) | 2011 (%) | 2016 (%) | 2021 (%) | 2026 (%) |
| 1 | 44 | 44 | 42 | 42 | 42 | 70 | 70 | 70 | 72 | 72 |
| 2 | 11 | 11 | 7 | 7 | 7 | 42 | 42 | 41 | 44 | 44 |
| 3 | 14 | 13 | 13 | 13 | 13 | 48 | 47 | 46 | 48 | 48 |
| 4 | 7 | 5 | 5 | 5 | 5 | 26 | 24 | 22 | 24 | 24 |
| 5 | 1 | 1 | 1 | 1 | 1 | 8 | 8 | 7 | 7 | 7 |
| 6 | 2 | 2 | 2 | 2 | 2 | 9 | 9 | 8 | 8 | 8 |
| 7 | 5 | 5 | 5 | 5 | 5 | 9 | 9 | 7 | 7 | 7 |
| 8 | 4 | 4 | 4 | 4 | 4 | 13 | 13 | 11 | 11 | 11 |
| 9 | 4 | 4 | 4 | 4 | 4 | 15 | 15 | 14 | 15 | 15 |
| 10 | 30 | 30 | 30 | 30 | 30 | 61 | 61 | 61 | 64 | 64 |
| 11 | 1 | 1 | 1 | 1 | 1 | 9 | 9 | 9 | 10 | 10 |
| | | | | | | | | | | |
| | | | | | | | | | | |

Sources: RECAP Model.
DTZ for market share adjustments.

Table: 65

FORECAST RETAIL SALES

| Scenario: 4 | | Location: Solihull Town Centre | | | | | | | | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------|--------------------------------|-------------|-------------|-------------|------------------|-------------|-------------|-------------|-------------|
| As Scenario 3 plus further Increase in market shares of comparison goods expenditure attracted by Solihull Town Centre from 2021 as a result of assumed new retail development of circa 20,000 sq m net comparison goods floorspace. | | | | | | | | | | |
| Catchment zone | RETAIL SALES BY CATCHMENT ZONE | | | | | | | | | |
| | CONVENIENCE GOODS | | | | | COMPARISON GOODS | | | | |
| | 2009 (£000) | 2011 (£000) | 2016 (£000) | 2021 (£000) | 2026 (£000) | 2009 (£000) | 2011 (£000) | 2016 (£000) | 2021 (£000) | 2026 (£000) |
| 1 | 23,926 | 23,976 | 24,378 | 25,655 | 26,937 | 59,443 | 60,437 | 75,012 | 95,855 | 119,443 |
| 2 | 11,837 | 11,839 | 7,923 | 8,242 | 8,565 | 70,583 | 71,625 | 85,673 | 112,910 | 139,247 |
| 3 | 17,506 | 16,180 | 16,874 | 17,421 | 17,966 | 93,730 | 92,683 | 110,237 | 140,191 | 171,582 |
| 4 | 9,520 | 6,765 | 7,044 | 7,258 | 7,472 | 55,223 | 51,449 | 57,221 | 75,928 | 92,770 |
| 5 | 1,198 | 1,192 | 1,241 | 1,279 | 1,316 | 14,963 | 15,107 | 16,041 | 19,507 | 23,834 |
| 6 | 3,998 | 3,994 | 4,191 | 4,349 | 4,510 | 28,099 | 28,476 | 30,949 | 37,917 | 46,658 |
| 7 | 8,245 | 8,315 | 8,828 | 9,284 | 9,746 | 23,177 | 23,715 | 22,818 | 28,327 | 35,291 |
| 8 | 8,949 | 8,943 | 9,393 | 9,757 | 10,125 | 45,422 | 46,051 | 47,692 | 58,478 | 72,018 |
| 9 | 1,450 | 1,447 | 1,504 | 1,549 | 1,594 | 8,492 | 8,596 | 9,716 | 12,656 | 15,459 |
| 10 | 18,966 | 18,951 | 19,827 | 20,543 | 21,264 | 60,225 | 61,056 | 74,429 | 95,515 | 117,333 |
| 11 | 518 | 520 | 550 | 576 | 602 | 7,276 | 7,410 | 9,139 | 12,545 | 15,561 |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| TOTALS | 106,114 | 102,122 | 101,753 | 105,912 | 110,095 | 466,632 | 466,607 | 538,926 | 689,830 | 849,195 |

Sources: RECAP Model.

Table: 66

FORECAST RETAIL CAPACITY

| Scenario: 4 | | Location: Solihull Town Centre | | | | | | | | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|--------------------------------|---------|---------|------------------------------------------|------------------|---------|---------|---------|---------|
| As Scenario 3 plus further Increase in market shares of comparison goods expenditure attracted by Solihull Town Centre from 2021 as a result of assumed new retail development of circa 20,000 sq m net comparison goods floorspace. | | | | | | | | | | |
| Growth in sales per sq m from shop floorspace existing in 2009 | | | | | Comparison Goods: 1.50 % pa 2011 to 2026 | | | | | |
| | CONVENIENCE GOODS | | | | | COMPARISON GOODS | | | | |
| | 2009 | 2011 | 2016 | 2021 | 2026 | 2009 | 2011 | 2016 | 2021 | 2026 |
| Residents' Spending £000 | 106,114 | 102,122 | 101,753 | 105,912 | 110,095 | 466,632 | 466,607 | 538,926 | 689,830 | 849,195 |
| Plus visitors' spending (%) | - | - | - | - | - | 2.5 | 2.5 | 2.0 | 2.0 | 2.0 |
| Total spending (£000) | 106,114 | 102,122 | 101,753 | 105,912 | 110,095 | 478,298 | 478,272 | 549,705 | 703,626 | 866,179 |
| Existing shop floorspace (sq m net) | 6,778 | 6,778 | 6,778 | 6,778 | 6,778 | 79,261 | 79,261 | 79,261 | 79,261 | 79,261 |
| Sales per sq m net (£) | 15,655 | 11,909 | 11,909 | 11,909 | 11,909 | 6,034 | 6,034 | 6,501 | 7,003 | 7,544 |
| Sales from extg flrspace (£000) | 106,114 | 80,721 | 80,721 | 80,721 | 80,721 | 478,298 | 478,298 | 515,263 | 555,084 | 597,983 |
| Available spending to support new shops (£000) | 0 | 21,401 | 21,032 | 25,191 | 29,374 | 0 | (26) | 34,442 | 148,542 | 268,196 |
| Less sales capacity of committed new floorspace (£000) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Net available spending for new shops (£000) | 0 | 21,401 | 21,032 | 25,191 | 29,374 | 0 | (26) | 34,442 | 148,542 | 268,196 |
| Sales per sq m net in new shops (£) | 14,000 | 14,000 | 14,000 | 14,000 | 14,000 | 5,000 | 5,000 | 5,386 | 5,803 | 6,251 |
| Capacity for new shop flrspace (sq m net) | 0 | 1,529 | 1,502 | 1,799 | 2,098 | 0 | (5) | 6,394 | 25,599 | 42,903 |
| Market Share of Catchment Area Expenditure | 8.3% | 8.0% | 7.6% | 7.6% | 7.6% | 23.3% | 23.0% | 21.7% | 22.6% | 22.6% |

Sources: RECAP Model.

Notes: Excludes vacant floorspace.

Scenario 4

Non-Town Centre Shopping in Solihull

Table: 67

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

| Scenario: | | Location: Non-Town Centre Shopping in Solihull | | | | | | | | | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------|------------------------------------------------|----------|----------|----------|------------------|----------------------------------|----------|----------|----------|--|
| As Scenario 3 plus further Increase in market shares of comparison goods expenditure attracted by Solihull Town Centre from 2021 as a result of assumed new retail development of circa 20,000 sq m net comparison goods floorspace. | | | | | | | | | | | |
| Market shares adjustment factors: | | Convenience Goods: | | | | | 100% of survey indicated figures | | | | |
| | | Comparison Goods: | | | | | 100% of survey indicated figures | | | | |
| Catchment Zone | PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED | | | | | | | | | | |
| | CONVENIENCE GOODS | | | | | COMPARISON GOODS | | | | | |
| | 2009 (%) | 2011 (%) | 2016 (%) | 2021 (%) | 2026 (%) | 2009 (%) | 2011 (%) | 2016 (%) | 2021 (%) | 2026 (%) | |
| 1 | 32 | 32 | 28 | 28 | 28 | 18 | 18 | 17 | 16 | 16 | |
| 2 | 51 | 51 | 35 | 35 | 35 | 23 | 23 | 21 | 19 | 19 | |
| 3 | 16 | 15 | 15 | 15 | 15 | 14 | 14 | 13 | 12 | 12 | |
| 4 | 15 | 7 | 7 | 7 | 7 | 6 | 4 | 4 | 4 | 4 | |
| 5 | 38 | 36 | 36 | 36 | 36 | 5 | 4 | 4 | 4 | 4 | |
| 6 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | |
| 7 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | |
| 8 | 5 | 5 | 5 | 5 | 5 | 6 | 6 | 6 | 6 | 6 | |
| 9 | 16 | 16 | 15 | 15 | 15 | 9 | 9 | 9 | 9 | 9 | |
| 10 | 20 | 20 | 19 | 19 | 19 | 14 | 14 | 14 | 13 | 13 | |
| 11 | 2 | 2 | 2 | 2 | 2 | 1 | 1 | 1 | 1 | 1 | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |

Sources: RECAP Model.
DTZ for market share adjustments.

Table: 68

FORECAST RETAIL SALES

| Scenario: | | Location: Non-Town Centre Shopping in Solihull | | | | | | | | | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------|------------------------------------------------|----------------|----------------|----------------|------------------|----------------|----------------|----------------|----------------|--|
| As Scenario 3 plus further Increase in market shares of comparison goods expenditure attracted by Solihull Town Centre from 2021 as a result of assumed new retail development of circa 20,000 sq m net comparison goods floorspace. | | | | | | | | | | | |
| Catchment zone | RETAIL SALES BY CATCHMENT ZONE | | | | | | | | | | |
| | CONVENIENCE GOODS | | | | | COMPARISON GOODS | | | | | |
| | 2009 (£000) | 2011 (£000) | 2016 (£000) | 2021 (£000) | 2026 (£000) | 2009 (£000) | 2011 (£000) | 2016 (£000) | 2021 (£000) | 2026 (£000) | |
| 1 | 17,401 | 17,437 | 16,252 | 17,104 | 17,958 | 15,285 | 15,541 | 18,217 | 21,301 | 26,543 | |
| 2 | 54,882 | 54,892 | 39,614 | 41,209 | 42,823 | 38,652 | 39,223 | 43,881 | 48,757 | 60,129 | |
| 3 | 20,006 | 18,669 | 19,470 | 20,101 | 20,730 | 27,338 | 27,608 | 31,154 | 35,048 | 42,895 | |
| 4 | 20,401 | 9,471 | 9,862 | 10,161 | 10,461 | 12,744 | 8,575 | 10,404 | 12,655 | 15,462 | |
| 5 | 45,512 | 42,907 | 44,683 | 46,030 | 47,388 | 9,352 | 7,554 | 9,166 | 11,147 | 13,619 | |
| 6 | 7,997 | 7,988 | 8,382 | 8,699 | 9,019 | 12,488 | 12,656 | 15,475 | 18,959 | 23,329 | |
| 7 | 6,596 | 6,652 | 7,063 | 7,427 | 7,796 | 10,301 | 10,540 | 13,039 | 16,187 | 20,166 | |
| 8 | 11,187 | 11,179 | 11,742 | 12,196 | 12,656 | 20,964 | 21,254 | 26,014 | 31,897 | 39,282 | |
| 9 | 5,800 | 5,787 | 5,638 | 5,807 | 5,977 | 5,095 | 5,158 | 6,246 | 7,594 | 9,275 | |
| 10 | 12,644 | 12,634 | 12,557 | 13,010 | 13,467 | 13,822 | 14,013 | 17,082 | 19,401 | 23,833 | |
| 11 | 1,035 | 1,039 | 1,100 | 1,151 | 1,203 | 808 | 823 | 1,015 | 1,255 | 1,556 | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| TOTALS | 203,462 | 188,655 | 176,362 | 182,896 | 189,478 | 166,850 | 162,945 | 191,693 | 224,199 | 276,091 | |

Sources: RECAP Model.

Table: 69

FORECAST RETAIL CAPACITY

| Scenario: 4 | | Location: Non-Town Centre Shopping in Solihull | | | | | | | | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|------------------------------------------------|---------|---------|------------------------------------------|------------------|---------|---------|---------|---------|
| As Scenario 3 plus further Increase in market shares of comparison goods expenditure attracted by Solihull Town Centre from 2021 as a result of assumed new retail development of circa 20,000 sq m net comparison goods floorspace. | | | | | | | | | | |
| Growth in sales per sq m from shop floorspace existing in | | | | | Comparison Goods: 1.50 % pa 2008 to 2026 | | | | | |
| | CONVENIENCE GOODS | | | | | COMPARISON GOODS | | | | |
| | 2009 | 2011 | 2016 | 2021 | 2026 | 2009 | 2011 | 2016 | 2021 | 2026 |
| Residents' Spending £000 | 203,462 | 188,655 | 176,362 | 182,896 | 189,478 | 166,850 | 162,945 | 191,693 | 224,199 | 276,091 |
| Plus visitors' spending (%) | - | - | - | - | - | - | - | - | - | - |
| Total spending (£000) | 203,462 | 188,655 | 176,362 | 182,896 | 189,478 | 166,850 | 162,945 | 191,693 | 224,199 | 276,091 |
| Existing shop floorspace (sq m net) | 13,058 | 13,058 | 13,058 | 13,058 | 13,058 | 52,815 | 52,815 | 52,815 | 52,815 | 52,815 |
| Sales per sq m net (£) | 15,581 | 13,200 | 13,200 | 13,200 | 13,200 | 3,159 | 3,008 | 3,319 | 3,576 | 3,852 |
| Sales from extg flrspace (£000) | 203,462 | 172,369 | 172,369 | 172,369 | 172,369 | 166,850 | 158,872 | 175,303 | 188,851 | 203,446 |
| Available spending to support new shops (£000) | 0 | 16,286 | 3,993 | 10,527 | 17,109 | 0 | 4,072 | 16,390 | 35,348 | 72,645 |
| Less sales capacity of committed new floorspace (£000) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 20,108 | 21,662 | 23,336 |
| Net available spending for new shops (£000) | 0 | 16,286 | 3,993 | 10,527 | 17,109 | 0 | 4,072 | (3,718) | 13,686 | 49,308 |
| Sales per sq m net in new shops (£) | 14,000 | 14,000 | 14,000 | 14,000 | 14,000 | 3,250 | 3,250 | 3,501 | 3,772 | 4,063 |
| Capacity for new shop flrspace (sq m net) | 0 | 1,163 | 285 | 752 | 1,222 | 0 | 1,253 | (1,062) | 3,629 | 12,135 |
| Market Share of Catchment Area Expenditure | 15.9% | 14.7% | 13.1% | 13.1% | 13.1% | 8.3% | 8.0% | 7.7% | 7.4% | 7.4% |

Sources: RECAP Model.

Notes: Excludes vacant floorspace.

Total Market Shares

Table: 70

TOTAL MARKET SHARES BY COMPARISON GOODS TYPE IN 2009

| SHOPPING LOCATION | COMPARISON GOODS TYPE | | | | | | | |
|-----------------------------------------------------|-----------------------|--------------------------|--------------------|----------------------|------------------------|------------------------------|----------------------------------|----------------------------|
| | Clothing & footwear | Furniture/ floorcrgs etc | Household Textiles | Household Appliances | Audio-visual equipment | Hardware, DIY & garden goods | Chemists, medical & beauty goods | All other comparison goods |
| Solihull Town Centre | 31% | 11% | 21% | 11% | 14% | 14% | 16% | 30% |
| Shirley Town Centre | 2% | 3% | 1% | 2% | 2% | 3% | 5% | 2% |
| Chelmsley Wood Town Centre | 1% | 1% | 2% | 1% | 1% | 2% | 3% | 2% |
| Sub-Totals 3 Town Centres | 34% | 15% | 25% | 14% | 17% | 18% | 24% | 33% |
| Knowle Local Centre | 0% | 0% | 0% | 0% | 0% | 1% | 2% | 0% |
| Non-Town Centre Shopping in Solihull | 1% | 20% | 10% | 29% | 27% | 19% | 5% | 1% |
| Sub-Totals Knowle & Non-central Shopping | 1% | 21% | 10% | 29% | 27% | 20% | 7% | 2% |
| GRAND TOTALS | 35% | 35% | 34% | 43% | 44% | 38% | 31% | 35% |

Sources: RECAP Model

Table: 71

Scenario: 1

TOTAL MARKET SHARES BY CATCHMENT ZONE FOR: Solihull Borough

| Catchment Zones | Town Centres, Knowle Local Centre, and Non-Central Foodstores and Retail Warehouses | | | | | | | | | |
|-----------------|-------------------------------------------------------------------------------------|----------|----------|----------|----------|------------------|----------|----------|----------|----------|
| | CONVENIENCE GOODS | | | | | COMPARISON GOODS | | | | |
| | 2009 (%) | 2011 (%) | 2016 (%) | 2021 (%) | 2026 (%) | 2009 (%) | 2011 (%) | 2016 (%) | 2021 (%) | 2026 (%) |
| 1 | 85 | 85 | 85 | 85 | 85 | 92 | 92 | 92 | 92 | 92 |
| 2 | 80 | 80 | 80 | 80 | 80 | 78 | 78 | 78 | 78 | 78 |
| 3 | 33 | 33 | 33 | 33 | 33 | 65 | 65 | 64 | 64 | 64 |
| 4 | 29 | 39 | 39 | 39 | 39 | 41 | 44 | 42 | 42 | 42 |
| 5 | 46 | 48 | 48 | 48 | 48 | 20 | 22 | 21 | 21 | 21 |
| 6 | 11 | 12 | 12 | 12 | 12 | 14 | 14 | 13 | 13 | 13 |
| 7 | 14 | 14 | 14 | 14 | 14 | 15 | 15 | 13 | 13 | 13 |
| 8 | 10 | 10 | 10 | 10 | 10 | 21 | 21 | 19 | 19 | 19 |
| 9 | 24 | 24 | 24 | 24 | 24 | 28 | 28 | 27 | 27 | 27 |
| 10 | 75 | 75 | 75 | 75 | 75 | 82 | 82 | 82 | 82 | 82 |
| 11 | 4 | 4 | 4 | 4 | 4 | 10 | 10 | 10 | 10 | 10 |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |

Sources: RECAP Model

Table: 72

Scenario: 2

TOTAL MARKET SHARES BY CATCHMENT ZONE FOR: Solihull Borough

| Catchment Zones | Town Centres, Knowle Local Centre, and Non-Central Foodstores and Retail Warehouses | | | | | | | | | |
|-----------------|-------------------------------------------------------------------------------------|----------|----------|----------|----------|------------------|----------|----------|----------|----------|
| | CONVENIENCE GOODS | | | | | COMPARISON GOODS | | | | |
| | 2009 (%) | 2011 (%) | 2016 (%) | 2021 (%) | 2026 (%) | 2009 (%) | 2011 (%) | 2016 (%) | 2021 (%) | 2026 (%) |
| 1 | 85 | 85 | 86 | 86 | 86 | 92 | 92 | 92 | 92 | 92 |
| 2 | 80 | 80 | 80 | 80 | 80 | 78 | 78 | 80 | 80 | 80 |
| 3 | 33 | 33 | 34 | 34 | 34 | 65 | 65 | 64 | 64 | 64 |
| 4 | 29 | 39 | 39 | 39 | 39 | 41 | 44 | 42 | 42 | 42 |
| 5 | 46 | 48 | 48 | 48 | 48 | 20 | 22 | 21 | 21 | 21 |
| 6 | 11 | 12 | 13 | 13 | 13 | 14 | 14 | 13 | 13 | 13 |
| 7 | 14 | 14 | 15 | 15 | 15 | 15 | 15 | 14 | 14 | 14 |
| 8 | 10 | 10 | 10 | 10 | 10 | 21 | 21 | 20 | 20 | 20 |
| 9 | 24 | 24 | 24 | 24 | 24 | 28 | 28 | 28 | 28 | 28 |
| 10 | 75 | 75 | 75 | 75 | 75 | 82 | 82 | 82 | 82 | 82 |
| 11 | 4 | 4 | 4 | 4 | 4 | 10 | 10 | 10 | 10 | 10 |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |

Sources: RECAP Model

Table: 73
 Scenario: 3

TOTAL MARKET SHARES BY CATCHMENT ZONE FOR: Solihull Borough

| Catchment Zones | Town Centres, Knowle Local Centre, and Non-Central Foodstores and Retail Warehouses | | | | | | | | | |
|-----------------|-------------------------------------------------------------------------------------|----------|----------|----------|----------|------------------|----------|----------|----------|----------|
| | CONVENIENCE GOODS | | | | | COMPARISON GOODS | | | | |
| | 2009 (%) | 2011 (%) | 2016 (%) | 2021 (%) | 2026 (%) | 2009 (%) | 2011 (%) | 2016 (%) | 2021 (%) | 2026 (%) |
| 1 | 85 | 85 | 86 | 86 | 86 | 92 | 92 | 92 | 93 | 93 |
| 2 | 80 | 80 | 80 | 80 | 80 | 78 | 78 | 80 | 81 | 81 |
| 3 | 33 | 33 | 34 | 34 | 34 | 65 | 65 | 64 | 64 | 64 |
| 4 | 29 | 39 | 39 | 39 | 39 | 41 | 44 | 42 | 43 | 43 |
| 5 | 46 | 48 | 48 | 48 | 48 | 20 | 22 | 21 | 21 | 21 |
| 6 | 11 | 12 | 13 | 13 | 13 | 14 | 14 | 13 | 13 | 13 |
| 7 | 14 | 14 | 15 | 15 | 15 | 15 | 15 | 14 | 14 | 14 |
| 8 | 10 | 10 | 10 | 10 | 10 | 21 | 21 | 20 | 20 | 20 |
| 9 | 24 | 24 | 24 | 24 | 24 | 28 | 28 | 28 | 28 | 28 |
| 10 | 75 | 75 | 75 | 75 | 75 | 82 | 82 | 82 | 83 | 83 |
| 11 | 4 | 4 | 4 | 4 | 4 | 10 | 10 | 10 | 10 | 10 |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |

Sources: RECAP Model

Table: 74
 Scenario: 4

TOTAL MARKET SHARES BY CATCHMENT ZONE FOR: Solihull Borough

| Catchment Zones | Town Centres, Knowle Local Centre, and Non-Central Foodstores and Retail Warehouses | | | | | | | | | |
|-----------------|-------------------------------------------------------------------------------------|----------|----------|----------|----------|------------------|----------|----------|----------|----------|
| | CONVENIENCE GOODS | | | | | COMPARISON GOODS | | | | |
| | 2009 (%) | 2011 (%) | 2016 (%) | 2021 (%) | 2026 (%) | 2009 (%) | 2011 (%) | 2016 (%) | 2021 (%) | 2026 (%) |
| 1 | 85 | 85 | 86 | 86 | 86 | 92 | 92 | 92 | 93 | 93 |
| 2 | 80 | 80 | 80 | 80 | 80 | 78 | 78 | 80 | 81 | 81 |
| 3 | 33 | 33 | 34 | 34 | 34 | 65 | 65 | 64 | 65 | 65 |
| 4 | 29 | 39 | 39 | 39 | 39 | 41 | 44 | 42 | 44 | 44 |
| 5 | 46 | 48 | 48 | 48 | 48 | 20 | 22 | 21 | 21 | 21 |
| 6 | 11 | 12 | 13 | 13 | 13 | 14 | 14 | 13 | 13 | 13 |
| 7 | 14 | 14 | 15 | 15 | 15 | 15 | 15 | 14 | 14 | 14 |
| 8 | 10 | 10 | 10 | 10 | 10 | 21 | 21 | 20 | 20 | 20 |
| 9 | 24 | 24 | 24 | 24 | 24 | 28 | 28 | 28 | 29 | 29 |
| 10 | 75 | 75 | 75 | 75 | 75 | 82 | 82 | 82 | 84 | 84 |
| 11 | 4 | 4 | 4 | 4 | 4 | 10 | 10 | 10 | 11 | 11 |
| | | | | | | | | | | |
| | | | | | | | | | | |
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Sources: RECAP Model

Appendix 3 – Town and Local Centre Health Checks

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1 Solihull

Solihull is located approximately 13 km (8 miles) from Birmingham City centre to the south east. The centre is located approximately 1.5 km (1 mile) from the M42 motorway. It has good connections to Birmingham along the A41.

The city centre shopping area can be split into 3 main sub areas as follows:

Mell Square Shopping Centre – This is an open air square around which are set a large variety of shops. Anchor stores include a large M&S and a BHS. There are links from the outdoor square through Poplar Way to a large Sainsburys Supermarket. Drury Lane links Mell square with a House of Fraser department store. High Street – High Street is a long pedestrianised road containing a wide variety of shops and some restaurants.

Touchwood Shopping Centre – This modern centre sits next to High Street and comprises 3 shopping arcades. The centre also links with the John Lewis department store and contains a multiscreen cinema complex along with numerous restaurants and bars.

Away from the prime retail pitches on Poplar Road and Station Road are a large number of banks and building societies, estate agents and bars and restaurants.



Diversity of Uses

Our inspection of Solihull City Centre identified a total of 286 retail units, the breakdown of which is identified within the table below.

| Category | Number of Units | % of total |
|-----------------------------|-----------------|------------|
| Comparison | 159 | 56 |
| Convenience | 16 | 6 |
| Service | 96 | 34 |
| Miscellaneous | 8 | 3 |
| Vacant | 7 | 2 |
| Total Retail outlets | 286 | |



As would be expected for a centre of this size, a large proportion of the units within the centre (150 units, 56%), fall within the category of comparison goods. These include all the major multiple chains such as Marks and Spencer, British Home Stores, Boots, TK Maxx, Zara, Laura Ashley, John Lewis, House of Fraser, Argos, H&M, Sports World, River Island and Top Shop.

96(34%) of the units within the centre, fall within the services category. Services provided include numerous restaurants and bars, numerous banks and building societies, hairdressers, estate agents, beauticians, betting shops, dry cleaning,

photograph development, opticians, post office and several hot food take-aways.

Within the category of stores selling convenience goods there were only 6 units. These included Sainsburys supermarket, a bakers, a newsagents and Timpson who provide shoe repairs and key cutting.

Retailer Representation

Multiple retailers make up 52% of the towns retailer offer and are represented in the convenience sector by Sainsburys, Greggs, Morrisons and Timpsons. Within the comparison goods sector the majority of the main high street fashion retailers are represented and some of the high end fashion retailers are also present within the centre. Large department stores such as House of Fraser and John Lewis are also present within the centre.

Within the service category 15% of the units surveyed were multiple retailers, including many of the leading banks and buildings society's and numerous pub and restaurant chains. Many of the smaller independent service providers are located outside of the prime retail pitches on streets such as Station Road and Poplar Road.



Retailer Requirements

A search using the Focus database revealed 18 requirements for retail space in Solihull. These are summarised within the table below.

| Requirement | Min size sq ft | Max size sq ft | Class |
|----------------------------|----------------|----------------|-------|
| Rituals | 600 | 1200 | All |
| Glitz Accezzoriez | 400 | 1000 | All |
| Charles Clinkard | 1000 | 3250 | All |
| Atlantis Enterprises | 5000 | 12000 | All |
| CTN | 1000 | 1500 | All |
| Caffe Nero | 800 | 1500 | A1 |
| Warren Evans | 3500 | 0 | All |
| Simply Eat | 600 | 1000 | All |
| Everest Kitchens | 1000 | 2000 | A1 |
| Dr SpaFish | 600 | 1500 | A1 |
| Yorkshire Building Society | 1500 | 2000 | All |
| Wok & Go | 800 | 0 | A3 |
| Global Care | 600 | 1500 | A1 |
| Headmasters | 1000 | 2000 | A1 |
| chop and wok | 750 | 1500 | A3 |
| Manpower | 700 | 2000 | All |
| Woktastic | 500 | 1000 | A5 |
| Leia | 1300 | 2000 | A1 |

It is important to consider also that there are many retailers who do not actually publish their requirements, but who may be attracted to a town which matches their operating profile.

We are not aware of any outstanding requirements from independent retailers, as these tend not to be advertised, but the low level of vacancies along with the development of two new build units on the edge of the centre indicates a healthy demand for retail space within the town.

Retail Rankings

As at 2010, Castle Solihull is regarded by VENUESCORE to be a Regional centre and is currently ranked 52nd nationally with a VENUESCORE of 217. This represents no change from the results in the previous year.

| Venue | Location Type | Location Grade | Venuescore | Rank | Movement |
|----------|---------------|----------------|------------|------|----------|
| Solihull | Centre | Regional | 217 | 52 | ↔ |

Source: Javelin Group 2010

Proportion of vacant street level property

Only 7 units were vacant within the centre at the time of survey, representing just 2% of the total stock available. This suggests a good demand for floor space within the centre.

Pedestrian Flows

Although we have not conducted a survey of footfall, at the time of survey the centre was very busy with strong flows of pedestrians in all areas. Footfall was particularly heavy in Mell Square and within the Crescent Arcade of the Touchwood Shopping Centre.

Accessibility

Solihull Centre is easily accessible by car, being just a short distance from the M42 and having in excess of 6000 parking spaces within the town centre. These are concentrated in a number of locations including the Churchill car park on Churchill Lane (127 spaces), Dominion Court Car Park on Herbert Road (100 spaces), Council House Car park on Churchill Road (174 spaces), Monkspath Hall Car Park on Monkspath Hall Road (1043 spaces), Mell Square Car Park located off Warwick Road (950 spaces), Marks and Spencers Car Park located off Mell Square (569 spaces), Touchwood Carpark located off Homer Road (670 spaces), John Lewis Car Park (1060 spaces). Some on street parking is also available.

In terms of bus connections there are regular bus services between Solihull centre and most destinations within the West Midlands as well as destinations further afield. A large number of bus services run from Station Road within the centre. Other services can be accessed from stops on Warwick Road or from the train station which is 5 minutes walk from the main shopping area.

Rail connections are good, with regular trains to both Birmingham and London along with regular services to smaller local stations such as Dorridge and Acocks Green.

Pedestrian accessibility around the centre is good, with the town centre being level and pavements in good condition.

Occurrences of Crime

We have accessed data on crime and anti social behaviour from the Home Office. The data shows that in 2009/10 the crime rate in England and Wales was 79 offences per 1000 population (giving a rate of 12.7).

We have also accessed data available at the local police force level which showed that for the neighbourhood within which Solihull centre is located, St Alphege, in the 12 months to April 2011 there were 184 crimes recorded (giving a crime rate of 14.77). This shows that levels of crime within Solihull centre were

slightly higher than the national average (although it must be recognised that the data covers slightly different time periods).

Exploring this data further at street level, it can be seen that directly within the main shopping centre of Solihull there were 136 offences in April 2011. The table below shows the breakdown of offences and it can be seen that a large proportion related to anti-social behaviour.

| Crime | total number of offences |
|-----------------------|--------------------------|
| Burglary | 15 |
| Anti social behaviour | 94 |
| Robbery | 4 |
| vehicle crime | 11 |
| violent crime | 31 |
| other crime | 91 |

Environmental Quality

The environmental quality within the centre is generally very good, with good quality, well maintained areas of public realm enhanced by the inclusion in places of landscaping and additional planters. At the time of survey the centre appeared to be very well managed and maintained with no evidence of littering or damage.

Whilst the 70s style architecture surrounding Mell Square now looks somewhat dated, the square is an attractive location, providing a useful function as a large open space for shoppers to sit and relax. The provision of a cafe facility with outdoor seating in the centre of the square is a successful addition to the space.



The touchwood shopping centre is a modern facility which has been finished to a high standard, providing a high quality indoor shopping arcade for users of the centre. The pedestrianised and tree lined High Street also provides a pleasant shopping environment.

Conclusions

Our analysis of Solihull centre suggests that the centre is performing well, with a consistent level of success and few signs of weakness in the face of the current economic climate within the UK.

Vacancy levels within the centre are very low, indicating good demand for retail space within the centre. The shopping environment is attractive and well maintained and representation from retailers is strong.



2 Shirley

Shirley is the second largest shopping centre in the Borough and is one of a number of centres situated along the A34 Stratford Road. It is categorised as a major district centre by Venuescore. The centre has faced increased competition from nearby out of centre retail development along the Stratford Road corridor, as well as from the increased offer at Solihull town centre.

The centre is substantially linear, with the great majority of the shops located along the Stratford Road. However, there is a buffer zone between the shops and the busy main road, providing off road parking and soft landscaping. There is also provision for parking in public car parks to the rear of stores, accessed from side roads.

The town centre lacks a substantial retail core, with several food stores acting as anchors for mini clusters. Shirley is well served in terms of variety for convenience shopping by Morrisons, Aldi, Iceland and Marks and Spencer Simply Food. There is a reasonable mix of comparison good retailers including national retailers, such as Woolworths, Boots the Chemist and Holland and Barrett, as well as charity shops including PDSA, Oxfam and Barnadoes, service providers, including banks, estate agents and independent retail operators.

Diversity of Uses

Our inspection of Shirley Centre identified a total of 188 retail units, the breakdown of which is identified within the table below.

| Category | Number of Units | % of total |
|-----------------------------|-----------------|------------|
| Comparison | 58 | 31 |
| Convenience | 15 | 8 |
| Service | 85 | 45 |
| Miscellaneous | 16 | 9 |
| Vacant | 13 | 7 |
| Total Retail outlets | 36 | |

A large proportion of the units within the centre (45%) fall within the category of services. These units provide a range of services including pubs, hot food takeaways, cafes, betting shops, accountants and estate agents etc.

58 (31%) of the units within the centre are categorised as selling comparison goods. These include a range of clothing and footwear, stationers, photography, homeware, furniture, computing etc.

Within the category of stores selling convenience goods there were 15 units. Notably, Shirley benefits from a full range of food retailing from butchers, small, medium and full sized supermarkets. Almost every big brand is represented



Retailer Representation

Multiple retailers make up 17% of the towns retailer offer with an even split in convenience and comparison.

Retail Requirements

A search using the Focus database reveals no requirements for retail or office space within Marston Green at the time of writing this report. It is important to consider, however, that there are many retailers who do not actually publish their requirements, but who may be attracted to a town which matches their operating profile.

Retail Rankings

The centre ranks 276th out of 374 'major city to major district' centres nationally (i.e. the 374 largest town and district centres) and out of all 2,226 centres in the UK, measured by Javelin Group's 2007 'Venuescore' rating. It has comparable ranking with Erdington town centre (ranked 283rd), Kings Heath town centre (ranked 290th), Northfield town centre (ranked 290th), Evesham town centre (ranked 284th), Lichfield City Centre (ranked 269th) and Oswestry town centre (ranked 272nd).

Shirley town centre's performance has remained broadly level since 2003 following a marked improvement from 2001. The comparable centres within the West Midlands are either large High Street locations within the Birmingham conurbation, or small/medium sized town centres.

Despite the significant improvements to Solihull town centre and the nearby out of centre retail units it is evident that Shirley continues to maintain its vitality and viability. Importantly, the development of the Parkgate scheme will help improve the quantitative and qualitative retail offer of Shirley town centre. The scheme proposes the demolition of units to create:

- 11,820 sq m (gross) of new shops, anchored by 8,320 sq m (gross) Asda superstore
- 250 residential apartments
- 600 space underground car park
- Town square and cafes/restaurants creating a much needed focal point for the town.

Proportion of vacant street level property

Only 13 units were vacant within the centre at the time of survey. These were the units mainly located in secondary positions within the centre. This represents 7% of the total units available within the centre and suggests a good demand for floor space within the centre.

Pedestrian Flows

Whilst we have not conducted a survey of pedestrian flows, we observed that at the time of our survey the centre was relatively busy in the core area of the centre, with a good level of shoppers observed. In secondary areas a significant drop in footfall was observed.

Accessibility

The centre is located on the A34 and benefits from excellent access to public transport with numerous bus services providing access to the centre from all neighbouring areas. Shirley station is a short walk from the centre.

Occurrences of Crime

We have accessed data on crime and anti social behaviour from the Home Office. The data shows that in October 2011 there were 17 offences noted on the High Street in Shirley and 7 at the Junction of Solihull Road.

Environmental Quality

Apart from the need for new retail attractions, there is a need for further environmental improvements. The pavement and carriageway surfaces are generally in reasonably good condition, and there are attractive and

well cared-for hanging baskets and planters. However, seating for shoppers is old and in poor condition. It needs to be replaced with new, low maintenance and vandal-proof seating. Environmental improvements should be aimed at breaking down the linearity and reinforcing local character areas within the shopping streets.

Signage to car parks is inadequate. Whilst there appears to be a substantial amount of car parking in total, it is in a number of car parks behind the shops on either side of the Stratford Road, and in some cases it is not immediately obvious how some of it can be reached. Respondents to the on-street survey mentioned that it is often difficult to park close to the shops they wish to use. Given the substantial length of the centre this can be off-putting to potential visitors. We therefore suggest that a car park signage audit is undertaken, new signs are provided where necessary, or existing signs repaired, replaced or re-sited as appropriate. Pedestrian routes from the car parks to the shopping areas need to be improved and more clearly signed

Conclusions

Our analysis would suggest that the performance of the centre is currently good.

The location of the centre in such close proximity to public transport services is an important factor in its success as a town centre, with valuable custom being drawn from passing trade.

The reduction in the number of vacant units within the centre indicates that, at the right rental values the centre remains both vital and viable. The development of the Parkgate scheme will improve the performance of the centre.

3 Chelmsley Wood

Chelmsley Wood is located approximately 15 km (9 miles) from Birmingham City Centre to the west and 10 km (6 miles) from Solihull to the south west. The centre is located approximately 1.5 km (2.5 miles) from the junction of the M42 and M6 motorways. It has good connections to Birmingham along the M6.



The centre is based around a 70's constructed purpose built shopping mall, located on Chelmsley Circle, just off the A452 (Chester Road) and close to the M6. Along with the shopping Mall there are also a number of other buildings including a newly built KFC unit to the front of the centre, the postal sorting office to the rear, a number of offices and a Job Centre.

The shopping centre has been recently redeveloped to accommodate a new 70,000ft Asda food store which is linked to the existing shops via a new covered mall. The development includes 12 new retail units and 45,000 sq ft of office space and a new public library. The redevelopment included the provision of an additional 625 car parking spaces. A new bus interchange has also been provided at the shopping centre.

Diversity of Uses

Our inspection of Chelmsley Wood Centre identified a total of 71 retail units, the breakdown of which is identified within the table below.

| Category | Number of Units | % of total |
|-----------------------------|-----------------|------------|
| Comparison | 28 | 39 |
| Convenience | 9 | 13 |
| Service | 21 | 30 |
| Miscellaneous | 8 | 11 |
| Vacant | 6 | 8 |
| Total Retail outlets | 71 | |

A large proportion of the units within the centre (39%) fall within the category of comparison goods. These include stores selling a wide range of goods including furniture, ladies and clothing, greetings cards, jewellery, travel agents and home ware.

There are also a large number of units occupied by service providers (30%), these include a photo processing shop, opticians, hot food takeaways, a tanning shop, beauticians, hair salons, job centre and a number of other public services.

9 (13%) of the units within the centre are categorised as selling convenience goods. These include 3 green grocers a bakers and a number of supermarkets including Asda, Iceland, Heron foods and Somerfield.

8 (11%) of the units within the centre fell into the miscellaneous category, these included several pawn brokers and an amusement arcade.

Retailer Representation

Multiple retailers make up 50% of the centres retail offer and are represented in the convenience sector by Asda, Iceland, Greggs, Heron Foods and Somerfield.

In the comparison goods category multiple retailers make up 75% of all units and include Wilkinsons, Poundland, Perfect Home, QS Clothes, Argos, Peacocks, Bon Marche, New Look, Shoe Zone, Ethel Austin, Bright House.

Within the service category 45% of all units are multiple operators, these include Max Spielman, Lloyds TSB, Coventry Building Society, Spec Savers and Tote Betting.

Retailer Requirements

A search using the Focus database reveals no requirements for retail or office space within Chelmsley Wood at the time of writing this report. It is important to consider, however, that there are many retailers who do not actually publish their requirements, but who may be attracted to a town which matches their operating profile.

We are not aware of any outstanding requirements from independent retailers, as these tend not to be advertised, but the low level of vacancies along with the development of two new build units on the edge of the centre indicates a healthy demand for retail space within the town.

Retail Rankings

As at 2010, Chelmsley Wood is regarded by VENUESCORE to be a Minor District centre and is currently ranked 628th nationally with a VENUESCORE of 38. This represents a decrease in the rankings from 543 the previous year.

| Venue | Location Type | Location Grade | Venuescore | Rank | Movement |
|----------------|---------------|----------------|------------|------|----------|
| Chelmsley Wood | Centre | Minor District | 38 | 628 | ↓ |

Source: Javelin Group 2010

Proportion of vacant street level property

6 units were vacant at the time of survey, which represents 8% of the total units available within the centre. 4 of these units appear to be new or refurbished units which are currently being marketed for rent and are located at the rear of the centre closest to the new Asda.

Pedestrian Flows

Whilst we have not undertaken a detailed survey of pedestrian flows within the centre, at the time of survey the centre was busy, with good numbers of pedestrians using the shops and facilities. There was also a lot of pedestrian activity around the bus stops which are located to the front of the centre. It was noted that there was less pedestrian activity by the vacant units at the rear of the centre.

Accessibility

There is a bus interchange at the Chelmsley wood shopping centre, with numerous services passing through the station. Buses to Birmingham via a variety of locations are every few minutes. There are also regular buses to locations such as Erdington, Sutton Coldfield and the National Exhibition Centre. The nearest train station is at Marston Green, a few minutes drive away.

There is ample parking at the shopping centre which has recently seen the addition of a further 625 parking spaces as a result of the redevelopment proposals which have delivered a new Asda store and extended retail space.

Occurrences of Crime

We have accessed data on crime and anti social behaviour from the Home Office. The data shows that in 2009/10 the crime rate in England and Wales was 79 offences per 1000 population (giving a crime rate of 12.7).

We have also accessed data available at the local police force level which showed that the Chelmsley Wood Shopping centre is located within the Chelmsley Wood neighbourhood, for data collection purposes. Within the 12 months to April 2011 there were 254 crimes recorded within the Chelmsley Wood neighbourhood (giving a crime rate of 20.17). This shows that levels of crime within this area are higher than the national average (although it must be recognised that the data covers slightly different time periods).

Exploring this data further at street level, it can be seen that there are no crimes recorded directly within the shopping centre or within the streets immediately surrounding it.

During our site visit it was noted that the centre was heavily patrolled by security staff and that the centre is monitored by CCTV.

Environmental Quality

The shopping centre is of 1960's design and whilst the design is now dated, the centre is kept clean and is well maintained. The newer elements of the centre are modern design and are of a good quality.

At the time of survey a considerable amount of litter was noted in the car park of KFC at the front of the centre. It should be noted that this area of land falls outside of the centre and the responsibility of the managing agents for the shopping centre.



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Conclusions

The development of Asda adjoining the shopping centre, along with the increase in bus services using the centre as a terminus are key factors in the continued success of the centre. The new units which have not yet been occupied make up a significant amount of space within the centre and it is important that occupiers are found for these as soon as possible, as this space is currently under utilised.

Whilst the centre is clearly very well managed and maintained, the 70s precinct design is not attractive and does not provide a pleasant shopping experience. It would be beneficial to introduce some form of greenery/landscaping into the centre in order to soften the environment and improve the aesthetic quality of the centre.

4 Knowle

Knowle is located approximately 5 km (3 miles) from Solihull City centre to the northwest and 19 km (12 miles) from Birmingham City Centre, also to the north west. The centre is located approximately 2 km (1.5 miles) from the M42 motorway and approximately 16 km (10 miles) from the M6.

The centre is located on High Street (A4141), Wilsons Road (B4101) and Station Road. The majority of shops and businesses are located on High Street, stretching over a quarter of a mile along its length.

Diversity of Uses

Our inspection of Knowle Centre identified a total of 107 retail units, the breakdown of which is identified within the table below.

| Category | Number of Units | % of total |
|-----------------------------|-----------------|------------|
| Comparison | 36 | 34 |
| Convenience | 8 | 7 |
| Service | 59 | 55 |
| Miscellaneous | 3 | 3 |
| Vacant | 1 | 1 |
| Total Retail outlets | 107 | |

More than half of the units within the centre (59%) fall within the category of services. These units provide a range of services including a health centre, a pub, a tanning centre, a funeral directors, mortgage broker, hairdressing, restaurants, dentist, garage, opticians, estate agents, banks, library, beauticians, video hire, betting shop, and photograph development.

36 (34%) of the units within the centre are categorised as selling comparison goods. These include a jewellers, a kitchen shop, footwear, curtains, greetings cards, ladies clothing, florist, charity shop, toys, art, travel agents, furniture, home ware, pharmacy, men's wear, office equipment and car sales.

Within the category of stores selling convenience goods there were only 8 units. These included a sweet shop, 2 butchers, a supermarket, a bakery, a shoe repair/key cutting shop and a convenience store.

Retailer Representation

Multiple retailers make up 11% of the towns retailer offer and are represented in the convenience sector by only one retailer, Tesco. The majority of convenience food stores within the town are independently owned. In the service category the majority were independent stores, with only HSBC, Lloyds Bank, Natwest Bank, Barclays Bank, West Bromwich Building Society and Blockbuster Video, being retailers/service providers with national representation through chains of multiple stores/branches.

Within the comparison goods category only 2 multiple retailers were present, these were Oxfam charity shop and Goldsmiths Jewellers.

Retailer Requirements

A search using the Focus database revealed 3 requirements for retail space within Knowle at the time of writing this report. These are summarised within the table below:

| Requirement | Min size sq ft | Max size sq ft | Class |
|-------------------|----------------|----------------|-------|
| Glitz Accezzoriez | 400 | 1000 | All |
| Costa | 1000 | 1500 | A1 |
| Global Care | 600 | 1500 | A1 |

It is important to consider also, that there are many retailers who do not actually publish their requirements, but who may be attracted to a town which matches their operating profile.

We are not aware of any outstanding requirements from independent retailers, as these tend not to be advertised, however, the requirements listed above along with the very low level of vacant units within the town suggests strong demand for space from retailers.

Retail Rankings

As at 2010, Knowle is regarded by VENUESCORE to be a Local Centre and is currently ranked 1961st nationally with a VENUESCORE of 10. This represents an decrease in the rankings from 1947th the previous year.

| Venue | Location Type | Location Grade | Venuescore | Rank | Movement |
|--------|---------------|----------------|------------|------|----------|
| Knowle | Centre | Local | 10 | 1961 | ↓ |

Source: Javelin Group 2010

Proportion of vacant street level property

Only 1 unit was vacant at the time of our survey, representing less than 1% of the total number of units within the centre. This is a very low vacancy rate, indicating that the centre is currently performing well and that there is a good demand for floor space within the centre.

Pedestrian Flows

At the time of survey the centre was very busy, with a large number of shoppers using the centre. Pedestrian flows were strongest up and down High Street. There were also noticeable flows of people between the centre and the car parks located off St Johns Close.

Pedestrian flows were lighter on Wilson Road, away from the High Street.

Accessibility

There are 3 main bus routes which pass through knowle and stop on the High Street. The S3 between Solihull and Hockley Heath departs every 30 minutes and this is the most frequent service. There are 2 buses a day in either direction between Solihull and Leamington Spa and 2 buses a day in either direction between Solihull and Wroxall.



Occurrences of Crime

We have accessed data on crime and anti social behaviour from the Home Office. The data shows that in 2009/10 the crime rate in England and Wales was 79 offences per 1000 population (giving a rate of 12.7).

We have also accessed data available at the local police force level which showed that for Knowle, within the 12 months to April 2011 there were 43 crimes recorded (giving a crime rate of 4.28). This shows that levels of crime within this area are below average (although it must be recognised that the data covers slightly different time periods).

Exploring this data further at street level, it can be seen that directly within the main shopping area on High Street/Station Road there were only 2 offences recorded in April 2011. These were categorised as 'other' crimes, which includes criminal damage, shoplifting and drug offences.

Environmental Quality

The environmental quality within the centre is generally good, with a good quality street scene enhanced by planters and some greenery in places. There are numerous attractive buildings within the town centre, including the library which dates back to Tudor times.

There are several free car parks located to the rear of the high street off St John's Close. The aesthetic quality of pedestrian routes onto the main shopping street from these car parks is poor, providing a poor first impression for visitors to the town.



Conclusions

Our analysis of Knowle centre suggests that it is currently performing soundly, with very few instances of vacancy and good demand for existing retail space.

The range of shops and services provided is very good, with the exception of any greengrocers shop within the town.

There are limited numbers of multiple retailers within the town, which can often be a sign of unpopularity on centres of a significant size such as this, however within Knowle the high level of independent retailers is a plus point, leading to a more diverse retail offer.

The aesthetic quality of the car parking areas to the rear of the High Street (in the St John's Close area) and the routes between there and the high street, would benefit from improvement in order to provide a better impression of Knowle for visitors arriving to the centre by car.

5 Dorridge

Dorridge is located approximately 6 km (4 miles) from Solihull City Centre to the north and 19 km (12 miles) from Birmingham City Centre to the north west. The centre is located approximately 3 km (2 miles) from the M42 motorway and it has good connections to Birmingham along the A41.

The main shopping focus within Dorridge is currently the square of shops located within the Arden Buildings on Station Road, including a Tesco Express. There are also further shops and businesses along station Road and Poplar Road, mostly situated within 19th century terraced buildings. To the north west of Station Road is the Forest Court Precinct, a 1960's shopping precinct which is predominantly vacant.

The Forest Court shopping centre benefits from planning permission for a new Sainsburys store.

Diversity of Uses

Our inspection of Dorridge Centre identified a total of 40 retail units, the breakdown of which is identified within the table below.

| Category | Number of Units | % of total |
|-----------------------------|-----------------|------------|
| Comparison | 2 | 5 |
| Convenience | 3 | 8 |
| Service | 22 | 55 |
| Miscellaneous | 1 | 3 |
| Vacant | 12 | 30 |
| Total Retail outlets | 40 | |

Over half of the units within the centre (55%) fall within the category of services. These units provide a range of services including dry cleaners, barbers, beauticians, beauticians, dentists, hot food take-aways, solicitors, hairdressers and restaurants.

Only 2 (5%) of the units within the centre are categorised as selling comparison goods. These are a ladies clothes shop and a pharmacy.

Within the category of stores selling convenience goods there were only 3 units (8%). These included an independent butcher, an off licence and a Tesco Express convenience store.



Retailer Representation

Multiple retailers make up 7% of the towns retailer offer and are represented by Tesco, Threshers off licence and regional estate agent Dixons. The remaining businesses are all independently run.

Retailer Requirements

A search using the Focus database reveals no requirements for retail or office space within Dorridge at the time of writing this report. It is important to consider, however, that there are many retailers who do not actually publish their requirements, but who may be attracted to a town which matches their operating profile.

We are not aware of any outstanding requirements from independent retailers, as these tend not to be advertised, but the relatively high level of vacancies suggests that demand for space within the centre is not currently high.

Retail Rankings

As at 2010, Dorridge is not ranked by VENUESCORE, reflecting its low performance in relation to other retail centres of a similar size within the UK.

Proportion of vacant street level property

At the time of survey 12 properties were vacant, representing 30% of the total number of units available within the town. It should be noted however that the majority of these vacant units were located within the Forest Court shopping centre. Only 3 properties on station road and Poplar Road were vacant at the time of survey.



Pedestrian Flows

At the time of survey the centre was quiet, with very little pedestrian activity. Most pedestrian activity was centred around the parking located in front of the Arden Buildings.

Accessibility

Accessibility to and from the centre by train is good, with Dorridge train station located on the London to Birmingham train line.

Bus services run between Dorridge and Solihull, Dorridge and Balsall common and temple balsall, all via a number of smaller locations. Services leave approximately half hourly in both directions from Dorridge. There are bus stops located at the train station, on Station Road and on Poplar Road.



Pedestrian accessibility is reasonably good, with paths and surfaces well maintained and pelican crossings in place at two points on Station Road to ease access between shops located in and around the Arden Buildings and those shops located on Poplar Road on the route to the station.



Free parking is available for 1 hour in the courtyard area in front of the Arden buildings, there is also a short stay car park to the rear of the Forest Court Shopping Centre. Further on street parking is available on Poplar Road, this is also restricted to 1 hour. The station car park provides long stay parking which is chargeable.

Occurrences of Crime

We have accessed data on crime and anti social behaviour from the Home Office. The data shows that in 2009/10 the crime rate in England and Wales was 79 offences per 1000 population (giving a crime rate of 12.7).

We have also accessed data available at the local police force level which showed that the Dorridge centre shopping facilities are located within the Dorridge and Hockley Heath neighbourhood, for data collection purposes. Within the 12 months to April 2011 there were 56 crimes recorded within the Dorridge and Hockley Heath neighbourhood (giving a crime rate of 5.15). This shows that levels of crime within this area are lower than the national average (although it must be recognised that the data covers slightly different time periods).

Exploring this data further at street level, it can be seen that there were 7 crimes recorded on Poplar way on the approach to the station. These included 6 incidences of anti social behaviour and 1 incident categorised as 'other crime', which includes criminal damage, shop lifting and drug offences. There were no other crimes recorded directly within or near to the centre.

Environmental Quality

The environmental quality within the centre is mixed, with pavements and street furniture showing signs that it has previously been upgraded in the past and is still faring reasonably well. Planters in the central reservation of Station Road are overgrown and in disrepair however and the presence of the Forest Court shopping centre which is in poor repair detracts from the rest of the centre. There are a number of attractive buildings and one or two of the original Victorian shop fronts have remained.



When approaching the town centre from the short stay parking at the rear of Forest Court, visitors are greeted by the rear service area of the building, presenting an unattractive gateway to the town centre.

There was some evidence of litter at the time of survey, particularly around the Forest Court Shopping Centre.



Conclusions

Dorridge centre currently performs the role of a small-scale local service centre, containing a limited supply of convenience goods and a small service offer. There is very little comparison goods shopping available, as would be expected for a centre of this size. Tesco Express acts as a valuable generator of pedestrian activity in the Arden Buildings area.

There are a relatively large number of vacant units within the centre, including several units in the Forest Court Shopping Centre. This gives the impression to shoppers that the centre is in decline. The loss of units such as the former HSBC on Poplar Road also does little to improve footfall and the image of the centre. The redevelopment of the Forest Court Shopping Centre for a new Sainsbury's store is key to the future success of Dorridge as a retail centre.

6 Marston Green

Marston Green is located approximately 9km (5.7 miles) from Solihull City centre to the north east and 13km (8 miles) from Birmingham City Centre to the west. The centre is located approximately 3 km (1.8 miles) from both the M6 and M42 motorways.

The centre is located on Station Road, next to the train station and comprises a short parade of shops to the south of Station Road along with a number of other units dotted around the roundabout at the entrance to the station car park.

The area has a suburban feel, being located away from a major road and surrounded by residential properties.

Diversity of Uses

Our inspection of Marston Green Centre identified a total of 36 retail units, the breakdown of which is identified within the table below.

| Category | Number of Units | % of total |
|-----------------------------|-----------------|------------|
| Comparison | 5 | 14 |
| Convenience | 4 | 11 |
| Service | 24 | 67 |
| Miscellaneous | 0 | 0 |
| Vacant | 3 | 8 |
| Total Retail outlets | 36 | |

The majority of the units within the centre (67%) fall within the category of services. These units provide a range of services including 2 hot food takeaways, a cafe, a dry cleaners, a betting shop, an accountants, an estate agents, a dentist, a post office, a restaurant, a pub, an opticians and 2 petrol filling stations.

5 (14%) of the units within the centre are categorised as selling comparison goods. These include a door shop, a glazing shop, a footwear shop and a shop selling greetings cards.



Within the category of stores selling convenience goods there were 4 units. These included a butchers/delicatessen, an off licence and 2 newsagents.

Retailer Representation

Multiple retailers make up 11% of the towns retailer offer and are represented in the service sector by johnsons dry cleaners, Barclays Bank, Jet fuel station and Murco filling station.

Retailer Requirements

A search using the Focus database reveals no requirements for retail or office space within Marston Green at the time of writing this report. It is important to consider, however, that there are many retailers who do not actually publish their requirements, but who may be attracted to a town which matches their operating profile.

We are not aware of any outstanding requirements from independent retailers, as these tend not to be advertised, but the low level of vacancies along with the development of two new build units on the edge of the centre indicates a healthy demand for retail space within the town.

Retail Rankings

As at 2010, Marston Green is not ranked by VENUESCORE, reflecting its small size and low performance in relation to other retail centres of a similar size within the UK.

Proportion of vacant street level property

Only 3 units were vacant within the centre at the time of survey. These were the units located furthest away from the train station on Station Road. This represents 8% of the total units available within the centre and suggests a good demand for floor space within the centre in those areas closest to the train station but poor demand further along station road, away from the train station.

Pedestrian Flows

Whilst we have not conducted a survey of pedestrian flows, we observed that at the time of our survey the centre was relatively quiet, with only a small number of shoppers observed.

Accessibility

The centre is located directly adjacent to Marston Green train station, which is located on the West Coast Mainline. There are 3 trains per hour to Birmingham, Birmingham International and Coventry, along with an hourly train to London.

There are a number of bus stops both outside of the station and on station road near to the shops. Numerous bus routes stop in Marston Green with frequent services to destinations such as Birmingham, Solihull, Birmingham Airport and the National Exhibition Centre.

Occurrences of Crime

We have accessed data on crime and anti social behaviour from the Home Office. The data shows that in 2009/10 the crime rate in England and Wales was 79 offences per 1000 population (giving a rate of 12.7).

We have also accessed data available at the local police force level which showed that the Marston Green shopping facilities are located within the Bickenhill neighbourhood, for data collection purposes. Within the 12 months to April 2011 there were 139 crimes recorded within the Bickenhill neighbourhood (giving a crime rate of 11.41). This shows that levels of crime within this area are lower than the national average (although it must be recognised that the data covers slightly different time periods).

Exploring this data further at street level, it can be seen that there are no crimes recorded directly on station road close to the shopping facilities. There was however one incident of anti social behaviour recorded at the train station.

Environmental Quality

The environmental quality within the centre is good, with no litter or vandalism noted at the time of survey. Pavements and street furniture appeared to be in fairly good condition and there is a good level of greenery and planting in and around the centre.

Many of the shops have roller shutters fitted, which makes the centre look uninviting when the shops are closed and impacts upon visitors perceptions of safety.



Conclusions

Our analysis would suggest that the performance of the centre is currently fairly average, possibly reflecting the current economic climate within the UK.

The location of the centre in such close proximity to public transport services is an important factor in its success as a service centre, with valuable custom being drawn from passing trade.

The existence of a number of vacant units within the area furthest away from the train station suggest that this centre should remain focussed around the station area only, where a critical mass of facilities can be achieved in one space.

7 Castle Bromwich

Castle Bromwich is located approximately 15 km (9 miles) from Solihull City centre to the south and 10 km (6 miles) from Birmingham City Centre to the south west. The centre is located approximately 1.5 km (1 mile) from the M6 motorway. It has good connections to Birmingham along the B4114 and A47.

The centre is located on the junction of Hurst Lane and Chester Road (the B4114). The retail premises are concentrated mainly around the junction and along the roads leading into the junction in a linear format of development. Many of the retail units are within building dating from around the 1920 – 1930's, often with residential accommodation above and with some limited office accommodation at first floor in others. To the south of Chester Road is a purpose built block of retail units dating from around the 1960 – 70's. Diagonally opposite this across the junction is a further block of 1970's shop units with two storeys of accommodation above, in use as offices and residential accommodation. At the South Eastern end of the centre is a large Morrison Supermarket, including a petrol filling station, next to which there is a DIY store.

Diversity of Uses

Our inspection of Castle Bromwich Centre identified a total of 48 retail units, the breakdown of which is identified within the table below.

| Category | Number of Units | % of total |
|-----------------------------|-----------------|------------|
| Comparison | 11 | 23 |
| Convenience | 4 | 8 |
| Service | 31 | 65 |
| Miscellaneous | 0 | 0 |
| Vacant | 2 | 4 |
| Total Retail outlets | 48 | |

The majority of the units within the centre (65%) fall within the category of services. These units provide a range of services including chiropody, dental services, betting shops, estate agencies and beauty services. Of the 31 units which provide services, 6 are hot food takeaways.

11 (23%) of the units within the centre are categorised as selling comparison goods. These include a bed shop, mens clothing, a shop selling gardening tools and home ware, a bathroom shop, a motoring accessories store, a charity shop a DIY store and a furniture shop.

Within the category of stores selling convenience goods there were only 4 units. These included Farm foods, a small independent deli, an off licence and a large Morrisons super market.

Retailer Representation

Multiple retailers make up 30% of the towns retailer offer and are represented in the convenience sector by Farm Foods foodstore, Morrisons supermarket and Booze Buster off licence.

In the comparison goods category the majority were independent stores, with only Lloyds pharmacy, the Age Concern charity shop and the Halfords motoring accessories store being retailers with national representation through chains of multiple stores.

Within the service category approximately a third of the units surveyed were multiple retailers, including the co-op funeral parlour, Coral Betting, Lloyds Bank, Barclays Bank, Blockbuster Video Store, along with a number of regional estate agencies.

Retailer Requirements

A search using the Focus database reveals no requirements for retail or office space within Castle Bromwich at the time of writing this report. It is important to consider, however, that there are many retailers who do not actually publish their requirements, but who may be attracted to a town which matches their operating profile.

We are not aware of any outstanding requirements from independent retailers, as these tend not to be advertised, but the low level of vacancies along with the development of two new build units on the edge of the centre indicates a healthy demand for retail space within the town.

Retail Rankings

As at 2010, Castle Bromwich is regarded by VENUESCORE to be a Minor District centre and is currently ranked 725th nationally with a VENUESCORE of 33. This represents an increase in the rankings from 834 the previous year.

| Venue | Location Type | Location Grade | Venuescore | Rank | Movement |
|-----------------|---------------|----------------|------------|------|----------|
| Castle Bromwich | Centre | Minor District | 33 | 725 | ↑ |

Source: Javelin Group 2010

Proportion of vacant street level property

Only 2 units were vacant within the centre at the time of survey, one of which displayed an agents board stating that the property was under offer. The second vacant unit was a new build shop unit which appeared to be still under construction. This suggests a good demand for floor space within the centre.

This represents just 4% of the total units available within the centre.



Pedestrian Flows

We have not undertaken a survey of pedestrian flows, however, at the time of survey the centre showed sign of being moderately busy, with small flows of pedestrian traffic in all areas. The busiest areas were those surrounding the junction of Chester Road with Hurst Lane North.

Accessibility

There are several bus stops along Chester Road and on the surrounding side streets, serving the shopping centre. Buses to Solihull leave every 20 minutes and buses to Birmingham leave very frequently on various routes, every few minutes. Buses to Sutton Coldfield leave every 20 minutes and buses to Fordbridge every 30 minutes.

Accessibility by car is good, with the M6 just minutes away and the B4114 running directly through the centre.



A large amount of free parking is available on-street and on the forecourts of the shops on Chester Road and Hurst Lane North. Free parking is also available in the large Morrisons Supermarket Car Park located at the south eastern edge of the centre.

Pedestrian accessibility is hindered by the presence of a busy dual carriage road and busy junction. Whilst signalled crossings are in place, these are located on the junction of Hurst Lane and Chester Road only. The poorly managed parking on shop forecourts also means that pedestrian access is disjointed in places, as cars can be parked in a way that obstructs the free flow of pedestrians.

Occurrences of Crime

We have accessed data on crime and anti social behaviour from the Home Office. The data shows that in 2009/10 the crime rate in England and Wales was 79 offences per 1000 population (giving a rate of 12.7).

We have also accessed data available at the local police force level which showed that the Castle Bromwich centre shopping facilities are located within the Castle Bromwich neighbourhood, for data collection purposes. Within the 12 months to April 2011 there were 115 crimes recorded within the Castle Bromwich neighbourhood (giving a crime rate of 9.83). This shows that levels of crime within this area are a little lower than the national average (although it must be recognised that the data covers slightly different time periods). Exploring this data further at street level, it can be seen that there were 10 crimes recorded directly within the main shopping area on Chester Road/Hurst Lane. These included 1 burglary, 2 incidences of anti social behaviour, 1 robbery, 1 vehicle crime, 1 violent crime and 4 incidences which were categorised as 'other crime', which includes criminal damage, shoplifting and drug offences. It should also be noted that during our site survey an assault was witnessed outside one of the shops.

Environmental Quality

The environmental quality within the centre is relatively poor, given that the centre is located on a busy dual carriage B road. Some of the informal parking on shop forecourts is not formally set out, with uneven surfaces in places and a number of concrete bollards lying on their sides.

There was some evidence of litter and graffiti within the centre. The presence of roller shutters on a number of hot food takeaways which are not open until later in the day added further to the poor environmental quality of the centre and detracted from feelings of safety for visitors to the centre.



Conclusions

Our analysis suggests that Castle Bromwich Centre is currently performing well, with demand for retail units strong and a good range of shopping facilities being available within the centre.

Whilst the presence of a large Morrisons store within the centre ensure a good supply of convenience food shopping, it is notable that there are no independent bakers or butchers located within the centre.

The quality of the public realm within the centre is generally fairly poor, with poorly managed areas of parking and poor pedestrian accessibility. Upgrades to parking areas and footpaths would improve the shopping experience for shoppers and visitors to the centre.

There are currently 5 hot food takeaways within the centre, representing 12% of the units within the centre. The Council may wish to monitor and resist any substantial increase in the number of hot food take-aways in the centre as these premises are often closed during day time opening hours, often with steel shutters in place, detracting from the overall vitality of the shopping centre and adding to poor perceptions of safety.

8 Balsall Common

Balsall Common centre is located to the South East of Solihull District, on the A452. The town is just 11 km (7 miles) from Solihull City Centre along the B4101 and less than 10 km (6 miles) from the M42. The town is also located just 14 km (9 miles) from Leamington Spa and 16 km (10 miles) from Warwick.

The shopping centre is focused mainly along Station Road and around the junction of Station Road with Kenilworth Road (the A452).

Diversity of Uses

Our inspection of Balsall Common Centre identified a total of 37 retail units, the breakdown of which is identified within the table below.

| Category | Number of Units | % of total |
|-----------------------------|-----------------|------------|
| Comparison | 4 | 11 |
| Convenience | 4 | 11 |
| Service | 27 | 73 |
| Miscellaneous | 0 | 0 |
| Vacant | 2 | 5 |
| Total Retail outlets | 37 | |

The majority of the units within the centre (73%) fall within the category of services. These units provide a range of services including estate agents, financial services, petrol filling station, doctors, dentist, optician, vet, library restaurants, post office, beauticians, betting shop, dry cleaners and hair dressers.

Just 4 (11%) of the units within the centre are categorised as selling comparison goods. These include a car accessories store, a florist, a travel agent and a pharmacy.

Within the category of stores selling convenience goods there were also only 4 units (11%). These included a co-op supermarket, an off licence, a butchers and a newsagent.

Retailer Representation

Multiple retailers make up 19% of the towns retailer offer and are represented in the convenience sector by the Co-operative Food Store.

In the comparison goods category the majority were independent stores, with only Lloyds pharmacy being a multiple retailer.

Within the service category only 4 of the units surveyed were multiple operators, these were Barclays Bank, Natwest Bank, the Shell filling station and the William Hill betting shop.

Retailer Requirements

A search using the Focus database reveals no requirements for retail or office space within Balsall Common at the time of writing this report. It is important to consider, however, that there are many retailers who do not actually publish their requirements, but who may be attracted to a town which matches their operating profile.

We are not aware of any outstanding requirements from independent retailers, as these tend not to be advertised.

Retail Rankings

As at 2010, Balsall common is not included within the VENUESSCORE rankings. This is likely to be due to the centres small size and lack of representation by multiple retailers.

Proportion of vacant street level property

At the time of survey there were just two units vacant within the centre. One of the vacant units, located close to the co-operative supermarket at the back of station road, displayed a sign stating that the business would be opening as a Barbers Shop in May. The other unit was located on Kenilworth Road, close to the junction with Station Road.

We also noted a vacant site within the town centre on station road. This site has been cleared and was subject to a successful planning application for an A1 retail unit and 14 apartments in 2008. However, our site visit revealed that this development has not been undertaken and the site currently remains fenced and vacant.

Pedestrian Flows

We have not undertaken a formal survey of pedestrian flows, however, at the time of survey the centre showed sign of being moderately busy, with pedestrian flows strongest on Station Road. On street parking on Station Road was very busy, with cars waiting for spaces to come available.

Accessibility

There is free on-street parking available to the front of the shops on Station Road. This parking was very busy at the time of our visit but alternative parking is available at the rear of Station Road at the co-op.

There is limited bus connectivity, with services running from the Balsall Common to Solihull and Coventry hourly along with a number of other services which include buses to Catherine de Barnes, Needlers End and Birmingham Airport.

Berkswell Train Station is located less than half a mile from the shopping centre and is situated on the West Coast Main Line between Birmingham and Coventry. There are two trains an hour to Birmingham and to Coventry, with one of these trains continuing on to London Euston.

Occurrences of Crime

We have accessed data on crime and anti social behaviour from the Home Office. The data shows that in 2009/10 the crime rate in England and Wales was 79 offences per 1000 population (giving a rate of 12.7).

We have also accessed data available at the local police force level which showed that for Balsall common is located within the Merdien neighbourhood, for data collection purposes. Within the 12 months to April 2011 there were 65 crimes recorded within the Meriden neighbourhood (giving a crime rate of 5.55). This shows that levels of crime within this area are lower than the national average (although it must be recognised that the data covers slightly different time periods).

Exploring this data further at street level, it can be seen that directly within the main shopping area on Station Road/Kenilworth Road, there were no crimes recorded.

Environmental Quality

At the time of our survey the centre appeared to be well maintained and tidy, with very little littering evident and good quality street furniture throughout. The centre is located on the A452 and as a consequence the traffic can be quite heavy at times and it has been necessary to erect railings at the junction of Station Road with Kenilworth Road, which detract from the attractiveness of the centre but which are essential for pedestrian safety. There are a small number of street trees along Station Road, which add an important element of greening to the centre.

Conclusions

The centre is an attractive shopping location, with a good range of service facilities for a centre of its size. Our analysis would suggest that the centre is currently fulfilling the role of a local service centre successfully. The vacant site on Station Road is in a prominent location and as such, the redevelopment of this site is an important factor in the ongoing success of the centre.

During our site visit demand for on street parking was high and as such it may be appropriate to consider extending the level of parking available within the centre.

9 Hobs Moat

The Hobs Moat commercial centre is located to the north of Solihull, on the B425. The town is just 4 km (2.5 miles) from Solihull City Centre and 9 km (6 miles) to the south east of Birmingham City Centre. The M42 motorway is 6km (4 miles) away and it is a further 3 km (2 miles) to the M6 motorway.

The shopping centre is located on Hobs Moat Road (B425), with many of the shops focussed around the roundabout with Ulleries Road. The local library and Solihull Ice Rink are located on Ulleries Road, along with a fitness First Leisure Centre.

Diversity of Uses

Our inspection of Hobs Moat Centre identified a total of 39 retail units, the breakdown of which is identified within the table below.

| Category | Number of Units | % of total |
|-----------------------------|-----------------|------------|
| Comparison | 12 | 31 |
| Convenience | 6 | 15 |
| Service | 18 | 46 |
| Miscellaneous | 2 | 5 |
| Vacant | 1 | 3 |
| Total Retail outlets | 39 | |

A large proportion of the units within the centre (46%) fall within the category of services. These units provide a range of services including a laundrette, beautician, hairdressers, several hot food takeaways, an opticians and a taxi cab firm.

12 units (31%) within the centre are categorised as selling comparison goods. These include a kitchen shop, a fireplace shop, a CTV/Security shop, an electrical shop, a toy shop and a charity shop.

Within the category of stores selling convenience goods there were only 6 units (15%). These included a convenience food store, an off licence, a butchers, a bakers, a minimarket and a newsagent.

Retailer Representation

Multiple retailers make up 18% of the centres retailer offer and are represented in the convenience sector by Tesco Extra and Greggs the Baker.

In the comparison goods category the majority of shops were independently owned, with only the PDSA charity shop being a multiple retailer.

Within the service category only 2 betting shops (Bet Fred and William Hill) and the petrol filling station (BP) are multiple retailers, with the remaining outlets all being independently owned.

There is also a Fitness First Leisure Centre and an Ice Rink within the centre.

Retailer Requirements

A search using the Focus database reveals no requirements for retail or office space within Hobs Moat at the time of writing this report. It is important to consider, however, that there are many retailers who do not actually publish their requirements, but who may be attracted to a town which matches their operating profile. We are not aware of any outstanding requirements from independent retailers, as these tend not to be advertised.

Retail Rankings

As at 2010, Hobs Moat is not included within the VENUESCORE rankings. This is likely to be due to the centres small size and the lack of representation by multiple retailers.

Proportion of vacant street level property

At the time of survey there was just one unit vacant within the This indicates a relatively good demand for units within this

Retail rents

Add

Commercial Yields



centre. location.

Add

Pedestrian Flows

Although we have not conducted a survey of footfall we noted that, at the time of survey, the centre was fairly quiet, with only a small number of shoppers apparent. There was slightly more pedestrian activity close to the Tesco Express store and the car parking area at the junction of Ulleries road and the parking in front of the Hobs Moat Road shops seemed busy however and there was some pedestrian activity around these areas.

Accessibility

There is free on-street parking available to the front of the shops on Hobs Moat Road, including area of parking at the junction of Ulleries Road Hobs Moat Road.

There are a number of bus services which stop close to the Hobs Moat Road shops. These include services between Birmingham and Solihull (every 20 minutes), Solihull and Chelmsley Wood (every 30 minutes), Radford Tile Hill Wood School, Birmingham and Cranes Park. Other services stopping at Hobs Moat go to Coventry, Leamington Spa and the airport.

Pedestrian accessibility is good, with pavements being wide and well maintained and the topography within the area being generally relatively flat.



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Occurrences of Crime

We have accessed data on crime and anti social behaviour from the Home Office. The data shows that in 2009/10 the crime rate in England and Wales was 79 offences per 1000 population (giving a crime rate of 12.7).

We have also accessed data available at the local police force level which showed that the Hobs Moat shopping centre is located on the border between the two neighbourhoods of Elmdon and Lyndon. Within these two neighbourhoods, in the 12 months to April 2011 there were 197 crimes recorded (giving a crime rate of 7.53 in Elmdon and 8.20 in Lyndon). This shows that levels of crime within this area are around average, although a little lower than the national average (although it must be recognised that the local area data that we have used covers slightly different time periods to the national data).

Exploring this data further at street level, it can be seen that directly within the main shopping area on Hobs Moat Road there were 14 offences in April 2011. The table below shows the breakdown of offences and it can be seen that a large proportion of the committed offences related to the 'other crime' category, which includes criminal damage, shoplifting and drug offences.

| Crime | total number of offences |
|-----------------------|--------------------------|
| Anti social behaviour | 4 |
| vehicle crime | 1 |
| other crime | 9 |

Environmental Quality

Overall the environmental quality of the centre is reasonable, although the presence of roller shutters on the majority of businesses in the evenings does detract from the aesthetic quality of the centre and leads to poor perceptions of safety.

At the time of our survey there was some evidence of littering within the centre and the landscaped area at the southern end of the parade of shops on Hobs Moat Road appeared to be in need of a little maintenance.

The area of landscaping around the car parking at the junction of Hobs Moat Road with Ulleries Road was in better condition and adds some attractive greenery to the centre.



Conclusions

The centre is small in size, serving predominantly local needs only, although the presence of the ice rink does provide the centre with a further draw and may attract some incidental trade from users travelling from further afield.

The Tesco Express store at the southern end of the centre is an important anchor, encouraging users to make regular trips to the centre. This is complemented by the presence of a butchers and a bakers at the northern end of the centre.

There is a reasonable level of comparison goods shopping for a centre of this size, indicating that the centre is performing reasonably successfully.

There are 5 hot food take-aways (12% of the total number of units) currently operating in the centre. The Council may wish to resist any substantial increase in the number of hot food take-aways as these premises are often closed during day time opening hours, often with steel shutters in place, detracting from the overall vitality of the shopping centre.

