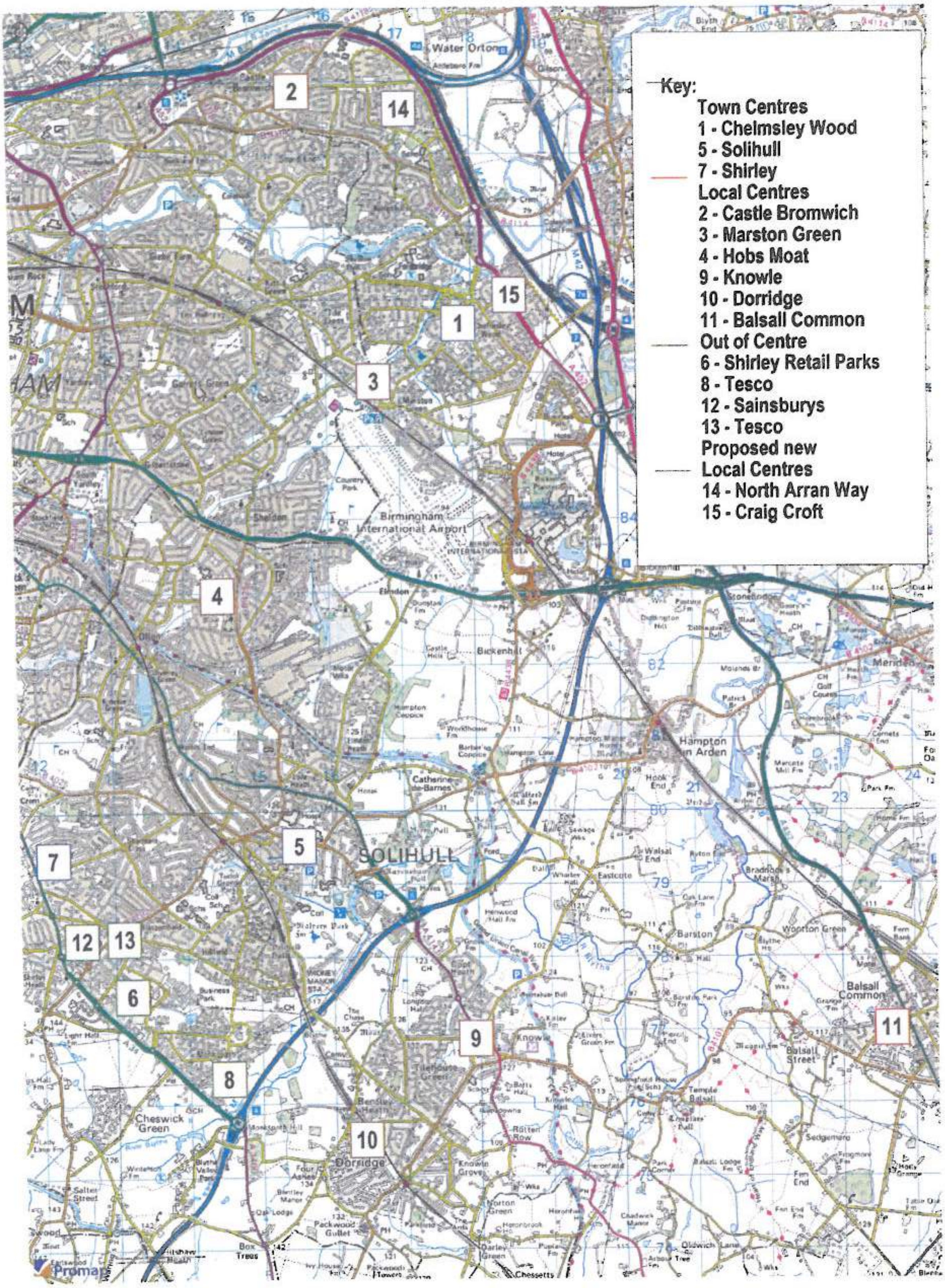
Appendix 1 – Catchment Area Map


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
Water Orton
Birmingham International Airport
SOLIHULL
Hampton in Arden
Catherine-de-Barnes
Balsall Common
Cheswick Green
Dorridge
Knowle

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
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/ florcvrgs 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/ florcvrgs 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 Q2	Top-up convenience Q5	WEIGHTED AVERAGE
	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 Q6	Furniture/ florcvrgs 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	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

2009 Sales in **Solihull Town Centre**

By Comparison Goods Type.

Catchment Zones	Clothing & footwear (£000)	Furniture/ florcvrgs 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									
	CONVENIENCE GOODS					COMPARISON 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
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 flrspce (£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 flrspc (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/ florcvrgs 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	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	2009 Sales in **Shirley Town Centre** By Comparison Goods Type. Clothing & footwear (£000)	Furniture/ florcvrgs 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 2009 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)	COMPARISON GOODS 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 conveninece 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 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	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 Q2	Top-up convenience Q5	WEIGHTED AVERAGE
	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 Q6	Furniture/ florcvrgs 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	0.0	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/ florcvrgs 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: CONVENIENCE GOODS 2009 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)	COMPARISON GOODS 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 flrspce (£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 flrspc (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/ florcvrgs 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/ florcvrgs 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 CONVENIENCE GOODS 2009 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)	COMPARISON GOODS 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 flrspce (£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 flrspc (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	Top-up convenience	WEIGHTED AVERAGE
	Q2	Q5	
	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	Furniture/ florcvrgs 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	0.9	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	2009 Sales in By Comparison Goods Type. Clothing & footwear (£000)	Non-Town Centre Shopping in Solihull Furniture/ florcvrgs 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	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 CONVENIENCE GOODS 2009 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)	COMPARISON GOODS 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	47,388	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	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

Net to gross ratio: 90 %*	Date of sales densities:			2009
Store	Gross Flrspce (sq m)	Net Flrspce (sq m)	Sales Density 2009 (£/sqm net#)	Sales 2009 (£000)
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
Multiyork	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

Table: 44

'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 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	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 flrspce (£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 flrspc (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 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	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 flrspce (£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 flrspc (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 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	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 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)	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 flrspc (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 flrspce (£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 flrspc (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 2009 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 flrspce (£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 flrspc (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: 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 flrspce (£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 flrspc (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: 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.

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: 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.

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 2009 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 flrspce (£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 flrspc (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 flrspce (£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 flrspc (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: 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.

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: 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.

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 2009 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 flrspce (£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 flrspc (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/ florcvrgs 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

Sources: RECAP Model

Appendix 3 – Town and Local Centre Health Checks

Contents

1 Solihull

Solihull is located approximately13 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 indpependent 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, is 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 Shirely 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.

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.

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 Chelmsely Circle, just of 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 VENUESCCORE 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 in 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.

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 VENUESCCORE 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, is 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 categorise 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 suggest that it is currently performing soundly, with very few instance of vacancy and good demand for existing retail space.

The range of shops and services provided as 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 cetre is not currently high.

Retail Rankings

As at 2010, Dorridge is not ranked by VENUESCCORE, 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 form 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 VENUESCCORE, 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 littler 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 takeways.

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 VENUESCCORE 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 car 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 VENUESCCORE 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, is 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 VENUESCCORE 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 centre. This indicates a relatively good demand for units within this location.

Retail rents

Add

Commercial Yields

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 an area of parking at the junction of Ulleries Road and 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 and 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.

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.