Nathaniel Lichfield and Partners

Planning Design Economics

RHONDDA CYNON TAF

COUNTY BOROUGH COUNCIL

RETAIL CAPCITY ASSESSMENT

QUANTITATIVE UPDATE

March 2008

Nathaniel Lichfield & Partners Ltd
1st Floor, Westville House
Fitzalan Court
Cardiff CF24 0EL

T 029 2043 5880
F 029 2049 4081
E cardiff@nlpplanning.com
www.nlpplanning.com

Offices also in:
Manchester
London
Newcastle-upon-Tyne

CONTENTS

1.0 INTRODUCTION

1.1 This quantitative retail study update has been prepared by Nathaniel Lichfield and Partners (NLP) on behalf of Rhondda Cynon Taf County Borough Council (RCT).

1.2 It is based on updated empirical evidence and population and expenditure data. It also takes account of extant commitments and new floorspace.

1.3 The quantitative assumptions and estimates therefore supersede Chapters 4 and 6 of the 2003 Retail Study.

1.4 It is intended that this update study will be used as background evidence to the Local Development Plan (LDP).

2.0 QUANTITATIVE SCOPE FOR NEW RETAIL DEVELOPMENT

Introduction

2.1 This update study assesses the quantitative scope for new retail floorspace in RCT in the period 2007 – 2021. It sets out the methodology adopted for this analysis and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison shopping.

2.2 Projections have been made to 2021 in line with the LDP timeframe. A number of assumptions are required to project this far into the future and the longer term projections beyond 2016 are therefore more susceptible to increasing margins of error, such that monitoring of expenditure trends will be necessary to assess changes in available expenditure in the future.

2.3 All monetary values expressed in this analysis are at 2005 prices unless stated otherwise.

Methodology and Data

2.4 The quantitative analysis is based on a study area defined for the Borough and the surrounding catchment area which has been divided into 8 zones for more detailed analysis. It mirrors the study area used in the 2003 Study.

2.5 The study area is shown in Appendix A. The primary catchment area broadly relates to the county borough boundary which is broadly covered by zones 1 – 4. Shopping facilities in RCT are expected to attract the majority of their trade from residents within the study area. There will, however, be some degree of expenditure inflow and outflow. We have assumed varying rates of inflow depending on location, size and attraction of the centre/store.

2.6 The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area populations. Experian's local consumer expenditure estimates for comparison and convenience goods for each zone in the study area for the year 2005 have been obtained.

2.7 Experian's latest national expenditure projections between 2005 and 2015 have been used to forecast expenditure within the study area. Experian's projections are based on an econometric model of disaggregated consumer spending. This model takes a number of macro-economic forecasts (chiefly consumer spending, incomes and inflation) and uses them to produce forecasts of disaggregated consumer spending volumes, prices and value. The model incorporates assumptions about income and price elasticities.

2.8 Experian provides recommended expenditure growth rates for the period 2005 to 2010, and 2005 to 2015. The recommended growth rates for the period 2004 and 2010 are 0.5% per annum for convenience goods and 4.3% per annum for comparison goods. These growth rates are to be used to forecast expenditure per capita up to 2010. Adjusted growth rates (0.9% and 3.3% per annum for convenience and comparison goods respectively) have been adopted to project expenditure between 2010 and 2015, consistent with Experian's overall growth forecasts for 2005 to 2015 and the use of their 2005 to 2010 forecast for this initial period. Growth in expenditure beyond 2015 is based on 0.7% and 3.8% per annum for convenience and comparison goods respectively, in line with Experian's growth forecast for 2005 to 2015.

2.9 To assess the capacity for new retail floorspace, penetration rates are estimated for both convenience and comparison shopping facilities within the study area. The assessment of penetration rates are based primarily on the household survey results undertaken as part of this study. The penetration rates take account of survey responses for main food shopping trips, top-up shopping trips and other stores used for main food shopping as well as a range of different classes of comparison goods.

2.10 The total turnover of shops within the study area is based on penetration rates and the level of available expenditure in the study area for comparison and convenience goods. These turnover estimates are converted into average turnover to sales floorspace density. Turnover densities are compared with company average turnover to sales floorspace densities and benchmark turnover levels in order to identify potential surplus capacity for convenience goods. The turnover estimates for comparison goods are used as a base point from which future growth in expenditure is assessed.

Population and Spending

2.11 The study area population for 2001 to 2021 is set out in Table 1B in Appendix B, based on the 2001 Census, and WAG population and household projections for

South East Wales. Table 2B in Appendix B sets out the forecast growth in spending per head for convenience goods within each zone in the study area.

2.12 The levels of available spending are derived by combining the population in Table 1B and per capita spending figures in Tables 2B and 1C. For both comparison and convenience spending, a reduction has been made for special forms of trading such as internet sales, street markets and vending machines.

2.13 As a consequence of the forecast growth in per capita spending, convenience and comparison goods spending within the study area is forecast to increase in the short, medium and long term as shown in Tables 3B and 2C in the appendices. These figures relate to real growth and exclude inflation.

Existing Retail Floorspace

2.14 Existing convenience goods retail sales floorspace within RCT is 29,372 sq m net as set out in Table 1A, Appendix A.

2.15 Comparison goods retail floorspace within RCT including retail warehouses is set out in Table 2A, Appendix A. Total identified comparison sales floorspace in RCT is estimated to be 99,519 sq m net, including the allowance for comparison sales floorspace within food stores (9,598 sq m net) and retail warehouse (46,661 sq m).

Existing and Future Convenience Spending Patterns

2.16 The results of the NEMS household shopper survey undertaken in November 2006, have been used to estimate existing shopping patterns within the study area. The estimates of market share or penetration for each study area zone are shown in Table 4B, Appendix B.

2.17 The total level of convenience goods expenditure available at 2007 within the RCT zones varies from £56.49 million in Zone 1 to £118.58 million in Zone 2 (as shown in Table 5B, Appendix B).

2.18 Convenience expenditure retention is currently highest in Zone 1, with approximately 91% of available expenditure being spent in Aberdare. This is a relatively high level of retention, reflecting the presence of two main supermarket operators (Tesco and Asda) in the town.

2.19 Convenience retention is currently lowest in Zone 2 at 45%, although this is anticipated to increase with the opening of Asda in Tonypandy.

2.20 There are a number of commitments for additional convenience goods floorspace as shown in Table 3A, Appendix A. The implementation of these commitments is anticipated to adjust the existing market share pattern. The estimated revised market shares assuming implementation of all the commitment shown in Table 3A is shown in Table 6B. The adjustments assume some clawback of leakage from stores outside of the Borough, but also some diversion of expenditure between competing stores in the Borough.

2.21 Projections in expenditure and population growth have been used to estimate available convenience goods expenditure in 2011, 2016 and 2021 on the basis of these adjusted market shares and are shown in Tables 7B, 8B and 9B of Appendix B.

2.22 Company average turnover to sales floorspace densities are available for major food store operators and these densities (adjusted to exclude petrol and comparison sales and include VAT) have been applied to the convenience sales area of the large food stores listed in Table 1A, Appendix A, and a benchmark turnover for each store has been calculated.

2.23 This benchmark turnover is not necessarily the actual turnover of the food store but does provide a helpful benchmark for assessing existing shopping patterns and the adequacy of current floorspace in quantitative terms. Estimates for comparison sales floorspace within large food stores has been deducted from the figures in Table 1A, for consistency with the use of goods based expenditure figures.

2.24 Average sales densities are not widely available for small convenience shops, particularly independent retailers. We have assumed that small shops within RCT will have an average sales density of £3,500 per sq m (£325 per sq ft).

2.25 The total convenience goods benchmark turnover of all identified food stores/convenience shops in RCT at 2007 is £239.44 million.

2.26 The estimates of available expenditure within the RCT centres are summarised and compared with the benchmark turnover in Tables 10B and 11B, Appendix B. Our assessment suggests that total convenience goods expenditure spent in RCT in 2007 is £302.38 million compared to a total average benchmark turnover of £239.44 million. Therefore, on average, convenience sales floorspace in the borough is shown to be trading significantly above (by about 26%) the company average benchmark turnover.

2.27 There are differences in trading performance across the food stores and towns in the study area. There is significant above average trading in Tesco Talbot Green, Asda Aberdare and Tesco Upperboat.

2.28 Even with adjusted market shares, the majority of the surplus capacity will be absorbed by the existing foodstore commitments. As shown in Table 11B Appendix B, whilst Zone 4 will continue to have significant capacity due to the overtrading at Tesco Talbot Green, other zones will have a deficit of available expenditure and therefore the Borough as a whole will only have £9.14 million surplus capacity at 2011.

2.29 This Borough-wide capacity is anticipated to grow to £20.08 million by 2016 and £31.7 million by 2021, predominantly fuelled by growth in available expenditure in Zone 4.

Existing and Future Comparison Goods Spending Patterns

2.30 The results of the NEMS household shopper survey undertaken in November 2006 have been used to estimate existing shopping patterns within the study area. The estimates of market share or penetration for each study area zone are shown in Table 3C, Appendix C.

2.31 The level of comparison goods expenditure available at 2007 within the RCT zones varies from £90.9 million in Zone 1 (Aberdare) to £183.86 million in Zone 2 (Tonypandy/Porth/Treorchy) as shown by Table 2C, Appendix C.

2.32 For residents in RCT, Aberdare, Pontypridd and Talbot Green are the main centres in the borough for attracting comparison goods expenditure. They compete with an outflow of expenditure to Merthyr Tydfil, Cardiff and Bridgend/McArthur Glen Outlet centre although there is not one dominant centre. There is only limited inflow of expenditure from the outer catchment zones and beyond to the main centres.

2.33 Average sales densities are not widely available for comparison shops. Based on our experience across the country average sales densities for high street comparison shops can vary significantly, and can typically range from between £2,153 and £7,535 per sq m net (£200 to £700 per sq ft). The higher end of this range is usually only achieved by large successful shopping centres, which reflects the higher proportion of quality multiple retailers and modern shopping facilities. We would normally expect comparison shops in medium to small town centres to have an average sales density of about £3,000 to £5,000 per sq m net.

2.34 The average sales density for retail warehouse operators is generally much lower than for high street comparison shops, usually ranging from between £1,076 and £2,691 per sq m net. Carpet and furniture operators have turnover densities at the bottom end of this range, where as electrical retailers have higher densities of over £5,000 per sq m.

2.35 Actual average trading densities within RCT have been calculated based on existing 2007 trading patterns shown in Table 3C, Appendix C, divided by the amount of sales floorspace shown in Table 4A, Appendix A.

2.36 Our analysis of existing shopping patterns (summarised in Table 2.1 below) suggests that all comparison sales floorspace in RCT (town centre and retail warehouse floorspace) is trading at an average of £3,662 per sq m net. This average sales density is reasonable and within the range we would expect. It should be noted that there is a high proportion of retail warehouse floorspace, although some of this, such as the Talbot Green Retail Park is predominantly fashion and electrical goods in an edge-of-centre location, and we would therefore expect this to trade at higher than average densities for retail warehouses. Indeed, the turnover density for Talbot Green has been lowered by the inclusion of two large furniture stores – Leeks and Arthur Llewellyn Jenkins which have a combined net floorspace of around 13,000 sq m and therefore the town centre and retail park are probably trading at a higher density than suggested in Table 2.1.

2.37 Whilst Pontypridd/Mountain Ash and Aberdare are trading at healthy levels, Tonypandy, Porth and Treorchy have an average turnover density that is relatively low at £1,771 per sq m, especially given that this is town centre floorspace rather than retail warehouses.

Table 2.1: Comparison Trading Levels in 2007

	Net Floorspace (town centre) sq m	Net floorspace (retail warehouse) sq m	net comparison floorspace in supermarkets sq m	Expenditure £M	Turnover Density £ per sq m
Aberdare	8,890	4,350	1,841	£55.57	£3,685
Tonypandy, Porth, Treorchy	14,840	0	1,359	£28.68	£1,771
Pontypridd/Mountain Ash	14,420	13,670	2,410	£144.05	£4,723
Talbot Green	910	28,641	3,988	£129.78	£3,870
Local Centres	4,200	0	0	£6.31	£1,503

Source: Tables 2A and 3C

Future Spending Growth

2.38 Overall, the Borough appears to be trading at satisfactory levels and therefore in the assessment of quantitative need for comparison goods floorspace we have assumed that the existing turnover of the centres represents an equilibrium level and that future need will be generated by growth in available expenditure from this base date, allowing for existing floorspace to increase its sales density in the future.

2.39 There are a number of commitments that it is considered may affect future market shares, most noticeably the Angharad Walk scheme in Pontypridd which will increase the retail floorspace of the town by approximately 15,300 sq m gross, and the Tirfounder Fields retail warehouse commitment in Aberdare. However, the increases in comparison goods floorspace should be viewed in the context of redevelopment that is currently under construction to the St David's Centre in Cardiff, which could counterbalance the improvement to and increase in floorspace in the Borough.

2.40 We have therefore made realistic estimates of the potential for Angharad Walk and other commitments to increase retention rates within the Borough and small increase in market shares from 2011 have been estimated in Table 5C.

2.41 On the basis of these adjusted market shares, projections in expenditure and population growth have been used to estimate available comparison goods expenditure in 2011, 2016 and 2021 as shown in Tables 6C, 7C and 8C of Appendix C and summarised in Table 9C.

2.42 As can be seen in Table 9C, the existing commitments will absorb all the growth in expenditure to 2016. By 2021 there is projected to be a comparison goods surplus capacity of £101.96 million of expenditure in the Borough as a whole.

Quantitative Capacity for Additional Convenience Floorspace

2.43 The forecast convenience goods surplus expenditure projections for the Borough have been converted into net sales floorspace projections in Table 2.2 below based on a benchmark turnover density of £12,000 per sq m at 2007 (and increased by 0.3% p.a). These figures assume that all surplus convenience expenditure will be accommodated within large food superstores rather than small convenience outlets. This turnover density figure represents a realistic mid-point of the company averages of the four main food operators – Tesco, Asda, Morrisons and Sainsbury.

2.44 An annual increase in turnover density efficiency of 0.3% has been allowed for existing and new convenience floorspace.

2.45 At 2011 there is only limited capacity for new convenience goods floorspace of 748 sq m across the Borough. It is anticipated that this will rise to 1,616 sq m by 2016 and 2,507 sq m by 2021.

2.46 The floorspace capacity relates to convenience goods sales floorspace. In any supermarket there is likely to be an element of comparison goods floorspace as well as storage and ancillary space. Therefore if a new supermarket were proposed to meet the need by 2021, we would anticipate a store in the region of 5,500 sq m gross.

Table 2.2 Projected Convenience Floorspace Requirements

	2011	**2016**	**2021**
Surplus expenditure (£M)			
Zone 1	£2.64	£4.65	£6.83
Zone 2	-£5.40	-£4.68	-£3.61
Zone 3	-£6.50	-£3.25	£0.06
Zone 4	£18.40	£23.36	£28.42
Subtotal	£9.14	£20.08	£31.70
Turnover Density £ per sq m	£12,211	£12,427	£12,646
Net floorspace requirement sq m	748	1,616	2,507

2.47 These projected floorspace figures should be regarded as broad guidance only for planning purposes, limited by further considerations of qualitative requirements – how new floorspace might complement and reinforce the existing centre rather than compete – and the consequential impact(s) on existing stores and other centres.

2.48 The figures suggest that the proposed Sainsbury’s store in Pontypridd and the Asda in Tonypandy will absorb all capacity in Zones 2 and 3. There will be limited capacity in Zone 1, with most of the capacity being in Zone 4. This is in part driven by the projected growth in available expenditure in the zone and partly by the current high level of overtrading in the Tesco at Talbot Green.

2.49 The Council will need to carefully consider how to best deal with this overtrading at Tesco and the need in the Borough as a whole. Since the last household survey was undertaken the old Tesco store at Talbot Green has been demolished and the larger Extra store opened. Over this time the market share of the store in Zone 4 has increased from 31% to 40%, with the market share of Zone 2 increasing from 15% to 23%. A significant element of this increase in market share will be due to the increase in product range resulting from the increased store size.

2.50 Whilst an extension to the Tesco at Talbot Green would relieve overtrading in the short term, a further extension of the store could result in further increases in market share to the detriment of other stores in the Borough.

2.51 Alternatively, if a new store were to be built in Zone 4 of sufficient size and quality to offer customers an alternative to Tesco, this would also reduce the overtrading and improve qualitative provision.

Quantitative Capacity for Additional Comparison Floorspace

2.52 Future available comparison goods expenditure is compared with the turnover of existing comparison retail facilities within the Borough, in order to provide estimates of surplus expenditure, as summarised in Table 9C, Appendix C.

2.53 The forecast comparison goods surplus expenditure projections for the Borough have been converted into net sales floorspace projections in Table 2.3 based on an average turnover density of £4,000 per sq m net at 2007, inflated by 1.5% per annum up to 2011, 2016 and 2021. This is an appropriate average sales density for new comparison floorspace and takes into account increases in turnover efficiency and the higher turnover density that would be anticipated in modern purpose built floorspace.

2.54 Trends indicate that comparison retailers historically will achieve some growth in trading efficiency. This is a function of spending growing at faster rates than new floorspace provision and retailers' ability to absorb real increases in their costs by increasing their turnover to floorspace ratio. An allowance has therefore been made for existing comparison floorspace to increase its turnover by 1.5% per annum, as well as the benchmark turnover used to convert to floorspace capacity.

2.55 For the comparison goods projections we have assumed that net sales floorspace will account for 70% of the total gross floorspace of new development.

2.56 The figures suggest that existing commitments will absorb all the quantitative need for new floorspace to 2016. Between 2016 – 2021 there is projected to be an increase in available expenditure that will generate a need for around 31,000 sq m gross of comparison goods floorspace by 2021. However, long term projections beyond 2016 should be treated with caution and will need to be reassessed during the plan period.

2.57 The Tirfounder Fields commitment should also be kept under review as there is some uncertainty as to whether the entire outline committed floorspace will come forward. Nonetheless, a relatively low turnover density of £2,000 per sq m has been assumed for the development, and a smaller development may still have a benchmark turnover close to that assumed for the development of £26.01 million (Table 4A Appendix A).

Table 2.3 Comparison Goods Capacity for the Borough 2007 – 2021

	2007	2011	2016	2021
Comparison Goods Surplus £M	n/a	-£46.44	-£1.42	£101.06
Average Turnover Density £ per sq m		£4,000	£4,309	£4,642
Comparison Goods net requirement sq m		n/a	n/a	21,770
Gross floorspace requirement		n/a	n/a	31,099

2.58 The Borough has a very high proportion of retail warehouse floorspace and it is considered that there is no qualitative need for further provision beyond that which is already committed. Resistance of further out-of-centre floorspace should encourage important town centre schemes such as Angharad Walk to come forward.

3.0 CONCLUSIONS AND RECOMMENDATIONS

Convenience Goods Floorspace

3.1 There is currently significant surplus expenditure in the Borough as a result of a number of supermarkets trading at above average levels.

3.2 However, there are a number of commitments in the borough which will absorb much of this surplus.

3.3 Assuming that these commitments are implemented and there is a consequential adjustment to market shares, there is emerging capacity at 2011. It is likely that there is only capacity for one main supermarket in the Borough during the plan period (small stores and deep discount retailers may be acceptable subject to considerations of sequential test and impact).

3.4 The most appropriate location of the new store would be in Zone 4 which is where the majority of the capacity exists.

Comparison Goods Floorspace

3.5 The main town centres are generally trading at healthy levels and it is suggested that this represents a suitable base point from which to measure future quantitative need arising from growth in expenditure.

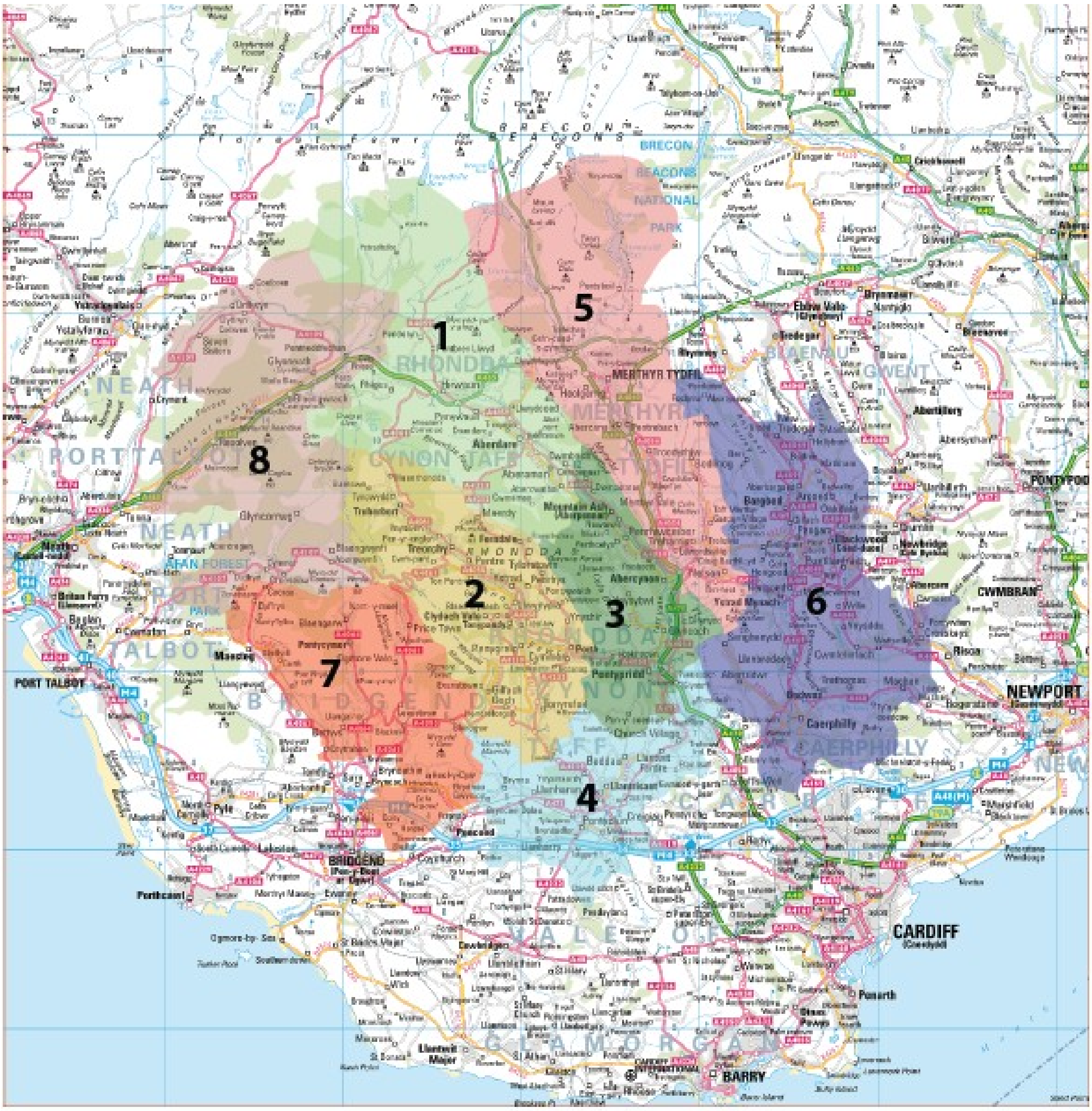
3.6 Short and medium term capacity to 2016 will be absorbed by commitments such as Angharad Walk and Tirfounder Fields, and the delivery of such schemes should be encouraged to counter balance the impact that improved and extended retail floorspace in Cardiff might have.

3.7 There is anticipated to be capacity in the long term for around 31,000 sq m gross, however, long term projections should be treated with caution and it is recommended that specific allocations are not made in the LDP until it is subsequently reviewed.

3.8 It is also considered that there is ample retail warehouse floorspace in the Borough and there is no qualitative need for further provision.

Appendix A

Study Area and Existing Retail Facilities



1
2
3
4
5
6
7
8
RHONDDA
CYNON TAFF
MERTHYR TYDFIL
BRECON BEACONS NATIONAL PARK
NEATH PORT TALBOT
BRIDGEND
CAERPHILLY
PORT TALBOT
NEWPORT
CARDIFF
BARRY
BRIDGEND
Pontypridd
Caerphilly
Aberdare
Pontycymer
Maesteg
Pyle
Porthcawl
Mountain Ash
Abercynon
Ebbw Vale
Tredegar
Blackwood
Risca
CWMBRAN
Ystrad Mynach
Llantrisant
Pencoed
Cowbridge
Llantwit Major

Table 1A Convenience Floorspace RCT 2007

Area	Stores	Total Net Sq m	% of Conv Goods	Conv floorspace
Aberdare	Asda - Riverside Retail Park	3,767	68%	2,562
	Iceland - Commercial Street	479	95%	455
	Tesco – DepotRoad	2,615	78%	2,040
	Co-op, Tramway Road	262	86%	225
	Local convenience shops	900	100%	900
	Sub-total	**8,023**		**6,182**
Mountain Ash	Iceland, Oxford Street	376	95%	357
	Co-op - Penrhiwceiber Road	123	85%	105
	Kwik Save, Oxford Street	427	90%	384
	Local convenience shops	700	100%	700
	Sub-total	**1626**		**1,546**
Pontypridd	Iceland, Taff St	501	95%	476
	Co-op - Commercial Street	203	88%	179
	Somerfield - Church Village	707	86%	608
	Somerfield - Taff Street	451	85%	383
	Marks & Spencer	836	95%	794
	Tesco, Gelli Hirion Estate	4,605	55%	2,533
	Local convenience shops	700	100%	700
	Sub-total	**8,003**		**5,673**
Porth	Co-op Pontypridd Road	2,140	90%	1,926
	Lidl, Cymer Road	1,286	83%	1,067
	Somerfield, Tonyrefail	883	85%	751
	Local convenience shops	500	100%	500
	Sub-total	**4,809**		**4,244**
Talbot Green	Tesco	7,180	47%	3,375
	Marks & Spencer	627	95%	596
	Aldi, Glamorgan Retail Park	754	80%	603
	Local convenience shops	100	100%	100
	Sub-total	**8,661**		**4,673**
Tonypandy	Aldi - Llywuynypia Road	808	83%	671
	Somerfield - Duraven Street	1,585	80%	1,268
	Local convenience shops	1,000	100%	1,000
	Sub-total	**3,393**		**2,939**
Treorchy	Somerfield - High Street	622	90%	560
	Co-op - Station Road	919	90%	827
	Local convenience shops	1,200	100%	1,200
	Sub-total	**2,741**		**2,587**
Ferndale	Lidl, East Road	846	83%	702
	Co-op, 60 High Street	282	85%	240
	Local convenience shops	200	100%	200
	Sub-total	**1,328**		**1,142**
Ynys y Bwl	Co-op, Robert Street	283	66%	187
	Local convenience shops	200	100%	200
	Sub-total	**483**		**387**
	Grand Total	**39,067**	**0**	**29,372**

Table 2A **Comparison Floorspace RCT 2007**

	Net Floorspace (town centre) sq m	Net floorspace (retail warehouse) sq m	Net comparison floorspace in supermarkets sq m
Aberdare	8,890	4,350	1,841
Tonypandy, Porth, Treorchy	14,840	0	1,359
Pontypridd/Mountain Ash	14,420	13,670	2,410
Talbot Green	910	28,641	3,988
Local Centres	4,200	0	0
Total	**43,260**	**46,661**	**9,598**

Table 3A Food Store Commitments

Zone	Area	Stores	Total Net Sq m	% of Conv Goods	Conv floorspace sq m	Benchmark turnover density (£ per sq m)	Turnover £M
2	Tonypandy	Asda	2,787	60%	1,672	£15,786	£26.39
1	Aberdare	Asda mezzanine	1,106	0%	0	n/a	n/a
1	Aberdare	Tesco extension	1612	55%	800	£13,088	£10.47
2	Porth	Unigate depot					£7.43
3	Pontypridd	Sainsburys, Angharad Walk	4,916	70%	3,441	£9,335	£32.12
3	Midway Retail Park	Tesco Extension	1,127	50%	564	£13,088	£7.38
	Total		**11,548**		**6,477**		**£83.79**

Table 4A Comparison Goods Commitments

Zone	Area	Scheme	Total Gross	Total net	Benchmark Turnover density (£ per sq m)	Turnover £M
1	Aberdare	Asda mezzanine		1,106	£7,298	£8.07
		Tirfounder Fields	16,258	13,006	£2,000	£26.01
		Subtotal				**£34.08**
2	Tonypandy	Asda		1,115	£7,298	£8.14
		Yns Fields	3,750	3,188	£2,000	£6.38
		Subtotal				**£14.51**
3	Pontypridd	Anghard Walk	15,336	13,036	£4,000	£52.14
		(comparison in food store)		1,721	£5,633	£9.69
		Subtotal				**£61.83**

* Tirfounder fields benefits from outline consent for 16,258 sq m gross. To date, reserved matters have been submitted for a total of 12,077 sq m gross. Surplus capacity may exist dependant on benchmark turnover of occupiers.

Appendix B

Convenience Goods Expenditure

Table 1B : Population Projections

Catchment Area	2001	2007	2011	2016	2021
Primary Catchment Area					
Zone 1: Aberdare	39,174	39,369	39,499	39,424	39,651
Zone 2: Rhondda Valley	83,819	82,007	80,799	79,277	78,689
Zone 3: Pontypridd	49,691	48,605	47,880	47,100	46,732
Zone 4: Llantrisant/Talbot Green	56,345	59,800	62,103	65,300	68,686
Primary Catchment Area Sub-Total	*229,029*	*229,780*	*230,281*	*231,102*	*233,758*
Secondary Catchment Area					
Zone 5: Merthyr Tydfil	60,029	61,831	62,793	64,177	65,528
Zone 6: Blackwood/Caerphilly	131,824	134,886	136,520	138,871	141,166
Zone 7: Bridgend/Maesteg rural	34,405	35,337	35,835	36,551	37,249
Zone 8: Glyncorwg	18,425	18,919	19,182	19,561	19,931
Secondary Catchment Area Sub-Total	*244,683*	*250,974*	*254,329*	*259,160*	*263,874*
Total	**473,712**	**480,754**	**484,610**	**490,262**	**497,633**

Sources: *WAG Population Projections*

Table 2B: Convenience Goods Expenditure Per Capita (2005 Prices)

Expenditure Per Capita	2007	2011	2016	2021	Growth 2007-2011	Growth 2007-2016	Growth 2007-2021
Zone 1	£1,435	£1,463	£1,527	£1,582	2.0%	6.4%	8.1%
Zone 2	£1,446	£1,475	£1,539	£1,594	2.0%	6.4%	8.1%
Zone 3	£1,386	£1,419	£1,481	£1,534	2.4%	6.9%	8.1%
Zone 4	£1,459	£1,494	£1,559	£1,614	2.4%	6.9%	8.0%
Zone 5	£1,447	£1,476	£1,540	£1,595	2.0%	6.4%	8.1%
Zone 6	£1,454	£1,483	£1,548	£1,602	2.0%	6.5%	8.0%
Zone 7	£1,473	£1,503	£1,569	£1,624	2.0%	6.5%	8.1%
Zone 8	£1,482	£1,512	£1,578	£1,634	2.0%	6.5%	8.1%

Sources: Experian

Table 3B: Total Available Convenience Goods Expenditure (£M - 2005 Prices)

Catchment Area	2007	2011	2016	2021	Growth 2007-2011	Growth 2007-2016	Growth 2007-2021
Zone 1	£56.49	£57.79	£60.20	£62.73	2.3%	6.6%	11.0%
Zone 2	£118.58	£119.18	£122.01	£125.43	0.5%	2.9%	5.8%
Zone 3	£67.37	£67.94	£69.76	£71.69	0.9%	3.5%	6.4%
Zone 4	£87.25	£92.78	£101.80	£110.86	6.3%	16.7%	27.1%
Zone 5	£89.47	£92.68	£98.83	£104.52	3.6%	10.5%	16.8%
Zone 6	£196.12	£202.46	£214.97	£226.15	3.2%	9.6%	15.3%
Zone 7	£52.05	£53.86	£57.35	£60.49	3.5%	10.2%	16.2%
Zone 8	£28.04	£29.00	£30.87	£32.57	3.4%	10.1%	16.2%
Total	**£695.37**	**£715.69**	**£755.79**	**£794.43**	**2.9%**	**8.7%**	**14.2%**

Sources: *Table 1B and Table 2B*

Table 4B: **Existing Convenience Shopping Penetration Rates 2007**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow
Zone 1									
Asda, Aberdare	40%	11%	18%	0%	1%	0%	0%	5%	5%
Tesco, Aberdare	38%	3%	4%	0%	1%	0%	0%	2%	5%
Other Local Convenience Shops	13%	1%	1%	0%	0%	0%	0%	0%	0%
Sub-total	**91%**	**15%**	**23%**	**0%**	**2%**	**0%**	**0%**	**7%**	n/a
Zone 2									
Porth	0%	7%	3%	1%	0%	0%	0%	0%	0%
Tonypandy	0%	13%	0%	0%	0%	0%	0%	0%	0%
Tonyrefail/Ferndale/Treorchy	0%	14%	0%	0%	0%	0%	0%	0%	0%
Other Local Convenience shops	0%	11%	1%	0%	1%	0%	0%	1%	0%
Sub-total	**0%**	**45%**	**4%**	**1%**	**1%**	**0%**	**0%**	**1%**	n/a
Zone 3									
Mountain Ash	1%	0%	7%	0%	0%	0%	0%	0%	0%
Pontypridd	1%	1%	12%	3%	0%	0%	0%	0%	5%
Tesco, Upper Boat	0%	3%	25%	15%	2%	2%	0%	1%	5%
Local Convenience shops	0%	0%	11%	3%	0%	0%	0%	0%	0%
Sub-total	**2%**	**4%**	**55%**	**21%**	**2%**	**2%**	**0%**	**1%**	n/a
Zone 4									
Tesco, Talbot Green	0%	23%	2%	40%	0%	0%	1%	2%	5%
Other Local Convenience shops	0%	1%	2%	24%	0%	0%	1%	0%	0%
Sub-total	**0%**	**24%**	**4%**	**64%**	**0%**	**0%**	**2%**	**2%**	n/a
Rhondda Cynon Taf Total	**93%**	**88%**	**86%**	**86%**	**5%**	**2%**	**2%**	**11%**	n/a
Zone 5									
Merthyr Tydfil and other shops	3%	1%	1%	0%	85%	3%	0%	3%	n/a
Sub-total	**3%**	**1%**	**1%**	**0%**	**85%**	**3%**	**0%**	**3%**	n/a
Zone 6									
Caerphilly/Blackwood and other local shops	0%	0%	5%	1%	6%	81%	2%	1%	n/a
Sub-total	**0%**	**0%**	**5%**	**1%**	**6%**	**81%**	**2%**	**1%**	n/a
Zone 7									
Maesteg and other local shops	0%	0%	0%	0%	0%	0%	20%	5%	n/a
Sub-total	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**20%**	**5%**	n/a
Zone 8									
Glyn Neath and other local shops	0%	0%	0%	0%	0%	0%	0%	20%	n/a
Sub-total	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**20%**	n/a
Outflow	4%	11%	8%	13%	4%	14%	76%	60%	n/a
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	n/a

Table 5B: **Convenience Expenditure 2007 £Million**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total Expend
Expenditure 2007	**£56.49**	**£118.58**	**£67.37**	**£87.25**	**£89.47**	**£196.12**	**£52.05**	**£28.04**	**n/a**	
Zone 1										
Asda, Aberdare	£22.60	£13.04	£12.13	£0.00	£0.89	£0.00	£0.00	£1.40	£2.63	£52.70
Tesco, Aberdare	£21.47	£3.56	£2.69	£0.00	£0.89	£0.00	£0.00	£0.56	£1.54	£30.71
Other Local Convenience Shops	£7.34	£1.19	£0.67	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£9.20
Sub-total	**£51.41**	**£17.79**	**£15.49**	**£0.00**	**£1.79**	**£0.00**	**£0.00**	**£1.96**	**£0.00**	**£88.44**
Zone 2										
Porth	£0.00	£8.30	£2.02	£0.87	£0.00	£0.00	£0.00	£0.00	£0.00	£11.19
Tonypandy	£0.00	£15.42	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£15.42
Tonyrefail/Ferndale/Treorchy	£0.00	£16.60	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£16.60
Other Local Convenience shops	£0.00	£13.04	£0.67	£0.00	£0.89	£0.00	£0.00	£0.28	£0.00	£14.89
Sub-total	**£0.00**	**£53.36**	**£2.69**	**£0.87**	**£0.89**	**£0.00**	**£0.00**	**£0.28**	**£0.00**	**£58.10**
Zone 3										
Mountain Ash	£0.56	£0.00	£4.72	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£5.28
Pontypridd	£0.56	£1.19	£8.08	£2.62	£0.00	£0.00	£0.00	£0.00	£0.66	£13.11
Tesco, Upper Boat	£0.00	£3.56	£16.84	£13.09	£1.79	£3.92	£0.00	£0.28	£2.08	£41.56
Local Convenience shops	£0.00	£0.00	£7.41	£2.62	£0.00	£0.00	£0.00	£0.00	£0.00	£10.03
Sub-total	**£1.13**	**£4.74**	**£37.05**	**£18.32**	**£1.79**	**£3.92**	**£0.00**	**£0.28**	**£0.00**	**£67.24**
Zone 4										
Tesco, Talbot Green	£0.00	£27.27	£1.35	£34.90	£0.00	£0.00	£0.52	£0.56	£3.40	£68.00
Other Local Convenience shops	£0.00	£1.19	£1.35	£20.94	£0.00	£0.00	£0.52	£0.00	£0.00	£23.99
Sub-total	**£0.00**	**£28.46**	**£2.69**	**£55.84**	**£0.00**	**£0.00**	**£1.04**	**£0.56**	**£0.00**	**£88.59**
Rhondda Cynon Taf Total	**£52.54**	**£104.35**	**£57.93**	**£75.03**	**£4.47**	**£3.92**	**£1.04**	**£3.08**	**£0.00**	**£302.38**
Zone 5										
Merthyr Tydfil and other shops	£1.69	£1.19	£0.67	£0.00	£76.05	£5.88	£0.00	£0.84	£0.00	£86.33
Sub-total	**£1.69**	**£1.19**	**£0.67**	**£0.00**	**£76.05**	**£5.88**	**£0.00**	**£0.84**	**£0.00**	**£86.33**
Zone 6										
Caerphilly/Blackwood and other local shops	£0.00	£0.00	£3.37	£0.87	£5.37	£158.86	£1.04	£0.28	£0.00	£169.79
Sub-total	**£0.00**	**£0.00**	**£3.37**	**£0.87**	**£5.37**	**£158.86**	**£1.04**	**£0.28**	**£0.00**	**£169.79**
Zone 7										
Maesteg and other local shops	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£10.41	£1.40	£0.00	£11.81
Sub-total	**£0.00**	**£0.00**	**£0.00**	**£0.00**	**£0.00**	**£0.00**	**£10.41**	**£1.40**	**£0.00**	**£11.81**
Zone 8										
shops	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£5.61	£0.00	£5.61
Sub-total	**£0.00**	**£0.00**	**£0.00**	**£0.00**	**£0.00**	**£0.00**	**£0.00**	**£5.61**	**£0.00**	**£5.61**
Outflow	£2.26	£13.04	£5.39	£11.34	£3.58	£27.46	£39.56	£16.82	£0.00	£119.45
Total	**£56.49**	**£118.58**	**£67.37**	**£87.25**	**£89.47**	**£196.12**	**£52.05**	**£28.04**	**£0.00**	**£695.37**

Table 6 B **Future Convenience Shopping Penetration Rates 2011 Allowing for Commitments**

Zone	Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow
Zone 1	Aberdare	92%	13%	16%	0%	2%	0%	0%	7%	5%
Zone 2	Porth	0%	10%	3%	1%	0%	0%	0%	0%	0%
	Tonypandy	0%	37%	0%	0%	1%	0%	0%	0%	0%
	Tonyrefail/Ferndale/Treorchy	0%	15%	0%	0%	0%	0%	0%	1%	0%
Zone 3	Mountain Ash/Yns y Bwl	1%	0%	5%	0%	0%	0%	0%	0%	0%
	Pontypridd/Upper Boat	1%	4%	62%	30%	2%	2%	0%	1%	5%
Zone 4	Talbot Green	0%	15%	3%	55%	0%	0%	2%	2%	5%
Zone 5	Merthyr Tydfil	3%	1%	1%	0%	85%	3%	0%	3%	n/a
Zone 6	Caerphilly/Blackwood	0%	0%	5%	1%	6%	81%	2%	1%	n/a
Zone 7	Maesteg	0%	0%	0%	0%	0%	0%	20%	5%	n/a
Zone 8	Glyn Neath	0%	0%	0%	0%	0%	0%	0%	20%	n/a
	Outflow	3%	5%	5%	13%	4%	14%	76%	60%	n/a
	Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	n/a

Table 7B **2011 Expenditure With Adjusted Market Shares**

Zone	Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
	Available Expenditure	**£57.79**	**£119.18**	**£67.94**	**£92.78**	**£92.68**	**£202.46**	**£53.86**	**£29.00**		
Zone 1	Aberdare	£53.16	£15.49	£10.87	£0.00	£1.85	£0.00	£0.00	£2.03	£4.39	**£87.80**
Zone 2	Porth	£0.00	£11.92	£2.04	£0.93	£0.00	£0.00	£0.00	£0.00	£0.00	**£14.88**
	Tonypandy	£0.00	£44.10	£0.00	£0.00	£0.93	£0.00	£0.00	£0.00	£0.00	**£45.02**
	Tonyrefail/Ferndale/Treorchy	£0.00	£17.88	£0.00	£0.00	£0.00	£0.00	£0.00	£0.29	£0.00	**£18.17**
Zone 3	Mountain Ash/Yns y Bwl	£0.58	£0.00	£3.40	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	**£3.97**
	Pontypridd/Upper Boat	£0.58	£4.77	£42.12	£27.83	£1.85	£4.05	£0.00	£0.29	£4.29	**£85.79**
Zone 4	Talbot Green	£0.00	£17.88	£2.04	£51.03	£0.00	£0.00	£1.08	£0.58	£3.82	**£76.42**
Zone 5	Merthyr Tydfil	£1.73	£1.19	£0.68	£0.00	£78.78	£6.07	£0.00	£0.87	n/a	**£89.33**
Zone 6	Caerphilly/Blackwood	£0.00	£0.00	£3.40	£0.93	£5.56	£163.99	£1.08	£0.29	n/a	**£175.24**
Zone 7	Maesteg	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£10.77	£1.45	n/a	**£12.22**
Zone 8	Glyn Neath	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£5.80	n/a	**£5.80**
	Outflow	£1.73	£5.96	£3.40	£12.06	£3.71	£28.34	£40.93	£17.40	n/a	**£113.54**
	Total	**£57.79**	**£119.18**	**£67.94**	**£92.78**	**£92.68**	**£202.46**	**£53.86**	**£29.00**	n/a	**£728.19**

Table 8B 2016 Available Expenditure with Adjusted Market Shares

Zone	Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
	Available Expenditure	**£60.20**	**£122.01**	**£69.76**	**£101.80**	**£98.83**	**£214.97**	**£57.35**	**£30.87**		
Zone 1	Aberdare	£55.38	£15.86	£11.16	£0.00	£1.98	£0.00	£0.00	£2.16	£4.55	**£91.10**
Zone 2	Porth	£0.00	£12.20	£2.09	£1.02	£0.00	£0.00	£0.00	£0.00	£0.00	**£15.31**
	Tonypandy	£0.00	£45.14	£0.00	£0.00	£0.99	£0.00	£0.00	£0.00	£0.00	**£46.13**
	Tonyrefail/Ferndale/Treorchy	£0.00	£18.30	£0.00	£0.00	£0.00	£0.00	£0.00	£0.31	£0.00	**£18.61**
Zone 3	Mountain Ash/Yns y Bwl	£0.60	£0.00	£3.49	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	**£4.09**
	Pontypridd/Upper Boat	£0.60	£4.88	£43.25	£30.54	£1.98	£4.30	£0.00	£0.31	£4.52	**£90.38**
Zone 4	Talbot Green	£0.00	£18.30	£2.09	£55.99	£0.00	£0.00	£1.15	£0.62	£4.11	**£82.26**
Zone 5	Merthyr Tydfil	£1.81	£1.22	£0.70	£0.00	£84.01	£6.45	£0.00	£0.93	n/a	**£95.11**
Zone 6	Caerphilly/Blackwood	£0.00	£0.00	£3.49	£1.02	£5.93	£174.13	£1.15	£0.31	n/a	**£186.02**
Zone 7	Maesteg	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£11.47	£1.54	n/a	**£13.01**
Zone 8	Glyn Neath	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£6.17	n/a	**£6.17**
	Outflow	£1.81	£6.10	£3.49	£13.23	£3.95	£30.10	£43.58	£18.52	n/a	**£120.78**
	Total	**£60.20**	**£122.01**	**£69.76**	**£101.80**	**£98.83**	**£214.97**	**£57.35**	**£30.87**	**£13.19**	**£768.97**

Table 9B 2021 Available Expenditure with Adjusted Market Shares

Zone	Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
	Available Expenditure	**£62.73**	**£125.43**	**£71.69**	**£110.86**	**£104.52**	**£226.15**	**£60.49**	**£32.57**		
Zone 1	Aberdare	£57.71	£16.31	£11.47	£0.00	£2.09	£0.00	£0.00	£2.28	£4.73	**£94.58**
Zone 2	Porth	£0.00	£12.54	£2.15	£1.11	£0.00	£0.00	£0.00	£0.00	£0.00	**£15.80**
	Tonypandy	£0.00	£46.41	£0.00	£0.00	£1.05	£0.00	£0.00	£0.00	£0.00	**£47.45**
	Tonyrefail/Ferndale/Treorchy	£0.00	£18.81	£0.00	£0.00	£0.00	£0.00	£0.00	£0.33	£0.00	**£19.14**
Zone 3	Mountain Ash/Yns y Bwl	£0.63	£0.00	£3.58	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	**£4.21**
	Pontypridd/Upper Boat	£0.63	£5.02	£44.45	£33.26	£2.09	£4.52	£0.00	£0.33	£4.75	**£95.04**
Zone 4	Talbot Green	£0.00	£18.81	£2.15	£60.97	£0.00	£0.00	£1.21	£0.65	£4.41	**£88.21**
Zone 5	Merthyr Tydfil	£1.88	£1.25	£0.72	£0.00	£88.84	£6.78	£0.00	£0.98	n/a	**£100.45**
Zone 6	Caerphilly/Blackwood	£0.00	£0.00	£3.58	£1.11	£6.27	£183.18	£1.21	£0.33	n/a	**£195.68**
Zone 7	Maesteg	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£12.10	£1.63	n/a	**£13.73**
Zone 8	Glyn Neath	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£6.51	n/a	**£6.51**
	Outflow	£1.88	£6.27	£3.58	£14.41	£4.18	£31.66	£45.97	£19.54	n/a	**£127.51**
	Total	**£62.73**	**£125.43**	**£71.69**	**£110.86**	**£104.52**	**£226.15**	**£60.49**	**£32.57**	**£13.89**	**£808.32**

Table 10B Summary of Convenience Turnover 2007

Town	Available Expenditure £M	Benchmark Turnover £M	Surplus Expenditure £M
Zone 1			
Asda, Aberdare	£52.70	£40.44	£12.26
Tesco, Aberdare	£30.71	£26.70	£4.02
Other Local Convenience Shops	£9.20	£6.67	£2.53
Sub-total	**£88.44**	**£73.80**	**£14.64**
Zone 2			
Porth	£11.19	£13.76	-£2.57
Tonypandy	£15.42	£9.78	£5.64
Tonyrefail/Ferndale/Treorchy	£16.60	£15.37	£1.23
Other Local Convenience shops	£14.89	£10.15	£4.74
Sub-total	**£58.10**	**£49.06**	**£9.04**
Zone 3			
Mountain Ash	£5.28	£3.74	£1.54
Pontypridd	£13.11	£12.53	£0.58
Tesco, Upper Boat	£41.56	£33.15	£8.41
Local Convenience shops	£10.03	£6.67	£3.36
Sub-total	**£67.24**	**£56.09**	**£11.15**
Zone 4			
Tesco, Talbot Green	£68.00	£44.17	£23.83
Other Local Convenience shops	£23.99	£16.32	£7.67
Sub-total	**£88.59**	**£60.49**	**£28.11**
Rhondda Cynon Taf Total	**£302.38**	**£239.44**	**£62.95**

Table 11B Summary of Convenience Turnover with Adjusted Market Shares

Town	2011	2016	2021
Available Expenditure			
Zone 1	£87.80	£91.10	£94.58
Zone 2	£78.07	£80.05	£82.40
Zone 3	£89.76	£94.47	£99.25
Zone 4	£76.42	£82.26	£88.21
Sub-total	**£332.06**	**£347.88**	**£364.44**
Benchmark Turnover			
Zone 1	£85.16	£86.45	£87.75
Zone 2	£83.47	£84.73	£86.01
Zone 3	£96.26	£97.72	£99.19
Zone 4	£58.03	£58.90	£59.79
Sub-total	**£322.92**	**£327.80**	**£332.74**
Surplus Expenditure			
Zone 1	£2.64	£4.65	£6.83
Zone 2	-£5.40	-£4.68	-£3.61
Zone 3	-£6.50	-£3.25	£0.06
Zone 4	£18.40	£23.36	£28.42
Sub-total	**£9.14**	**£20.08**	**£31.70**

Appendix C

Comparison Goods Expenditure

Table 1C: Comparison Goods Expenditure Per Capita (2005 Prices)

Expenditure Per Capita	2007	2011	2016	2021	Growth 2006-2011	Growth 2006-2016	Growth 2006-2021
Zone 1	£2,309	£2,669	£3,151	£3,797	15.6%	36.5%	64.4%
Zone 2	£2,242	£2,591	£3,059	£3,686	15.6%	36.4%	64.4%
Zone 3	£2,271	£2,625	£3,099	£3,735	15.6%	36.5%	64.5%
Zone 4	£2,562	£2,961	£3,496	£4,213	15.6%	36.5%	64.4%
Zone 5	£2,282	£2,638	£3,115	£3,753	15.6%	36.5%	64.5%
Zone 6	£2,376	£2,746	£3,242	£3,907	15.6%	36.4%	64.4%
Zone 7	£2,367	£2,736	£3,230	£3,892	15.6%	36.5%	64.4%
Zone 8	£2,232	£2,579	£3,045	£3,669	15.5%	36.4%	64.4%

Sources: Experian

Table 2C: Total Available Comparison Goods Expenditure (£M - 2005 Prices)

Catchment Area	2007	2011	2016	2021	Growth 2005-2011	Growth 2005-2016	Growth 2005-2021
Zone 1	£90.90	£105.42	£124.22	£150.55	16.0%	36.7%	65.6%
Zone 2	£183.86	£209.35	£242.51	£290.05	13.9%	31.9%	57.8%
Zone 3	£110.38	£125.69	£145.96	£174.54	13.9%	32.2%	58.1%
Zone 4	£153.21	£183.89	£228.29	£289.37	20.0%	49.0%	88.9%
Zone 5	£136.99	£163.11	£195.60	£240.86	19.1%	42.8%	75.8%
Zone 6	£313.21	£370.40	£442.60	£542.57	18.3%	41.3%	73.2%
Zone 7	£81.44	£96.68	£115.75	£142.25	18.7%	42.1%	74.7%
Zone 8	£41.12	£48.79	£58.41	£71.77	18.6%	42.0%	74.5%
Total	**£1,111.11**	**£1,303.33**	**£1,553.34**	**£1,901.97**	**17.3%**	**39.8%**	**71.2%**

Sources: *Table 1B and Table 1C*

Table 3C: **Comparison Shopping Penetration Rates 2007**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow
Market Share									
Aberdare	32%	6%	9%	0%	1%	0%	0%	2%	5%
Pontypridd/Upper Boat	4%	19%	39%	20%	6%	2%	1%	0%	10%
Talbot Green	1%	23%	5%	27%	1%	1%	4%	2%	20%
Tonypandy	0%	9%	0%	0%	0%	0%	0%	0%	0%
Mountain Ash	0%	0%	2%	0%	0%	0%	0%	0%	5%
Porth	0%	3%	1%	0%	0%	0%	0%	0%	0%
Treorchy	0%	3%	0%	0%	0%	0%	0%	0%	0%
Llantrisant	0%	0%	0%	4%	0%	0%	0%	0%	5%
RCT Local Centres	0%	2%	1%	1%	0%	0%	0%	0%	0%
Merthyr Tydfil	28%	2%	10%	0%	55%	4%	0%	2%	n/a
Caerphilly	0%	0%	1%	1%	2%	32%	0%	0%	n/a
Bridgend/McArthur Glen	1%	5%	1%	11%	1%	1%	51%	8%	n/a
Cardiff	19%	19%	23%	27%	20%	28%	18%	3%	n/a
Swansea	9%	1%	0%	1%	2%	0%	13%	31%	n/a
Other outflow	6%	8%	8%	8%	12%	32%	13%	52%	n/a
Market Share Total	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***n/a***

Table 4C: ***Comparison Shopping Available Expenditure 2007***

Centre/Facilities	**Zone 1**	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**Inflow**	**Total Expenditure**
Turnover £M	**£90.90**	**£183.86**	**£110.38**	**£153.21**	**£136.99**	**£313.21**	**£81.44**	**£41.12**	**n/a**	**£1,111.11**
Aberdare	£29.09	£11.03	£9.93	£0.00	£1.92	£0.00	£0.00	£0.82	£2.78	**£55.57**
Pontypridd/Upper Boat	£3.64	£34.93	£43.05	£30.64	£8.22	£6.26	£0.81	£0.00	£14.17	**£141.73**
Talbot Green	£0.91	£42.29	£5.52	£41.37	£1.37	£3.13	£3.26	£0.82	£24.67	**£123.33**
Tonypandy	£0.00	£16.55	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	**£16.55**
Mountain Ash	£0.00	£0.00	£2.21	£0.00	£0.00	£0.00	£0.00	£0.00	£0.12	**£2.32**
Porth	£0.00	£5.52	£1.10	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	**£6.62**
Treorchy	£0.00	£5.52	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	**£5.52**
Llantrisant	£0.00	£0.00	£0.00	£6.13	£0.00	£0.00	£0.00	£0.00	£0.32	**£6.45**
RCT Local Centres	£0.00	£3.68	£1.10	£1.53	£0.00	£0.00	£0.00	£0.00	£0.00	**£6.31**
Merthyr Tydfil	£25.45	£3.68	£11.04	£0.00	£75.34	£12.53	£0.00	£0.82	£0.00	**£128.86**
Caerphilly	£0.00	£0.00	£1.10	£1.53	£2.74	£100.23	£0.00	£0.00	£0.00	**£105.60**
Bridgend/McArthur Glen	£0.91	£9.19	£1.10	£16.85	£1.37	£3.13	£41.53	£3.29	£0.00	**£77.38**
Cardiff	£17.27	£34.93	£25.39	£41.37	£27.40	£87.70	£14.66	£1.23	£0.00	**£249.95**
Swansea	£8.18	£1.84	£0.00	£1.53	£2.74	£0.00	£10.59	£12.75	£0.00	**£37.63**
Other outflow	£5.45	£14.71	£8.83	£12.26	£16.44	£100.23	£10.59	£21.38	£0.00	**£189.89**
Total Turnover	**£90.90**	**£183.86**	**£110.38**	**£153.21**	**£137.53**	**£313.21**	**£81.44**	**£41.12**	**n/a**	**£346.12**

Table 5C: Comparison Shopping Penetration Rates 2011 - 2021 with Adjusted Market Shares to Take Account of Commitments

Centre/Facilities	**Zone 1**	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**Inflow**
Market Share									
Aberdare	40%	6%	8%	0%	1%	0%	0%	2%	5%
Pontypridd/Upper Boat	4%	19%	55%	20%	6%	2%	1%	0%	10%
Talbot Green	1%	22%	4%	27%	1%	1%	4%	2%	20%
Tonypandy	0%	10%	0%	0%	0%	0%	0%	0%	0%
Mountain Ash	0%	0%	2%	0%	0%	0%	0%	0%	5%
Porth	0%	3%	1%	0%	0%	0%	0%	0%	0%
Treorchy	0%	3%	0%	0%	0%	0%	0%	0%	0%
Llantrisant	0%	0%	0%	4%	0%	0%	0%	0%	5%
RCT Local Centres	0%	2%	1%	1%	0%	0%	0%	0%	0%
Merthyr Tydfil	24%	2%	8%	0%	55%	4%	0%	2%	n/a
Caerphilly	0%	0%	1%	1%	2%	32%	0%	0%	n/a
Bridgend/McArthur Glen	1%	5%	1%	11%	1%	1%	51%	8%	n/a
Cardiff	18%	19%	15%	27%	20%	28%	18%	3%	n/a
Swansea	8%	1%	0%	1%	2%	0%	13%	31%	n/a
Other outflow	4%	8%	4%	8%	12%	32%	13%	52%	n/a
Market Share Total	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***n/a***

Table 6C: **Comparison Shopping Available Expenditure 2011**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total Expenditure
Turnover £M	**£105.42**	**£209.35**	**£125.69**	**£183.89**	**£163.11**	**£370.40**	**£96.68**	**£48.79**	**n/a**	**£1,303.33**
Aberdare	£42.17	£12.56	£10.05	£0.00	£2.28	£0.00	£0.00	£0.98	£3.58	**£71.63**
Pontypridd/Upper Boat	£4.22	£39.78	£69.13	£36.78	£9.79	£7.41	£0.97	£0.00	£18.67	**£186.73**
Talbot Green	£1.05	£46.06	£5.03	£49.65	£1.63	£3.70	£3.87	£0.98	£27.99	**£139.96**
Tonypandy	£0.00	£20.93	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	**£20.93**
Mountain Ash	£0.00	£0.00	£2.51	£0.00	£0.00	£0.00	£0.00	£0.00	£0.13	**£2.65**
Porth	£0.00	£6.28	£1.26	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	**£7.54**
Treorchy	£0.00	£6.28	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	**£6.28**
Llantrisant	£0.00	£0.00	£0.00	£7.36	£0.00	£0.00	£0.00	£0.00	£0.39	**£7.74**
RCT Local Centres	£0.00	£4.19	£1.26	£1.84	£0.00	£0.00	£0.00	£0.00	£0.00	**£7.28**
Merthyr Tydfil	£25.30	£4.19	£10.05	£0.00	£89.71	£14.82	£0.00	£0.98	£0.00	**£145.05**
Caerphilly	£0.00	£0.00	£1.26	£1.84	£3.26	£118.53	£0.00	£0.00	£0.00	**£124.89**
Bridgend/McArthur Glen	£1.05	£10.47	£1.26	£20.23	£1.63	£3.70	£49.31	£3.90	£0.00	**£91.55**
Cardiff	£18.98	£39.78	£18.85	£49.65	£32.62	£103.71	£17.40	£1.46	£0.00	**£282.46**
Swansea	£8.43	£2.09	£0.00	£1.84	£3.26	£0.00	£12.57	£15.13	£0.00	**£43.32**
Other outflow	£4.22	£16.75	£5.03	£14.71	£19.57	£118.53	£12.57	£25.37	£0.00	**£216.74**
Total Turnover	***£105.42***	***£209.35***	***£125.69***	***£183.89***	***£163.76***	***£370.40***	***£96.68***	***£48.79***	***n/a***	***£429.43***

Table 7C: **Comparison Shopping Available Expenditure 2016**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total Expend.
Available Expenditure 2016	**£124.22**	**£242.51**	**£145.96**	**£228.29**	**£195.60**	**£442.60**	**£115.75**	**£58.41**		**£1,553.34**
Turnover £M										
Aberdare	£49.69	£14.55	£11.68	£0.00	£2.74	£0.00	£0.00	£1.17	£4.20	**£84.03**
Pontypridd/Upper Boat	£4.97	£46.08	£80.28	£45.66	£11.74	£8.85	£1.16	£0.00	£22.08	**£220.81**
Talbot Green	£1.24	£53.35	£5.84	£61.64	£1.96	£4.43	£4.63	£1.17	£33.56	**£167.81**
Tonypandy	£0.00	£24.25	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	**£24.25**
Mountain Ash	£0.00	£0.00	£2.92	£0.00	£0.00	£0.00	£0.00	£0.00	£0.15	**£3.07**
Porth	£0.00	£7.28	£1.46	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	**£8.73**
Treorchy	£0.00	£7.28	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	**£7.28**
Llantrisant	£0.00	£0.00	£0.00	£9.13	£0.00	£0.00	£0.00	£0.00	£0.48	**£9.61**
RCT Local Centres	£0.00	£4.85	£1.46	£2.28	£0.00	£0.00	£0.00	£0.00	£0.00	**£8.59**
Merthyr Tydfil	£29.81	£4.85	£11.68	£0.00	£107.58	£17.70	£0.00	£1.17	£0.00	**£172.79**
Caerphilly	£0.00	£0.00	£1.46	£2.28	£3.91	£141.63	£0.00	£0.00	£0.00	**£149.29**
Bridgend/McArthur Glen	£1.24	£12.13	£1.46	£25.11	£1.96	£4.43	£59.03	£4.67	£0.00	**£110.02**
Cardiff	£22.36	£46.08	£21.89	£61.64	£39.12	£123.93	£20.83	£1.75	£0.00	**£337.60**
Swansea	£9.94	£2.43	£0.00	£2.28	£3.91	£0.00	£15.05	£18.11	£0.00	**£51.71**
Other outflow	£4.97	£19.40	£5.84	£18.26	£23.47	£141.63	£15.05	£30.37	£0.00	**£258.99**
Total Turnover	***£124.22***	***£242.51***	***£145.96***	***£228.29***	***£196.38***	***£442.60***	***£115.75***	***£58.41***	***n/a***	***£1,614.60***

Table 8C **Comparison Shopping Available Expenditure 2021**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total Expend.
Available Expenditure 2021	**£150.55**	**£290.05**	**£174.54**	**£289.37**	**£240.86**	**£542.57**	**£142.25**	**£71.77**		**£1,901.97**
Turnover £M										
Aberdare	£60.22	£17.40	£13.96	£0.00	£3.37	£0.00	£0.00	£1.44	£5.07	**£101.47**
Pontypridd/Upper Boat	£6.02	£55.11	£96.00	£57.87	£14.45	£10.85	£1.42	£0.00	£26.86	**£268.59**
Talbot Green	£1.51	£63.81	£6.98	£78.13	£2.41	£5.43	£5.69	£1.44	£41.35	**£206.74**
Tonypandy	£0.00	£29.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	**£29.00**
Mountain Ash	£0.00	£0.00	£3.49	£0.00	£0.00	£0.00	£0.00	£0.00	£0.18	**£3.67**
Porth	£0.00	£8.70	£1.75	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	**£10.45**
Treorchy	£0.00	£8.70	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	**£8.70**
Llantrisant	£0.00	£0.00	£0.00	£11.57	£0.00	£0.00	£0.00	£0.00	£0.61	**£12.18**
RCT Local Centres	£0.00	£5.80	£1.75	£2.89	£0.00	£0.00	£0.00	£0.00	£0.00	**£10.44**
Merthyr Tydfil	£36.13	£5.80	£13.96	£0.00	£132.47	£21.70	£0.00	£1.44	n/a	**£211.51**
Caerphilly	£0.00	£0.00	£1.75	£2.89	£4.82	£173.62	£0.00	£0.00	n/a	**£183.08**
Bridgend/McArthur Glen	£1.51	£14.50	£1.75	£31.83	£2.41	£5.43	£72.55	£5.74	n/a	**£135.71**
Cardiff	£27.10	£55.11	£26.18	£78.13	£48.17	£151.92	£25.61	£2.15	n/a	**£414.37**
Swansea	£12.04	£2.90	£0.00	£2.89	£4.82	£0.00	£18.49	£22.25	n/a	**£63.40**
Other outflow	£6.02	£23.20	£6.98	£23.15	£28.90	£173.62	£18.49	£37.32	n/a	**£317.70**
Total Turnover	***£150.55***	***£290.05***	***£174.54***	***£289.37***	***£241.82***	***£542.57***	***£142.25***	***£71.77***	***n/a***	***£1,977.01***

Table 9C: Summary of Comparison Expenditure/Turnover 2007 to 2021 £M (With adjusted market shares and commitments)

Centre	2007	2011	2016	2021
Available Expenditure				
Zone 1	£55.57	£71.63	£84.03	£101.47
Zone 2	£28.68	£34.75	£40.26	£48.15
Zone 3	£144.05	£189.38	£223.88	£272.26
Zone 4	£129.78	£147.70	£177.43	£218.92
Local Centres	£6.31	£7.28	£8.59	£10.44
Subtotal	£364.40	£450.74	£534.19	£651.25
Turnover of Floorspace				
Zone 1	£55.57	£58.98	£63.54	£64.62
Zone 2	£28.68	£30.44	£32.80	£33.87
Zone 3	£144.05	£152.89	£164.71	£165.79
Zone 4	£129.78	£137.74	£148.39	£149.47
Local Centres	£6.31	£6.70	£7.22	£8.30
Subtotal	£364.40	£386.77	£416.66	£422.04
Turnover of Commitments				
Zone 1		£34.08	£36.71	£39.55
Zone 2		£14.51	£15.63	£16.84
Zone 3		£61.83	£66.61	£71.76
Zone 4		£0.00	£0.00	£0.00
Local Centres		£0.00	£0.00	£0.00
Subtotal		£110.42	£118.95	£128.15
Surplus Expenditure				
RCT	n/a	-£46.44	-£1.42	£101.06

Table 10C Comparison Goods Floorspace requirements

	2007	2011	2016	2021
Comparison Goods Surplus £M	n/a	-£46.44	-£1.42	£101.06
Average Turnover Density £ per sq m		£4,000	£4,309	£4,642
Comparison Goods net requirement sq m		n/a	n/a	21,770
Gross floorspace requirement		n/a	n/a	31,099