Mansfield District Retail & Commercial Leisure Study:

2014 Addendum Report

Final Report

On behalf of **Mansfield District Council**

Mansfield District Council

31564 | November 2014

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1 Introduction & structure of report

1.1 Introduction

1.1.1 Mansfield District Council (MDC) has commissioned Peter Brett Associates (PBA) to provide an update to quantitative retail and leisure capacity forecasts for the District. The Council wishes to refresh its retail capacity evidence base, in order to:

- ensure consistency with other evidence base studies which the Council is in the process of commissioning;
- extend the period of assessment for retail and leisure needs to 2031; and
- bring the study up to date with current forecasts of expenditure growth, and other key inputs which can affect the need for future retail and commercial leisure floorspace, such as online shopping and other 'special forms of trading'.

1.1.2 This report forms an **Addendum Report** to the **Mansfield Retail & Leisure Study** (2011), which was prepared by Roger Tym & Partners (now part of PBA), and should be read alongside the findings of the previous Study. The remit of this study extends solely to updating the quantitative retail and commercial leisure capacity forecasts which the 2011 Study identified, and does not update any of the other components of the 2011 Study (for example, 'health checks' of centres in the District). The findings of both studies should thus be considered together.

1.1.3 Importantly, no new household telephone survey of shopping patterns has been undertaken in support of this Update. We therefore continue to use the findings of the household telephone survey results from the the 2011 Study as the basis of our updated assessment. Any new retail and commercial leisure developments which have taken place subsequent to the completion of the telephone survey are treated as 'commitments' for the purposes of this Update.

1.2 Updated policy context

1.2.1 The 2011 Study was prepared whilst Planning Policy Statement 4 (PPS4) was the extant national planning policy guidance which covered matters associated with retail and town centres. On 27 March 2012, the Government published the National Planning Policy Framework (NPPF), which consolidates guidance set out in preceding Planning Policy Statements (PPS), Planning Policy Guidance (PPG), and a number of related circulars, into a single document. This document now forms national planning policy. We therefore provide a summary of the updated national policy position below.

National Planning Policy Framework (NPPF)

1.2.2 Paragraph 6 of the NPPF confirms that *'the purpose of the planning system is to contribute to the achievement of sustainable development' and provides the economic, social and environmental implications of this for the planning system. Paragraph 9 adds that 'pursuing sustainable development involves seeking positive improvements in the quality of the built, natural and historic environment, as well as in people's quality of life'.*

1.2.3 The NPPF makes it clear that there should be a presumption in favour of sustainable development. For plan-making this means that '*local planning authorities should positively seek opportunities to meet the development needs of their area*' and that '*Local Plans should meet objectively assessed needs, with sufficient flexibility to adapt to rapid change*'.

1.2.4 Paragraph 17 of the NPPF sets out a series of 12 'Core Planning Principles' which should underpin both plan-making and decision-taking. These 12 Principles include a requirement that planning should be 'genuinely plan-led', with 'succinct plans' to shape development of an area. Local planning authorities should also support sustainable economic development, and plans should take account of market signals to set out a clear strategy for allocating sufficient land for development.

1.2.5 Paragraphs 23 to 27 of the NPPF pay particular attention to retail. The NPPF retains the approach set out in PPS6, PPS4 and preceding national planning guidance by advocating a 'town centres first approach' (paragraph 23). In drawing up Local Plans, LPAs should:

- **Recognise town centres** as the heart of their communities and pursue policies to support their success;
- Define a **network and hierarchy of centres** that is resilient to anticipated future economic changes;
- Define the extent of **town centres and primary shopping areas**, based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations;
- Promote **competitive town centres** that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;
- **Retain and enhance existing markets** and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;
- **Allocate a range of suitable sites** to meet the scale and type of development needed in town centres. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability. Local planning authorities should therefore undertake an assessment of the need to expand town centres to ensure a sufficient supply of suitable sites;
- **Allocate appropriate edge of centre sites** for main town centre uses that are well connected to the town centre where suitable town centre sites are not available. If sufficient edge of centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre;
- Set policies for the consideration of proposals for main town centre uses which **cannot be accommodated** in or adjacent to town centres;
- Recognise that **residential development** can play an important role in ensuring the vitality of centres and set out policies to encourage residential development on appropriate sites; and
- Where town centres are in decline, local planning authorities should **plan positively for their future** to encourage economic activity.

1.2.6 Paragraphs 24 to 27 of the NPPF discuss the principal 'tests' which LPAs should apply to applications for retail development that fall outside defined town centre locations. Firstly, applications for *'town centre uses'* (such as retail) will need to demonstrate that the proposed scheme cannot be accommodated on an in-centre site (if the application site is in an edge-of-centre location), or either an in-centre or an edge-of-centre (if the application site is in an out-of-centre location).

1.2.7 Applications *for 'town centre uses'* outside defined centres which are above 2,500 sq.m (or a locally-set threshold) must also submit an impact assessment, to assess the impact of the proposal on existing, committed, and planned investment in defined centres in an appropriate catchment area, as well as the impact on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area. The NPPF is clear that in instances

where a planning application cannot demonstrate compliance with either the sequential or impact 'tests', it should be refused planning permission.

Plan-making

1.2.8 Paragraphs 150 to 185 of the NPPF discuss plan-making, with paragraphs 150 to 157 focussing on the role of Local Plans. Paragraph 150 of the NPPF states *'Local Plans are the key to delivering sustainable development that reflects the vision and aspirations of local communities'* and that '*planning decisions must be taken in accordance with the development plan, unless material considerations indicate otherwise'.*

1.2.9 The NPPF advises that local plans should be aspirational but realistic, and should set out 'opportunities for development and clear policies on what will or will not be permitted and where' as well as 'the strategic priorities for the area', including for the provision of retail, leisure and other commercial development.

Evidence bases

1.2.10 The NPPF also identifies a requirement for local planning authorities to use a proportionate evidence base. Furthermore, local plans must be based on '*adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area* (paragraph 158).

1.2.11 As such, in relation to retail matters, the evidence base should assess, amongst other things (paragraph 161):

- The needs for land or floorspace for economic development, including both the quantitative and qualitative needs for all foreseeable types of economic activity over the plan period, including for retail and leisure development;
- The role and function of town centres and the relationship between them, including any trends in the performance of centres; and
- The capacity of existing centres to accommodate new town centre development.

Planning Practice Guidance (PPG)

1.2.12 The Government recently published the Planning Practice Guidance (PPG) in order to provide further guidance on and support to the policies contained within the NPPF. The PPG is a web based resource, which will be actively managed by the Department for Communities and Local Government (DCLG) in order to allow for any necessary updates to be issued as soon as possible. The guidance will continue to be subject to a regular review process.

1.2.13 The PPG is set out thematically. Matters associated with town centre uses are set out in the section 'Ensuring the vitality of town centres'. This section states that a positive vision or strategy for town centres, articulated through the Local Plan, is key to ensuring successful town centres, which enable sustainable economic growth and provide a wider range of social and environmental benefits. It also states that any strategy should be based on evidence of the current state of town centres and opportunities to meet development needs and support their viability and vitality. Strategies should also identify changes in the hierarchy of town centres, including where a town centre is in decline. In these cases, strategies should seek to manage decline positively to encourage economic activity and achieve an appropriate mix of uses commensurate with a realistic future for that town centre.

1.2.14 The PPG also provides further guidance in terms of the interpretation of the NPPF's sequential and impact tests (discussed above), including how they should be applied to both plan-making and decision-taking. A stage-by-stage guide to undertaking an impact test is also provided.

1.3 Structure of the remainder of the report

1.3.1 The remainder of our report is structured as follows:

- **Section 2** sets out a summary of the key changes in the retail sector and wider economy which have taken place subsequent to the 2011 Study, which are likely to influence future demand for new retail and commercial leisure floorspace;
- **Section 3** provides a summary of the key findings of the 2011 Study;
- **Section 4** discusses the adjustments we have made to the key data inputs used for forecasting retail and commercial leisure floorspace capacity for the purposes of this update;
- **Section 5** sets out the updated forecasts for new comparison (non-food) and convenience (food) floorspace; as well as updated forecasts for new A3, A4 and A5 commercial leisure floorspace; and
- **Section 6** sets out a summary of our findings.

1.3.2 The report is supported by the following appendices:

- **Appendix A** provides a map of the Mansfield Study Area (MSA);
- **Appendix B** provides data tables for the updated comparison and convenience goods capacity forecasts;
- **Appendix C** provides data tables for the updated commercial leisure capacity forecasts;
- **Appendix D** provides a method statement for how our assessments of retail and commercial leisure need are undertaken; and
- **Appendix E** provides a summary of the key data inputs into our need assessment.

2 Study context

2.1 Introduction

2.1.1 This Update is being prepared in the midst of a renewed focus on the future of town centres and the high street, in the context of the recent economic downturn; the continued attraction of out-of-town facilities; the increasing popularity of online shopping; and town centres increasingly evolving from solely being retail-destinations to also including commercial leisure, residential and other uses. It is widely accepted that many town centres will need to adapt to accommodate a broader range of roles and functions in order to remain vital and viable in the long term. In this section we briefly summarise the key trends in retail and town centres, which supplements the discussion at paragraphs 2.32 to 2.65 of the 2011 Study.

2.2 Key trends in retail

Polarisation to higher-order centres

2.2.1 The **'polarisation trend'** refers to the preference of retailers to concentrate trading activities in larger schemes, within larger centres. The trend has been driven by the economic downturn, online shopping and a more discerning customer base. There is therefore a concentration of comparison goods expenditure in a smaller number of large centres. Within the East Midlands, Nottingham, Leicester and Derby are the centres where many retailers seek to focus their trading presence.

2.2.2 The implications of this on town centres are that many retailers will seek to downsize their portfolios, particularly in smaller centres, because they can operate more efficiently with a smaller network of stores combined with a strong online presence. Deloitte[1] consider that this will have three principal impacts on retail property:

- Increased availability of property as vacancy rates increase
- Decreasing prime retail rents (with the exception of central London)
- Increased flexibility in rental terms

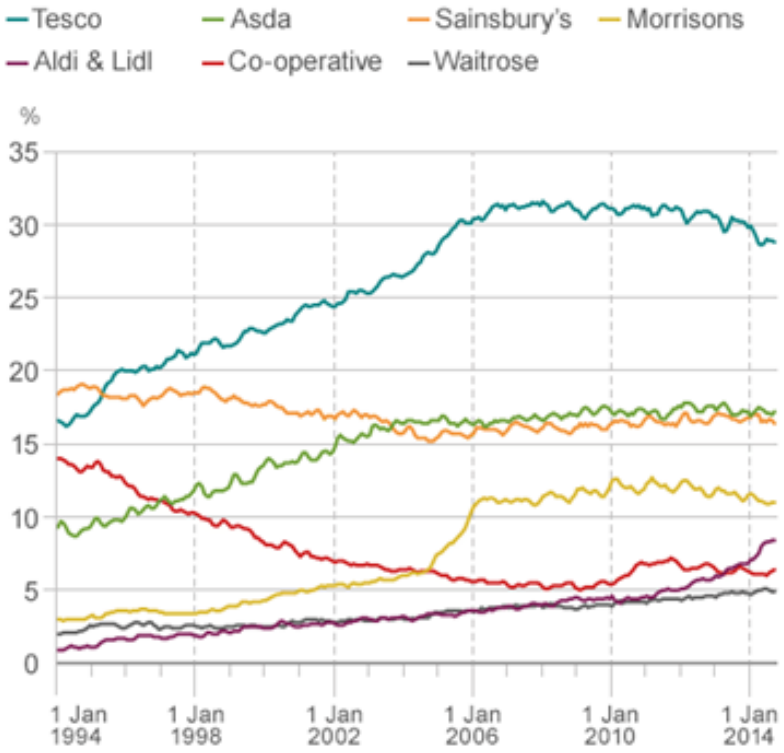
2.2.3 Small centres are therefore particularly vulnerable to this trend, meaning these centres may be required to potentially refocus their role and function away from solely being shopping destinations to incorporate a much broader retail, leisure, culture and residential offer.

Growth of the convenience goods sector

2.2.4 The **convenience goods** sector has become a key driver of growth. The sector has traditionally been dominated by the 'big four' (Asda, Morrisons, Tesco and Sainsbury's) and increasingly, higher-quality operators (Waitrose, Marks & Spencer) and discount retailers (Aldi, Lidl). The discount retailers have posted significant year-on-year growth in recent years and are beginning to emerge as increasingly important forces in the convenience goods market. We expect these retailers to continue to take market share from the 'big four' supermarket operators in future years (see **Figure 1)**

[1] Deloitte, 'The Changing Face of Retail', 2011

Figure 1 — leading supermarkets' market share, 1994-2014



Source: Kantar Worldpanel

2.2.5 The sector has often benefited from floorspace becoming available in town and city centres as a result of comparison goods retailers entering administration. For example, Iceland acquired 57 former Woolworths stores in early 2009, and recently Morrisons acquired a number of stores formerly operated by Blockbuster as part of their 'M Local' network of smaller-format stores.

2.2.6 Large foodstores have historically been the primary driver of growth in the convenience goods sector. However, convenience goods operators are increasingly moving away from opening larger-format stores towards establishing a network of smaller 'top up' convenience goods shopping facilities (referred to as 'c-stores'), often located in town centres, or district/ neighbourhood shopping parades, reflecting customers' changing shopping patterns away from 'bulk' weekly (or less frequent) shopping trips to more frequent, lower-spend visits to smaller stores in locations convenient to their home, work or commute.

'C store' formats operated by Tesco, Sainsbury's and Morrisons

2.2.7 Verdict Research[2] comment that: '*The second dip of the double-dip recession in 2012 has knocked consumer confidence… increasing fuel prices, deterring out-of-town trips, and the move towards online food shopping each feed into this trend towards top-up shopping. Out-of-town space is increasingly difficult for grocers to make profitable*'.

2.2.8 Verdict consider that the proportion of convenience goods floorspace which will be accounted for by 'smaller stores' will increase from 37.6% in 2007 to 41.6% by 2017. The majority of floorspace will continue to be accounted for by 'superstores' (53% of floorspace by 2017). Industry body IGD predicts that the convenience goods market will grow by 29% between 2012 and 2017, from £33.9bn to £43.6bn, and the main retail operators are responding quickly by opening new stores.

Growth in commercial leisure

2.2.9 Most commentators predict that **commercial leisure,** such as cafes, bars, restaurants and cinemas, will constitute a growing share of town centre floorspace.

2.2.10 There is scope for town centres to capitalise on this, redefining their function as 'destinations'. This, in turn, can have positive implications on the performance of town centres as residents and visitors undertake "linked trips" and spend more time in the town centres. The development of a strong commercial leisure offer can help increase footfall outside of retail hours. There are particular opportunities for Mansfield in respect of this, reflecting the findings of the 2011 Study which identified a limited commercial leisure offer in Mansfield town centre, and a need for additional cinema provision to serve the District over the Council's Plan period.

2.3 Economic Context

2.3.1 The recent downturn in the economy had a number of clear changes on the retail landscape in the UK. However, there are signs that confidence is returning to consumer spending, and this is expected to remain the case in the short-to-medium term.

2.3.2 It has been widely documented that online shopping has increased rapidly. Online shopping is perceived to offer a number of significant advantages over 'traditional', high street-format shopping including lower prices, wider choices and the ability for customers to find bargains. While unfavourable economic conditions are forcing many retailers to scale back on physical retail space, their online operations allow them to reach a wider customer base. However, the competition is not as simple as 'online shopping versus the high street' as new technologies promote integration between the two shopping channels.

2.3.3 Returning to the bigger picture, internet sales have been rising much more rapidly than general retail sales in recent years. Experian however consider that at the turn of the next decade, growth in online shopping is expected to plateau. The outputs of this study specifically take into account this anticipated growth in online shopping[3].

[2] Verdict Research 'Food & Grocery Retailing in the UK' Market Report

[3] The figures which we use are Experian's 'adjusted' comparison (non-food) and convenience (food) goods forecasts, which make a deduction on Experian's 'baseline' figures in order to take account of internet goods sales from store space (such as through 'Click & Collect', as discussed below). For comparison goods, Experian apply a discount of 25% to calculate the 'adjusted' figure, and for convenience goods this figure is 70% (these proportions have been altered by Experian since the 2011 Study). The latter figure is particularly high because many online food shopping transactions placed with Sainsbury's, Tesco, Asda and Waitrose are 'picked' from the shelves of the nearest large store of the retailer. Convenience goods retailers are increasingly choosing to instead fulfil orders from warehouses known as 'dark stores' — although this trend remains in its infancy.

2.3.4 This forecast growth in online spending does not equate to a redundant future for 'bricks and mortar' stores, however. There is a role for physical outlets to act as 'showrooms' for online retailers[4]. A physical presence on the high street improves the visibility of businesses; indeed 12 out of the top 20 e-commerce businesses in the UK have a physical presence on the high street (**Figure 2**).

Figure 2 — Top 20 e-commerce websites in the UK, 2013

Source: IMRG Experian Hitwise Hot Shops List, 2013

2.3.5 The growth in the 'Click & Collect' online shopping is another relatively new trend, but one which looks set to play an increasing role. The 'click & collect' concept is such that a customer orders and pays for a desired product online, and then collects the product from the nearest large branch of the retailer in question. This approach is being rolled out by a number of retailers – examples of retailers trading in Mansfield town centre who already offer this service include Debenhams, Topshop/Topman, River Island, Boots and Wilkinson. Like 'showrooming', it is also a trend where the physical outlet of the store can still be used to drive footfall. Recent research by the British Retail Consortium indicates that 60% of 'click & collect' transactions result in an additional purchase in the store.

2.3.6 There is, therefore, a role for 'bricks and mortar' stores. The role and function of high streets — particularly those outside the higher-order shopping centres — are likely to need to consider uses beyond that of traditional retail activity in order to remain vital and viable.

2.4 What this means for the Council's network of centres

2.4.1 There is little doubt that recent years have seen significant challenges to 'traditional' store-based shopping. However, it is quite clear that there remains a role for store-based shopping — and for town centres. Experian forecast that store-based shopping is still expected to expand at an average of 1.9% per annum in capita terms to 2030 while online sales will begin to plateau.

2.4.2 In our view, the most successful town centres will be the ones that adapt to the changes in shopping habits, which move away from solely being shopping destinations to those which offer a broad range of retail, leisure, cultural and civic services.

[4] This is where customers visit 'bricks and mortar' stores to look at / try on a product, before using technology such as smartphones to check whether the product is available elsewhere (in another store, or online) for a cheaper price.

2.4.3 There will also be an important role for niche retail destinations, which are able to compete with advances in online / mobile technology because they offer an experience based on excellent customer service and a unique retail offer. We therefore expect that place marketing and 'selling' the offer of a town centre will become of increasing importance.

3 Key findings from the Mansfield District Retail & Leisure Study (2011)

3.1 Introduction

3.1.1 In this section we summarise the findings of the 2011 Study, to provide context to the updated capacity forecasts which we set out in **Section 3** of this report.

3.2 The Mansfield Study Area (MSA)

3.2.1 In assessing the need for retail and commercial leisure floorspace, the first step is to define a suitable catchment area over which to assess shopping and leisure patterns of residents (through the findings of the household telephone survey, as mentioned in paragraph 1.1.3, Section 1). The study area which forms the basis of our assessment - the 'Mansfield Study Area' (MSA) is unchanged from that used in the 2011 Study. The MSA places Mansfield at the centre, and extends over a wide geographical area which forms a realistic catchment area from which we would expect Mansfield to draw trade. In order to get an accurate picture of shopping patterns, the MSA is divided into nine survey zones. Again, these are unchanged from those used in the 2011 Study (and the preceding 2005 GVA Grimley Retail Study from 2005).

3.2.2 The MSA extends beyond the relatively compact boundaries of Mansfield District to including surrounding areas including Sutton-in-Ashfield, Shirebrook, Creswell, New Ollerton, Newstead and Kirkby-in-Ashfield. The MSA also includes the McArthur Glen East Midlands Designer Outlet, to the west of Mansfield adjacent to the M1.

3.2.3 In **Table 3.1** we summarise the individual zones within the MSA, showing their main centres and predominant administrative areas.

Table 3.1 — Mansfield Study Area (MSA) zones

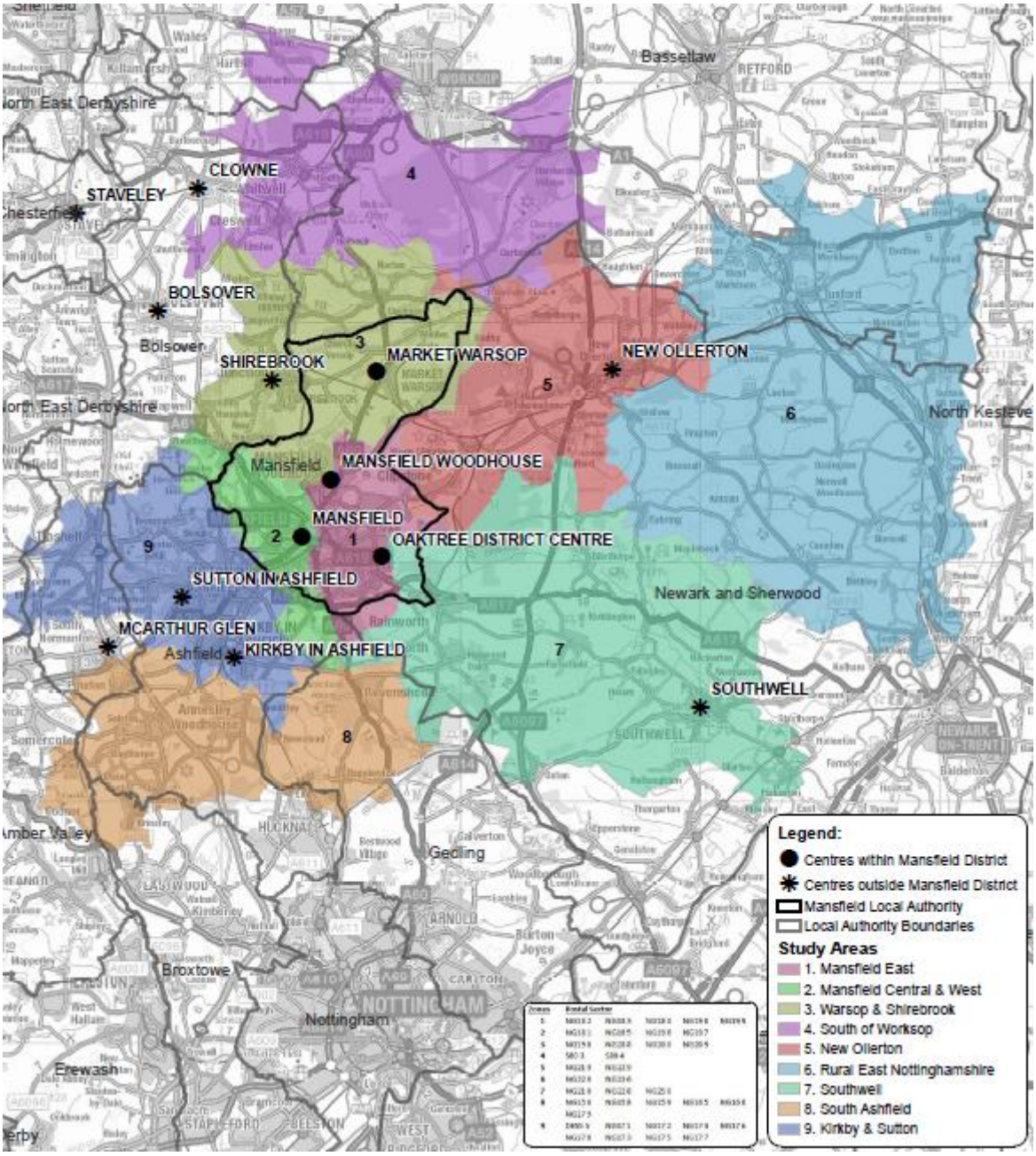
Zone	**Zone name**	Main centres	Predominant administrative area
1	**Mansfield East**	None	Mansfield
2	**Mansfield Central & West**	Mansfield town centre, Pleasley	Mansfield
3	**Warsop & Shirebrook**	Mansfield Woodhouse district centre, Market Warsop district centre, Meden Vale, Shirebrook, Langwith/Whaley	Mansfield
4	**South of Worksop**	Creswell, Whitwell	Bolsover*
5	**New Ollerton**	New Ollerton, Clipstone, Edwinstowe	Newark & Sherwood
6	**Rural East Nottinghamshire**	Tuxford	Newark & Sherwood
7	**Southwell**	Blidworth, Bilsthorpe, Rainworth, Southwell	Newark & Sherwood
8	**South Ashfield**	Jacksdale, Newstead,	Ashfield

		Ravenshead, Selston, Underwood	
9	**Kirkby & Sutton**	Kirkby-in-Ashfield, Sutton-in-Ashfield, Huthwaite, Tibshelf	Ashfield

Source: Table 4.1, Mansfield Retail Study 2011. *covers a smaller administrative area than Bassetlaw, but contains the majority of the zone's population

3.2.4 A plan of the MSA is shown at **Figure 3**[5].

Figure 3 — The Mansfield Study Area (MSA)



[5] A larger version of the plan is reproduced at **Appendix A.**

3.3 Comparison goods shopping patterns

3.3.1 Below we provide a brief summary of the findings of the household telephone survey of shopping patterns which was undertaken in support of the 2011 Study. A full discussion of the findings is set out at **Section 5** of the 2011 Study, which also provides details on the survey methodology.

3.3.2 By way of recap, the survey results identified that 65% of total available comparison (non-food) expenditure is retained by destinations within the MSA. In the 2011 Study we commented that 'given the rural nature of the MSA, and the presence of major shopping destinations such as Nottingham and Sheffield close to the boundaries of the MSA, this is a strong performance', and we continue to hold this view - particularly as retention rates for the zones within Mansfield District itself are higher still.

3.3.3 The household survey results identified the following destinations accounted for the greatest proportion of comparison goods spending:

- Mansfield town centre (29% of available expenditure)
- Sutton-in-Ashfield town centre and retail parks (11%)
- Mansfield retail parks (9%)
- Oak Tree District Centre, Mansfield (3%)
- East Midlands Designer Outlet, South Normanton (3%)

3.3.4 The household survey results thus confirm Mansfield town centre as the dominant comparison goods shopping destination within the MSA. In total, destinations in Mansfield District account for 45% of total available comparison goods expenditure available to the MSA.

3.3.5 The remaining 35% comparison goods expenditure 'leaks' outside the MSA, cheifly to the following destinations:

- Nottingham (including Bulwell / Arnold) (11% of available expenditure)
- Alfreton (including Somercotes) (3%)
- Hucknall (3%)
- Sheffield (including Meadowhall) (3%)
- Giltbrook Retail Park, Giltbrook (including Ikea) (3%)
- Worksop (3%)

3.3.6 Limited expenditure leakage also takes place from the MSA to other centres including Chesterfield, Retford, Derby and Newark-on-Trent.

3.3.7 Nottingham is a UK top-ten retail destination and our 2011 Study held the view that 'given the strong retail offer in Nottingham as well as the proximity of the city to the MSA, this [limited trade draw to Nottingham] suggests that the centres within the MSA are trading efficiently'.

3.3.8 The study found that the three survey zones which fall within Mansfield District (zones 1, 2 and 3), all benefit from good levels of comparison goods expenditure retention, with upwards of 80% of available expenditure retained within the MSA, suggesting that non-food shopping needs are - to a large extent - being met at the local level. Mansfield town centre is the most popular comparison goods shopping destination for five of the nine survey zones - including all three zones within Mansfield District - and is the second-most popular comparison goods shopping destination for residents in zone 9, behind Sutton-in-Ashfield. The household survey results indicate that Mansfield town centre also faces some competition for spending from the Portland and St Peter's Retail Parks, although the market shares attracted to these locations are more limited.

3.3.9 The other centres in Mansfield District - the district centres of Mansfield Woodhouse and Market Warsop - do not feature significantly as comparison goods shopping destinations, as these locations only have a limited comparison goods offer and a stronger convenience (food) shopping and retail services function. At the time of the 2011 Study a third district centre at Oak Tree in Mansfield attracted some spending as a comparison goods shopping destination, largely because of the strong non-food offer in its anchor Tesco Extra store, and an adjacent Argos store. As a result of the recommendations of the 2011 Study, the Council's emerging Local Plan proposes the declassification of this centre, as its retail function is solely limited to these two stores and a small number of ancillary facilities.

3.4 Convenience goods shopping patterns

3.4.1 The household telephone survey of shopping patterns identified that 76% of total available expenditure on convenience (food) goods is retained by centres and stores within the MSA. The higher retention rate reflects the fact that convenience goods shopping is generally a more localised activity, meaning people are less willing to travel as far to undertake their food shopping trips as they are their non-food. It also indicates that there is a good network of food shopping facilities within the MSA - and indeed we are aware that subsequent to completion of the household survey this offer has been strengthened further (we return to discuss this point below).

3.4.2 Three foodstores in the MSA each attracted upwards of 10% of total available convenience goods expenditure from residents in the MSA:

- Asda, Forest Town, Mansfield (11% of total expenditure)
- Asda, Sutton-in-Ashfield (10%)
- Tesco Extra, Oak Tree, Mansfield (10%)

3.4.3 A further four foodstores attract between 5 and 10% of total available convenience goods expenditure from residents in the MSA:

- Tesco Extra, Chesterfield Road South, Mansfield (7% of total expenditure);
- Morrisons, Mansfield (7%);
- Morrisons, Mansfield Woodhouse (6%); and
- Sainsbury's, Mansfield (5%)

3.4.4 There is some leakage of convenience goods expenditure from the MSA to foodstores in Hucknall, Alfreton, and Clay Cross - however this is relatively limited when considered as a proportion of total convenience goods expenditure.

3.4.5 The household survey found that for the Mansfield zones, virtually no residents travelled outside the MSA for their convenience goods shopping, with retention rates of 97%, 96% and 98% for zones 1, 2 and 3 respectively. This suggests that food shopping needs are being adequately met by the network of foodstores in the MSA, and there is no need for residents to travel longer distances to undertake their food shopping. Foodstores in Mansfield also play an important role in meeting shopping needs in the wider MSA, not just residents of Mansfield District, with residents in centres such as New Ollerton and Southwell looking towards foodstores in the town. Overall, foodstores in Mansfield District account for 51% of total available convenience goods spending available to the MSA.

3.4.6 The 2011 Study concluded that 'current convenience goods shopping patterns in Mansfield District are generally sustainable and there is only very limited 'leakage' of expenditure outside the boundaries of zones 1 to 3'.

3.5 The need for new floorspace

3.5.1 The 2011 Study identified the following **comparison goods** requirements over the period to 2026 (**Table 3.2**), with the 'static' retention requirement assuming that current patterns of comparison goods shopping remain unchanged throughout the study period, and the 'increasing' retention scenario assuming a modest uplift in the retention rate of centres and stores within the MSA from the current retention rate of 46%, to 49% by the end of the study period. This increase in the amount of expenditure retention was based on the assumption that new comparison goods retail development would come forward on opportunity sites in Mansfield town centre, which would in turn increase the attractiveness of Mansfield town centre as a shopping destination, and reduce the number of residents who travel outside the MSA to undertake their comparison goods shopping. The Study makes it clear than an improvement to the retention rate is dependent on improvements to the town centre coming forward, and also that the scope for any uplift in retention will also be tempered by planned improvements to the retail offer in Nottingham city centre.

Table 3.2 – Summary of comparison goods capacity in Mansfield District to 2026 (Mansfield Retail & Leisure Study, 2011)

	2016 (sq.m net)	2021 (sq.m net)	2026 (sq.m net)
Static retention (rounded)	2,900	12,100	19,900
Increasing retention (rounded)	5,000	15,500	25,300

Source: Mansfield Retail & Leisure Study 2011, Table 6.5. Figures are cumulative.

3.5.2 Therefore the 2011 Study identified a requirement of between 19,900 sq.m and 25,300 sq.m net comparison goods floorspace over the duration of the study period to 2026, including a short-term requirement of between 2,900 sq.m and 5,000 sq.m net by 2016.

3.5.3 For **convenience goods**, we also tested a 'static' and 'increasing' expenditure retention scenario. The static retention scenario assumes that current patterns of shopping will remain unchanged, with foodstores in Mansfield District continuing to account for 51% of total available spending for the remainder of the study period. The increasing retention scenario allows for a limited uplift in this figure, on account of the fact that, at the time of the study, there were a number of extant commitments for new conveneince goods floorspace which, if all developed, have potential to improve the District-wide retention rate. On this basis a scenario which increased the retention rate to 54% was also tested.

3.5.4 A summary of the requirements identified is shown in **Table 3.3**. It identifies no capacity for additional convenience goods floorspace over the period to 2021, over and above 'committed' floorspace. Under the increasing retention scenario, a small requirement for additional floorspace (c. 1,000 sq.m net) is identified at the end of the study period, at 2026. The convenience goods forecast makes allowance for the trading performance of existing foodstores in the District, many of which the study identified as 'over-trading' against company averages.

Table 3.3 – Summary of convenience goods capacity in Mansfield District to 2026 (Mansfield Retail & Leisure Study, 2011)

	2016 (sq.m net)	2021 (sq.m net)	2026 (sq.m net)
Static retention (rounded)	-2,000	-1,200	-300
Increasing retention (rounded)	-1,500	-300	1,000

Source: Mansfield Retail & Leisure Study 2011, Table 6.5. Figures are cumulative.

3.5.5 The floorspace requirements summarised above are based on the assumption that a new foodstore will come forward as part of the redevelopment of Stockwell Gate South in Mansfield town centre. They show that if a foodstore is developed here, there is only a very limited requirement for provision elsewhere in the District over the remainder of the Plan period. If however the site is given over entirely to comparison goods floorspace, the need for additional comparison goods floorspace reduces to between 18,600 sq.m and 24,000 sq.m net over by 2026, whilst the need for additional convenience goods floorspace increases to between 800 and 2,000 sq.m net by 2026. In light of the continued uncertainty as to how the Stockwell Gate South site will be developed, we again run this alternative scenario in the updated capacity forecasts we present here.

3.6 Food & beverage spending patterns and need

3.6.1 The 2011 Study also undertook a comprehensive assessment of spending patterns on different types of commercial leisure activities. Most of the expenditure growth in this sector is concentrated in the food & beverage sector, which includes cafes, pubs, bars and restaurants. The household survey identified that destinations in Mansfield District account for 40% of total available expenditure, and the Study considered that whilst this was a 'reasonable performance', scope existed for improvement given the relative lack of competing destinations.

3.6.2 The household survey identified that Mansfield town centre scores poorly in terms of its attractiveness as a destination for visits to restaurants; the town centre does not attract a market share higher than 30% from any single zone. Indeed, destinations outside the town centre were often more popular than those within. Nottingham town centre also attracts strong market shares from many survey zones. Mansfield town centre is significantly more popular as a destination for pub and bar-orientated leisure activity, and our assessment identified the offer of the town centre is overly-skewed towards this type of activity.

3.6.3 Our assessment identified capacity for an additional 3,500 sq.m gross A3, A4 and A5 uses for the District over the period to 2026, and we advised that *'It would be expected that these requirements would be satisfied through the development of a mixed-use, retail-led scheme which incorporates an element of leisure provision'.*

4 Changes to data inputs

4.1 Introduction

4.1.1 In this section we set out the changes to the data inputs which inform our retail capacity update. The changes relate to the following inputs:

- Population forecasts (Section 4.2)
- Per capita expenditure data (Section 4.3);
- Special Forms of Trading (such as online shopping) (Section 4.4);
- Turnover efficiency gain in existing retailers (Section 4.5); and
- Retail planning commitments (Section 4.6)

4.2 Population forecasts

4.2.1 Our update makes use of 2012-based population projections, bespoke for each of the nine survey zones which make up the MSA, provided by Experian. A summary of the population growth expected to come forward in each of the survey zones by 2031, at the study base year of 2014, and the interval years of 2017, 2021 and 2026, is shown at **Table CM1** of **Appendix B**. For ease of reference, we summarise the population growth which we expect to come forward in **Table 4.1**. This shows that the population of the MSA is expected to increase by 31,912 persons over the period between 2014 and 2031 (the 2011 Study forecast population growth of 31,042 persons between 2011 and 2026, so the level of population growth is broadly unchanged, albeit over a slightly longer timeframe in this instance).

Table 4.1 – Population forecasts for MSA to 2031

	2014	2017	2021	2026	2031
Population of MSA (2012-based)	312,570	318,154	326,172	335,781	344,482

Source: Table CM1, Appendix B

4.3 Expenditure growth rates

4.3.1 Updated, 2012-based per capita spending on comparison (non-food) and convenience (food) goods is provided by Experian for each of the MSA zones. In order to calculate how much per capita spending is likely to increase over the course of the study period, we apply expenditure growth rates sourced from Experian's Retail Planner Briefing Note 12 (October 2014) to the base year figures.

4.3.2 In the 2011 Study, which was prepared during the economic downturn with some uncertainty amongst data providers over the speed at which economic recovery would take place, in identifying expenditure growth rates we adopted a series of mid-point growth rates between the two principal data providers, Experian and Pitney Bowes for the period to 2021, before reverting to Experian forecasts for the remainder of the study period to 2026. In this update, we rely solely on Experian forecasts, to be consistent with the other key data inputs into the study, and also consistent with our approach adopted elsewhere.

4.3.3 In the 2011 Study, we adopted comparison goods expenditure growth rates of 3.59% per annum between 2011 and 2016; 3.62% per annum between 2016 and 2021; and 3% per annum between

2021 and 2026. Experian's Retail Planner Briefing Note 12 (October 2014) offers a slightly more conservative approach, identifying a comparison goods expenditure growth rate of 3.1% per annum between 2016 and 2021, which increases slightly to 3.3% per annum from 2021 to 2031.

4.3.4 For convenience goods, the 2011 Study adopted growth rates of 0.46% per annum between 2011 and 2016, 0.46% per annum between 2016 and 2021, and 0.6% per annum between 2021 and 2026. Experian's forecasts of expenditure growth in the convenience goods sector are broadly unchanged from those used in the 2011 Study, with a growth rate of 0.6% per annum applied for the period 2017-31.

4.3.5 Full details of the growth rates applied to the base year per capita expenditure figures are set out in Table CM2 (for comparison goods) and Table CV2 (for convenience goods) of Appendix B.

4.4 Special Forms of Trading

4.4.1 'Special Forms of Trading' (SFT) is expenditure which is diverted from traditional retail outlets towards channels such as online shopping. SFT therefore acts as a 'claim' on expenditure which is available to support physical retail outlets, and so is removed from the total expenditure 'pot' in order to ensure that the residual expenditure (i.e. that which is left over having removed the SFT) is available to entirely support physical retail developments.

4.4.2 Experian Retail Planner Briefing Note 12 provides the most recent published guidance on SFT forecasts. As in the 2011 Study, we adopt Experian's 'adjusted' SFT rates for the purposes of our assessment, which make allowance for 'store-picked' online transactions (whereby the customer orders a product online, but it is processed by the nearest local branch of the retailer). **Table 4.2** shows the SFT forecasts set out in Experian Retail Planner 12, alongside those used in the 2011 Study. It can be seen that there has been an increase in the 'claim' of SFT on comparison goods spending relative to that identified previously, but the convenience goods 'claim' has actually reduced slightly relative to that used in the 2011 Study.

Table 4.2 — Special Forms of Trading

	Comparison goods			Convenience goods		
	SFT discount (this study)	SFT discount (2011 Study)	Difference	SFT discount (this study)	SFT discount (2011 Study)	Difference
2014	11.7%	-	-	2.6%	-	-
2016	-	12.7%	-	-	5.9%	-
2017	14.0%	-	-	3.3%	-	-
2021	15.9%	12.4%	+3.5%	4.4%	6.3%	-1.9%
2026	15.9%	12.1%	+3.8%	5.0%	6.8%	-1.8%
2031	15.5%	12.0%	+3.5%	5.6%	7.0%	-1.4%

Source: Experian Retail Planner Briefing Note 12, Appendix 3 / Mansfield Retail & Leisure Study 2011

4.5 Sales density growth in existing retailers

4.5.1 It is also necessary to make allowance for sales density growth (also known as floorspace productivity growth) in existing comparison and convenience goods retailers. This is based on the assumption that existing stores within the MSA will trade at increasingly efficient levels of

turnover per sq.m over the course of the study period. Allowances for sales density growth are linked to expenditure growth and therefore there are a number of slight changes to sales density figures relative to those used in the 2011 Study; **Table 4.3** summarises the sales density growth rates we have used for the purposes of our assessment.

4.5.2 Owing to the low forecasts of expenditure growth in the convenience goods sector, we do not forecast any sales density growth in this sector until 2016 onwards.

Table 4.3 — Sales density growth rates

	Comparison goods		Convenience goods	
	Sales density growth allowance (this study) (% per annum)	Sales density growth allowance (2011 Study) (% per annum)	Sales density growth allowance (this study) (% per annum)	Sales density growth allowance (2011 Study) (% per annum)
To 2016	1.7%	1.74%	0%	0.14%
2016 onwards	1.7%	1.75%	0.3%	0.29% (to 2021) / 0.25% (2021-31)

Source: PBA estimates

4.6 Commitments to new retail floorspace

4.6.1 The household survey data which our updated capacity assessment is based on dates from April 2011, as it was undertaken in support of the 2011 Study. In order to provide an accurate indication of the amount of surplus comparison and convenience goods expenditure which is available to support new floorspace, it is necessary to deduct the turnovers of retail developments which have been granted permission subsequent to this point, because no new household survey of shopping patterns has been undertaken. Such commitments can include developments which have commenced trading subsequent to completion of the household survey, or sites that benefit from an extant planning permission that has not been implemented.

4.6.2 The 2011 Study made allowance for a number of committed comparison and convenience goods developments, which we have reviewed, in order to establish whether they need to be carried forward again, or removed from the capacity forecasts (for example, if the planning permission has lapsed). In conjunction with the Council, we have also considered applications for new retail and leisure floorspace which have been granted permission subsequent to the completion of the 2011 Study, and introduced these as additional 'commitments' where appropriate.

Comparison goods commitments

4.6.3 Table CM6 of Appendix B shows the comparison goods commitments which we have included for the purposes of this Update. The first part of the table shows the commitments which have been 'carried over', and the second part introduces new commitments. In the case of comparison goods floorspace, we are not aware of any new comparison goods floorspace over 500 sq.m net which need to be included as part of our updated assessment.

4.6.4 Table CM6 of Appendix B shows that there is a total of £16.11m of comparison goods commitments which have been 'carried over' from the 2011 Study. We forecast the turnover of these will increase to £16.71m by 2017. The majority of the 'commitments' are in fact now completed and trading, with the following developments all completed subsequent to completion of the 2011 Study:

- Extension to Tesco Extra, Oak Tree (estimated comparison goods turnover at 2014 of £4.47m);
- Replacement Sainsbury's store, Nottingham Road, Mansfield (£2.31m);
- Former Queens Head public house, Mansfield (£1.64m); and
- Aldi, Nottingham Road, Mansfield (£0.74m);

4.6.5 The only extant planning permission for new comparison goods floorspace which is yet to be implemented is for the redevelopment of the Stockwell Gate South site in Mansfield town centre, for which we have assumed a comparison goods turnover of £7.07m will be generated by 2017[6]. However, as this permission expires at the end of November 2015 and there is currently no reserved matters application with the Council, we consider it unlikely this permission will be implemented in the short term. On this basis, we present our comparison goods capacity forecasts with and without the Stockwell Gate South commitment in Section 5.

Convenience goods commitments

4.6.6 In Table CV6 of Appendix B, we repeat the above exercise for convenience goods floorspace. Table CV6 shows that existing convenience goods commitments which have been 'carried over' account for a turnover of £34.15m at 2014, again with the majority of these subsequently completed and now trading, as follows:

- Redevelopment of The Flamingo PH, Oak Tree Lane, Mansfield (estimated convenience goods turnover at 2014 of £7.35m)
- Extension to Tesco Extra, Oak Tree (£5.30m);
- Aldi, Nottingham Road, Mansfield (£4.00m)
- Replacement Sainsbury's store, Nottingham Road, Mansfield (£3.60m – turnover from increase in sales area relative to the Sainsbury's store which was trading at the time of the 2011 household survey);

4.6.7 Again, we have also made allowance for convenience goods floorspace to come forward as part of the redevelopment of Stockwell Gate South, with this floorspace achieving a turnover of £13.94m at 2017. In total, we expect existing commitments to achieve a turnover of £34.15m in 2014, increasing to £34.25m in 2017.

4.6.8 Subsequent to the completion of the 2011 Study, the council granted permission for a new supermarket at Burns Lane, Market Warsop, to be operated by Tesco. For the purposes of our assessment we have assumed this development will commence trading in 2017. Whilst this permission has yet to be implemented (although it is due to expire in December 2014[7]), it remains extant and on this basis we make allowance for the forecast turnover of this store — £9.67m at 2017 — in our updated convenience goods capacity forecasts[8].

4.6.9 Adding the existing and new commitments together generates a total 'claim' on expenditure of £43.92m at 2017.

[6] Based on the assumption that 50% of the permitted floorspace will be for comparison goods sales, and 50% for convenience goods sales (reflecting the assumptions made in respect of this commitment in the 2011 Study).

[7] As this commitment is due to expire in December 2014, in Section 5 we also provide convenience goods capacity forecasts which exclude this commitment.

[8] The approved supermarket at Burns Lane only includes a very small amount of comparison goods floorspace and we do not include this in our comparison goods capacity forecasts.

5 Updated retail capacity forecasts

5.1 Introduction

5.1.1 In the previous section we have set out the key changes to the data inputs which inform our updates to the comparison and convenience goods capacity forecasts for Mansfield District. Based on these inputs, in this section we set out the revised comparison and convenience goods capacity forecasts for the District.

5.1.2 The findings of this section should be read in conjunction with the following appendices:

- **Appendix B**, which sets out our updated quantitative need tabulations;
- **Appendix D**, which sets out a summary of the methodology for calculating retail need; and
- **Appendix E**, which sets out a summary of the key data inputs into our quantitative assessment (many of which we have discussed in the previous section).

5.2 Structure of quantitative assessment

5.2.1 The data tables set out at Appendix B follow a standard format, organised as shown in **Table 5.1.**

Table 5.1 — Structure of quantitative assessment, Appendix B

Table	Description
Table CM1	Summarises the updated population projections in the nine MSA zones, at the study base year of 2014, and the interval years of 2017, 2021, 2026 and 2031.
Table CM2	Shows the per capita expenditure on comparison goods for the nine survey zones, at the base and interval years.
Table CM3	Sets out updated estimates of total comparison goods spending for the MSA, by multiplying the population figures in Table CM1 with the per capita expenditure figures in Table CM2. A discount is applied at each interval period for 'Special Forms of Trading' such as online shopping, as discussed in the previous section.
Table CM4	Shows the current market shares (in percentage terms) for comparison goods shopping destinations in the MSA. These are unchanged from those in the 2011 Study, as no new household survey has been undertaken in support of this update.
Table CM5	Applies the percentage market shares from Table CM4 to the total available comparison goods expenditure shown in Table CM3, to show the spending patterns[9] to each comparison goods shopping destination in monetary terms.
Table CM6	Sets out a summary of the comparison goods retail planning commitments which act as a 'claim' on the total available comparison goods expenditure, as summarised in Section 4.6. All of the comparison goods commitments have been 'carried over' from the 2011 Study, but turnover figures have been updated to reflect the revised base year of 2014.
Table CM7	Sets out the revised comparison goods retail capacity forecasts for the MSA.

[9] We assume equilibrium in shopping patterns between the period of the household survey (in support of the 2011 Study) and this Update.

Table	Description
	Reflecting the approach set out in the 2011 Study, we set out a 'constant market share' capacity forecast (Table CM7a) (which assumes current patterns of shopping will remain unchanged over the study period) and an 'increasing market share' forecast (Table CM7b), which assumes that if a suitable comparison goods-led scheme comes forward in Mansfield town centre, there will be an increase in the amount of expenditure retained in the MSA, and thus a greater amount of surplus expenditure available to support new comparison goods retail floorspace.

Source: Appendix B

5.3 Comparison goods floorspace requirements

5.3.1 The revised capacity forecasts are therefore summarised in **Table CM7a and Table CM7b** of **Appendix B.** Each of these tables is structured as follows:

- **Row A** summarises the population of the MSA at 2014 (the study base year), 2017, 2021, 2026 and 2031 (derived from Table CM1);
- **Row B** summarises the total comparison goods expenditure available to the MSA at the same interval years (derived from Table CM3);
- **Row C** summarises the total comparison goods expenditure available to the relevant Sub-Area (also derived from Table CM3);
- **Row D** shows the amount of comparison goods expenditure retained by the centres and stores in Mansfield District, as a proportion of the total expenditure available to the MSA, and based on the patterns of spending identified in the household survey in support of the 2011 Study; **Row E** shows the expenditure leakage (Row B minus Row D);
- **Rows F and G** show the amount of 'inflow' of comparison goods expenditure we have allowed for in the capacity assessment. Reflecting the approach adopted in the 2011 Study, we have not made any allowance for inflow into the MSA. There have been no significant comparison goods retail developments which have taken place in the MSA subsequent to the completion of the 2011 Study which would warrant revisiting this approach.
- **Row H** shows the total comparison goods turnover of the centres in the respective Sub-Areas. These figures are held static throughout the study period; the growth in available comparison goods expenditure is shown in **Row I**;
- **Rows J, K and L** summarise the 'claims' on expenditure growth which must be deducted from the total available expenditure shown in Row I. Row J makes allowance for growth in sales efficiency of existing retailers (see **Section 4.5**); Row K summarises the turnover of the comparison goods retail commitments (see **Section 4.6**); and Row L sums Rows J and K together to show the total 'claims' on expenditure.
- **Rows M, N and O** draw together the preceding information to present a summary of comparison goods expenditure capacity for each Sub-Area. Row M summarises the total available expenditure to in Mansfield District (reflecting the figures in Row I); Row N summarises the 'claims' on comparison goods expenditure (reflecting the figures in Row L), and Row O shows the residual amount of comparison goods expenditure which is available to support new floorspace.

- Finally, **Rows P, Q and R** convert the surplus expenditure in monetary terms (in Row O) to floorspace, by applying the sales densities (turnover per square metre) shown in Row P to the expenditure from Row O. Row P shows that we have adopted a sales density of £5,000 per sq.m at the study base year (2014), and we have increased this over the study period in line with the sales density growth rate of 1.7% per annum, as previously discussed. Row Q shows the resultant floorspace requirements in net sales area, and Row R shows the requirements in gross area (using a 70% gross: net ratio).

5.3.2 For ease of reference, we summarise the comparison goods floorspace requirements from Tables CM7a and CM7b of Appendix B in **Table 5.2** (figures are rounded from those in Appendix B):

Table 5.2 — Summary of comparison goods floorspace requirements for Mansfield District

	2014 (sq.m net)	2017 (sq.m net)	2021 (sq.m net)	*2026* (sq.m net)	*2031* (sq.m net)
Static Retention	-1,800	1,700	5,900	*14,600*	*25,200*
Increasing Retention	-1,800	5,000	11,300	*25,800*	*42,100*

Source: Table CM7a, Table CM7b, Appendix B. Negative figures denote over-supply. Figures in italics are indicative. Figures are cumulative.

5.3.3 Therefore, based on the assumptions set out in Section 4 of this report, the floorspace requirements we identify are as follows:

- A requirement of up to 5,000 sq.m net additional comparison goods floorspace by 2017;
- An indicative requirement of between 14,600 sq.m net and 25,800 sq.m net additional comparison goods floorspace by 2026; and
- An indicative requirement of between 25,200 sq.m net and 42,100 sq.m net by 2031 (all figures are cumulative).

5.3.4 The upper-end figures at each interval period are based on the delivery of a new comparison goods-led scheme in a centrally-located position in Mansfield town centre, and the assumption that this will attract sufficient quality tenants to reduce expenditure leakage from outside the MSA. Whilst we are of the view that there are suitable sites within Mansfield town centre which can accommodate such a development, if the aspiration of the Council is for these sites to be developed for alternative uses, then it should take forward the 'static' retention figures in its Local Plan.

5.3.5 Figures beyond 2026 should be considered indicative.

Alternative scenarios

5.3.6 There are two alternative scenarios which we have tested for the purposes of this update:

5.3.7 **Alternative Scenario 1** assumes that the Stockwell Gate South permission is not implemented. Under this scenario, the following capacity requirements arise (Table 5.3). Again, the increasing retention scenario assumes that a major new comparison goods-led development will come forward in Mansfield town centre early in the Plan period. Under this scenario, the overall indicative requirement for the study period increases to between 26,600 sq.m net and 43,900 sq.m net.

Table 5.3 —Summary of comparison goods floorspace requirements for Mansfield District (without Stockwell Gate South commitment)

	2014 (sq.m net)	2017 (sq.m net)	2021 (sq.m net)	*2026* (sq.m net)	*2031* (sq.m net)
Static Retention	-1,800	3,000	7,300	*15,900*	*26,600*
Increasing Retention	-1,800	6,400	12,800	*27,400*	*43,900*

Source: Table CM8a, Table CM8b, Appendix B. Negative figures denote over-supply. Figures in italics are indicative. Figures are cumulative.

5.3.8 **Alternative Scenario 2** assumes that all of the permitted floorspace at Stockwell Gate South comes forward for comparison goods floorspace. Under this scenario, the commitment thus acts as a greater 'claim' on expenditure, and therefore the capacity figures reduce, as shown in Table 5.4.

Table 5.4 —Summary of comparison goods floorspace requirements for Mansfield District (Stockwell Gate comparison goods only)

	2014 (sq.m net)	2017 (sq.m net)	2021 (sq.m net)	*2026* (sq.m net)	*2031* (sq.m net)
Static Retention	-1,800	100	4,300	*13,000*	*23,600*
Increasing Retention	-1,800	3,400	9,500	*23,900*	*40,000*

5.4 Comparison goods floorspace requirements — summary

5.4.1 Taking the above scenarios into account, and given the uncertainty regarding the future of the Stockwell Gate commitment, we recommend that the Council plans for a range of comparison goods floorspace over its study period, with a 'minimum' and 'maximum' figure derived the various scenarios tested above, as follows:

- By 2017: up to 6,400 sq.m net additional comparison goods floorspace;
- By 2021: between 4,300 sq.m net and 12,800 sq.m net additional comparison goods floorspace; and
- By 2031: between 23,600 sq.m net and 43,900 sq.m net additional comparison goods floorspace – however we would advise that these figures are considered indicative only and should be subject to further testing throughout the Plan period.

5.4.2 We repeat our advice that the 'maximum' figures set out above will be dependent on a quality new comparison goods-led retail development coming forward in Mansfield town centre, within the short-to-medium term. If this is unlikely to be forthcoming, and the Stockwell Gate permission lapses, then the Council should revert to the 'static retention' floorspace requirements, as follows:

- By 2017: up to 3,000 sq.m net additional comparison goods floorspace;
- By 2021: between 5,900 sq.m net and 7,300 sq.m net additional comparison goods floorspace; and
- By 2031: between 25,200 sq.m net and 26,600 sq.m net additional comparison goods floorspace – again, these figures should be subject to regular review throughout the Plan period.

5.5 Convenience goods floorspace requirements

5.5.1 In this section we set out our updated assessment of convenience goods capacity for Mansfield District. which should be read alongside **Tables CV1 to CV7a and CV7b** of **Appendix B.** The structure of these tables are the same as the comparison goods assessment above, and therefore we do not repeat our approach here. As with the comparison goods assessment, the forecasts solely relate to capacity for Mansfield District, rather than the whole of the MSA.

5.5.2 The household survey undertaken in support of the 2011 Study identified that many foodstores in Mansfield District were 'over-trading' when compared to operator benchmark turnovers (i.e. if they were trading in line with company averages). As no new household telephone survey has been undertaken in support of this Update, we continue to assume that over-trading is taking place. However, we have applied updated operator sales densities (sourced from Verdict) to the assessment, which has resulted in the extent of over-trading increasing relative to the position identified in the 2011 Study; this is because the sales density (i.e. the turnover per square metre) of the foodstore operators is now lower than at the time of the 2011 Study.

5.5.3 As set out in the previous section, subsequent to the completion of the 2011 Study there have been a number of foodstore developments which have taken place in the District, including an extension to Tesco Extra at Oak Tree, Mansfield, and a replacement, enlarged Sainsbury's store at Nottingham Road, Mansfield. The 2011 Study identified that both of these stores were over-trading, however given they now operate over a larger sales area we would expect that this over-trading is likely to have been, in part, mitigated. We have therefore reduced the over-trading performance identified by the household survey results for these two stores by 50%. Taking this into account, Row O of Table CV7a shows that existing foodstores in the District are over-trading by £39.24m, and therefore this amount is factored into our capacity calculations.

5.5.4 It should also be noted that convenience goods floorspace trades at a higher sales density (turnover per sq.m) than comparison goods floorspace, and this is reflected in the sales density figures shown at Row Q of Table CV7a/7b, which is £12,500 per sq.m at the base year of 2014. The sales density figure is increased in line with the sales efficiency growth rates shown in **Table 4.3**.

5.5.5 As with the comparison goods capacity forecasts, the 2011 Study assumed a 'constant market share' approach, i.e. that the shopping patterns identified in the 2011 household survey will remain unchanged over the remainder of the study period. However, because of the planned improvements to the Tesco Extra and Sainsbury's stores (which have now been completed), the 2011 Study also made allowance for a modest improvement in the District-wide convenience goods expenditure retention rate, from 51% to 54%. Given these stores will have considerably improved their respective retail offers vis-à-vis other supermarkets within and surrounding the District, it is appropriate to assume that they may have improved the retention rate. Should the permitted supermarket in Market Warsop come forward, this will further reinforce an improved retention rate. Taking these into account, and in the absence of any updated household survey, we therefore continue to model an improved retention scenario for the purposes of this Update[10].

5.5.6 **Table 5.5** summarises the requirement for additional convenience goods floorspace in the MSA (figures are rounded from those shown in Table CV7 of Appendix B):

[10] In the 2011 Study, the 'increasing retention' scenario assumed a staggered uplift in the retention rate throughout the study period. Given the Tesco and Sainsbury's developments have now been completed, along with a new Aldi store at Nottingham Road in Mansfield, we consider it appropriate to bring forward the uplift to 2017 and hold the uplift constant for the remainder of the study period.

Table 5.5 — Summary of convenience goods floorspace requirements for Mansfield District

	2014 (sq.m net)	2017 (sq.m net)	2021 (sq.m net)	*2026* (sq.m net)	*2031* (sq.m net)
Static Retention	1,500	-100	500	*1,400*	*2,300*
Increasing Retention	1,500	1,300	2,000	*2,900*	*3,900*

Source: Table CV7a, Table CV7b, Appendix B. Figures *in italics* are indicative. *Note: requirements decrease from 2014 to 2017 as a number of commitments for new retail floorspace are not expected to commence trading until 2017.

5.5.7 The requirement for convenience goods floorspace decreases between 2014 and 2017 because at 2017 we have modelled for two additional commitments – a foodstore at Stockwell Gate South, and the approved foodstore at Market Warsop. Pending these developments coming forward, we do not foresee a need to plan for any new supermarket provision prior to 2021, by which time a relatively modest requirement of between 500 sq.m and 2,000 sq.m net convenience goods floorspace arises. Larger requirements then follow in the latter part of the study period, and these should be subject to regular review.

5.5.8 As with the comparison goods forecasts, we have also modelled alternative scenarios which identify the capacity forecasts which arise if the Stockwell Gate South permission either lapses, or is developed entirely as comparison goods floorspace (**Table CV8a and CV8b, Appendix B**). A summary of the capacity arising under these scenarios is shown in **Table 5.6**. Tables CV8a and CV8b also remove the commitment for the supermarket at Burns Lane, Market Warsop, as this permission is set to expire in December 2014.

Table 5.6 — Summary of comparison goods floorspace requirements for Mansfield District (without Stockwell Gate South and Burns Lane, Market Warsop commitments)

	2014 (sq.m net)	2017 (sq.m net)	2021 (sq.m net)	*2026* (sq.m net)	*2031* (sq.m net)
Static Retention	1,500	1,800	2,400	*3,200*	*4,200*
Increasing Retention	1,500	3,200	3,800	*4,800*	*5,800*

Source: Table CV8a, Table CV8b, Appendix B. Figures *in italics* are indicative.

5.5.9 Table 5.6 shows that, if no foodstore is forthcoming on the Stockwell Gate South site, and the foodstore permission in Market Warsop lapses, the Council will need to plan for additional provision earlier in its Plan period, with a requirement of up to 3,200 sq.m net arising by 2017. Under this scenario, by the end of the study period, the requirement for additional convenience goods floorspace increases to between 4,200 sq.m net and 5,800 sq.m net.

5.6 A3, A4 and A5 requirements

5.6.1 **Tables L1 to L5 of Appendix C** set out our updated assessment of the capacity for additional commercial food and beverage (use classes A3, A4 and A5) uses in Mansfield District over the study period. These figures supersede those set out in Table 8.7 of the 2011 Study.

5.6.2 The leisure capacity tables at Appendix C are structured as follows:

- Table L1 shows the population projections for the nine zones which make up the MSA (these reflect the figures used in the retail capacity assessment set out above);

- Table L2 shows updated per capita expenditure on the different types of leisure goods (accommodation services e.g. hotels; cultural services, e.g. art galleries, museums and live music; games of chance e.g. bingo; hairdressing salons & personal grooming; recreational & sporting services; and restaurants/cafes);
- Table L3 multiplies Table L1 and Table L2 together, to show the total spending for each of the leisure categories which arises over the study period. Table L3 shows that:
  - Spending on accommodation services will increase by £11.18m between 2014 and 2031;
  - Spending on cultural services will increase by £33.75m;
  - Spending on games of chance will increase by £16.12m;
  - Spending on hairdressing & personal grooming will increase by £8.47m;
  - Spending on recreational & sporting services will increase by £10.34m; and
  - Spending on restaurants & cafes will increase by £97.54m

- Reflecting the position in the 2011 Study, spending on restaurants & cafes therefore continues to be the primary driver of expenditure growth in the commercial leisure sector.
- Table L4 shows the market shares attracted by the principal centres in the District for spending on these types of services, which is based on the findings of the household telephone survey in support of the 2011 Study. Based on the results of the household survey, 40% of total available expenditure on A3/A4/A5 uses available to the MSA is spent at destinations in Mansfield District[11].
- Table L5 then converts the expenditure growth and market shares to a floorspace requirement for A3/A4/A5 commercial leisure floorspace. Table L5 is structured in the same format as the comparison goods needs assessment Table CM7, the approach of which we have set out in Section 5.4 above.

5.6.3 Subsequent to completion of the 2011 Study, an application for the development of three use class A3 retail units at Mansfield Leisure Park was granted planning permission on appeal. This therefore now forms a 'commitment' to new floorspace which needs to be deduced from the total growth in food & drink expenditure which is expected to come forward over the study period. In addition, we have been advised by the Council of two further permissions for new food & drink floorspace. In total, we estimate that these permissions will amount to a 'claim' on expenditure of £8.91m at 2014 (the commitments are listed in the footnote to **Table L5, Appendix C**).

5.6.4 Having regard to the expenditure claims, Table L5 identifies the following requirement for additional A3/A4/A5 floorspace over the course of the study period. At 2026, the requirement amounts to 1,700 sq.m – approximately half of the requirement of 3,500 sq.m at 2026 which was identified in the 2011 Study.

Table 5.7 — Summary of A3, A4 & A5 floorspace requirements for Mansfield District

	2014 (sq.m gross)	2017 (sq.m gross)	2021 (sq.m gross)	*2026* (sq.m gross)	*2031* (sq.m gross)
Static Retention	-1,400	-400	400	*1,700*	*3,100*

Source: Table L5, Appendix C. Figures *in italics* are indicative.

[11] The retention rate of 40% is based on the weighted results from questions 32 and 33 of the household telephone survey undertaken in support of the 2011 Study. Question 32 considered patterns of visits to restaurant facilities, and question 33 considered patterns of visits to cafes, pubs and bars. The proportion of respondents who answered 'don't know / don't do this type of activity' is removed, and a series of revised market shares is produced which excludes these – see Table L4, Appendix C. A 50:50 weighting is then applied to these market shares to calculate the aggregate retention rate for the District.

5.6.5 Table 5.7 shows that there is no requirement for additional A3/A4/A5 floorspace in the District in the short or medium terms, with capacity only arising at the end of the study period. However, as we identified in the 2011 Study, there is a qualitative need to improve the offer of Mansfield town centre in respect of some of this type of floorspace. Whilst there is a strong provision of pubs and bars, there is a deficiency of mid-market restaurants, which limits the attractiveness of the town centre outside of retail trading hours. Applications which seek to provide improved provision in this respect, and assist in diversifying the range of food & drink options available in the town centre, should be considered favourably — although it is acknowledged that the granting of permission for the units at Mansfield Leisure Park might, in the short term, have accounted for much of the potential operator demand.

6 Conclusions and recommendations

6.1.1 This report sets out updated assessments of quantitative retail and leisure (use classes A3, A4 and A5) capacity for Mansfield District, and serves as a refresh of the quantitative capacity forecasts set out in the Mansfield District Retail & Commercial Leisure Study, 2011. Specifically, it updates estimates of population growth, per capita expenditure growth, 'special forms of trading' such as online shopping, and commitments for new retail development. Because no new household telephone survey of shopping patterns has been undertaken in support of this Update, we continue to use the findings of the survey undertaken in support of the 2011 Study as the basis of our assessment. This means that any retail developments which have opened subsequent to completion of the 2011 Study are included as 'commitments' for the purposes of this Update.

6.1.2 We have also extended the period of assessment from 2026 in the 2011 Study, to 2031 in this Update.

Study context

6.1.3 This Update is being prepared in the midst of a renewed focus on the future of town centres and the high street, in the context of the recent economic downturn; the continued attraction of out-of-town facilities; the increasing popularity of online shopping; and town centres increasingly evolving from solely being retail-destinations to also including commercial leisure, residential and other uses.

6.1.4 Looking forward, in our view, the most successful town centres will be the ones that adapt to the changes in shopping habits, and which move away from solely being shopping destinations to those which offer a broad range of retail, leisure, cultural and civic services. There will also be an important role for niche retail destinations, which are able to compete with advances in online / mobile technology because they offer an experience based on excellent customer service and a unique retail offer. We therefore expect that place marketing and 'selling' the offer of a town centre will become of increasing importance.

Comparison goods capacity forecasts

6.1.5 Our updated capacity assessment identifies a requirement of between 5,900 sq.m net and 11,300 sq.m net additional comparison goods floorspace by 2021, increasing to between 25,200 sq.m net and 42,100 sq.m net by 2031. The upper requirements are based on the delivery of a comparison goods-led new retail development in Mansfield town centre in the short-to-medium term, which will in turn increase the amount of comparison goods expenditure which is retained in the District. If the Council consider that such a scenario is unlikely to come forward, then it should only use the lower figures to inform the preparation of its Plan.

6.1.6 The requirements identified above assume that all existing planning commitments will come forward, including the Stockwell Gate South permission which is due to expire in November 2015. Should Stockwell Gate South expire, this will 'free up' capacity for additional comparison goods floorspace, with the requirement increasing to between 7,300 sq.m net and 12,800 sq.m by 2021, and 26,600 sq.m net to 43,900 sq.m by 2031. It is recommended that figures beyond 2021 are only treated as indicative, and should be subject to further review later in the study period.

Convenience goods capacity forecasts

6.1.7 Assuming that all committed floorspace comes forward, we do not foresee a need to plan for any new supermarket provision prior to 2021, by which time a relatively modest requirement of between 500 sq.m and 2,000 sq.m net convenience goods floorspace arises. Larger requirements then follow in the latter part of the study period, and again we advise that these are subject to regular review.

6.1.8 If no foodstore is forthcoming on the Stockwell Gate South site (or if the permission lapses), and if the permission for a new foodstore in Market Warsop also lapses, the Council will need to plan for additional provision earlier in its Plan period, with a requirement of up to 3,200 sq.m net arising by 2017. Under this scenario, by the end of the study period, the requirement for additional convenience goods floorspace increases to between 4,200 sq.m net and 5,800 sq.m net.

6.1.9 Although we have not undertaken a full reappraisal of the qualitative need for additional floorspace provision as part of this Update, we recommend that any additional provision should be concentrated in Mansfield town centre in the first instance, as there is currently no supermarket provision in the town centre following the closure of the Tesco at Stockwell Gate (with the exception of limited provision in the Marks & Spencer store). A supermarket in the town centre would further enhance the attractiveness of the town centre as a retail destination (i.e. it would give residents another reason to visit, with likely linked-trips benefits for other retailers), and the strong accessibility of the town centre by public transport means that provision would be readily accessible by residents in deprived areas to the east and west of the town centre. A full discussion of the qualitative needs for additional convenience floorspace is provided at Section 7 of the 2011 Study.

Leisure capacity forecasts

6.1.10 We have also undertaken an update to the quantitative requirements for additional food & beverage (use class A3, A4 and A5) provision in the District over the period to 2031. Our assessment has demonstrated that growth in spending on this type of commercial leisure activity will continue to outstrip other forms of leisure spending growth, and, allied with the qualitative recommendations identified in the 2011 Study, there is a clear opportunity for Mansfield town centre to capitalise on this growth in spending.

6.1.11 However, the recent appeal decision to permit the development of new A3 floorspace at Mansfield Leisure Park has, for the short term, accounted for available expenditure to support the development of new floorspace. A requirement of 3,100 sq.m gross A3, A4 & A5 floorspace arises at the end of the study period.

6.1.12 The 2011 Study identified that there is a qualitative need to improve the offer of Mansfield town centre in respect of some of this type of floorspace. Whilst there is a strong provision of pubs and bars, there is a deficiency of mid-market restaurants, which limits the attractiveness of the town centre outside of retail trading hours. We continue to hold the view that applications which seek to provide improved provision in this respect, and assist in diversifying the range of food & drink options available in the town centre, should be considered favourably. The granting of permission for the units at Mansfield Leisure Park might, in the short term, have accounted for much of the potential operator demand however.

6.1.13 Although we have not undertaken a full refresh of the need for other types of leisure activities, we continue to hold the opinion that there is a qualitative requirement for additional cinema

provision to serve the growing population of the District over the course of the study period, and, inter alia with our observations above, any additional provision should also be directed to Mansfield town centre. A combined cinema/restaurant development would represent a significant enhancement of the vitality and viability of the town centre, and improve its attractiveness outside of retail trading hours.

Distribution of floorspace

6.1.14 In the 2011 Study, we set out a variety of scenarios in respect of the distribution of comparison goods floorspace requirements which the Council should consider taking forward in its Plan process. Central to the recommendations were that Mansfield town centre would accommodate 80% of the identified comparison goods floorspace requirements, with the remaining amount distributed between the district centres.

6.1.15 Subsequent to this, the Council has undertaken a review of potential capacity of the district centres, and identified that there would be little scope for 20% of the district's comparison goods needs to be easily accommodated on potential development sites within or on the edge of existing district centres. Reflecting the emphasis placed by the NPPF that local planning authorities must be able to demonstrate that they can meet development requirements, we have therefore adjusted the distribution of the identified requirements, so that the vast majority (95%) of the identified need is accommodated in Mansfield town centre, with residual allocations of 2.5% to each of Mansfield Woodhouse and Market Warsop district centres.

6.1.16 Under the 'baseline' comparison goods requirements, this means that the Council should seek to provide the following floorspace in Mansfield town centre over the Plan period to 2031:

- Between 24,000 sq.m net and 40,000 sq.m net comparison goods floorspace;
- Up to 3,700 sq.m net convenience goods floorspace; and
- Up to 2,900 sq.m net A3, A4 and A5 commercial leisure floorspace.

6.1.17 The Council should seek to provide the following floorspace in each of Mansfield Woodhouse and Market Warsop district centres over the Plan period to 2031:

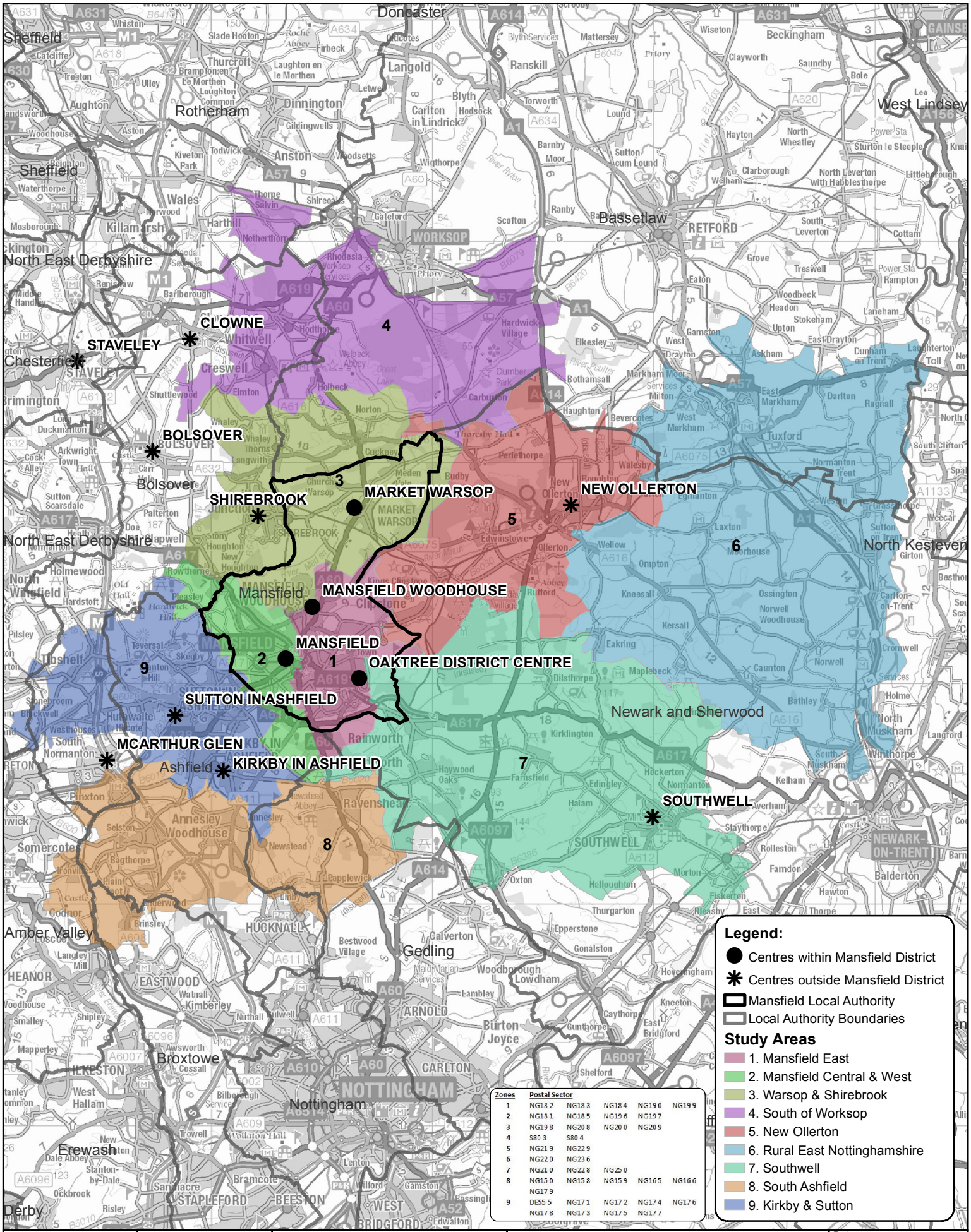
- Between 600 sq.m net and 1,100 sq.m net comparison goods floorspace;
- Up 100 sq.m net convenience goods floorspace;
- Up to 100 sq.m net A3, A4 and A5 commercial leisure floorspace.

6.1.18 The above distribution of floorspace indicates that there will be little scope for the district centres to expand their offer; rather, a scenario of piecemeal improvements to existing provision is likely. However, we recommend that any applications which fall above these amounts which are within or well-located to an existing district centre should be considered on their individual merits, providing they are of a scale appropriate to the role and function of the centre.

Monitoring

6.1.19 As advised previously, it is recommended that capacity forecasts are subject to regular updates throughout the study period, and particularly given the significant recent and planned developments, it will be necessary to refresh surveys of shopping patterns at regular intervals.

Appendix A Mansfield study area map



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Client
Mansfield District Council

0 2.5 5 Kilometers

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Mansfield Study Area (MSA) and Zones

Date	11/2014
Scale	1:216,060 @ A4
Drawn By	HF
Checked By	JN
Revision Number	03
Figure Number	

Appendix B Updated retail capacity tables

Table CM1 —
Population projections

	2014	2017	2021	2026	2031	Change, 2014-31
Zone 1	51,026	51,824	53,020	54,291	55,537	4,511
Zone 2	29,771	30,188	30,858	31,650	32,357	2,586
Zone 3	36,104	36,562	37,224	38,207	39,144	3,040
Zone 4	15,820	16,118	16,456	16,915	17,285	1,465
Zone 5	22,708	23,290	24,131	25,132	26,034	3,326
Zone 6	12,135	12,316	12,550	12,772	12,933	798
Zone 7	28,535	29,115	29,984	31,030	31,962	3,427
Zone 8	40,584	41,200	42,018	42,932	43,759	3,175
Zone 9	75,887	77,541	79,931	82,852	85,471	9,584
Total	**312,570**	**318,154**	**326,172**	**335,781**	**344,482**	**31,912**

Notes
Source: Experian MMG3 (2012), for base year and population projections.
Population forecasts 2014-31 are based on Office of National Statistics Sub-National Population Projections

Table CM2 —
Per capita expenditure on comparison goods

	2012	2014	2017	2021	2026	2031
Zone 1	2,608	2,799	3,182	3,595	4,229	4,974
Zone 2	2,301	2,470	2,807	3,172	3,731	4,388
Zone 3	2,119	2,274	2,584	2,920	3,435	4,040
Zone 4	2,549	2,736	3,110	3,514	4,133	4,861
Zone 5	2,395	2,571	2,922	3,301	3,883	4,568
Zone 6	3,246	3,484	3,960	4,474	5,262	6,190
Zone 7	2,842	3,050	3,467	3,917	4,607	5,419
Zone 8	2,834	3,041	3,456	3,905	4,594	5,403
Zone 9	2,336	2,507	2,850	3,220	3,787	4,455

Notes
The following expenditure growth rates are applied (source: Experian Retail Planner Briefing Note 12, October 2014, Figures 1a and 1b):

2012-13:	2.60%	
2013-14:	4.60%	
2014-15:	5.60%	
2015-16:	4.40%	
2016-17	3.10%	
2017-21:	3.10%	(per annum)
2021-31:	3.30%	(per annum)

Source: Experian MMG3 (2012 data in 2012 prices).
All monetary values held constant at 2012 prices.

Table CM3 —

Total comparison goods expenditure

a. Total expenditure (Table CM1 x Table CM2)

	2014	2017	2021	2026	2031	Change, 2014-31
	£m	£m	£m	£m	£m	£m
Zone 1	142.83	164.89	190.60	229.57	276.23	133.40
Zone 2	73.52	84.74	97.87	118.08	141.99	68.47
Zone 3	82.09	94.49	108.70	131.24	158.15	76.06
Zone 4	43.28	50.12	57.82	69.91	84.03	40.75
Zone 5	58.37	68.05	79.67	97.59	118.92	60.54
Zone 6	42.27	48.77	56.15	67.21	80.05	37.78
Zone 7	87.03	100.93	117.45	142.97	173.22	86.19
Zone 8	123.41	142.41	164.10	197.22	236.45	113.04
Zone 9	190.25	220.96	257.35	313.77	380.74	190.50
Total	**843.07**	**975.35**	**1,129.70**	**1,367.55**	**1,649.78**	**806.71**

b. Spending on Special Forms of Trading, e.g. internet shopping

	2014	2017	2021	2026	2031	Change, 2014-31
SFT rate	**11.70%**	**14.00%**	**15.90%**	**15.90%**	**15.50%**	
	£m	£m	£m	£m	£m	£m
Zone 1	16.71	23.08	30.31	36.50	42.82	26.10
Zone 2	8.60	11.86	15.56	18.77	22.01	13.41
Zone 3	9.60	13.23	17.28	20.87	24.51	14.91
Zone 4	5.06	7.02	9.19	11.12	13.02	7.96
Zone 5	6.83	9.53	12.67	15.52	18.43	11.60
Zone 6	4.95	6.83	8.93	10.69	12.41	7.46
Zone 7	10.18	14.13	18.67	22.73	26.85	16.67
Zone 8	14.44	19.94	26.09	31.36	36.65	22.21
Zone 9	22.26	30.93	40.92	49.89	59.02	36.76
Total	**98.64**	**136.55**	**179.62**	**217.44**	**255.72**	**157.08**

c. Residual comparison goods expenditure (Table a less Table b)

	2014	2017	2021	2026	2031	Change, 2014-31
	£m	£m	£m	£m	£m	£m
Zone 1	126.12	141.80	160.30	193.07	233.41	107.30
Zone 2	64.92	72.88	82.31	99.30	119.98	55.06
Zone 3	72.49	81.26	91.42	110.37	133.64	61.15
Zone 4	38.22	43.10	48.63	58.79	71.00	32.79
Zone 5	51.54	58.52	67.00	82.08	100.48	48.94
Zone 6	37.33	41.94	47.22	56.52	67.64	30.32
Zone 7	76.85	86.80	98.77	120.23	146.37	69.52
Zone 8	108.98	122.47	138.01	165.86	199.80	90.83
Zone 9	167.99	190.02	216.43	263.88	321.73	153.74
Total	**744.43**	**838.80**	**950.08**	**1,150.11**	**1,394.06**	**649.64**

Notes
Source: Table CM1, Table CM2

Special forms of trading ('SFT') discount source: Experian Retail Planner Briefing Note 12, October 2014, Appendix 3 ('adjusted' percentage figures to take into account store-picked goods)

The main component of SFT is online shopping

All monetary values are held constant at 2012 prices.

Table CM4 —
Comparison goods market shares, 2011

	Zone 1 %	Zone 2 %	Zone 3 %	Zone 4 %	Zone 5 %	Zone 6 %	Zone 7 %	Zone 8 %	Zone 9 %
Survey Zone 1									
Oak Tree	6.12%	1.59%	2.83%	0.00%	3.60%	0.75%	14.12%	0.10%	0.86%
— Tesco Extra	*3.81%*	*0.62%*	*1.48%*	*0.00%*	*1.73%*	*0.75%*	*8.19%*	*0.00%*	*0.60%*
— All other stores	*2.31%*	*0.97%*	*1.35%*	*0.00%*	*1.87%*	*0.00%*	*5.93%*	*0.10%*	*0.26%*
Asda, Old Mill Lane, Forest Town	3.33%	0.66%	3.56%	0.90%	4.67%	0.00%	3.01%	0.00%	0.71%
Retail warehouses, Zone 1	4.64%	3.32%	5.22%	0.00%	4.92%	0.66%	3.81%	1.29%	1.05%
Sub-total, Survey Zone 1	**14.09%**	**5.57%**	**11.60%**	**0.90%**	**13.19%**	**1.41%**	**20.94%**	**1.40%**	**2.61%**
Survey Zone 2									
Mansfield town centre	51.20%	49.96%	41.64%	4.10%	33.79%	3.40%	32.80%	10.56%	15.46%
Retail parks, Mansfield	8.47%	9.81%	3.72%	0.24%	10.25%	0.31%	9.06%	1.22%	7.14%
— Portland Retail Park, Midland Way, Mansfield	*3.53%*	*4.56%*	*2.41%*	*0.24%*	*6.65%*	*0.31%*	*5.84%*	*0.80%*	*3.26%*
— St Peter's Retail Park, Station Street, Mansfield	*4.94%*	*5.25%*	*1.30%*	*0.00%*	*3.61%*	*0.00%*	*3.22%*	*0.42%*	*3.88%*
Tesco Extra, Chesterfield Road Sth, Mansfield	0.74%	3.69%	1.12%	0.00%	0.63%	0.00%	1.17%	0.28%	0.09%
All other centres and stores, Survey Zone 2	1.09%	1.82%	1.25%	0.00%	0.31%	0.00%	1.17%	0.05%	0.33%
Sub-total, Survey Zone 2	**61.50%**	**65.28%**	**47.72%**	**4.34%**	**44.98%**	**3.71%**	**44.20%**	**12.11%**	**23.02%**
Survey Zone 3									
Mansfield Woodhouse district centre	0.61%	1.23%	11.41%	0.00%	2.62%	0.24%	0.88%	0.26%	0.00%
— District centre stores	*0.56%*	*1.07%*	*11.03%*	*0.00%*	*2.62%*	*0.24%*	*0.88%*	*0.26%*	*0.00%*
— Morrisons, Woodhouse Centre	*0.05%*	*0.16%*	*0.38%*	*0.00%*	*0.00%*	*0.00%*	*0.00%*	*0.00%*	*0.00%*
Shirebrook town centre	1.55%	0.72%	3.56%	1.99%	2.82%	0.00%	1.40%	0.19%	2.17%
Market Warsop district centre	0.00%	0.00%	0.79%	0.00%	0.42%	0.00%	0.00%	0.00%	0.00%
Sub-total, Survey Zone 3	**2.16%**	**1.95%**	**15.76%**	**1.99%**	**5.86%**	**0.24%**	**2.27%**	**0.45%**	**2.17%**
Survey Zone 4									
Sainsbury's, High Grounds Road, Worksop	0.00%	0.00%	0.00%	3.57%	0.00%	0.00%	0.00%	0.00%	0.00%
All other centres, Survey Zone 4	0.00%	0.00%	0.00%	0.63%	0.00%	0.00%	0.00%	0.00%	0.00%
Sub-total, Survey Zone 4	**0.00%**	**0.00%**	**0.00%**	**4.19%**	**0.00%**	**0.00%**	**0.00%**	**0.00%**	**0.00%**
Survey Zone 5									
New Ollerton	0.00%	0.00%	0.44%	0.00%	3.75%	4.93%	0.15%	0.00%	0.00%
— New Ollerton town centre	*0.00%*	*0.00%*	*0.00%*	*0.00%*	*2.37%*	*3.85%*	*0.15%*	*0.00%*	*0.00%*
— Tesco, Forest Road, New Ollerton	*0.00%*	*0.00%*	*0.44%*	*0.00%*	*1.38%*	*1.08%*	*0.00%*	*0.00%*	*0.00%*
All other centres, Survey Zone 5	0.30%	0.26%	0.00%	0.00%	3.78%	0.00%	0.32%	0.12%	0.00%
Sub-total, Survey Zone 5	**0.30%**	**0.26%**	**0.44%**	**0.00%**	**7.53%**	**4.93%**	**0.47%**	**0.12%**	**0.00%**
Survey Zone 6									
All centres, Survey Zone 6	0.00%	0.00%	0.00%	0.00%	0.11%	2.88%	0.00%	0.00%	0.00%
Sub-total, Survey Zone 6	**0.00%**	**0.00%**	**0.00%**	**0.00%**	**0.11%**	**2.88%**	**0.00%**	**0.00%**	**0.00%**
Survey Zone 7									
All centres, Survey Zone 7	0.16%	0.00%	0.13%	0.00%	0.13%	0.18%	3.89%	0.00%	0.00%
Sub-total, Survey Zone 7	**0.16%**	**0.00%**	**0.13%**	**0.00%**	**0.13%**	**0.18%**	**3.89%**	**0.00%**	**0.00%**
Survey Zone 8									
East Mids' Designer Outlet, South Normanton	0.70%	1.83%	0.77%	0.35%	1.94%	0.00%	2.33%	3.84%	6.51%
All other centres, Survey Zone 8	0.00%	0.41%	0.00%	0.00%	0.00%	0.00%	0.00%	0.61%	0.28%
Sub-total, Survey Zone 8	**0.70%**	**2.24%**	**0.77%**	**0.35%**	**1.94%**	**0.00%**	**2.33%**	**4.45%**	**6.78%**
Survey Zone 9									
Sutton-in-Ashfield	5.03%	7.61%	6.46%	0.00%	5.97%	0.84%	9.75%	6.07%	29.89%
— Sutton-in-Ashfield town centre	*2.55%*	*2.96%*	*2.93%*	*0.00%*	*2.11%*	*0.00%*	*4.03%*	*4.39%*	*17.36%*
— B&Q, Ashfield Gateway, Sutton-in-Ashfield	*2.16%*	*3.58%*	*3.27%*	*0.00%*	*3.20%*	*0.66%*	*4.55%*	*1.63%*	*4.41%*
— Asda, Priestic Road, Sutton-in-Ashfield	*0.27%*	*0.08%*	*0.00%*	*0.00%*	*0.28%*	*0.00%*	*0.11%*	*0.00%*	*5.77%*
— Other retail warehouses, Survey Zone 9	*0.04%*	*0.99%*	*0.26%*	*0.00%*	*0.39%*	*0.18%*	*1.05%*	*0.05%*	*2.35%*
All other centres, Survey Zone 9	0.11%	0.37%	0.51%	0.00%	0.22%	0.00%	0.29%	1.72%	1.61%
Sub-total, Survey Zone 9	**5.14%**	**7.98%**	**6.97%**	**0.00%**	**6.20%**	**0.84%**	**10.04%**	**7.79%**	**31.50%**
Total catchment area market share	**84.04%**	**83.27%**	**83.40%**	**11.77%**	**79.94%**	**14.19%**	**84.13%**	**26.31%**	**66.08%**

Destinations outside Mansfield Study Area

	Zone 1 %	Zone 2 %	Zone 3 %	Zone 4 %	Zone 5 %	Zone 6 %	Zone 7 %	Zone 8 %	Zone 9 %
Nottingham (including Bulwell, Arnold)	10.18%	8.82%	7.20%	1.45%	7.23%	8.76%	7.26%	33.52%	3.39%
— Nottingham city centre	*9.47%*	*8.31%*	*6.74%*	*1.45%*	*6.01%*	*8.76%*	*6.12%*	*27.62%*	*2.87%*
— Retail parks/retail warehouses, Nottingham	*0.36%*	*0.31%*	*0.46%*	*0.00%*	*1.07%*	*0.00%*	*1.02%*	*2.23%*	*0.52%*
— Foodstores, Nottingham	*0.19%*	*0.11%*	*0.00%*	*0.00%*	*0.15%*	*0.00%*	*0.00%*	*0.41%*	*0.00%*
— Bulwell and Arnold town centres	*0.16%*	*0.09%*	*0.00%*	*0.00%*	*0.00%*	*0.00%*	*0.12%*	*3.25%*	*0.00%*
Alfreton (including Somercotes)	0.26%	0.12%	0.00%	0.00%	0.54%	0.00%	0.19%	4.09%	11.26%
— Alfreton town centre (including Tesco)	*0.00%*	*0.00%*	*0.00%*	*0.00%*	*0.54%*	*0.00%*	*0.06%*	*3.94%*	*10.54%*
— B&Q, Nottingham Road, Somercotes	*0.26%*	*0.12%*	*0.00%*	*0.00%*	*0.00%*	*0.00%*	*0.13%*	*0.16%*	*0.72%*
Sheffield	1.24%	1.29%	4.31%	23.74%	1.56%	2.15%	1.66%	0.56%	2.32%
— Meadowhall	*0.73%*	*0.82%*	*3.72%*	*13.60%*	*1.06%*	*1.73%*	*0.70%*	*0.11%*	*1.99%*
— Sheffield city centre	*0.51%*	*0.47%*	*0.59%*	*9.56%*	*0.50%*	*0.42%*	*0.96%*	*0.45%*	*0.33%*
— Other destinations, Sheffield	*0.00%*	*0.00%*	*0.00%*	*0.59%*	*0.00%*	*0.00%*	*0.00%*	*0.00%*	*0.00%*
Giltbrook Retail Park, Giltbrook	1.88%	1.63%	0.34%	0.24%	1.65%	0.32%	1.59%	9.02%	2.85%
Chesterfield (all centres/stores)	0.50%	2.23%	1.26%	3.48%	0.14%	0.00%	1.45%	0.26%	6.60%
Hucknall	0.08%	0.26%	0.00%	0.00%	0.00%	0.00%	0.10%	20.05%	0.09%
— Hucknall town centre	*0.08%*	*0.26%*	*0.00%*	*0.00%*	*0.00%*	*0.00%*	*0.00%*	*16.46%*	*0.09%*
— Tesco Extra, Ashgate Road, Hucknall	*0.00%*	*0.00%*	*0.00%*	*0.00%*	*0.00%*	*0.00%*	*0.10%*	*3.05%*	*0.00%*
— Ashgate Retail Park, Hucknall	*0.00%*	*0.00%*	*0.00%*	*0.00%*	*0.00%*	*0.00%*	*0.00%*	*0.54%*	*0.00%*
Worksop (all centres/stores)	0.07%	0.10%	0.22%	49.64%	0.74%	4.00%	0.14%	0.00%	0.00%
Derby (all centres/stores)	0.11%	0.60%	0.41%	0.00%	0.00%	0.00%	0.52%	1.94%	4.12%
Retford (all centres/stores)	0.00%	0.00%	0.69%	0.96%	2.45%	29.11%	0.10%	0.00%	0.00%
Newark-on-Trent (all centres/stores)	0.09%	0.56%	0.11%	0.35%	2.24%	19.44%	1.05%	0.00%	0.13%
Lincoln (all centres/stores)	0.26%	0.21%	0.19%	0.00%	1.07%	13.67%	0.00%	0.00%	0.00%
Other centres outside catchment area	1.28%	0.90%	1.86%	8.38%	2.44%	8.35%	1.84%	4.25%	3.16%
Total outside catchment area	**15.96%**	**16.73%**	**16.60%**	**88.23%**	**20.06%**	**85.81%**	**15.87%**	**73.69%**	**33.92%**
Overall total	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**

Source: NEMS Market Research Household Survey (undertaken in support of Mansfield District Retail & Leisure Study 2011

Table CM5 —

Comparison goods spending patterns, 2014

2011-based spending patterns, rolled forward to 2014

	Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Zone 6 £m	Zone 7 £m	Zone 8 £m	Zone 9 £m	Total £m	Total %
Total comparison goods expenditure, 2014	126.12	64.92	72.49	38.22	51.54	37.33	76.85	108.98	167.99	744.43	-
Survey Zone 1											
Oak Tree	7.72	1.03	2.05	0.00	1.85	0.28	10.85	0.11	1.44	25.34	3.4%
— Tesco Extra	*4.81*	*0.40*	*1.07*	*0.00*	*0.89*	*0.28*	*6.29*	*0.00*	*1.01*	*14.76*	*2.0%*
— All other stores	*2.91*	*0.63*	*0.98*	*0.00*	*0.96*	*0.00*	*4.56*	*0.11*	*0.43*	*10.58*	*1.4%*
Asda, Old Mill Lane, Forest Town	4.20	0.43	2.58	0.34	2.41	0.00	2.31	0.00	1.19	13.46	1.8%
Retail warehouses, Zone 1	5.85	2.16	3.78	0.00	2.54	0.25	2.93	1.41	1.76	20.66	2.8%
Sub-total, Survey Zone 1	**17.77**	**3.62**	**8.41**	**0.34**	**6.80**	**0.53**	**16.09**	**1.52**	**4.39**	**59.46**	**8.0%**
Survey Zone 2											
Mansfield town centre	64.57	32.43	30.18	1.57	17.41	1.27	25.21	11.51	25.97	210.13	28.2%
Retail parks, Mansfield	10.68	6.37	2.69	0.09	5.29	0.12	6.96	1.33	12.00	45.52	6.1%
— Portland Retail Park, Midland Way, Mansfield	*4.45*	*2.96*	*1.75*	*0.09*	*3.43*	*0.12*	*4.49*	*0.87*	*5.48*	*23.63*	*3.2%*
— St Peter's Retail Park, Station Street, Mansfield	*6.23*	*3.41*	*0.94*	*0.00*	*1.86*	*0.00*	*2.47*	*0.46*	*6.52*	*21.90*	*2.9%*
Tesco Extra, Chesterfield Road Sth, Mansfield	0.94	2.40	0.81	0.00	0.32	0.00	0.90	0.30	0.16	5.82	0.8%
All other centres and stores, Survey Zone 2	1.37	1.18	0.91	0.00	0.16	0.00	0.90	0.06	0.55	5.12	0.7%
Sub-total, Survey Zone 2	**77.56**	**42.38**	**34.59**	**1.66**	**23.18**	**1.39**	**33.96**	**13.20**	**38.67**	**266.59**	**35.8%**
Survey Zone 3											
Mansfield Woodhouse district centre	0.77	0.80	8.27	0.00	1.35	0.09	0.67	0.28	0.00	12.23	1.6%
— District centre stores	*0.71*	*0.69*	*8.00*	*0.00*	*1.35*	*0.09*	*0.67*	*0.28*	*0.00*	*11.79*	*1.6%*
— Morrisons, Woodhouse Centre	*0.06*	*0.11*	*0.27*	*0.00*	*0.00*	*0.00*	*0.00*	*0.00*	*0.00*	*0.44*	*0.1%*
Shirebrook town centre	1.95	0.47	2.58	0.76	1.45	0.00	1.07	0.21	3.64	12.14	1.6%
Market Warsop district centre	0.00	0.00	0.57	0.00	0.21	0.00	0.00	0.00	0.00	0.79	0.1%
Sub-total, Survey Zone 3	**2.72**	**1.27**	**11.43**	**0.76**	**3.02**	**0.09**	**1.75**	**0.49**	**3.64**	**25.15**	**3.4%**
Survey Zone 4											
Sainsbury's, High Grounds Road, Worksop	0.00	0.00	0.00	1.36	0.00	0.00	0.00	0.00	0.00	1.36	0.2%
All other centres, Survey Zone 4	0.00	0.00	0.00	0.24	0.00	0.00	0.00	0.00	0.00	0.24	0.0%
Sub-total, Survey Zone 4	**0.00**	**0.00**	**0.00**	**1.60**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**1.60**	**0.2%**
Survey Zone 5											
New Ollerton	0.00	0.00	0.32	0.00	1.93	1.84	0.12	0.00	0.00	4.21	0.6%
— New Ollerton town centre	0.00	0.00	0.00	0.00	1.22	1.44	0.12	0.00	0.00	2.78	0.4%
— Tesco, Forest Road, New Ollerton	0.00	0.00	0.32	0.00	0.71	0.40	0.00	0.00	0.00	1.43	0.2%
All other centres, Survey Zone 5	0.38	0.17	0.00	0.00	1.95	0.00	0.25	0.13	0.00	2.87	0.4%
Sub-total, Survey Zone 5	**0.38**	**0.17**	**0.32**	**0.00**	**3.88**	**1.84**	**0.36**	**0.13**	**0.00**	**7.07**	**1.0%**
Survey Zone 6											
All centres, Survey Zone 6	0.00	0.00	0.00	0.00	0.06	1.07	0.00	0.00	0.00	1.13	0.2%
Sub-total, Survey Zone 6	**0.00**	**0.00**	**0.00**	**0.00**	**0.06**	**1.07**	**0.00**	**0.00**	**0.00**	**1.13**	**0.2%**
Survey Zone 7											
All centres, Survey Zone 7	0.20	0.00	0.09	0.00	0.07	0.07	2.99	0.00	0.00	3.42	0.5%
Sub-total, Survey Zone 7	**0.20**	**0.00**	**0.09**	**0.00**	**0.07**	**0.07**	**2.99**	**0.00**	**0.00**	**3.42**	**0.5%**
Survey Zone 8											
East Mids' Designer Outlet, South Normanton	0.89	1.19	0.56	0.13	1.00	0.00	1.79	4.18	10.93	20.67	2.8%
All other centres, Survey Zone 8	0.00	0.27	0.00	0.00	0.00	0.00	0.00	0.66	0.46	1.39	0.2%
Sub-total, Survey Zone 8	**0.89**	**1.45**	**0.56**	**0.13**	**1.00**	**0.00**	**1.79**	**4.85**	**11.39**	**22.06**	**3.0%**
Survey Zone 9											
Sutton-in-Ashfield	6.34	4.94	4.68	0.00	3.08	0.31	7.49	6.61	50.21	83.68	11.2%
— Sutton-in-Ashfield town centre	*3.22*	*1.92*	*2.12*	*0.00*	*1.09*	*0.00*	*3.10*	*4.78*	*29.16*	*45.39*	*6.1%*
— B&Q, Ashfield Gateway, Sutton-in-Ashfield	*2.73*	*2.32*	*2.37*	*0.00*	*1.65*	*0.25*	*3.50*	*1.78*	*7.41*	*22.00*	*3.0%*
— Asda, Priestic Road, Sutton-in-Ashfield	*0.34*	*0.05*	*0.00*	*0.00*	*0.14*	*0.00*	*0.09*	*0.00*	*9.69*	*10.32*	*1.4%*
— Other retail warehouses, Survey Zone 9	*0.05*	*0.65*	*0.19*	*0.00*	*0.20*	*0.07*	*0.80*	*0.06*	*3.96*	*5.97*	*0.8%*
All other centres, Survey Zone 9	0.14	0.24	0.37	0.00	0.11	0.00	0.22	1.88	2.70	5.66	0.8%
Sub-total, Survey Zone 9	6.48	5.18	5.05	0.00	3.19	0.31	7.71	8.49	52.92	89.34	12.0%
Total catchment area market share	**106.00**	**54.06**	**60.45**	**4.50**	**41.20**	**5.30**	**64.65**	**28.67**	**111.00**	**475.83**	**63.9%**

Destinations outside Mansfield Study Area

	Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Zone 6 £m	Zone 7 £m	Zone 8 £m	Zone 9 £m	Total £m	Total %
Nottingham (including Bulwell, Arnold)	12.84	5.73	5.22	0.55	3.73	3.27	5.58	36.53	5.69	79.14	10.6%
— Nottingham city centre	*11.95*	*5.40*	*4.89*	*0.55*	*3.10*	*3.27*	*4.70*	*30.10*	*4.81*	*68.77*	*9.2%*
— Retail parks/retail warehouses, Nottingham	*0.45*	*0.20*	*0.33*	*0.00*	*0.55*	*0.00*	*0.78*	*2.43*	*0.88*	*5.62*	*0.8%*
— Foodstores, Nottingham	*0.24*	*0.07*	*0.00*	*0.00*	*0.08*	*0.00*	*0.00*	*0.45*	*0.00*	*0.84*	*0.1%*
— Bulwell and Arnold town centres	*0.20*	*0.06*	*0.00*	*0.00*	*0.00*	*0.00*	*0.09*	*3.55*	*0.00*	*3.89*	*0.5%*
Alfreton (including Somercotes)	0.33	0.08	0.00	0.00	0.28	0.00	0.14	4.46	18.91	24.19	3.3%
— Alfreton town centre (including Tesco)	*0.00*	*0.00*	*0.00*	*0.00*	*0.28*	*0.00*	*0.05*	*4.29*	*17.70*	*22.32*	*3.0%*
— B&Q, Nottingham Road, Somercotes	*0.33*	*0.08*	*0.00*	*0.00*	*0.00*	*0.00*	*0.10*	*0.17*	*1.21*	*1.88*	*0.3%*
Sheffield	1.56	0.84	3.12	9.07	0.80	0.80	1.27	0.61	3.89	21.99	3.0%
— Meadowhall	*0.92*	*0.53*	*2.70*	*5.20*	*0.54*	*0.65*	*0.54*	*0.12*	*3.34*	*14.53*	*2.0%*
— Sheffield city centre	*0.64*	*0.31*	*0.43*	*3.65*	*0.26*	*0.16*	*0.74*	*0.49*	*0.55*	*7.23*	*1.0%*
— Other destinations, Sheffield	*0.00*	*0.00*	*0.00*	*0.22*	*0.00*	*0.00*	*0.00*	*0.00*	*0.00*	*0.22*	*0.0%*
Giltbrook Retail Park, Giltbrook	2.37	1.06	0.25	0.09	0.85	0.12	1.22	9.83	4.79	20.58	2.8%
Chesterfield (all centres/stores)	0.64	1.44	0.92	1.33	0.07	0.00	1.11	0.28	11.09	16.88	2.3%
Hucknall	0.11	0.17	0.00	0.00	0.00	0.00	0.07	21.85	0.16	22.36	3.0%
— Hucknall town centre	*0.11*	*0.17*	*0.00*	*0.00*	*0.00*	*0.00*	*0.00*	*17.94*	*0.16*	*18.37*	*2.5%*
— Tesco Extra, Ashgate Road, Hucknall	*0.00*	*0.00*	*0.00*	*0.00*	*0.00*	*0.00*	*0.07*	*3.32*	*0.00*	*3.40*	*0.5%*
— Ashgate Retail Park, Hucknall	*0.00*	*0.00*	*0.00*	*0.00*	*0.00*	*0.00*	*0.00*	*0.59*	*0.00*	*0.59*	*0.1%*
Worksop (all centres/stores)	0.09	0.06	0.16	18.97	0.38	1.49	0.10	0.00	0.00	21.27	2.9%
Derby (all centres/stores)	0.14	0.39	0.30	0.00	0.00	0.00	0.40	2.11	6.93	10.27	1.4%
Retford (all centres/stores)	0.00	0.00	0.50	0.37	1.26	10.87	0.07	0.00	0.00	13.07	1.8%
Newark-on-Trent (all centres/stores)	0.11	0.37	0.08	0.13	1.15	7.26	0.80	0.00	0.22	10.12	1.4%
Lincoln (all centres/stores)	0.33	0.13	0.14	0.00	0.55	5.10	0.00	0.00	0.00	6.26	0.8%
Other centres outside catchment area	1.61	0.59	1.35	3.20	1.26	3.12	1.41	4.63	5.31	22.48	3.0%
Total outside catchment area	**20.12**	**10.86**	**12.04**	**33.72**	**10.34**	**32.03**	**12.20**	**80.30**	**56.99**	**268.60**	**36.1%**
Overall total	**126.12**	**64.92**	**72.49**	**38.22**	**51.54**	**37.33**	**76.85**	**108.98**	**167.99**	**744.43**	**100.0%**

Source: Table CM3, Table CM4
All monetary values held constant at 2012 prices.

Table CM6 —

Comparison goods planning commitments

Commitments from previous retail study

	Floorspace sq.m net	Turnover from 2011 Study £m	Updated turnover (2014) £m	Updated turnover (2017) £m	Notes
Trading at study base year (2014):					
Former Queens Head PH, Mansfield Town Centre	311	1.56	1.64	1.73	Site has now been redeveloped.
Sainsbury's, Nottingham Road, Mansfield	915	2.20	2.31	2.43	Store is now trading. Turnover is net additional from that achieved by the now-closed existing store
Aldi, Nottingham Road, Mansfield	148	0.70	0.74	0.77	Store is now trading.
Extension to Tesco Extra, Oak Tree District Centre	1,407	4.25	4.47	4.70	Floorspace is now trading.
Sub-total	**2,781**	**8.71**	**9.16**	**9.64**	
Assumed opening year of 2017:					
Stockwell Gate South, Mansfield town centre	1,390	6.95	6.95	7.07	Permission lapses November 2014.
Sub-total	**1,390**	**6.95**	**6.95**	**7.07**	
Overall total	**4,171**	**15.66**	**16.11**	**16.71**	

New commitments

None

Source: Mansfield District Council

Table CM7a —
Comparison goods floorspace requirements to 2031
Baseline requirement

		2014	2017	2021	2026	2031
Total population and expenditure						
A	Total population (persons)	312,570	318,154	326,172	335,781	344,482
B	Total comparison goods expenditure (£m)	744.43	838.80	950.08	1,150.11	1,394.06
Retained expenditure						
C	Retained comparison goods expenditure in Mansfield District (%)	46%	46%	46%	46%	46%
D	Retained comparison goods expenditure in Mansfield District (£m)	339.07	382.052	432.73425	523.84475	634.95776
E	Comparison goods expenditure leakage (£m)	405.36	456.75	517.34	626.27	759.11
Inflow						
F	Inflow (%)	0%	0%	0%	0%	0%
G	Inflow (£m)	0.00	0.00	0.00	0.00	0.00
Total turnover						
H	Baseline comparison goods turnover of stores (£m)	339.07	339.07	339.07	339.07	339.07
Initial surplus						
I	Growth in retained comparison goods expenditure (£m)	0.00	42.99	93.67	184.78	295.89
Claims on expenditure						
J	Sales efficiency growth in existing retailers (£m)	0.00	17.59	42.47	76.02	112.52
K	Comparison goods commitments (£m)	9.16	16.71	17.87	19.44	21.15
L	Total claims on capacity	9.16	34.29	60.34	95.46	133.67
Expenditure summary						
M	Initial surplus of comparison goods expenditure (£m)	0.00	42.99	93.67	184.78	295.89
N	Total claims on capacity (£m)	9.16	34.29	60.34	95.46	133.67
O	Residual comparison goods expenditure (£m)	-9.16	8.69	33.33	89.32	162.22
Conversion to floorspace need						
P	Assumed turnover per sq.m (£ per sq.m)	5,000	5,259	5,626	6,121	6,438
Q	**Comparison goods floorspace need (sq.m net)**	**-1,832**	**1,653**	**5,924**	**14,592**	**25,195**
R	Comparison goods floorspace need (sq.m gross)	-2,618	2,361	8,463	20,846	35,993

Notes
Total comparison goods expenditure retained by centres/stores in Mansfield District (zones 1, 2 and some locations in zone 3)
No inflow is applied.
Sales efficiency growth of 1.5% per annum applied.
Turnover per sq.m at 2014 PBA estimate. Turnover per sq.m increased to 2031 in line with sales effiency growth rate.
Total requirement shown is cumulative.
Gross: net ratio of 70% applied.
All monetary values held constant at 2012 prices.

Table CM7b —
Comparison goods floorspace requirements to 2031

Increasing retention requirement

		2014	2017	2021	2026	2031
Total population and expenditure						
A	Total population (persons)	312,570	318,154	326,172	335,781	344,482
B	Total comparison goods expenditure (£m)	744.43	838.80	950.08	1,150.11	1,394.06
Retained expenditure						
C	Retained comparison goods expenditure in Mansfield District (%)	46%	47.5%	48.0%	49.0%	49.0%
D	Retained comparison goods expenditure in Mansfield District (£m)	339.07	398.43	456.04	563.56	683.09
E	Comparison goods expenditure leakage (£m)	405.36	440.37	494.04	586.56	710.97
Inflow						
F	Inflow (%)	0%	0%	0%	0%	0%
G	Inflow (£m)	0.00	0.00	0.00	0.00	0.00
Total turnover						
H	Baseline comparison goods turnover of stores (£m)	339.07	339.07	339.07	339.07	339.07
Initial surplus						
I	Growth in retained comparison goods expenditure (£m)	0.00	59.37	116.97	224.49	344.03
Claims on expenditure						
J	Sales efficiency growth in existing retailers (£m)	0.00	17.59	42.47	76.02	112.52
K	Comparison goods commitments (£m)	9.16	16.71	17.87	19.44	21.15
L	Total claims on capacity	9.16	34.29	60.34	95.46	133.67
Expenditure summary						
M	Initial surplus of comparison goods expenditure (£m)	0.00	59.37	116.97	224.49	344.03
N	Total claims on capacity (£m)	9.16	34.29	60.34	95.46	133.67
O	Residual comparison goods expenditure (£m)	-9.16	25.07	56.63	129.03	210.35
Conversion to floorspace need						
P	Assumed turnover per sq.m (£ per sq.m)	5,000	5,000	5,000	5,000	5,000
Q	**Comparison goods floorspace need (sq.m net)**	**-1,832**	**5,015**	**11,327**	**25,806**	**42,071**
R	Comparison goods floorspace need (sq.m gross)	-2,618	7,164	16,181	36,866	60,101

Notes
Total comparison goods expenditure retained by centres/stores in Mansfield District (zones 1, 2 and some locations in zone 3)
No inflow is applied.
Sales efficiency growth of 1.5% per annum applied.
Turnover per sq.m at 2014 PBA estimate. Turnover per sq.m increased to 2031 in line with sales effiency growth rate.
Total requirement shown is cumulative.
Gross: net ratio of 70% applied.
All monetary values held constant at 2012 prices.

Table CM8a —

Comparison goods floorspace requirements to 2031 (Alternative Scenario 1)

Baseline requirement

		2014	2017	2021	2026	2031
Total population and expenditure						
A	Total population (persons)	312,570	318,154	326,172	335,781	344,482
B	Total comparison goods expenditure (£m)	744.43	838.80	950.08	1,150.11	1,394.06
Retained expenditure						
C	Retained comparison goods expenditure in Mansfield District (%)	46%	46%	46%	46%	46%
D	Retained comparison goods expenditure in Mansfield District (£m)	339.07	382.052	432.73425	523.84475	634.95776
E	Comparison goods expenditure leakage (£m)	405.36	456.75	517.34	626.27	759.11
Inflow						
F	Inflow (%)	0%	0%	0%	0%	0%
G	Inflow (£m)	0.00	0.00	0.00	0.00	0.00
Total turnover						
H	Baseline comparison goods turnover of stores (£m)	339.07	339.07	339.07	339.07	339.07
Initial surplus						
I	Growth in retained comparison goods expenditure (£m)	0.00	42.99	93.67	184.78	295.89
Claims on expenditure						
J	Sales efficiency growth in existing retailers (£m)	0.00	17.59	42.47	76.02	112.52
K	Comparison goods commitments (£m)	9.16	9.64	10.31	11.22	12.20
L	Total claims on capacity	9.16	27.23	52.78	87.23	124.72
Expenditure summary						
M	Initial surplus of comparison goods expenditure (£m)	0.00	42.99	93.67	184.78	295.89
N	Total claims on capacity (£m)	9.16	27.23	52.78	87.23	124.72
O	Residual comparison goods expenditure (£m)	-9.16	15.76	40.89	97.54	171.17
Conversion to floorspace need						
P	Assumed turnover per sq.m (£ per sq.m)	5,000	5,259	5,626	6,121	6,438
Q	**Comparison goods floorspace need (sq.m net)**	**-1,832**	**2,997**	**7,268**	**15,936**	**26,585**
R	Comparison goods floorspace need (sq.m gross)	-2,618	4,281	10,383	22,766	37,979

Notes

Total comparison goods expenditure retained by centres/stores in Mansfield District (zones 1, 2 and some locations in zone 3)
No inflow is applied.
Sales efficiency growth of 1.5% per annum applied.
Turnover per sq.m at 2014 PBA estimate. Turnover per sq.m increased to 2031 in line with sales effiency growth rate.
Total requirement shown is cumulative.
Gross: net ratio of 70% applied.
All monetary values held constant at 2012 prices.

Table CM8b —

Comparison goods floorspace requirements to 2031 (Alternative Scenario 1)

Increasing retention requirement

		2014	2017	2021	2026	2031
Total population and expenditure						
A	Total population (persons)	312,570	318,154	326,172	335,781	344,482
B	Total comparison goods expenditure (£m)	744.43	838.80	950.08	1,150.11	1,394.06
Retained expenditure						
C	Retained comparison goods expenditure in Mansfield District (%)	46%	47.5%	48.0%	49.0%	49.0%
D	Retained comparison goods expenditure in Mansfield District (£m)	339.07	398.43	456.04	563.56	683.09
E	Comparison goods expenditure leakage (£m)	405.36	440.37	494.04	586.56	710.97
Inflow						
F	Inflow (%)	0%	0%	0%	0%	0%
G	Inflow (£m)	0.00	0.00	0.00	0.00	0.00
Total turnover						
H	Baseline comparison goods turnover of stores (£m)	339.07	339.07	339.07	339.07	339.07
Initial surplus						
I	Growth in retained comparison goods expenditure (£m)	0.00	59.37	116.97	224.49	344.03
Claims on expenditure						
J	Sales efficiency growth in existing retailers (£m)	0.00	17.59	42.47	76.02	112.52
K	Comparison goods commitments (£m)	9.16	9.64	10.31	11.22	12.20
L	Total claims on capacity	9.16	27.23	52.78	87.23	124.72
Expenditure summary						
M	Initial surplus of comparison goods expenditure (£m)	0.00	59.37	116.97	224.49	344.03
N	Total claims on capacity (£m)	9.16	27.23	52.78	87.23	124.72
O	Residual comparison goods expenditure (£m)	-9.16	32.14	64.20	137.26	219.30
Conversion to floorspace need						
P	Assumed turnover per sq.m (£ per sq.m)	5,000	5,000	5,000	5,000	5,000
Q	**Comparison goods floorspace need (sq.m net)**	**-1,832**	**6,428**	**12,839**	**27,451**	**43,861**
R	Comparison goods floorspace need (sq.m gross)	-2,618	9,183	18,342	39,216	62,658

Notes

Total comparison goods expenditure retained by centres/stores in Mansfield District (zones 1, 2 and some locations in zone 3)
No inflow is applied.
Sales efficiency growth of 1.5% per annum applied.
Turnover per sq.m at 2014 PBA estimate. Turnover per sq.m increased to 2031 in line with sales effiency growth rate.
Total requirement shown is cumulative.
Gross: net ratio of 70% applied.
All monetary values held constant at 2012 prices.

Table CM9a —

Comparison goods floorspace requirements to 2031 (Alternative Scenario 2)

Baseline requirement

		2014	2017	2021	2026	2031
Total population and expenditure						
A	Total population (persons)	312,570	318,154	326,172	335,781	344,482
B	Total comparison goods expenditure (£m)	744.43	838.80	950.08	1,150.11	1,394.06
Retained expenditure						
C	Retained comparison goods expenditure in Mansfield District (%)	46%	46%	46%	46%	46%
D	Retained comparison goods expenditure in Mansfield District (£m)	339.07	382.052	432.73425	523.84475	634.95776
E	Comparison goods expenditure leakage (£m)	405.36	456.75	517.34	626.27	759.11
Inflow						
F	Inflow (%)	0%	0%	0%	0%	0%
G	Inflow (£m)	0.00	0.00	0.00	0.00	0.00
Total turnover						
H	Baseline comparison goods turnover of stores (£m)	339.07	339.07	339.07	339.07	339.07
Initial surplus						
I	Growth in retained comparison goods expenditure (£m)	0.00	42.99	93.67	184.78	295.89
Claims on expenditure						
J	Sales efficiency growth in existing retailers (£m)	0.00	17.59	42.47	76.02	112.52
K	Comparison goods commitments (£m)	9.16	25.02	26.76	29.11	31.68
L	Total claims on capacity	9.16	42.60	69.23	105.13	144.20
Expenditure summary						
M	Initial surplus of comparison goods expenditure (£m)	0.00	42.99	93.67	184.78	295.89
N	Total claims on capacity (£m)	9.16	42.60	69.23	105.13	144.20
O	Residual comparison goods expenditure (£m)	-9.16	0.38	24.44	79.65	151.70
Conversion to floorspace need						
P	Assumed turnover per sq.m (£ per sq.m)	5,000	5,259	5,626	6,121	6,438
Q	**Comparison goods floorspace need (sq.m net)**	**-1,832**	**72**	**4,344**	**13,012**	**23,561**
R	Comparison goods floorspace need (sq.m gross)	-2,618	104	6,206	18,588	33,658

Notes

Total comparison goods expenditure retained by centres/stores in Mansfield District (zones 1, 2 and some locations in zone 3)
No inflow is applied.
Sales efficiency growth of 1.5% per annum applied.
Turnover per sq.m at 2014 PBA estimate. Turnover per sq.m increased to 2031 in line with sales effiency growth rate.
Total requirement shown is cumulative.
Gross: net ratio of 70% applied.
All monetary values held constant at 2012 prices.

Table CM9b —

Comparison goods floorspace requirements to 2031 (Alternative Scenario 2)

Increasing retention requirement

		2014	2017	2021	2026	2031
Total population and expenditure						
A	Total population (persons)	312,570	318,154	326,172	335,781	344,482
B	Total comparison goods expenditure (£m)	744.43	838.80	950.08	1,150.11	1,394.06
Retained expenditure						
C	Retained comparison goods expenditure in Mansfield District (%)	46%	47.5%	48.0%	49.0%	49.0%
D	Retained comparison goods expenditure in Mansfield District (£m)	339.07	398.43	456.04	563.56	683.09
E	Comparison goods expenditure leakage (£m)	405.36	440.37	494.04	586.56	710.97
Inflow						
F	Inflow (%)	0%	0%	0%	0%	0%
G	Inflow (£m)	0.00	0.00	0.00	0.00	0.00
Total turnover						
H	Baseline comparison goods turnover of stores (£m)	339.07	339.07	339.07	339.07	339.07
Initial surplus						
I	Growth in retained comparison goods expenditure (£m)	0.00	59.37	116.97	224.49	344.03
Claims on expenditure						
J	Sales efficiency growth in existing retailers (£m)	0.00	17.59	42.47	76.02	112.52
K	Comparison goods commitments (£m)	9.16	25.02	26.76	29.11	31.68
L	Total claims on capacity	9.16	42.60	69.23	105.13	144.20
Expenditure summary						
M	Initial surplus of comparison goods expenditure (£m)	0.00	59.37	116.97	224.49	344.03
N	Total claims on capacity (£m)	9.16	42.60	69.23	105.13	144.20
O	Residual comparison goods expenditure (£m)	-9.16	16.76	47.74	119.36	199.83
Conversion to floorspace need						
P	Assumed turnover per sq.m (£ per sq.m)	5,000	5,000	5,000	5,000	5,000
Q	**Comparison goods floorspace need (sq.m net)**	**-1,832**	**3,352**	**9,549**	**23,871**	**39,966**
R	Comparison goods floorspace need (sq.m gross)	-2,618	4,789	13,641	34,102	57,094

Notes

Total comparison goods expenditure retained by centres/stores in Mansfield District (zones 1, 2 and some locations in zone 3)
No inflow is applied.
Sales efficiency growth of 1.5% per annum applied.
Turnover per sq.m at 2014 PBA estimate. Turnover per sq.m increased to 2031 in line with sales effiency growth rate.
Total requirement shown is cumulative.
Gross: net ratio of 70% applied.
All monetary values held constant at 2012 prices.

Table CV1 —
Population projections

	2014	2017	2021	2026	2031	Change, 2014-31
Zone 1	51,026	51,824	53,020	54,291	55,537	4,511
Zone 2	29,771	30,188	30,858	31,650	32,357	2,586
Zone 3	36,104	36,562	37,224	38,207	39,144	3,040
Zone 4	15,820	16,118	16,456	16,915	17,285	1,465
Zone 5	22,708	23,290	24,131	25,132	26,034	3,326
Zone 6	12,135	12,316	12,550	12,772	12,933	798
Zone 7	28,535	29,115	29,984	31,030	31,962	3,427
Zone 8	40,584	41,200	42,018	42,932	43,759	3,175
Zone 9	75,887	77,541	79,931	82,852	85,471	9,584
Total	**312,570**	**318,154**	**326,172**	**335,781**	**344,482**	**31,912**

Notes
Source: Experian MMG3 (2012), for base year and population projections.
Population forecasts 2014-31 are based on Office of National Statistics Sub-National Population Projections

Table CV2 —
Per capita expenditure on convenience goods

	2012	2014	2017	2021	2026	2031
Zone 1	1,933	1,898	1,906	1,952	2,011	2,072
Zone 2	1,835	1,802	1,809	1,853	1,909	1,967
Zone 3	1,802	1,770	1,777	1,820	1,875	1,932
Zone 4	1,931	1,897	1,904	1,950	2,010	2,071
Zone 5	1,910	1,876	1,884	1,929	1,988	2,048
Zone 6	2,306	2,265	2,274	2,329	2,400	2,472
Zone 7	2,051	2,014	2,022	2,071	2,134	2,199
Zone 8	2,068	2,031	2,039	2,089	2,152	2,217
Zone 9	1,842	1,809	1,817	1,861	1,917	1,975

Notes
The following expenditure growth rates are applied (source: Experian Retail Planner Briefing Note 12, October 2014, Figures 1a and 1b):

2012-13:	-0.50%	
2013-14:	-1.30%	
2014-15:	-0.50%	
2015-16:	0.50%	
2016-17	0.40%	
2017-21:	0.60%	(per annum)
2021-31:	0.60%	(per annum)

Source: Experian MMG3 (2012 data in 2012 prices).
All monetary values held constant at 2012 prices.

Table CV3 —
Total convenience goods expenditure

a. Total expenditure (Table CV1 x Table CV2)

	2014	2017	2021	2026	2031	Change, 2014-31
	£m	£m	£m	£m	£m	£m
Zone 1	96.86	98.77	103.49	109.19	115.09	18.23
Zone 2	53.64	54.61	57.18	60.42	63.65	10.00
Zone 3	63.90	64.97	67.74	71.64	75.63	11.73
Zone 4	30.01	30.69	32.10	33.99	35.79	5.78
Zone 5	42.60	43.87	46.55	49.95	53.32	10.72
Zone 6	27.48	28.00	29.23	30.65	31.98	4.49
Zone 7	57.48	58.88	62.11	66.23	70.29	12.81
Zone 8	82.43	84.01	87.76	92.39	97.03	14.60
Zone 9	137.31	140.86	148.71	158.83	168.82	31.52
Total	**591.71**	**604.66**	**634.87**	**673.30**	**711.59**	**119.88**

b. Spending on Special Forms of Trading, e.g. internet shopping

	2014	2017	2021	2026	2031	Change, 2014-31
SFT rate	2.60%	3.30%	4.40%	5.00%	5.60%	
	£m	£m	£m	£m	£m	£m
Zone 1	2.52	3.26	4.55	5.46	6.44	3.93
Zone 2	1.39	1.80	2.52	3.02	3.56	2.17
Zone 3	1.66	2.14	2.98	3.58	4.24	2.57
Zone 4	0.78	1.01	1.41	1.70	2.00	1.22
Zone 5	1.11	1.45	2.05	2.50	2.99	1.88
Zone 6	0.71	0.92	1.29	1.53	1.79	1.08
Zone 7	1.49	1.94	2.73	3.31	3.94	2.44
Zone 8	2.14	2.77	3.86	4.62	5.43	3.29
Zone 9	3.57	4.65	6.54	7.94	9.45	5.88
Total	**15.38**	**19.95**	**27.93**	**33.67**	**39.85**	**24.46**

c. Residual convenience goods expenditure (Table a less Table b)

	2014	2017	2021	2026	2031	Change, 2014-31
	£m	£m	£m	£m	£m	£m
Zone 1	94.34	95.51	98.94	103.73	108.64	14.30
Zone 2	52.25	52.81	54.66	57.40	60.08	7.84
Zone 3	62.24	62.82	64.76	68.06	71.39	9.16
Zone 4	29.23	29.68	30.68	32.29	33.79	4.56
Zone 5	41.49	42.42	44.50	47.46	50.33	8.84
Zone 6	26.77	27.08	27.94	29.12	30.19	3.42
Zone 7	55.99	56.94	59.38	62.92	66.35	10.36
Zone 8	80.29	81.24	83.90	87.77	91.59	11.31
Zone 9	133.74	136.21	142.17	150.89	159.37	25.63
Total	**576.33**	**584.71**	**606.93**	**639.64**	**671.75**	**95.42**

Notes
Source: Table CM1, Table CM2

Special forms of trading ('SFT') discount source: Experian Retail Planner Briefing Note 12, October 2014, Appendix 3 ('adjusted' percentage figures to take into account store-picked goods)

The main component of SFT is online shopping

All monetary values are held constant at 2012 prices.

Table CV4 —

Convenience goods market shares, 2011

	Zone 1 %	Zone 2 %	Zone 3 %	Zone 4 %	Zone 5 %	Zone 6 %	Zone 7 %	Zone 8 %	Zone 9 %
Survey Zone 1									
Asda, Old Mill Lane, Forest Town, Mansfield	23.38%	5.74%	22.04%	3.22%	36.76%	0.00%	14.36%	0.00%	1.55%
Tesco Extra, Oak Tree, Mansfield	26.20%	2.07%	4.01%	0.00%	9.17%	3.69%	39.07%	0.00%	0.87%
Other foodstores/local shops, Survey Zone 1	8.50%	8.13%	1.85%	0.00%	2.75%	0.00%	4.26%	0.30%	0.20%
Sub-total for Survey Zone 1	**58.08%**	**15.94%**	**27.89%**	**3.22%**	**48.67%**	**3.69%**	**57.70%**	**0.30%**	**2.63%**
Survey Zone 2									
Tesco Extra, Chesterfield Road Sth, Mansfield	12.62%	25.19%	11.34%	0.00%	1.43%	0.00%	4.14%	0.71%	2.73%
Morrisons, Sutton Road, Mansfield	4.84%	17.96%	5.36%	0.00%	1.89%	1.20%	8.37%	3.17%	9.21%
Sainsbury's, Nottingham Road, Mansfield	9.43%	20.40%	2.37%	0.00%	1.89%	0.00%	3.38%	3.13%	1.94%
Iceland, The Rosemary Centre, Mansfield	0.94%	4.02%	0.00%	0.00%	1.42%	0.00%	0.90%	0.00%	0.00%
Other foodstores/local shops, Survey Zone 2	1.96%	6.17%	1.24%	0.00%	0.32%	0.00%	3.27%	0.00%	0.39%
Sub-total for Survey Zone 2	**29.79%**	**73.74%**	**20.31%**	**0.00%**	**6.94%**	**1.20%**	**20.06%**	**7.00%**	**14.27%**
Survey Zone 3									
Morrisons, Woodhouse Ctr, Mansfield W'house	2.01%	2.54%	39.04%	0.00%	3.15%	0.33%	1.53%	0.71%	0.77%
Other foodstores/local shops, Mansfield W'house	0.10%	0.23%	6.20%	0.00%	0.22%	0.00%	0.00%	0.00%	0.00%
Foodstores/local shops, Market Warsop	0.00%	0.00%	1.53%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Other foodstores/local shops, Survey Zone 3	0.18%	0.00%	1.51%	0.00%	0.22%	0.00%	0.26%	0.10%	0.00%
Sub-total for Survey Zone 3	**2.28%**	**2.77%**	**48.28%**	**0.00%**	**3.60%**	**0.33%**	**1.79%**	**0.81%**	**0.77%**
Survey Zone 4									
Sainsbury's, High Grounds Road, Worksop	0.00%	0.00%	0.00%	40.06%	0.16%	0.33%	0.00%	0.00%	0.00%
Other foodstores/local shops, Survey Zone 4	0.00%	0.00%	0.00%	2.48%	0.00%	0.00%	0.00%	0.00%	0.00%
Sub-total for Survey Zone 4	**0.00%**	**0.00%**	**0.00%**	**42.53%**	**0.16%**	**0.33%**	**0.00%**	**0.00%**	**0.00%**
Survey Zone 5									
Tesco, Forest Road, New Ollerton	0.00%	0.00%	0.41%	0.00%	15.81%	23.60%	0.00%	0.00%	0.00%
Netto, Forest Road, New Ollerton	0.00%	0.00%	0.00%	0.00%	1.58%	4.35%	0.00%	0.00%	0.00%
Co-Operative, Mansfield Road, Clipstone	0.08%	0.00%	0.00%	0.00%	3.71%	0.00%	0.00%	0.00%	0.00%
Co-Operative, High Street, Edwinstowe	0.00%	0.00%	0.11%	0.00%	3.37%	0.00%	0.00%	0.00%	0.00%
Other foodstores/local shops, Survey Zone 5	0.18%	0.00%	0.00%	0.00%	4.80%	0.67%	0.00%	0.00%	0.00%
Sub-total for Survey Zone 5	**0.26%**	**0.00%**	**0.52%**	**0.00%**	**29.27%**	**28.61%**	**0.00%**	**0.00%**	**0.00%**
Survey Zone 6									
Co-Operative, Newcastle Street, Tuxford	0.16%	0.00%	0.00%	0.00%	0.00%	7.25%	0.00%	0.00%	0.00%
Other foodstores/local shops, Tuxford	0.00%	0.00%	0.00%	0.00%	0.00%	3.99%	0.00%	0.00%	0.00%
Other foodstores/local shops, Survey Zone 6	0.00%	0.00%	0.00%	0.00%	0.22%	1.33%	0.00%	0.00%	0.00%
Sub-total for Survey Zone 6	**0.16%**	**0.00%**	**0.00%**	**0.00%**	**0.22%**	**12.57%**	**0.00%**	**0.00%**	**0.00%**
Survey Zone 7									
Co-Operative, Southwell Road East, Rainworth	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	7.08%	0.00%	0.00%
Other foodstores/local shops, Survey Zone 7	0.66%	0.70%	0.00%	0.00%	0.17%	1.00%	5.42%	0.00%	0.00%
Sub-total for Survey Zone 7	**0.66%**	**0.70%**	**0.00%**	**0.00%**	**0.17%**	**1.00%**	**12.50%**	**0.00%**	**0.00%**
Survey Zone 8									
All foodstores/local shops, Survey Zone 8	0.26%	0.19%	0.41%	0.00%	0.00%	0.00%	0.00%	5.68%	0.10%
Sub-total for Survey Zone 8	**0.26%**	**0.19%**	**0.41%**	**0.00%**	**0.00%**	**0.00%**	**0.00%**	**5.68%**	**0.10%**
Survey Zone 9									
Asda, Priestic Road, Sutton-in-Ashfield	1.84%	1.50%	0.41%	0.00%	1.26%	0.00%	1.49%	5.72%	35.96%
Aldi, Station Road, Sutton-in-Ashfield	3.02%	1.38%	0.41%	0.00%	0.63%	0.00%	1.64%	0.00%	2.73%
Other foodstores/local shops, Sutton-in-Afld	1.07%	0.11%	0.00%	0.00%	1.26%	0.00%	2.52%	1.00%	5.89%
Other foodstores/local shops, Tibshelf	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	3.33%
Other foodstores/local shops, Stanton Hill	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	2.12%
Other foodstores/local shops, Survey Zone 9	0.08%	0.00%	0.14%	0.00%	0.38%	0.00%	0.26%	1.46%	2.78%
Sub-total for Survey Zone 9	**6.01%**	**3.00%**	**0.97%**	**0.00%**	**3.53%**	**0.00%**	**5.92%**	**8.18%**	**52.80%**
Total catchment area market share	**97.49%**	**96.32%**	**98.38%**	**45.76%**	**92.56%**	**47.74%**	**97.97%**	**21.98%**	**70.58%**

Destinations outside Mansfield Study Area

	Zone 1 %	Zone 2 %	Zone 3 %	Zone 4 %	Zone 5 %	Zone 6 %	Zone 7 %	Zone 8 %	Zone 9 %
Tesco Extra, Ashgate Road, Hucknall	0.61%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	22.57%	0.00%
Tesco, Hall Street, Alfreton	0.00%	0.00%	0.00%	0.00%	2.22%	0.00%	0.00%	3.19%	10.02%
Tesco Express, Annesley Road, Hucknall	0.00%	0.57%	0.41%	0.00%	0.00%	0.00%	0.00%	13.38%	0.00%
Tesco Extra, Bridge Street North, Clay Cross	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	5.73%
Morrisons, Derby Road, Eastwood	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	3.89%	1.75%
Morrisons, Leen Drive, Bulwell	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	6.49%	0.00%
Morrisons, Idle Valley Road, Retford	0.00%	0.00%	0.00%	2.18%	1.43%	16.77%	0.00%	0.00%	0.00%
Asda, Wharf Road, East Retford	0.00%	0.00%	0.00%	0.00%	0.00%	19.87%	0.00%	0.00%	0.00%
Sainsbury's, Nottingham Road, Ripley	0.77%	0.23%	0.00%	0.00%	0.00%	0.00%	0.00%	1.07%	1.17%
Aldi, Ashgate Road, Hucknall	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	5.03%	0.00%
Tesco, Gateford Road, Worksop	0.00%	0.00%	0.00%	14.70%	0.00%	0.00%	0.00%	0.00%	0.00%
Asda, Wesley Street, Langley Mill	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	3.91%	0.00%
Other foodstores outside catchment area	1.12%	2.88%	1.20%	37.37%	3.80%	15.62%	2.03%	18.50%	10.75%
Total outside catchment area	**2.51%**	**3.68%**	**1.62%**	**54.24%**	**7.44%**	**52.26%**	**2.03%**	**78.02%**	**29.42%**
Overall total	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**

Source: NEMS Market Research Household Survey (undertaken in support of Mansfield District Retail & Leisure Study 2011)

Table CV5 —

Convenience goods spending patterns, 2014

2011-based spending patterns, rolled forward to 2014

	Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Zone 6 £m	Zone 7 £m	Zone 8 £m	Zone 9 £m	Total £m	Total %
Total convenience goods expenditure, 2014	94.34	52.25	62.24	29.23	41.49	26.77	55.99	80.29	133.74	576.33	-
Survey Zone 1											
Asda, Old Mill Lane, Forest Town, Mansfield	22.06	3.00	13.72	0.94	15.25	0.00	8.04	0.00	2.07	65.08	11.3%
Tesco Extra, Oak Tree, Mansfield	24.71	1.08	2.49	0.00	3.80	0.99	21.87	0.00	1.17	56.13	9.7%
Other foodstores/local shops, Survey Zone 1	8.01	4.25	1.15	0.00	1.14	0.00	2.39	0.24	0.27	17.45	3.0%
Sub-total for Survey Zone 1	**54.79**	**8.33**	**17.36**	**0.94**	**20.20**	**0.99**	**32.30**	**0.24**	**3.51**	**138.66**	**24.1%**
Survey Zone 2											
Tesco Extra, Chesterfield Road Sth, Mansfield	11.91	13.16	7.06	0.00	0.59	0.00	2.32	0.57	3.66	39.26	6.8%
Morrisons, Sutton Road, Mansfield	4.57	9.38	3.34	0.00	0.78	0.32	4.69	2.55	12.32	37.95	6.6%
Sainsbury's, Nottingham Road, Mansfield	8.90	10.66	1.47	0.00	0.78	0.00	1.89	2.51	2.59	28.81	5.0%
Iceland, The Rosemary Centre, Mansfield	0.88	2.10	0.00	0.00	0.59	0.00	0.50	0.00	0.00	4.08	0.7%
Other foodstores/local shops, Survey Zone 2	1.85	3.22	0.77	0.00	0.13	0.00	1.83	0.00	0.52	8.33	1.4%
Sub-total for Survey Zone 2	**28.11**	**38.53**	**12.64**	**0.00**	**2.88**	**0.32**	**11.23**	**5.62**	**19.09**	**118.43**	**20.5%**
Survey Zone 3											
Morrisons, Woodhouse Ctr, Mansfield W'house	1.90	1.33	24.30	0.00	1.31	0.09	0.86	0.57	1.04	31.38	5.4%
Other foodstores/local shops, Mansfield W'house	0.09	0.12	3.86	0.00	0.09	0.00	0.00	0.00	0.00	4.16	0.7%
Foodstores/local shops, Market Warsop	0.00	0.00	0.95	0.00	0.00	0.00	0.00	0.00	0.00	0.95	0.2%
Other foodstores/local shops, Survey Zone 3	0.17	0.00	0.94	0.00	0.09	0.00	0.15	0.08	0.00	1.43	0.2%
Sub-total for Survey Zone 3	**2.15**	**1.45**	**30.05**	**0.00**	**1.49**	**0.09**	**1.00**	**0.65**	**1.04**	**37.92**	**6.6%**
Survey Zone 4											
Sainsbury's, High Grounds Road, Worksop	0.00	0.00	0.00	11.71	0.07	0.09	0.00	0.00	0.00	11.86	2.1%
Other foodstores/local shops, Survey Zone 4	0.00	0.00	0.00	0.72	0.00	0.00	0.00	0.00	0.00	0.72	0.1%
Sub-total for Survey Zone 4	**0.00**	**0.00**	**0.00**	**12.43**	**0.07**	**0.09**	**0.00**	**0.00**	**0.00**	**12.59**	**2.2%**
Survey Zone 5											
Tesco, Forest Road, New Ollerton	0.00	0.00	0.26	0.00	6.56	6.32	0.00	0.00	0.00	13.14	2.3%
Netto, Forest Road, New Ollerton	0.00	0.00	0.00	0.00	0.66	1.16	0.00	0.00	0.00	1.82	0.3%
Co-Operative, Mansfield Road, Clipstone	0.07	0.00	0.00	0.00	1.54	0.00	0.00	0.00	0.00	1.61	0.3%
Co-Operative, High Street, Edwinstowe	0.00	0.00	0.07	0.00	1.40	0.00	0.00	0.00	0.00	1.46	0.3%
Other foodstores/local shops, Survey Zone 5	0.17	0.00	0.00	0.00	1.99	0.18	0.00	0.00	0.00	2.34	0.4%
Sub-total for Survey Zone 5	**0.24**	**0.00**	**0.32**	**0.00**	**12.14**	**7.66**	**0.00**	**0.00**	**0.00**	**20.37**	**3.5%**
Survey Zone 6											
Co-Operative, Newcastle Street, Tuxford	0.15	0.00	0.00	0.00	0.00	1.94	0.00	0.00	0.00	2.09	0.4%
Other foodstores/local shops, Tuxford	0.00	0.00	0.00	0.00	0.00	1.07	0.00	0.00	0.00	1.07	0.2%
Other foodstores/local shops, Survey Zone 6	0.00	0.00	0.00	0.00	0.09	0.36	0.00	0.00	0.00	0.45	0.1%
Sub-total for Survey Zone 6	**0.15**	**0.00**	**0.00**	**0.00**	**0.09**	**3.37**	**0.00**	**0.00**	**0.00**	**3.61**	**0.6%**
Survey Zone 7											
Co-Operative, Southwell Road East, Rainworth	0.00	0.00	0.00	0.00	0.00	0.00	3.96	0.00	0.00	3.96	0.7%
Other foodstores/local shops, Survey Zone 7	0.62	0.36	0.00	0.00	0.07	0.27	3.04	0.00	0.00	4.35	0.8%
Sub-total for Survey Zone 7	**0.62**	**0.36**	**0.00**	**0.00**	**0.07**	**0.27**	**7.00**	**0.00**	**0.00**	**8.32**	**1.4%**
Survey Zone 8											
All foodstores/local shops, Survey Zone 8	0.24	0.10	0.26	0.00	0.00	0.00	0.00	4.56	0.13	5.29	0.9%
Sub-total for Survey Zone 8	**0.24**	**0.10**	**0.26**	**0.00**	**0.00**	**0.00**	**0.00**	**4.56**	**0.13**	**5.29**	**0.9%**
Survey Zone 9											
Asda, Priestic Road, Sutton-in-Ashfield	1.74	0.79	0.26	0.00	0.52	0.00	0.83	4.59	48.09	56.81	9.9%
Aldi, Station Road, Sutton-in-Ashfield	2.85	0.72	0.26	0.00	0.26	0.00	0.92	0.00	3.65	8.66	1.5%
Other foodstores/local shops, Sutton-in-Afld	1.01	0.06	0.00	0.00	0.52	0.00	1.41	0.81	7.88	11.69	2.0%
Other foodstores/local shops, Tibshelf	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.45	4.45	0.8%
Other foodstores/local shops, Stanton Hill	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.83	2.83	0.5%
Other foodstores/local shops, Survey Zone 9	0.08	0.00	0.09	0.00	0.16	0.00	0.15	1.17	3.71	5.35	0.9%
Sub-total for Survey Zone 9	**5.67**	**1.56**	**0.60**	**0.00**	**1.47**	**0.00**	**3.31**	**6.57**	**70.62**	**89.80**	**15.6%**
Total catchment area market share	**91.97**	**50.33**	**61.23**	**13.37**	**38.41**	**12.78**	**54.85**	**17.65**	**94.39**	**434.98**	**75.5%**

Destinations outside Mansfield Study Area

	Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Zone 6 £m	Zone 7 £m	Zone 8 £m	Zone 9 £m	Total £m	Total %
Tesco Extra, Ashgate Road, Hucknall	0.58	0.00	0.00	0.00	0.00	0.00	0.00	18.12	0.00	18.70	3.2%
Tesco, Hall Street, Alfreton	0.00	0.00	0.00	0.00	0.92	0.00	0.00	2.56	13.40	16.88	2.9%
Tesco Express, Annesley Road, Hucknall	0.00	0.30	0.26	0.00	0.00	0.00	0.00	10.74	0.00	11.30	2.0%
Tesco Extra, Bridge Street North, Clay Cross	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7.66	7.66	1.3%
Morrisons, Derby Road, Eastwood	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.12	2.34	5.47	0.9%
Morrisons, Leen Drive, Bulwell	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.21	0.00	5.21	0.9%
Morrisons, Idle Valley Road, Retford	0.00	0.00	0.00	0.64	0.59	4.49	0.00	0.00	0.00	5.72	1.0%
Asda, Wharf Road, East Retford	0.00	0.00	0.00	0.00	0.00	5.32	0.00	0.00	0.00	5.32	0.9%
Sainsbury's, Nottingham Road, Ripley	0.73	0.12	0.00	0.00	0.00	0.00	0.00	0.86	1.56	3.27	0.6%
Aldi, Ashgate Road, Hucknall	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.04	0.00	4.04	0.7%
Tesco, Gateford Road, Worksop	0.00	0.00	0.00	4.30	0.00	0.00	0.00	0.00	0.00	4.30	0.7%
Asda, Wesley Street, Langley Mill	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.14	0.00	3.14	0.5%
Other foodstores outside catchment area	1.06	1.51	0.75	10.92	1.58	4.18	1.14	14.85	14.37	50.36	8.7%
Total outside catchment area	**2.37**	**1.92**	**1.01**	**15.85**	**3.09**	**13.99**	**1.14**	**62.64**	**39.34**	**141.35**	**24.5%**
Overall total	**94.34**	**52.25**	**62.24**	**29.23**	**41.49**	**26.77**	**55.99**	**80.29**	**133.74**	**576.33**	**100.0%**

Source: Table CV3, Table CV4
All monetary values held constant at 2012 prices.

Table CV6 —
Convenience goods planning commitments

Commitments from previous retail study

	Floorspace sq.m net	Turnover from 2011 Study £m	Updated turnover (2014) £m	Updated turnover (2017) £m	Notes
Trading at study base year (2014):					
Sainsbury's, Nottingham Road, Mansfield		3.60	3.60	3.61	Store is now trading. Turnover is net additional from that achieved by the now-closed existing store
Aldi, Nottingham Road, Mansfield		4.00	4.00	4.01	Store is now trading.
Extension to Tesco Extra, Oak Tree District Centre	1,556	5.30	5.30	5.32	Floorspace is now trading.
Redevelopment of The Flamingo PH, Oak Tree Lane	735	7.35	7.35	7.37	Floorspace is now trading.
Sub-total	**1,556**	**20.25**	**20.25**	**20.31**	
Assumed opening year of 2017:					
Stockwell Gate South, Mansfield town centre	1,390	13.90	13.90	13.94	Permission lapses November 2014.
Sub-total	**1,390**	**13.90**	**13.90**	**13.94**	

New commitments

Burns Lane, Market Warsop	891	-	-	9.67	
Sub-total	**891**			**9.67**	
Overall total	**3,837**	**34.15**	**34.15**	**43.92**	

Source: Mansfield District Council

Table CV7a —

Convenience goods floorspace requirements to 2031

Baseline requirement

		2014	2017	2021	2026	2031
Total population and expenditure						
A	Total population (persons)	312,570	318,154	326,172	335,781	344,482
B	Total convenience goods expenditure (£m)	576.33	584.71	606.93	639.64	671.75
Retained expenditure						
C	Retained convenience goods expenditure in Mansfield District (%)	51%	51%	51%	51%	51%
D	Retained convenience goods expenditure in Mansfield District (£m)	293.58	297.85	309.17	325.83	342.18
E	Convenience goods expenditure leakage (£m)	282.75	286.86	297.77	313.81	329.56
Inflow						
F	Inflow (%)	0%	0%	0%	0%	0%
G	Inflow (£m)	0.00	0.00	0.00	0.00	0.00
Total turnover						
H	Baseline convenience goods turnover of stores (£m)	293.58	293.58	293.58	293.58	293.58
Initial surplus						
I	Growth in retained convenience goods expenditure (£m)	0.00	4.27	15.59	32.25	48.60
Claims on expenditure						
J	Sales efficiency growth in existing retailers (£m)	0.00	0.88	4.43	8.93	11.66
K	Convenience goods commitments (£m)	20.25	43.92	44.45	45.12	45.80
L	Total claims on capacity	20.25	44.80	48.88	54.05	57.46
Expenditure summary						
M	Initial surplus of convenience goods expenditure (£m)	0.00	4.27	15.59	32.25	48.60
N	Total claims on capacity (£m)	20.25	44.80	48.88	54.05	57.46
O	Foodstore trading performance allowance (£m)	39.24	39.24	39.24	39.24	39.24
P	Residual convenience goods expenditure (£m)	18.99	-1.29	5.95	17.44	30.38
Conversion to floorspace need						
Q	Assumed turnover per sq.m (£ per sq.m)	12,500	12,538	12,689	12,880	13,074
R	**Convenience goods floorspace need (sq.m net)**	**1,519**	**-103**	**469**	**1,354**	**2,324**
S	Convenience goods floorspace need (sq.m gross)	2,337	-159	721	2,083	3,575

Notes

Total comparison goods expenditure retained by centres/stores in Mansfield District (zones 1, 2 and some locations in zone 3)
No inflow is applied.
Sales efficiency growth of 0.3% per annum applied, 2016 onwards
Turnover per sq.m at 2014 PBA estimate. Turnover per sq.m increased to 2031 in line with sales effiency growth rate.
Total requirement shown is cumulative.
Gross: net ratio of 70% applied.
All monetary values held constant at 2012 prices.

Table CV7b —

Convenience goods floorspace requirements to 2031

Increasing retention requirement

		2014	2017	2021	2026	2031
Total population and expenditure						
A	Total population (persons)	312,570	318,154	326,172	335,781	344,482
B	Total convenience goods expenditure (£m)	576.33	584.71	606.93	639.64	671.75
Retained expenditure						
C	Retained convenience goods expenditure in Mansfield District (%)	51%	54%	54%	54%	54%
D	Retained convenience goods expenditure in Mansfield District (£m)	293.58	315.74	327.74	345.40	362.74
E	Convenience goods expenditure leakage (£m)	282.75	268.97	279.19	294.23	309.00
Inflow						
F	Inflow (%)	0%	0%	0%	0%	0%
G	Inflow (£m)	0.00	0.00	0.00	0.00	0.00
Total turnover						
H	Baseline convenience goods turnover of stores (£m)	293.58	293.58	293.58	293.58	293.58
Initial surplus						
I	Growth in retained convenience goods expenditure (£m)	0.00	22.17	34.17	51.83	69.17
Claims on expenditure						
J	Sales efficiency growth in existing retailers (£m)	0.00	0.88	4.43	8.93	11.66
K	Convenience goods commitments (£m)	20.25	43.92	44.45	45.12	45.80
L	Total claims on capacity	20.25	44.80	48.88	54.05	57.46
Expenditure summary						
M	Initial surplus of convenience goods expenditure (£m)	0.00	22.17	34.17	51.83	69.17
N	Total claims on capacity (£m)	20.25	44.80	48.88	54.05	57.46
O	Foodstore trading performance allowance (£m)	39.24	39.24	39.24	39.24	39.24
P	Residual convenience goods expenditure (£m)	18.99	16.60	24.53	37.02	50.94
Conversion to floorspace need						
Q	Assumed turnover per sq.m (£ per sq.m)	12,500	12,538	12,689	12,880	13,074
R	**Convenience goods floorspace need (sq.m net)**	**1,519**	**1,324**	**1,933**	**2,874**	**3,896**
S	Convenience goods floorspace need (sq.m gross)	2,337	2,037	2,974	4,421	5,995

Notes

Total comparison goods expenditure retained by centres/stores in Mansfield District (zones 1, 2 and some locations in zone 3)
No inflow is applied.
Sales efficiency growth of 0.3% per annum applied, 2016 onwards
Turnover per sq.m at 2014 PBA estimate. Turnover per sq.m increased to 2031 in line with sales effiency growth rate.
Total requirement shown is cumulative.
Gross: net ratio of 70% applied.
All monetary values held constant at 2012 prices.

Table CV8a —

Convenience goods floorspace requirements to 2031 (Alternative Scenario 1)

Baseline requirement

		2014	2017	2021	2026	2031
Total population and expenditure						
A	Total population (persons)	312,570	318,154	326,172	335,781	344,482
B	Total convenience goods expenditure (£m)	576.33	584.71	606.93	639.64	671.75
Retained expenditure						
C	Retained convenience goods expenditure in Mansfield District (%)	51%	51%	51%	51%	51%
D	Retained convenience goods expenditure in Mansfield District (£m)	293.58	297.85	309.17	325.83	342.18
E	Convenience goods expenditure leakage (£m)	282.75	286.86	297.77	313.81	329.56
Inflow						
F	Inflow (%)	0%	0%	0%	0%	0%
G	Inflow (£m)	0.00	0.00	0.00	0.00	0.00
Total turnover						
H	Baseline convenience goods turnover of stores (£m)	293.58	293.58	293.58	293.58	293.58
Initial surplus						
I	Growth in retained convenience goods expenditure (£m)	0.00	4.27	15.59	32.25	48.60
Claims on expenditure						
J	Sales efficiency growth in existing retailers (£m)	0.00	0.88	4.43	8.93	11.66
K	Convenience goods commitments (£m)	20.25	20.31	20.56	20.87	21.18
L	Total claims on capacity	20.25	21.19	24.99	29.79	32.84
Expenditure summary						
M	Initial surplus of convenience goods expenditure (£m)	0.00	4.27	15.59	32.25	48.60
N	Total claims on capacity (£m)	20.25	21.19	24.99	29.79	32.84
O	Foodstore trading performance allowance (£m)	39.24	39.24	39.24	39.24	39.24
P	Residual convenience goods expenditure (£m)	18.99	22.32	29.84	41.69	55.00
Conversion to floorspace need						
Q	Assumed turnover per sq.m (£ per sq.m)	12,500	12,538	12,689	12,880	13,074
R	**Convenience goods floorspace need (sq.m net)**	**1,519**	**1,780**	**2,352**	**3,237**	**4,207**
S	Convenience goods floorspace need (sq.m gross)	2,337	2,738	3,618	4,980	6,472

Notes

Total comparison goods expenditure retained by centres/stores in Mansfield District (zones 1, 2 and some locations in zone 3)
No inflow is applied.
Sales efficiency growth of 0.3% per annum applied, 2016 onwards
Turnover per sq.m at 2014 PBA estimate. Turnover per sq.m increased to 2031 in line with sales effiency growth rate.
Total requirement shown is cumulative.
Gross: net ratio of 70% applied.
All monetary values held constant at 2012 prices.

Table CV8b —

Convenience goods floorspace requirements to 2031 (Alternative Scenario 1)

Increasing retention requirement

		2014	2017	2021	2026	2031
Total population and expenditure						
A	Total population (persons)	312,570	318,154	326,172	335,781	344,482
B	Total convenience goods expenditure (£m)	576.33	584.71	606.93	639.64	671.75
Retained expenditure						
C	Retained convenience goods expenditure in Mansfield District (%)	51%	54%	54%	54%	54%
D	Retained convenience goods expenditure in Mansfield District (£m)	293.58	315.74	327.74	345.40	362.74
E	Convenience goods expenditure leakage (£m)	282.75	268.97	279.19	294.23	309.00
Inflow						
F	Inflow (%)	0%	0%	0%	0%	0%
G	Inflow (£m)	0.00	0.00	0.00	0.00	0.00
Total turnover						
H	Baseline convenience goods turnover of stores (£m)	293.58	293.58	293.58	293.58	293.58
Initial surplus						
I	Growth in retained convenience goods expenditure (£m)	0.00	22.17	34.17	51.83	69.17
Claims on expenditure						
J	Sales efficiency growth in existing retailers (£m)	0.00	0.88	4.43	8.93	11.66
K	Convenience goods commitments (£m)	20.25	20.31	20.56	20.87	21.18
L	Total claims on capacity	20.25	21.19	24.99	29.79	32.84
Expenditure summary						
M	Initial surplus of convenience goods expenditure (£m)	0.00	22.17	34.17	51.83	69.17
N	Total claims on capacity (£m)	20.25	21.19	24.99	29.79	32.84
O	Foodstore trading performance allowance (£m)	39.24	39.24	39.24	39.24	39.24
P	Residual convenience goods expenditure (£m)	18.99	40.21	48.42	61.27	75.57
Conversion to floorspace need						
Q	Assumed turnover per sq.m (£ per sq.m)	12,500	12,538	12,689	12,880	13,074
R	**Convenience goods floorspace need (sq.m net)**	**1,519**	**3,207**	**3,816**	**4,757**	**5,780**
S	Convenience goods floorspace need (sq.m gross)	2,337	4,935	5,871	7,319	8,892

Notes

Total comparison goods expenditure retained by centres/stores in Mansfield District (zones 1, 2 and some locations in zone 3)
No inflow is applied.
Sales efficiency growth of 0.3% per annum applied, 2016 onwards
Turnover per sq.m at 2014 PBA estimate. Turnover per sq.m increased to 2031 in line with sales effiency growth rate.
Total requirement shown is cumulative.
Gross: net ratio of 70% applied.
All monetary values held constant at 2012 prices.

Appendix C Updated leisure capacity tables

Table L1 —
Population projections

	2014	2017	2021	2026	2031	Change, 2014-31
Zone 1	51,026	51,824	53,020	54,291	55,537	4,511
Zone 2	29,771	30,188	30,858	31,650	32,357	2,586
Zone 3	36,104	36,562	37,224	38,207	39,144	3,040
Zone 4	15,820	16,118	16,456	16,915	17,285	1,465
Zone 5	22,708	23,290	24,131	25,132	26,034	3,326
Zone 6	12,135	12,316	12,550	12,772	12,933	798
Zone 7	28,535	29,115	29,984	31,030	31,962	3,427
Zone 8	40,584	41,200	42,018	42,932	43,759	3,175
Zone 9	75,887	77,541	79,931	82,852	85,471	9,584
Total	**312,570**	**318,154**	**326,172**	**335,781**	**344,482**	**31,912**

Notes
Source: Experian MMG3 (2012), for base year and population projections.
Population forecasts 2014-31 are based on Office of National Statistics Sub-National Population Projections.

Table L2 —
Per capita expenditure on leisure goods

	Zone 1 £	Zone 2 £	Zone 3 £	Zone 4 £	Zone 5 £	Zone 6 £	Zone 7 £	Zone 8 £	Zone 9 £
Expenditure per person, 2012									
Accommodation services	100	83	72	102	91	155	122	109	84
Cultural services	280	254	246	278	269	330	310	308	263
Games of chance	127	128	134	129	134	138	126	143	132
Hairdressing salons and personal grooming	72	58	53	73	65	106	90	84	60
Recreational and sporting services	86	68	60	88	81	144	117	106	71
Restaurants/cafes	831	736	674	808	762	990	899	913	749
Expenditure per person, 2014									
Accommodation services	99	83	72	101	90	154	121	108	83
Cultural services	278	252	245	276	267	328	308	306	261
Games of chance	126	127	133	128	133	137	125	142	131
Hairdressing salons and personal grooming	72	58	53	73	65	105	89	83	60
Recreational and sporting services	85	68	60	87	81	143	116	105	71
Restaurants/cafes	826	732	670	803	757	984	894	908	745
Expenditure per person, 2017									
Accommodation services	106	88	76	108	96	164	129	115	89
Cultural services	296	268	260	294	284	349	328	326	278
Games of chance	134	135	142	136	142	146	133	151	140
Hairdressing salons and personal grooming	76	61	56	77	69	112	95	89	63
Recreational and sporting services	91	72	63	93	86	152	124	112	75
Restaurants/cafes	878	778	712	854	805	1046	950	965	792
Expenditure per person, 2021									
Accommodation services	110	92	79	113	100	171	135	120	93
Cultural services	309	280	272	307	297	364	342	340	290
Games of chance	140	141	148	142	148	152	139	158	146
Hairdressing salons and personal grooming	79	64	59	81	72	117	99	93	66
Recreational and sporting services	95	75	66	97	89	159	129	117	78
Restaurants/cafes	918	813	744	892	841	1093	993	1008	827
Expenditure per person, 2026									
Accommodation services	118	98	85	120	107	183	144	128	99
Cultural services	330	299	290	327	317	389	365	363	310
Games of chance	150	151	158	152	158	163	148	168	155
Hairdressing salons and personal grooming	85	68	62	86	77	125	106	99	71
Recreational and sporting services	101	80	71	104	95	170	138	125	84
Restaurants/cafes	979	867	794	952	897	1166	1059	1075	882
Expenditure per person, 2031									
Accommodation services	126	104	90	128	114	195	153	137	106
Cultural services	352	319	309	349	338	415	389	387	330
Games of chance	160	161	168	162	168	173	158	180	166
Hairdressing salons and personal grooming	90	73	67	92	82	133	113	106	75
Recreational and sporting services	108	85	75	111	102	181	147	133	89
Restaurants/cafes	1044	925	847	1015	957	1244	1129	1147	941

Notes
The following expenditure growth rates are applied (source: Experian Retail Planner Briefing Note 12, October 2014, Figures 1a and 1b)

2012-13:	-0.60%	
2013-14:	0.00%	
2014-15:	2.10%	
2015-16:	2.80%	
2016-17	1.30%	
2017-21:	1.10%	(per annum)
2020-31:	1.30%	(per annum)

Table L3 —
Total leisure goods expenditure

	Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Zone 6 £m	Zone 7 £m	Zone 8 £m	Zone 9 £m	Total £m
Total expenditure, 2014										
Accommodation services	5.07	2.46	2.58	1.60	2.05	1.87	3.46	4.40	6.34	29.83
Cultural services	14.20	7.52	8.83	4.37	6.07	3.98	8.79	12.42	19.84	86.03
Games of chance	6.44	3.79	4.81	2.03	3.02	1.66	3.57	5.77	9.96	41.06
Hairdressing salons and personal grooming	3.65	1.72	1.90	1.15	1.47	1.28	2.55	3.39	4.53	21.63
Recreational and sporting services	4.36	2.01	2.15	1.38	1.83	1.74	3.32	4.28	5.36	26.43
Restaurants/cafes	42.15	21.78	24.19	12.71	17.20	11.94	25.50	36.83	56.50	248.79
Total expenditure, 2017										
Accommodation services	5.48	2.65	2.78	1.74	2.24	2.02	3.75	4.75	6.88	32.29
Cultural services	15.34	8.10	9.51	4.74	6.62	4.30	9.54	13.41	21.55	93.10
Games of chance	6.96	4.08	5.18	2.20	3.30	1.80	3.88	6.23	10.82	44.43
Hairdressing salons and personal grooming	3.94	1.85	2.05	1.24	1.60	1.38	2.77	3.66	4.92	23.41
Recreational and sporting services	4.71	2.17	2.32	1.50	1.99	1.87	3.60	4.62	5.82	28.60
Restaurants/cafes	45.51	23.48	26.04	13.76	18.76	12.89	27.66	39.75	61.38	269.24
Total expenditure, 2021										
Accommodation services	5.85	2.83	2.96	1.85	2.42	2.15	4.04	5.06	7.41	34.58
Cultural services	16.39	8.65	10.11	5.05	7.17	4.57	10.26	14.29	23.21	99.71
Games of chance	7.43	4.36	5.51	2.34	3.57	1.91	4.17	6.63	11.65	47.58
Hairdressing salons and personal grooming	4.21	1.98	2.18	1.33	1.73	1.47	2.98	3.90	5.30	25.07
Recreational and sporting services	5.03	2.32	2.47	1.60	2.16	2.00	3.87	4.92	6.27	30.63
Restaurants/cafes	48.65	25.08	27.70	14.68	20.30	13.72	29.76	42.36	66.10	288.35
Total expenditure, 2026										
Accommodation services	6.39	3.09	3.24	2.03	2.69	2.33	4.46	5.51	8.20	37.95
Cultural services	17.90	9.47	11.07	5.54	7.96	4.96	11.33	15.57	25.66	109.47
Games of chance	8.12	4.77	6.03	2.57	3.97	2.08	4.60	7.23	12.88	52.25
Hairdressing salons and personal grooming	4.60	2.16	2.38	1.45	1.92	1.59	3.29	4.25	5.85	27.52
Recreational and sporting services	5.50	2.53	2.70	1.75	2.40	2.17	4.28	5.36	6.93	33.61
Restaurants/cafes	53.14	27.44	30.33	16.10	22.56	14.89	32.86	46.17	73.09	316.56
Total expenditure, 2031										
Accommodation services	6.98	3.37	3.54	2.22	2.98	2.52	4.90	5.99	9.02	41.51
Cultural services	19.54	10.33	12.10	6.04	8.80	5.36	12.45	16.93	28.24	119.78
Games of chance	8.86	5.20	6.59	2.80	4.38	2.24	5.06	7.86	14.17	57.18
Hairdressing salons and personal grooming	5.02	2.36	2.61	1.59	2.13	1.72	3.61	4.62	6.44	30.10
Recreational and sporting services	6.00	2.76	2.95	1.91	2.65	2.34	4.70	5.83	7.62	36.77
Restaurants/cafes	57.98	29.92	33.15	17.55	24.92	16.09	36.10	50.19	80.43	346.33
Growth in expenditure, 2014-31										
Accommodation services	1.91	0.92	0.96	0.61	0.92	0.65	1.44	1.60	2.68	11.68
Cultural services	5.34	2.81	3.27	1.67	2.73	1.38	3.66	4.51	8.40	33.75
Games of chance	2.42	1.42	1.78	0.77	1.36	0.58	1.49	2.09	4.22	16.12
Hairdressing salons and personal grooming	1.37	0.64	0.70	0.44	0.66	0.44	1.06	1.23	1.92	8.47
Recreational and sporting services	1.64	0.75	0.80	0.53	0.82	0.60	1.38	1.55	2.27	10.34
Restaurants/cafes	15.83	8.14	8.96	4.84	7.72	4.14	10.60	13.36	23.93	97.54

Notes
Source: Table L1, Table L2
All monetary values held constant at 2012 prices.

Table L4 —
Food & drink market shares for Mansfield District centres, 2011

	Zone 1 £	Zone 2 £	Zone 3 £	Zone 4 £	Zone 5 £	Zone 6 £	Zone 7 £	Zone 8 £	Zone 9 £
Restaurants									
Mansfield town centre	20.00%	14.00%	10.00%	1.00%	5.00%	1.00%	10.00%	2.00%	5.00%
Mansfield - local public house/restaurant	16.00%	23.00%	17.00%	0.00%	15.80%	0.00%	8.00%	4.00%	6.00%
Mansfield Woodhouse	0.00%	0.00%	12.00%	0.00%	0.00%	0.00%	2.00%	1.00%	0.00%
Retail parks, Market Warsop & Forest Town	3.00%	0.00%	1.00%	0.00%	3.00%	0.00%	3.00%	0.00%	0.00%
Total	**39.00%**	**37.00%**	**40.00%**	**1.00%**	**23.80%**	**1.00%**	**23.00%**	**7.00%**	**11.00%**
Cafes, Pubs and bars									
Mansfield town centre	35.00%	22.00%	16.00%	1.00%	18.80%	1.00%	14.00%	3.00%	12.00%
Mansfield - local public house/restaurant	18.00%	31.00%	12.00%	1.00%	7.90%	0.00%	4.00%	0.00%	8.00%
Mansfield Woodhouse	0.00%	1.00%	16.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Retail parks, Market Warsop & Forest Town	4.00%	0.00%	1.00%	0.00%	3.00%	0.00%	2.00%	0.00%	1.00%
Total	**57.00%**	**54.00%**	**45.00%**	**2.00%**	**29.70%**	**1.00%**	**20.00%**	**3.00%**	**21.00%**

Source: NEMS Market Research Household Survey (undertaken in support of Mansfield District Retail & Leisure Study 2011)

Table L5 —
Summary of A3, A4 & A5 capacity for Mansfield District

	2014	2017	2021	2026	2031
Total population and expenditure					
A Total population	312,570	318,154	326,172	335,781	344,482
B Total study area expenditure on food & drink	248.79	269.24	288.35	316.56	346.33
Retained expenditure					
C Retained food & drink expenditure	40%	40%	40%	40%	40%
D Retained food & drink expenditure	99.03	107.17	114.78	126.01	137.86
E Expenditure leakage	149.76	162.07	173.57	190.55	208.47
Inflow					
F Inflow	0%	0%	0%	0%	0%
G Inflow	0.00	0.00	0.00	0.00	0.00
Total turnover of food & drink facilities					
H Total turnover	99.03	99.03	99.03	99.03	99.03
Initial surplus					
I Growth in retained expenditure	0.00	8.14	15.75	26.97	38.82
Claims on expenditure					
J Sales efficiency growth in existing operators	0.00	1.49	3.52	6.11	7.69
K Commitments for new floorspace	8.91	9.05	9.23	9.46	9.70
L Total claims on capacity	**8.91**	**10.54**	**12.75**	**15.57**	**17.40**
Expenditure summary					
M Initial surplus of expenditure	0.00	8.14	15.75	26.97	38.82
N Total claims on capacity	8.91	10.54	12.75	15.57	17.40
O Residual expenditure	**-8.91**	**-2.40**	**3.00**	**11.40**	**21.43**
Conversion to floorspace requirements					
P Assumed turnover per sq.m	6,500	6,598	6,731	6,901	7,005
Q Gross food & drink floorspace requirement[5]	**-1,371**	**-364**	**445**	**1,652**	**3,059**

Commitments (row K)

	Sq.m gross	Sq.m net	Turnover per sq.m	Turnover, 2014
3 no. A3 units, Mansfield Leisure Park, Mansfield	1,022	818	6,500	5.31
Nottingham Road Methodist Church, Mansfield	600	480	6,500	3.12
Titchfield Park, Nottingham	200	160	3,000	0.48
Total	**1,822**	**1,458**	**-**	**8.91**

Notes
All monetary values are held constant at 2012 prices.
Sales efficiency growth rate of 0.5% per annum applied.

Appendix D Method statement

Appendix: Quantitative Need Methodology

Summary of methodology

Our methodology for forecasting convenience (food) and comparison (non-food) retail needs follows a widely-adopted step-by-step methodology. The key steps of this are set out below, and should be read alongside the analysis in the main study report.

The technical inputs into each stage of the methodology which we have used for the purposes of this study are presented overleaf.

Step 1	Estimate the population growth over the course of the study period for each of the study area zones, using population projections agreed with the Council at the inception of the study. Define appropriate 'forecast years' at which to assess quantitative need.
Step 2	Establish the base year per capita (per head) spending on convenience (food) and comparison (non-food) goods, using published data sources. Apply appropriate growth rates to establish the expenditure per head in the forecast years.
Step 3	Calculate the 'pot' of expenditure within the study area at each of the forecast years by combining the population figures (calculated at **Step 1**) with the expenditure figures (calculated at **Step 2**), and making an allowance for Special Forms of Trading (SFT) such as internet / mobile shopping, catalogue shopping, and so on. SFT is increased in the forecast years to reflect the latest economic forecasts.
Step 4	Calculate the study area spending by applying the market share data from the household telephone survey to the overall 'pot' of expenditure (calculated at **Step 3**)
Step 5	Allow for any 'inflow' of expenditure from beyond the study area, if appropriate.
Step 6	Calculate the sales densities of existing retail floorspace, to assess turnover performance in the base year, and if appropriate make allowance for over or under-trading of this floorspace (i.e. the difference between the household survey-derived turnovers and the 'benchmark' turnovers)
Step 7	Project the spending forecasts forward to the forecast years.
Step 8	Make allowances for sales density growth (i.e. money ring-fenced to allow for the growth in productivity / turnover of existing retailers), and/or any commitments to new retail floorspace (i.e. extant planning permissions, or schemes under construction)
Step 9	Draw together steps 1 to 8 to assess whether there is any excess expenditure growth in the forecast years which can be translated into a quantitative need for new retail floorspace, by applying a typical sales density for new floorspace figure to the excess expenditure figure.
Step 10	Assess alternative policy scenarios, and / or the sensitivity testing of key assumptions.

Appendix E Technical note

Appendix: Technical inputs into capacity forecasts

<table>
<tr><th>Data</th><th>Source</th><th>How we have used the data</th></tr>
<tr><td>Base Population</td><td>Experian</td><td>Experian's MMG3 software provides 2012-based population forecasts at postcode sector level. The postcode sector populations are grouped together to form the study zones used for the purpose of our analysis.</td></tr>
<tr><td>Population Projections</td><td>Experian</td><td>Experian's MMG software provides annual population projections over the period to 2031.</td></tr>
<tr><td>Base Per Capita Expenditure</td><td>Experian</td><td>Experian's MMG software provides per capita annual expenditure in each zone of the study area on convenience (food), comparison (non-food) and commercial leisure.</td></tr>
<tr><td>Retail and leisure expenditure growth forecasts</td><td>Experian</td><td>We have adopted expenditure growth rates from Experian Retail Planner Briefing Note 12 (Figures 1a and 1b), as follows:

<table>
<tr><th></th><th>Comparison goods</th><th>Convenience goods</th><th>Commercial leisure</th></tr>
<tr><td>2012-13</td><td>2.60%</td><td>-0.50%</td><td>-0.60%</td></tr>
<tr><td>2013-14</td><td>4.60%</td><td>-1.30%</td><td>0.00%</td></tr>
<tr><td>2014-15</td><td>5.60%</td><td>-0.50%</td><td>2.10%</td></tr>
<tr><td>2015-16</td><td>4.40%</td><td>0.50%</td><td>2.80%</td></tr>
<tr><td>2016-17</td><td>3.10%</td><td>0.40%</td><td>1.30%</td></tr>
<tr><td>2017-21*</td><td>3.10%</td><td>0.60%</td><td>1.10%</td></tr>
<tr><td>2021-31*</td><td>3.30%</td><td>0.60%</td><td>1.30%</td></tr>
</table>
*per annum growth rates</td></tr>
<tr><td>Base Year Special Forms of Trading (SFT)</td><td>Experian / Household survey</td><td>Special Forms of Trading refers to the amount of money not spent in bricks and mortar retail floorspace (includes internet, temporary markets etc...). Experian's Retail Planner Briefing Note 12 (Appendix 3) advises the following SFT discounts at the base year of the study:

Comparison goods (2014): 11.7%
Convenience goods (2014): 2.6%

For the purposes of our assessment we used the 'adjusted' figure presented by Experian, which makes allowance for store-picked online shopping transactions.</td></tr>
<tr><td>Growth in SFT</td><td>Experian</td><td>Experian's Retail Planner Briefing Note 12 (Appendix 3) advises the following SFT discounts at the study forecast years:

<table>
<tr><th></th><th>Comparison goods</th><th>Convenience goods</th></tr>
<tr><td>2017</td><td>14.0%</td><td>3.3%</td></tr>
<tr><td>2021</td><td>15.9%</td><td>4.4%</td></tr>
<tr><td>2026</td><td>15.9%</td><td>5.0%</td></tr>
<tr><td>2031</td><td>15.5%</td><td>5.6%</td></tr>
</table>
For the purposes of our assessment we used the 'adjusted' figure presented by Experian, which makes allowance for store-picked online shopping transactions. Experian do not project SFT to 2031 and therefore the 2026 is held constant for the remainder of the study period.</td></tr>
<tr><td>Retailer productivity changes</td><td>Experian/PBBI</td><td>Experian's forecast of retailer productivity changes outstrips the per capita expenditure growth figures highlighted above. We have therefore assumed the following productivity changes for the purposes of our quantitative analysis:

Comparison goods: 1.7% per annum, 2014-31
Convenience goods: 0% per annum, 2014-16; 0.3% per annum, 2016-31.</td></tr>
</table>