

Tess Square, Marnhull Retail Technical Note

Final Report

M B Crocker Limited

24 October 2023

LICHFIELDS

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1.0 Introduction

Objectives

- 1.1 Lichfields has been commissioned by MB Crocker Limited to assess the need for new retail, food/beverage and other non-retail services in Marnhull, Dorset.
- 1.2 This technical note includes the following elements:
- identification of an appropriate catchment areas for facilities within Marnhull;
 - estimations of the existing trade draw and trading performance of facilities in Marnhull, drawing on Dorset Council's Retail and Leisure Study;
 - an assessment of the future quantitative and qualitative capacity for retail uses (comparison, convenience goods, food/beverage and other non-retail services) generated by the existing population within the catchment area up to 2030 and 2035;
 - estimation of future expenditure retention that Marnhull should achieve if facilities are improved; and
 - a qualitative gap analysis and audit of facilities within the Marnhull local catchment area.

Marnhull development proposals

- 1.3 Proposed development at Tess Square and Butts Close in Marnhull is expected to provide up to 120 dwellings on the Butts Close site and a mixed use development on the Tess Square site. The mixed use development is expected to provide:
- food store (including in-store café and post office) – 1,455 sq.m (GIA);
 - café – 222 sq.m (GIA);
 - estate agent – 99 sq.m (GIA);
 - hairdresser – 100 sq.m (GIA);
 - funeral care – 100 sq.m (GIA);
 - dentist – 100 sq.m (GIA);
 - vet – 100 sq.m (GIA); and
 - offices – 181 sq.m (GIA).
- 1.4 The proposed food store is expected to have a net sales area of 814 sq.m net, broken down as follows:
- convenience (food and grocery) goods - 638 sq.m net;
 - comparison (ancillary durable) goods – 113 sq.m net; and
 - in-store café – 63 sq.m net.

2.0 Capacity assessment

Introduction

- 2.1 This section assesses the quantitative scope for new retail and food/beverage floorspace that could be provided to support the needs arising from the development in Marnhull. This assessment draws on information from the Dorset Retail & Leisure Study (2022 Update).
- 2.2 It sets out the methodology adopted and provides a quantitative capacity analysis in terms of levels of spending for convenience goods, comparison goods and food/beverage (eating and drinking away from the home). The assessment is based on Experian's latest forecasts, which take account of the implications of Covid-19 and the cost of living crisis. .

Methodology and base data

- 2.3 The quantitative assessment for the proposed Tess Square village centre includes the following:
- 1 identification of an appropriate catchment area for the proposed new development. Experian population and local expenditure projections have been obtained;
 - 2 estimations of the existing trade draw and trading performance of retail, drawing on household shopper survey information from the Dorset Retail & Leisure Study; and
 - 3 an assessment of the future quantitative capacity for retail uses (comparison, convenience goods and food/beverage) generated by the new dwellings and existing population within the local catchment area, provided in 2023, 2030 and 2035.

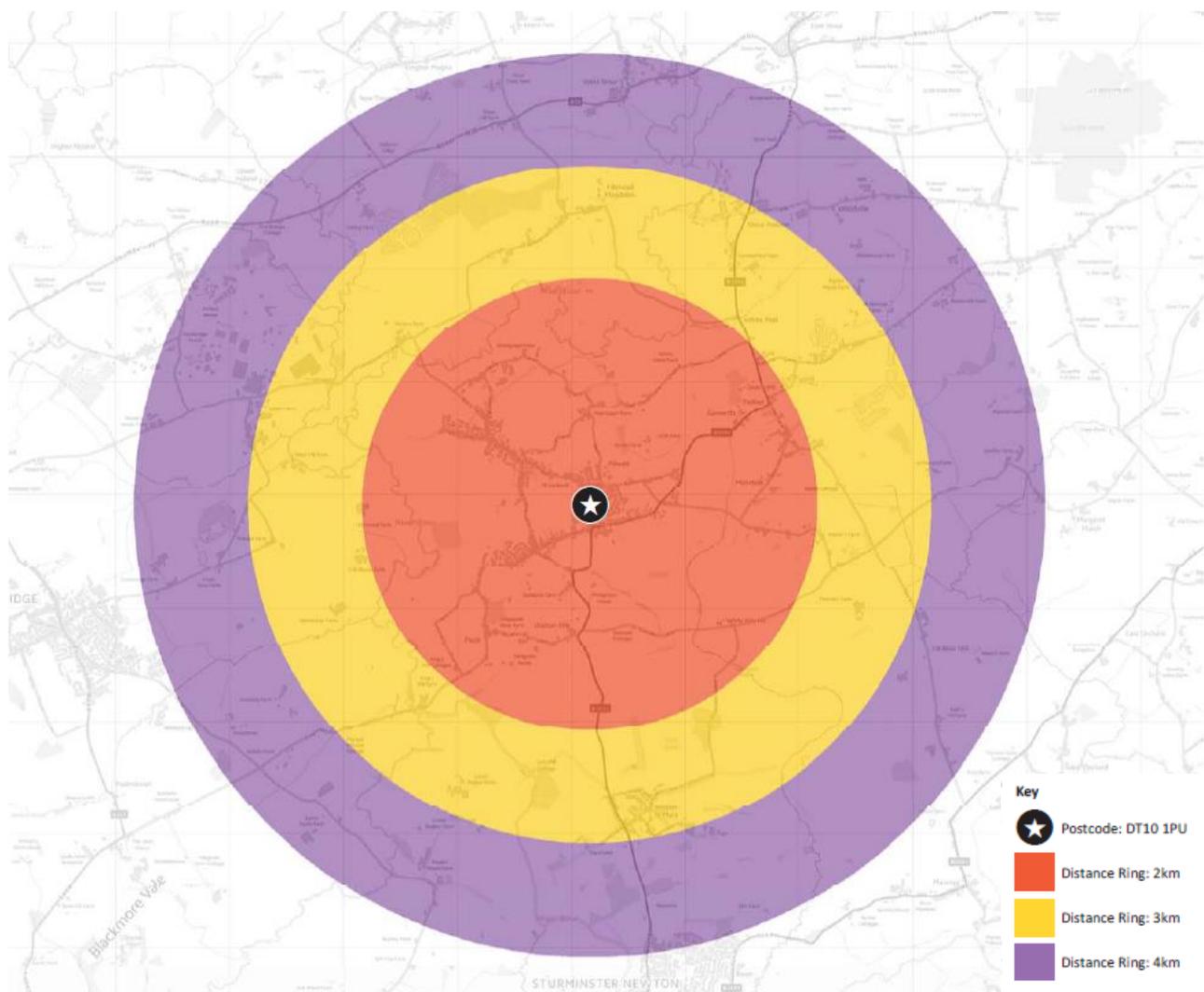
Price base and base year

- 2.4 All monetary values expressed in this report are at 2021 prices. The base year adopted for the assessment is 2023, although turnover and expenditure figures for this year are expressed at 2021 prices. The base year adopts Experian's projections for the second full calendar year post Covid-19 lockdowns, recognising that expenditure levels have been significantly distorted during 2020 and 2021.

Catchment area

- 2.5 The quantitative analysis is based on an identification of an appropriate retail catchment area for the proposed development. The primary catchment of Marnhull is unlikely to extend significantly beyond 4 kilometres, due to the location of surrounding towns i.e. Sturminster (about 5km to the south), Stalbridge (about 4.5km to the west), Gillingham (about 8km to the north) and Shaftesbury (about 9.5km to the east).
- 2.6 The Dorset Retail & Leisure Study adopted a study area extending across Dorset and beyond, broken down into 22 zones. Marnhull is within Zone 10 close to the boundary with Zone 9. Marnhull's primary catchment area falls within Zone 9 and 10.

Figure 2.1 Marnhull primary catchment area



Population and expenditure

- 2.7 The resident catchment area population for the period 2023 to 2035 is set out in Table 1 in the Appendix, adopting the population projections for Zone 9 and 10 in the Dorset Retail & Leisure Study. Population within Zone 9 and 10 combined is 60,717 in 2023, was projected to increase to 61,556 in 2030 and then to 62,007 in 2035.
- 2.8 There are 15 unimplemented but extant planning permission for new residential dwellings within Marnhull village, as listed overleaf. If implemented, these commitments would deliver 275 new dwellings (including 39 dwellings permitted on the Butts Close site). Based on 2.5 people per dwelling these residential commitments would increase Marnhull's population by 687 people.
- 2.9 The proposed residential at Butts Close will, if permitted increase the number of new dwellings in Marnhull to 356 dwelling, an additional 81 dwellings on the Butts Close site.

These additional dwellings along with commitments will increase Marnhull's population by 890 people.

Extant residential planning permissions in Marnhull

- 2/2017/1215/FUL 1 no. dwelling;
- 2/2018/0084/OUT 9 no. dwellings;
- 2/2018/0449/OUT 67 no. dwellings;
- 2/2018/1124/OUT 72 no. dwellings;
- 2/2018/1303/OUT 1 no. dwelling;
- 2/2018/1406/OUT 2 no. dwellings;
- 2/2018/1808/OUT 61 no. dwellings;
- 2/2019/0722/FUL 1 no. dwelling;
- P/OUT/2020/00179 1 no. dwelling;
- 2/2020/0610/OUT 4 no. dwellings;
- P/PAAC/2021/00061 4 no. dwellings;
- P/OUT/2021/03030 39 no. dwellings;
- P/FUL/2022/07019 11 no. dwellings;
- P/FUL/2023/00733 1 no. dwelling; and
- P/FUL/2023/01156 1 no. dwelling.

- 2.10 The proposed retail and service uses are expected to serve the local day-to-day needs of Marnhull's catchment area and these proposed residential developments.
- 2.11 To assess future expenditure levels it is necessary to consider wider economic trends, particularly in the short and medium terms. Careful consideration is needed to establish the appropriate level of expenditure growth to be adopted over the development period. Trends in population growth, home shopping/internet sales and growth in turnover efficiency also need to be considered and a balanced approach taken.
- 2.12 Historic trends indicate that consumer expenditure has grown consistently in real terms, generally following a cyclical growth trend. This growth fuelled demand for new retail floorspace. Experian's pre-Covid/cost of living crisis forecasts suggested slower expenditure growth overall but with home shopping/internet spending growing at a much faster rate than traditional shopping. Experian's latest short-term expenditure growth projections (2022 and 2023) for retail and leisure now reflect the Coronavirus pandemic and cost of living crisis. Reflecting these recent trends, Experian's latest projections recommend relatively modest levels of growth when compared with historic trends.
- 2.13 For convenience goods, Experian's latest forecasts (February 2023) anticipate limited growth (0.1% per annum after 2024). Experian expects slow growth in the future, but most of the growth will relate to non-store sales. Any need for new convenience goods retail floorspace is likely to relate to population growth or qualitative areas of deficiency.

- 2.14 For comparison goods, higher levels of growth are expected in the future (between 2.5% to 3% per annum), still at a lower rate than previous pre-recession trends (8% per annum between 1997 and 2007). Historically comparison goods expenditure has grown significantly more than convenience goods expenditure, and Experian's latest national growth rate recommendations are consistent with these past trends.
- 2.15 The need assessment makes an allowance for future growth in e-tailing based on Experian projections. Given the likelihood that multi-channel expenditure will continue to grow at a faster pace than other consumer expenditure, the assessment adopts relatively cautious growth projections for expenditure and an allowance is made for growth in home shopping. This home/e-tailing expenditure will not generate demand for traditional floorspace and has therefore been subtracted from the need analysis, consistent with standard practice.
- 2.16 Experian's latest EBS national expenditure information (Experian Retail Planner Briefing Note 20 – February 2023) has been used to forecast expenditure. Experian's medium and long term growth average forecasts have been adopted, as follows:
- 1 convenience goods: 0.1% per annum growth for 2025 to 2029 and +0.2% per annum after 2029;
 - 2 comparison goods: +2.5% per annum growth for 2025 to 2029 and +3.0% per annum after 2029; and
 - 3 leisure: +1.0% per annum growth for 2025 to 2029 and +0.9% per annum after 2029.
- 2.17 These growth figures relate to real growth and exclude inflation.
- 2.18 Experian's latest adjusted deductions for SFT (i.e. home and online shopping through non-retail businesses) in 2023 are:
- 1 5.6% of convenience goods expenditure; and
 - 2 26.5% of comparison goods expenditure.
- 2.19 Experian's projections suggest that these percentages will increase to 7.0% and 30.3% by 2030 respectively. The long-term Experian projections suggest an increase to 7.5% and 31.6% by 2035 respectively.
- 2.20 Table 2 in the Appendix sets out the updated forecasts for spending per head on convenience, comparison retail goods and food/beverage (eating and drinking away from the home) within the catchment area up to 2030 and 2035, excluding SFT. Average convenience goods expenditure is expected to reduce slightly due to a higher proportional increase in SFT.
- 2.21 As a consequence of growth in population, total convenience goods spending within the catchment area is forecast to increase from £166.61 million in 2023 to £171.33 million in 2035, as shown in Table 3A in the Appendix. Comparison goods spending is forecast to increase from £210.02 million in 2023 to £274.36 million in 2035, as shown in Table 3B. Food/beverage spending is forecast to increase from £105.65 million in 2023 to £121.14 million in 2035, as shown in Table 3C. These figures relate to real growth and exclude inflation.
- 2.22 Resident's total expenditure within Marnhull (0 to 2km area) is £15.87 million, which is projected to increase to £18.39 million in 2035, excluding additional expenditure from the new residential developments identified above.

2.23 Residents within the new residential developments in Marnhull are expected to generate £8.01 million of new expenditure by 2035 that would not otherwise be available, broken down as follows:

- convenience goods expenditure = £2.42 million;
- comparison goods expenditure = £3.88 million; and
- food/beverage (eating/drinking) expenditure = £1.71 million.

2.24 Total growth in expenditure within the 0 to 2km area between 2023 and 2035 is +£10.53 million, a 66% increase.

Existing spending patterns in the catchment area

2.25 Convenience goods (food and grocery) shopping provision within Marnhull is limited. It includes two small convenience stores i.e. a Spar store and Robin Hill Stores. These stores are relatively small and cater primarily for top-up shopping trips. The expected benchmark convenience goods turnover of these stores is estimated to be only £0.7 million (based on 107 sq.m net at £6,500 per sq.m), as shown in Table 6 in the Appendix.

2.26 This existing provision and the results of the household shopper survey in the Dorset Retail & Leisure Study (2022 Update) have been used to estimate existing convenience goods shopping patterns in the Marnhull catchment area.

2.27 Marnhull's local catchment area fall within Zones 9 and 10 adopted in the Dorset Retail & Leisure Study (2022 Update). The study indicated that only 51% of the convenience goods expenditure generated by residents in Zones 9 and 10 is retained within the local area. Expenditure leakage to facilities outside the area is significant (49%). Local shopping facilities in Zones 9 and 5 only retained 0.8% of convenience goods expenditure, primarily top-up rather than main food shopping trips.

2.28 Marnhull's existing market share of convenience goods expenditure in Zones 9 and 10 is estimated to be about 0.4%.

2.29 Comparison goods shopping provision within Marnhull is also limited. It includes the new pharmacy and a fabric/textile shop. Marnhull's existing market share of comparison goods expenditure in Zones 9 and 10 is estimated to be about 0.5%. The expected benchmark comparison goods turnover of existing facilities in Marnhull is estimated to be £1.0 million (based on 154 sq.m net at £6,500 per sq.m) as shown in Table 6 in the Appendix.

2.30 Food and beverage provision within Marnhull includes two public houses. There are no café/restaurants. Marnhull's existing market share of food/beverage expenditure in Zones 9 and 10 is estimated to be about 1.8%. The expected benchmark food/beverage turnover of existing facilities in Marnhull is estimated to be £1.8 million (based on 300 sq.m net at £6,000 per sq.m) as shown in Table 6 in the Appendix.

2.31 Lichfields' estimates of Marnhull's trade draw and market share are shown in Table 4 in the Appendix.

Future spending patterns

2.32 As indicated above, population and expenditure within the local catchment area are projected to grow. Shops and food/beverage outlets in Marnhull retain a very low proportion of local residents' expenditure. Marnhull should seek to better meet the day-to-day needs of residents within the local catchment area, to minimise the need to travel for items and services purchased on a regular basis.

- 2.33 The development of new facilities within Marnhull provides an opportunity to increase expenditure retention within the local catchment area, by improving the range and choice of products and services available. Future floorspace capacity has been assessed based on expected expenditure retention from the indigenous population and new residential development.
- 2.34 Realistic expected expenditure retention rates/market shares are shown in Table 4 in the Appendix, based on Lichfields' experience of similar freestanding settlements and household survey results from across the country.
- 2.35 These market shares exclude on-line expenditure, which has already been deducted from the expenditure projections. A relatively high proportion of residents within Marnhull (the 0 to 2km area) are expected to do their top-up food and grocery shopping within the village. Top-up food and grocery shopping typically accounts for about 30% of all food and grocery shopping (with 70% spent on main food shopping trips). The proposed food store will provide a much broader range and choice of products and is expected to attract top-up and some main food and grocery shopping trips. Marnhull's overall retention of convenience goods expenditure is estimated to be 60% in the 0 to 2km area. This assumption assumes 40% of expenditure will continue to leak from the 0 to 2km area.
- 2.36 The expected retention rates for comparison goods expenditure are much lower than for convenience goods shopping and food/beverage because residents will generally travel further and shop around for comparison goods. A modest amount (15%) of comparison goods expenditure retention is estimated in the 0 to 2km area.
- 2.37 Existing public houses and the proposed cafés are expected to retain a reasonable level (45%) of food/beverage expenditure in the 0 to 2km area.
- 2.38 These predicted market shares are considered viable in terms of the scope to expand existing facilities, the scale and type of new facilities proposed and the amount of expenditure leakage from the local catchment area.

Capacity for convenience goods floorspace

- 2.39 Adopting these market shares, the future attraction of convenience goods expenditure to Marnhull is shown in Table 5A in the Appendix. Based on the new homes proposed at Marnhull, the level of convenience goods expenditure attracted to Marnhull is projected to increase from £0.75 million in 2023 to £7.81 million in 2030 and then to £7.89 million in 2035, as shown in Table 5A.
- 2.40 Table 7A in the Appendix subtracts the turnover of existing facilities from available expenditure to calculate the amount of surplus expenditure that will be available to support new retail floorspace in Marnhull. The surplus expenditure projections have then been converted into floorspace estimates adopting an assumed base year average sales density figure of £11,000 per sq.m, consistent with the sales density adopted in the Dorset Retail & Leisure Study (2022 Update). This average sales density has been projected to 2030 and 2035 based on Experian's latest recommended growth projections.
- 2.41 The projected convenience goods retail floorspace requirement is 631 sq.m net in 2035, over and above existing provision in Marnhull, which is consistent with the amount of sales floorspace envisaged in the proposed food store i.e. 638 sq.m net.

Capacity for comparison goods floorspace

- 2.42 As for the convenience goods retail capacity, the assumed retention rates have been used to determine the future levels of available comparison goods expenditure in 2030 and 2035. This analysis demonstrates available comparison expenditure will increase from £1.13 million in 2023 to £2.32 million in 2030, and then to £2.66 million in 2035, as shown in Table 5B in the Appendix.
- 2.43 The surplus expenditure projections have then been converted into floorspace estimates in Table 7B, adopting an assumed base year average sales density figure of £6,500 per sq.m, also consistent with the Dorset Retail & Leisure Study (2022 Update).
- 2.44 The projected floorspace requirement is 161 sq.m net in 2035, over and above existing provision in Marnhull. This projection is higher than the amount of ancillary comparison goods sales floorspace envisaged in the proposed food store i.e. 113 sq.m net.
- 2.45 The ancillary comparison goods sales floorspace within the proposed food store might be expected to include lower order goods purchased on a regular basis for example: toiletries/ beauty items, small household/kitchen items, cards/stationery, cut flowers and pet products etc.

Capacity for food and beverage floorspace

- 2.46 The future levels of available food and beverage expenditure in 2030 and 2035 are shown in Table 5C in the Appendix. This analysis suggests available food/beverage expenditure will increase from £1.9 million in 2023 to £3.19 million in 2030, increasing to £3.36 million in 2035. Surplus available food and beverage expenditure projections are converted into food and beverage floorspace projections in 7C, adopting a base year average sales density of £6,000 per sq.m gross (source: company annual reports for selected food and beverage operators), projected forward based on Experian's leisure sales density projections.
- 2.47 The projected floorspace requirement is 246 sq.m net in 2035, over and above existing provision in Marnhull. This projection is slightly higher than the amount of café floorspace envisaged in the development i.e. 218 sq.m net.

Other service uses

- 2.48 In addition to these retail and food/beverage uses, the proposed development will provide other non-retail service uses i.e. a hairdresser, estate agent, funeral care, vet and dentist. These facilities are not currently available within Marnhull, therefore residents need to travel to Gillingham, Shaftesbury or Sturminster for these services.
- 2.49 Experian's local expenditure figures indicate residents in the Marnhull catchment area spend, on average, £581 per annum on selected services uses, including £288 per person on property transactions, hair/grooming and funeral services.
- 2.50 In total the 0 to 4km catchment area will generate (3,375 people) about £2 million on services, including property transactions, hair/grooming and funeral services. The additional population within proposed residential developments in Marnhull should increase this total service expenditure to about £2.5 million, including £1.3 million on property transactions, hair/grooming and funeral services.
- 2.51 The projected catchment population is sufficient to support the proposed service facilities proposed.

3.0 Conclusions

- 3.1 Resident's total retail and food/beverage expenditure within Marnhull (0 to 2km area) is £15.87 million, which is projected to increase by £2.52 million between 2023 to 2035. Additional residents within proposed residential developments will generate a further £8.01 million of new expenditure by 2035, which would not otherwise be available.
- 3.2 Retail and service provision in Marnhull is currently limited. The expected turnover of existing retail and food/beverage facilities is estimated to be about £3.5 million, only 22% of total expenditure generated by existing residents within Marnhull (0 to 2km area).
- 3.3 The scale of new retail and floorspace proposed at Marnhull has an expected turnover of about £9.1 million, which is lower than the projected growth in expenditure between 2023 and 2035 (£10.53 million).
- 3.4 There is significant potential for Marnhull to increase its retention of expenditure within the local catchment area if new facilities are provided. Based on realistic increases in market share, the floorspace capacity projections indicate 1,038 sq.m net of retail and food/beverage sales floorspace can be supported by 2035, over and above existing provision, compared with 964 sq.m net proposed.

Appendix 1 Capacity assessment

Table 1: Local catchment area population

Area	2023	2030	2035
New residential development in Marnhull	0	890	890
0 - 2 kilometres	1,998	2,026	2,040
2 - 3 kilometres	642	651	656
3 - 4 kilometres	735	745	751
Rest of Zone 9 and 10	57,342	58,134	58,561
Total	60,717	62,446	62,897

Sources:

Experian MMG3 2023 population for Marnhull catchment area rings in 2023

Dorset Retail and Leisure Study 2022 - population projections for Zones 9 and 10

New residential development - 356 home at 2.5 people per home.

Table 2: Local catchment retail and food/beverage expenditure per person (£)

	2023	2030	2035
Convenience goods	2,744	2,711	2,724
Comparison goods	3,459	3,834	4,362
Food/beverage	1,740	1,841	1,926

Sources:

Experian Local Expenditure 2021 (2021 prices) for Marnhull catchment area and growth rates.

Experian expenditure growth rates. Excluding special forms of trading.

Table 3A: Local catchment convenience goods expenditure (£m)

	2023	2030	2035
New residential development in Marnhull	£0.00	£2.41	£2.42
0 - 2 kilometres	£5.48	£5.49	£5.56
2 - 3 kilometres	£1.76	£1.76	£1.79
3 - 4 kilometres	£2.02	£2.02	£2.04
Rest of Zone 9 and 10	£157.35	£157.60	£159.52
Total	£166.61	£169.29	£171.33

Table 3B: Local catchment comparison goods expenditure (£m)

	2023	2030	2035
New residential development in Marnhull	£0.00	£3.41	£3.88
0 - 2 kilometres	£6.91	£7.77	£8.90
2 - 3 kilometres	£2.22	£2.50	£2.86
3 - 4 kilometres	£2.54	£2.86	£3.27
Rest of Zone 9 and 10	£198.35	£222.89	£255.44
Total	£210.02	£239.42	£274.36

Table 3C: Local catchment food/beverage expenditure (£m)

	2023	2030	2035
New residential development in Marnhull	£0.00	£1.64	£1.71
0 - 2 kilometres	£3.48	£3.73	£3.93
2 - 3 kilometres	£1.12	£1.20	£1.26
3 - 4 kilometres	£1.28	£1.37	£1.45
Rest of Zone 9 and 10	£99.78	£107.03	£112.79
Total	£105.65	£114.96	£121.14

Source: Tables 1 and 2

Table 4: Existing and predicted future expenditure retention rates (% market shares)

	Marnhull village/ 0-2 km	2 - 3 km	3 - 4 km	Rest of Zone 9/10
Existing retention rates 2023				
% convenience goods expenditure retained in Marnhull	10.0%	2.0%	0.5%	0.1%
% comparison goods expenditure retained in Marnhull	12.0%	4.0%	0.5%	0.1%
% food/beverage expenditure retained in Marnhull	40.0%	25.0%	10.0%	0.1%
Future retention rates 2030/35				
% convenience goods expenditure retained in Marnhull	60.0%	50.0%	30.0%	1.0%
% comparison goods expenditure retained in Marnhull	15.0%	6.0%	2.0%	0.2%
% food/beverage expenditure retained in Marnhull	45.0%	30.0%	15.0%	0.2%

Source: Lichfields' estimates.

Table 5A: Convenience goods expenditure retained (£m)

By year	Marnhull village/ 0-2 km	2 - 3 km	3 - 4 km	Rest of Zone 9/10	Total
2023	0.55	0.04	0.01	0.16	0.75
2030	4.74	0.88	0.61	1.58	7.81
2035	4.79	0.89	0.61	1.60	7.89

Table 5B: Comparison goods expenditure retained (£m)

By year	Marnhull village/ 0-2 km	2 - 3 km	3 - 4 km	Rest of Zone 9/10	Total
2023	0.83	0.09	0.01	0.20	1.13
2030	1.68	0.15	0.05	0.45	2.32
2035	1.92	0.17	0.06	0.51	2.66

Table 5C: Food/beverage expenditure retained (£m)

By year	Marnhull village/ 0-2 km	2 - 3 km	3 - 4 km	Rest of Zone 9/10	Total
2023	1.39	0.28	0.13	0.10	1.90
2030	2.42	0.36	0.21	0.21	3.19
2035	2.54	0.38	0.22	0.23	3.36

Source: Tables 3A to 3C and Tables 4A to 4C.

Table 6: Existing and proposed retail/ food and beverage floorspace and expected turnover in Marnhull

	Floorspace (sq.m gross)	Sales floorspace (sq.m net)	Convenience sales (sq.m net)	Comparison sales (sq.m net)	Food/beverage sales (sq.m net)	Convenience turnover (£M)	Comparison turnover (£M)	Food/beverage turnover (£M)	Total Turnover (£M)
Existing uses									
Marnhull Pharmacy	149	120	0	120	0	0.00	0.78	0.00	0.78
Spar Marnhull	81	60	55	5	0	0.36	0.03	0.00	0.39
Robin Hill Stores	79	58	52	6	0	0.34	0.04	0.00	0.38
The Curtain Man	43	23	0	23	0	0.00	0.15	0.00	0.15
The Blackmore Vale Inn	150	100	0	0	100	0.00	0.00	0.60	0.60
The Crown	300	200	0	0	200	0.00	0.00	1.20	1.20
Total	802	561	107	154	300	0.70	1.00	1.80	3.50
Proposed uses									
Food store (excl. café)	1,348	751	638	113	0	7.02	0.73	0.00	7.75
Café in food store	107	63	0	0	63	0	0	0.38	0.38
Café	222	155	0	0	155	0	0	0.93	0.93
Total	1,677	969	638	113	218	7.02	0.73	1.31	9.06

Sources:

Valuation Office Agency Global Data and Mintel company average sales densities

Adopted average convenience goods sales density = £6,500 per sq.m net for existing floorspace and £11,000 per sq.m net for proposed food store.

Adopted average comparison goods sales density = £6,500 per sq.m net.

Adopted average food/beverage sales density = £6,000 per sq.m net.

Table 7A: Convenience goods floorspace capacity

By year	Retained available expenditure £m	Turnover of existing stores £m	Residual available expenditure £m	Turnover density new floorspace £psm net	Sales floorspace capacity sq.m net
2023	0.75	0.70	0.06	11,000	5
2030	7.81	0.72	7.09	11,365	624
2035	7.89	0.72	7.17	11,365	631

Table 7B: Comparison goods floorspace capacity

By year	Retained available expenditure £m	Turnover of existing stores £m	Residual available expenditure £m	Turnover density new floorspace £psm net	Sales floorspace capacity sq.m net
2023	1.13	1.00	0.13	6,500	19
2030	2.32	1.13	1.19	7,348	162
2035	2.66	1.30	1.36	8,436	161

Table 7C: Food/beverage floorspace capacity

By year	Retained available expenditure £m	Turnover of existing stores £m	Residual available expenditure £m	Turnover density new floorspace £psm net	Sales floorspace capacity sq.m net
2023	1.90	1.80	0.10	6,000	16
2030	3.19	1.83	1.37	6,090	225
2035	3.36	1.85	1.52	6,151	246

Sources:

Tables 5A to 5C and Table 6.

Experian recommended sales density growth rates.

the 1990s, the number of people in the UK who are aged 65 and over has increased from 10.5 million to 13.5 million (1990–2000) (ONS 2001).

There is a growing awareness of the need to address the health care needs of the elderly population. The Department of Health (2000) has set out a strategy for the NHS to meet the needs of the elderly population. This strategy is based on the following principles:

- To ensure that the NHS is able to meet the needs of the elderly population.
- To ensure that the NHS is able to provide a high quality of care to the elderly population.
- To ensure that the NHS is able to provide a range of services to the elderly population.

The NHS is currently facing a number of challenges in order to meet these principles:

- The increasing number of people aged 65 and over.
- The increasing number of people aged 65 and over who are in poor health.
- The increasing number of people aged 65 and over who are in long-term care.

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