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CHESHIRE WEST AND CHESTER RETAIL STUDY

Volume 3: Quantitative Capacity Assessment – Population Growth Scenario 2 (Higher Growth)

Prepared for:

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APPENDIX 1: EXPERIAN INSIGHTS DATA

TABLE 1: SUPERMARKET / CONVENIENCE STORE / OTHER CONVENIENCE TRANSACTIONS (E)

Merchant location	Retail Location	Destination	Zone 1	Zone 2	Zone 3	Zone 4	Customer Location	Total Study Area	Out of Area customers	Total Expenditure
Zone 1	Chester Oaks	CWAC	1,644,475.48	300,377.65	88,360.46	183,034.81	325,111.70	2,414,355.30	674,020.45	1,740,334.85
Zone 1	Chester	CWAC	1,209,500.83	116,020.01	24,806.48	168,789.72	36,676.63	1,555,593.67	224,466.76	1,331,126.91
Zone 1	Chester - Cady Valley Retail Park	CWAC	2,340,078.75	183,035.22	16,420.30	17,720.68	16,387.85	2,593,843.78	113,646.10	2,480,197.68
Zone 1	Chester - Faulkner Street	CWAC	286,841.72	9,744.53	3,239.31	12,055.01	5,780.22	317,680.59	37,953.68	279,726.91
Zone 1	Chester - Greyhound Retail Park	CWAC	1,997,959.06	81,931.84	12,237.57	489,426.13	30,988.95	2,612,545.55	113,616.00	2,500,929.55
Zone 1	Ellesmere Port Retail Park	CWAC	1,512,623.42	49,790.30	8,000.34	43,128.80	112,053.42	2,124,658.28	60,154.59	2,064,503.69
Zone 1	Ellesmere Port Retail Park	CWAC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Zone 1	Little Sutton	CWAC	294,309.87	2,539.93	191.51	6,292.01	18,846.94	322,180.26	13,052.76	309,127.50
Zone 1	Newton	CWAC	1,819,523.53	5,215.76	1,208.46	14,742.29	180,388.52	2,021,478.56	42,444.90	1,979,033.66
Zone 1	Out of Centre shopping	CWAC	11,171,032.15	733,443.15	75,494.89	78,494.89	785,796.30	13,050,564.22	650,575.27	12,399,988.95
Zone 1	Out of Centre shopping	Out of Area	93,321.94	12,114.01	3,736.32	402,736.70	7,603.29	1,339,531.26	33,760.88	1,305,770.38
Zone 1	Total	Total	23,790,963.75	1,470,184.03	233,620.54	2,777,722.43	1,038,837.54	28,808,418.27	1,543,410.39	27,265,007.88
Zone 2	Middlewich	Out of Area	1,501.04	514,574.54	439,314.92	1,607.04	1,805.97	959,566.61	80,394.93	1,039,961.54
Zone 2	Northwich	CWAC	26,028.77	8,396,058.33	629,748.63	9,132.55	3,033.77	9,064,002.05	265,083.16	9,329,085.21
Zone 2	Northwich - Northwich Retail Park	CWAC	3,183.56	2,771,572.26	273,583.51	2,756.27	1,590.66	3,058,266.26	110,534.25	2,947,732.01
Zone 2	Tarporely	CWAC	83,685.27	775,534.05	32,638.63	9,310.77	2,000.13	902,238.15	45,555.70	856,682.45
Zone 2	Winsford	CWAC	25,562.07	4,355,484.33	233,728.73	7,521.35	11,464.13	4,633,760.61	134,488.20	4,499,272.41
Zone 2	Winsford - Wharton Retail Park	CWAC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Zone 2	Winsford	CWAC	33,360.66	862,848.09	93,780.13	2,737.05	2,520.68	992,255.61	72,612.80	1,064,868.41
Zone 2	Out of Centre shopping	CWAC	533,960.86	5,612,876.90	516,864.96	37,255.56	19,253.69	10,730,211.97	442,434.42	11,172,646.39
Zone 2	Out of Centre shopping	Out of Area	40,764.38	1,105,095.21	835,763.96	9,379.03	10,818.37	2,001,820.95	187,034.47	1,814,786.48
Zone 2	Total	Total	748,558.13	26,494,043.71	3,055,622.77	75,759.62	23,998.98	32,240,520.21	1,341,117.93	30,900,402.28
Zone 3	Crewes	Out of Area	7,083.16	160,468.68	2,295,824.42	11,785.58	1,958.86	3,471,126.77	99,165.94	3,371,960.83
Zone 3	Crewes - Edleston Road	Out of Area	2,114.77	26,110.82	1,217,626.42	3,398.45	1,223.94	1,250,474.40	21,530.59	1,228,943.81
Zone 3	Crewes - Grand Junction Retail Park	Out of Area	443.69	40,246.13	292,517.21	1,863.19	218.48	335,280.70	115,327.76	219,952.94
Zone 3	Knutsford	Out of Area	6,086.37	425,646.45	8,976,102.35	1,317.23	3,684.42	2,156,272.75	520,430.23	2,676,703.99
Zone 3	Lymm	Out of Area	210.21	1,331.06	94,791.11	1,130.19	314.31	94,778.26	64,959.63	162,844.51
Zone 3	Runcom - Old Town	Out of Area	31,381.58	165,159.79	2,553,222.12	46,821.54	1,973.73	2,798,556.78	512,556.60	2,285,999.18
Zone 3	Runcom - Old Town	Out of Area	1,847.13	53,381.39	418,144.43	282.17	1,709.16	417,406.28	34,561.39	381,844.89
Zone 3	Runcom - Runcom Shopping City	Out of Area	21,274.58	482,292.68	3,163,169.78	6,465.19	10,018.62	3,683,120.85	327,976.97	3,355,143.88
Zone 3	Sandbach	Out of Area	594.43	33,035.52	1,288,868.31	1,014.90	54.27	1,330,060.36	639,089.81	1,669,150.17
Zone 3	Stockton Heath	Out of Area	8,365.79	486,386.42	1,822,500.31	1,114.44	4,530,158.94	2,530,158.94	1,884,484.43	6,414,643.37
Zone 3	Out of Centre shopping	Out of Area	11,122.63	1,500,427.60	11,634,316.55	12,747.02	18,863.54	15,339,137.27	3,646,412.37	11,692,724.90
Zone 3	Total	Total	192,451.83	3,318,488.74	31,654,033.01	155,539.90	46,618.33	35,947,112.43	9,221,347.08	26,725,765.35
Zone 4	Chester - Brougham Shopping Park	Out of Area	62,501.35	10,484.54	1,430,387.36	2,046.99	11,266.97	1,454,647.21	112,664.92	1,341,982.29
Zone 4	Denlith	Out of Area	146.75	30.15	104.60	90,281.71	103.23	90,666.44	11,218.00	79,448.44
Zone 4	Flint - Flintshire Retail Centre	Out of Area	9,160.42	972.40	484.06	633,714.00	2,635.89	646,979.77	25,288.33	621,691.44
Zone 4	Hollywell	Out of Area	13,256.69	1,473.09	1,621.13	1,238,211.73	8,188.57	2,102,360.63	65,565.08	2,036,795.55
Zone 4	Mold	Out of Area	3,347.63	242.22	439.74	564,535.38	1,832.56	570,397.53	26,832.42	543,565.11
Zone 4	Mold	Out of Area	26,908.78	3,886.82	4,042.23	3,481,762.41	18,091.01	3,534,641.25	151,009.65	3,383,631.60
Zone 4	Prestatyn	Out of Area	19,865.17	16,079.86	17,572.80	17,120,090.64	3,929.42	21,914,252.52	1,718,156.21	19,696,096.31
Zone 4	Ruthin	Out of Area	658.68	52.24	281.52	225,839.55	819.31	227,651.05	35,693.69	191,957.36
Zone 4	Shotton	Out of Area	2,012.48	192.87	87.38	159,274.98	209.34	161,777.05	3,240.39	158,536.66
Zone 4	Shotton - Connahs Quay	Out of Area	5,090.20	141.37	404.16	1,286,202.49	1,458.62	1,288,048.48	15,977.02	1,272,071.46
Zone 4	Whitchurch	Out of Area	575,592.42	95,014.33	189,435.77	1,650,945.32	6,353.55	2,517,341.39	561,368.67	3,078,710.06
Zone 4	Wrexham	Out of Area	4,563.31	272.20	229.16	213,112.41	570.43	218,745.51	16,274.72	202,470.79
Zone 4	Wrexham - Border Retail Park	Out of Area	137,844.55	8,179.18	5,295.29	4,063,606.99	4,651.79	4,215,607.80	255,182.46	3,960,425.34
Zone 4	Wrexham - Central Retail Park	Out of Area	13,154.66	272.88	68,263.63	31.22	82,013.19	7,884.18	87,897.37	7,006,715.73
Zone 4	Wrexham - Plas Coch Retail Park	Out of Area	150,182.23	10,625.07	5,731.09	3,316,058.23	4,856.67	3,487,453.29	205,066.36	3,282,386.93
Zone 4	Out of Centre shopping	Out of Area	1,561,345.74	184,106.88	115,954.89	24,950,714.63	307,789.65	26,934,920.45	5,284,607.70	21,650,312.75
Zone 4	Total	Total	1,043,020.97	39,852.88	332,442.83	44,917,336.66	263,044.68	48,717,336.66	6,822,157.55	41,895,179.11
Zone 5	Beblingham	Out of Area	940.83	100.21	73.59	464.87	121,715.73	123,291.25	3,165.87	120,125.38
Zone 5	Birkenhead	Out of Area	14,480.07	799.84	2,442.76	2,246.62	1,233,298.48	1,233,997.77	63,956.26	1,170,041.51
Zone 5	Birkenhead - Rock Retail Park	Out of Area	6,586.37	197.16	1,971.56	329,819.37	559.89	331,524.80	337,174.70	668,699.50
Zone 5	Bromborough - The Croft Retail & Leisure Park	Out of Area	3,346.11	8,539.79	2,280.21	19,754.09	3,161,665.39	3,526,565.99	106,334.97	3,420,231.02
Zone 5	Haswall	Out of Area	541,197.04	7,016.75	4,651.42	16,740.15	4,014,417.19	4,584,022.55	178,950.83	4,405,071.72
Zone 5	Hoylake	Out of Area	9,439.15	182.11	676.79	81,278.51	471,296.51	483,935.81	87,221.58	396,714.23
Zone 5	Merton	Out of Area	2,185.84	204.64	144.46	958.54	363,884.33	367,248.01	14,230.92	353,017.09
Zone 5	New Ferry	Out of Area	677.30	1.61	2.00	197.54	107,334.28	108,012.73	2,378.44	105,634.29
Zone 5	Upton - Upton By Pass Retail Park	Out of Area	37,324.86	5,087.16	1,113.18	3,108,495.92	3,109,617.01	3,109,617.01	3,109,617.01	3,109,617.01
Zone 5	Wallasey (Liscard)	Out of Area	7,748.44	5,299.13	672.84	7,946.36	3,060,297.24	3,081,964.01	64,696.57	3,017,267.44
Zone 5	Wallasey (Liscard) - Junction 1 Retail Park	Out of Area	94,046.95	10,200.18	8,747.75	15,850.87	4,397,751.56	4,526,597.31	156,367.89	4,370,229.42
Zone 5	West Kirby	Out of Area	26,407.92	2,160.60	4,788.17	1,749,137.63	1,749,137.63	1,749,137.63	1,749,137.63	1,749,137.63
Zone 5	Out of Centre shopping	Out of Area	651,258.21	29,529.99	19,598.47	71,617.10	17,770,014.28	18,541,618.05	704,061.78	17,835,556.27
Zone 5	Total	Total	1,726,914.31	70,141.11	44,257.23	149,224.79	39,889,370.09	41,279,916.53	1,470,964.78	40,008,951.75
Out of Area	Beblingham	Out of Area	940.83	100.21	73.59	464.87	121,715.73	123,291.25	3,165.87	120,125.38
Out of Area	Liverpool - Central	Out of Area	28,529.22	16,561.01	19,035.90	14,354.09	178,278.89	256,759.11	1,470,964.78	245,294.32
Out of Area	Macclesfield	Out of Area	5,680.92	32,868.59	380,658.76	7,520.93	4,273.58	431,002.78	43,002.78	387,999.99
Out of Area	Macclesfield - Silk Retail Park	Out of Area	25.80	1,860.60	15,457.67	251.90	21.14	17,339.11	17,339.11	17,339.11
Out of Area	Manchester - Central Retail Park	Out of Area	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Out of Area	Manchester - Central Retail Park	Out of Area	347,307.40	59,814.96	87,537.59	20,984.98	20,847.85	212,992.98	212,992.98	212,992.98
Out of Area	Market Drayton	Out of Area	2,828.19	38,494.17	38,494.17	5,180.27	97.51	39,833.78	11,833.78	27,999.99
Out of Area	Newcastle-under-Lyme	Out of Area	984.98	11,759.70	55,737.92	3,805.68	485.58	72,773.86	7,273.86	65,500.00
Out of Area	Oswestry	Out of Area	7,683.07	1,650.83	1,442.88	6,768.76	1,611.54	8,380.30	1,611.54	6,768.76
Out of Area	Stoke-on-Trent - City Centre (Hanley)	Out of Area	9.42	1,945.71	1,945.71	54.25	0.00	2,991.01	2,991.01	2,991.01
Out of Area	Trafford Centre	Out of Area	3,793.71	26,405.76	44,864.65	5,082.16	2,695.12	82,841.40	82,841.40	82,841.40
Out of Area	Warrington	Out of Area	1,138.27	33,040.45	138,305.70	905.55	1,422.47	172,834.44	172,834.44	172,834.44
Out of Area	Other	Out of Area	1,701,544.55	3,853,643.53	12,480,148.15	72,334,386.91	3,223,156.15	78,538,542.28	78,538,542.28	78,538,542.28
Out of Area	Total	Total	1,842,396.52	4,024,502.05	13,313,212.18	75,956,084.64	4,343,811.04	80,370,006.63	80,370,006.63	80,370,006.63
Online Expenditure			4,418,463.36	5,287,508.12	6,487,672.63	7,054,043.54	5,666,856.94	28,914,544.58	28,914,544.58	28,914,544.58
Total Expenditure			25,762,295.27	43,468,720.65	55,140,851.65	61,951,817.40	50,380,143.20	246,412,796.19	22,427,137.14	226,985,659.05

TABLE 2: ALL COMPARISON RETAIL TRANSACTIONS (E)

Merchant Location	Retail Location	Destination	Zone 1	Zone 2	Zone 3	Zone 4	Customer Location	Total Study Area	Out of Area customers	Total Expenditure
Zone 1	Chester Oaks	In Area	1,802,564.28	890,617.83	628,085.62	990,227.15	1,106,296.76	8,244,366.64	8,244,366.64	13,527,995.14
Zone 1	Chester	In Area	2,882,975.21	750,301.21	388,549.38	1,365,192.13	422,241.55	5,799,259.22	2,146,951.12	9,907,951.14
Zone 1	Chester - Calvely Valley Retail Park	In Area	17,370.21	13,140.68	1,426.55	12,737.92	1,721.24	206,346.60	9,040.40	2,987,001.50
Zone 1	Chester - Foulmer Street	In Area	2,583.86	87.08	20.41	16.94	10.37	2,768.42	0.00	3,003.14
Zone 1	Chester - Heywood Retail Park	In Area	2,864,121.01	1,111.01	54,500.73	1,372,712.94	4,298,136.17	4,298,136.17	12,426,517.17	18,930,183.25
Zone 1	Ellesmere Port	In Area	14,068.61	5,853.94	1,270.90	11,355.14	17,853.88	47,120.47	7,123.03	212,525.50
Zone 1	Ellesmere Port Retail Park	In Area	72,847.42	37,777.02	5,506.86	17,744.88	118,778.71	901,514.89	31,391.41	912,348.30
Zone 1	Little Sutton	In Area	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Zone 1	Neston	In Area	28,877.11	138.44	1,401.00	446.46	5,037.04	34,568.86	1,152.89	53,721.75
Zone 1	Out of Centre shopping	In Area	3,754,145.13	646,440.74	186,181.38	1,552,664.90	1,580,427.12	8,037,035.22	1,026,609.07	9,062,640.29
Zone 1	Out of Centre shopping	In Area	12,848,683.25	4,478.86	1,219,258.08	1,592,793.63	4,488,870.05	35,851,851.93	4,488,870.05	43,805,881.85
Zone 1	Total	Total	32,727,791.18	8,019,740.41	1,219,258.08	5,452,971.99	8,488,970.05	25,116,781.43	11,678,108.48	368,689,011.1
Zone 2	Middlewich	Out of Area	61.95	210,318.07	239,133.57	115.19	518.85	470,702.63	22,423.93	493,126.56
Zone 2	Northwich	Out of Area	7,691.21	2,304,156.23	219,232.35	2,332,130.28	2,570,107.28	2,570,107.28	1,949,399.65	4,519,506.93
Zone 2	Northwich - Northwich Retail Park	In Area	1,834.51	1,217,076.71	233,766.81	2,404.72	625.45	4,157,708.20	65,250.57	12,522,958.77
Zone 2	Tarporley	In Area	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Zone 2	Winford	In Area	2,907.43	519,995.73	36,099.73	1,053.26	718.43	2,141,401.11	34,995.11	2,176,396.22
Zone 2	Winford - Wharton Retail Park	In Area	1,283.24	398,623.35	26,844.81	1,013.82	160.32	357,923.54	12,481.10	370,404.64
Zone 2	Frodham	In Area	9,937.84	110,233.49	23,816.05	1,978.01	1,546.86	154,532.15	20,178.05	276,000.20
Zone 2	Out of Centre shopping	In Area	37,213.73	2,055,611.92	3,714,362.38	3,714,362.38	3,714,362.38	1,613,203,907.98	31,653,497.98	1,645,862,405.96
Zone 2	Out of Centre shopping	Out of Area	5,714.86	19,268.82	16,210.74	3,012.62	128.74	45,453.85	19,991.46	174,261.31
Zone 2	Total	Total	69,600.89	6,112,939.49	978,706.56	22,507.35	10,929.20	7,344,683.79	324,013.21	756,887.97
Zone 3	Crewe	Out of Area	2,462.06	107,908.99	1,071,585.05	4,555.34	631.47	1,808,042.91	1,416,686.96	1,603,729.87
Zone 3	Crewe - Edleston Road	Out of Area	218.47	440,987.07	756,190.11	754.43	367,781.93	1,416,686.96	470,383.25	1,470,383.25
Zone 3	Crewe - Grand Junction Retail Park	In Area	5,681.95	441,350.56	2,476,960.01	26,889.34	2,788.73	2,957,710.59	1,147,308.69	4,105,020.28
Zone 3	Knutsford	Out of Area	1,781.00	94,523.44	277,112.12	1,119.78	1,006.04	370,063.04	96,859.01	467,462.05
Zone 3	Lymm	In Area	1,585.78	27,784.19	2,287.18	1,608.67	429.75	40,895.35	84,870.97	84,870.97
Zone 3	Nantwich - Old Town	Out of Area	8,505.92	61,955.49	729,742.14	11,947.95	2,081.58	815,235.98	190,905.59	1,000,140.67
Zone 3	Runcorn - Ditchingham	Out of Area	332.79	4,048.36	94,288.82	79.50	84.55	98,843.62	10,326.51	109,170.13
Zone 3	Runcorn - Junction Shopping City	Out of Area	2,529.21	171,814.84	603,405.87	3,488.26	3,488.26	793,642.05	803,739.01	1,597,378.06
Zone 3	Sandbach	Out of Area	233.35	5,739.50	16,122.06	221.76	133.05	169,449.72	60,722.59	260,909.59
Zone 3	Stockton Heath	Out of Area	157.59	14,047.23	102,028.01	136.54	26.69	117,496.06	33,678.55	181,218.61
Zone 3	Out of Centre shopping	Out of Area	462,729.88	1,025,448.11	1,122,488.11	11,229.88	11,229.88	3,902,602.07	2,204,042.27	8,095,664.18
Zone 3	Total	Total	7,958.81	1,404,942.74	8,905,159.41	121,694.54	22,690.70	10,530,403.20	4,485,959.40	14,088,058.20
Zone 4	Chester - Broughton Shopping Park	Out of Area	532,801.89	220,889.88	31,004.94	1,766,277.59	114,963.02	2,624,733.32	383,156.36	2,907,889.48
Zone 4	Delneth	Out of Area	8.37	54.79	0.00	10,702.37	0.00	12,747.74	4,895.50	17,883.24
Zone 4	Fleet	Out of Area	83.18	85.85	25.05	17,418.61	635.55	18,174.27	630.14	18,804.41
Zone 4	Fleet - Filshie Retail Park	In Area	5,539.47	1,897.38	800.70	791,512.88	4,999.71	808,750.10	37,957.52	845,707.66
Zone 4	Hoylake	Out of Area	741.88	47.76	2.27	23,120.19	1,139.99	232,912.49	10,180.15	243,112.84
Zone 4	Mold	Out of Area	1,391.88	8,969.18	3,899.15	3,899.15	3,899.15	344,456.54	18,456.54	362,913.08
Zone 4	Prestatyn	Out of Area	3,678.34	870.98	10,289.73	134,467.67	7,089.44	145,571.65	1,043,930.48	1,891,522.12
Zone 4	Ruthin	Out of Area	910.72	48.46	223.29	15,780.39	530.01	157,492.89	33,376.16	193,869.05
Zone 4	Shotton	Out of Area	553.91	21.10	14,664.87	147.81	0.00	44,612.72	739.05	47,351.77
Zone 4	Shotton - Connahs Quay	Out of Area	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Zone 4	Whitchurch	Out of Area	471,888.95	6,648.15	17,941.81	177,909.47	515.86	2,502,524.94	80,208.85	3,300,731.79
Zone 4	Wrexham	Out of Area	8,379.16	4,444.11	2,190.48	480,482.96	29.32	2,305,271.92	29,320.00	2,334,591.92
Zone 4	Wrexham - Border Retail Park	Out of Area	11,684.10	139.28	1,151.57	202,216.63	57.32	215,504.90	25,168.41	240,671.31
Zone 4	Wrexham - Central Retail Park	Out of Area	6,880.33	1,138.71	1,325.07	374,668.60	47.00	4,007,317.44	42,815.14	4,050,132.58
Zone 4	Wrexham - Plas Coch Retail Park	Out of Area	4,254,362.93	3,500.44	4,892.10	5,905.07	1,264.39	12,643,677.89	1,264,397.89	12,908,075.78
Zone 4	Out of Centre shopping	Out of Area	407,918.21	69,440.53	1,848,556.39	56,733.50	38,637.67	13,574,518.78	7,683,150.58	18,257,669.36
Zone 4	Total	Total	11,544,743.32	322,646.42	153,446.37	14,021,899.84	56,935.25	15,686,011.20	1,468,121.10	19,157,732.89
Zone 5	Birkenhead	Out of Area	12.43	0.00	0.00	0.00	0.00	13,950.11	0.00	13,950.11
Zone 5	Birkenhead	Out of Area	406,363.01	1,991.94	1,282.74	794.79	1,497,910.52	1,549,093.01	1,000,870.07	1,649,963.07
Zone 5	Birkenhead - Rock Retail Park	Out of Area	330,805.54	757.81	1,372.90	4,917.30	1,284,391.19	1,326,630.24	69,028.48	1,395,658.72
Zone 5	Bromborough - The Croft Retail & Leisure Park	Out of Area	502,229.82	28,780.02	11,112.88	67,476.70	1,034,311.72	1,645,679.83	143,407.77	1,789,010.60
Zone 5	Headwall	Out of Area	21,170.74	432.02	432.02	441,468.70	1,468.70	155,274.74	10,484.59	155,759.34
Zone 5	Haylake	Out of Area	1,574.71	76.48	18.23	532.51	188,247.30	200,790.63	5,096.95	205,887.58
Zone 5	Merton	Out of Area	628.87	175.38	18.20	37.46	88,379.03	89,371.24	4,114.68	93,487.92
Zone 5	New Ferry	Out of Area	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Zone 5	Upston (by Upson Retail Park)	Out of Area	5,087.09	547.16	145.90	859.54	318,868.23	329,525.52	16,861.82	346,089.54
Zone 5	Walsley (Liscard)	Out of Area	5,560.51	1,184.73	45.40	47,919.57	782,607.29	73,940.27	33,665.38	828,868.52
Zone 5	Wallyton (Liscard) - Junction 1 Retail Park	Out of Area	6,019,611.60	6,019,611.60	2,847.39	1,666,631.01	1,793,133.31	69,089.12	1,862,222.43	18,930,183.25
Zone 5	West Kirby	Out of Area	3,630.48	46.125	6,682.75	306.43	184,311.09	229,887.78	9,866.68	199,075.38
Zone 5	Zone 5	Out of Area	13,525,645.64	16,115.09	1,691.73	17,865.40	2,021,226.07	1,937,000.83	392,482.72	2,620,516.67
Zone 5	Total	Total	68,652,920.92	23,502.58	122,741.95	1,623,187.46	12,291,760.57	12,291,760.57	854,582.42	13,142,757.39
Out of Area	Completion	Out of Area	312.19	5,582.81	22,587.10	333.89	54.7	28,870.52	0.00	28,870.52
Out of Area	Liverpool - Central	Out of Area	496,246.29	331,659.29	339,093.20	350,775.77	3,136,669.58	4,955,143.63	0.00	4,955,143.63
Out of Area	Macclesfield	Out of Area	27,416.52	154,817.01	154,817.01	154,817.01	1,919,174.53	2,022,222.40	202,222.40	2,224,444.80
Out of Area	Macclesfield - Green Retail Park	Out of Area	208.23	5,643.13	76,409.04	822.73	501.15	83,644.28	0.00	83,644.28
Out of Area	Macclesfield - Lifford Retail Park	Out of Area	38.128	1,929.00	8,664.08	37.91	11.60	10,672.87	0.00	10,672.87
Out of Area	Manchester - Central Retail Park	Out of Area	0.00	1,973.65	5,162.23	0.00	0.00	7,276.56	0.00	7,276.56
Out of Area	Manchester - Central Retail Park	Out of Area	130,394.08	393,132.41	580,148.36	105,975.92	135,750.40	1,242,976.67	0.00	1,242,976.67
Out of Area	Market Drayton	Out of Area	1,388.76	576.69	7,402.65	10,755.61	68.78	20,392.49	0.00	20,392.49
Out of Area	Newcastle - Underlyme Retail Park	Out of Area	169.50	1,611.98	6,224.35	392.35	317.06	8,765.24	0.00	8,765.24
Out of Area	Overton	Out of Area	2,620.34	1,512.00	1,149.04	1,344.02	0.00	24,081.08	0.00	24,081.08
Out of Area	Stoke-on-Trent - City Centre (Hanley)	Out of Area	92.774	13,948.28	1,699.29	2,070.13	63.05	181,701.49	0.00	181,701.49
Out of Area	Trafford Centre	Out of Area	134,055.67	796,771.81	123,892.62	214,302.38	115,061.12	2,798,983.62	0.00	2,798,983.62
Out of Area	Warrington	Out of Area	8,864.59	245,232.30	3,091,378.94	5,274.46	6,903.69	86,797,787.84	0.00	86,797,787.84
Out of Area	All Other	Out of Area	2,123,397.91	5,180,816.79	10,330,175.35	4,962,834.51	2,954,052.28	25,750,262.04	0.00	25,750,262.04
Out of Area	Total	Total	12,424,602.50	6,972,716.13	15,427,520.03	5,888,844.21	63,353,581.73	157,616.00	0.00	157,616.00
Out of Area	Total	Total	11,544,743.32	12,966,947.92	17,623,187.46	15,123,187.58	12,291,760.57	18,260,460.97	18,260,460.97	18,260,460.97
Total Expenditure	Total	Total	29,942,346.50	55,947,569.42	47,329,175.14	47,033,221.57	16,763,766.77	178,152,402.19	20,795,121.32	81,874,350.93

APPENDIX 2: POPULATION AND EXPENDITURE ANALYSIS

TABLE 1: BASE YEAR POPULATION & PROJECTIONS (2025 - 2040)

	2025	2030	2035	2040
Zone 1	228,470	240,917	253,364	265,811
Zone 2	166,600	175,676	184,753	193,829
Zone 3	269,460	274,216	278,570	283,437
Zone 4	367,034	368,103	369,269	371,027
Zone 5	325,408	327,591	329,696	332,470
Total Study Area:	1,356,972	1,386,503	1,415,651	1,446,573
Total CWaC:	370,321	391,844	413,367	434,890

Notes: Experian population estimates and projects are generated from Experian Location Analyst, which is based on data from the Office of National Statistics (ONS) 2018-based 'Sub-National Population Projections' (SNPP).

Growth 2025 to 2035	
%	No.
10.9%	24,894
10.9%	18,153
3.4%	9,110
0.6%	2,235
1.3%	4,288
4.3%	58,679
11.6%	43,046

Growth 2025 to 2040:	
%	No.
16.3%	37,341
16.3%	27,229
5.2%	13,977
1.1%	3,993
2.2%	7,062
6.6%	89,601
17.4%	64,569

TABLE 2: CONVENIENCE GOODS EXPENDITURE PER CAPITA FORECASTS (2025 to 2040)

	Including Online	Excluding Online Transactions			
	2025	2025	2030	2035	2040
UK Online Market Shares (%):	17.5%	5.2%	6.0%	6.6%	7.3%
Transaction-based Online Market Shares (%):	11.7%	3.5%	4.1%	4.5%	4.9%
Zone 1	£3,026	£2,919	£2,851	£2,808	£2,766
Zone 2	£3,128	£3,018	£2,947	£2,903	£2,859
Zone 3	£3,050	£2,943	£2,874	£2,830	£2,788
Zone 4	£3,017	£2,911	£2,843	£2,800	£2,758
Zone 5	£2,947	£2,843	£2,777	£2,735	£2,694
Total Study Area:	£3,033	£2,927	£2,858	£2,815	£2,773
Total CWaC:	£3,056	£2,948	£2,879	£2,836	£2,794

Source: Average spend per capita estimates (2023 prices) are derived from an Experian MMG3 'Location Analyst' report. The year-on-year expenditure growth forecasts have been informed by the latest Retail Planner Briefing Note 22 (RPBN 22) published by Experian (March 2025).

Notes: At the Base Year (2025) spend per capita is adjusted to exclude the market share of retail expenditure per capita on online sales based on online market share identified for the Study Area (derived from the Experian Insights transaction data). The online market share is adjusted to reflect online sales sourced from physical store, which is Forecast growth in online transactions is informed by the year-on-year national growth forecasts published by Experian Business Strategies in RPBN 22 for Special Forms of Trading (comprising sales via the internet, mail order, stalls and markets, door-to-door and telephone sales).

TABLE 3: TOTAL AVAILABLE CONVENIENCE GOODS EXPENDITURE (£million) (2025 to 2040)

	Including Online	Excluding Online Transactions			
	2025	2025	2030	2035	2040
Zone 1	£691.28	£666.94	£686.83	£711.38	£735.23
Zone 2	£521.12	£502.78	£517.77	£536.27	£554.25
Zone 3	£821.87	£792.93	£788.06	£788.45	£790.29
Zone 4	£1,107.31	£1,068.33	£1,046.39	£1,033.81	£1,023.28
Zone 5	£958.91	£925.15	£909.58	£901.56	£895.63
Total Study Area:	£4,100.49	£3,956.14	£3,948.62	£3,971.48	£3,998.69
Total CWaC:	£1,131.66	£1,091.82	£1,128.26	£1,172.21	£1,214.91

Growth 2025 to 2035	
%	No.
6.7%	£44.4
6.7%	£33.5
-0.6%	-£4.5
-3.2%	-£34.5
-2.5%	-£23.6
0.4%	£15.3
7.4%	£80.4

Growth 2025 to 2040:	
%	No.
10.2%	£68.3
10.2%	£51.5
-0.3%	-£2.6
-4.2%	-£45.0
-3.2%	-£29.5
1.1%	£42.5
11.3%	£123.1

TABLE 4: COMPARISON GOODS EXPENDITURE PER CAPITA FORECASTS (2025 to 2040)

	Including Online	Excluding Online Transactions			
	2025	2025	2030	2035	2040
UK Online Market Shares (%):	32.1%	24.1%	25.9%	27.6%	29.3%
Transaction-based Online Market Shares (%):	40.0%	30.0%	32.3%	34.4%	36.5%
Zone 1	£4,765	£3,334	£3,608	£3,970	£4,368
Zone 2	£5,064	£3,543	£3,835	£4,219	£4,642
Zone 3	£4,755	£3,327	£3,600	£3,962	£4,359
Zone 4	£3,971	£2,778	£3,007	£3,308	£3,640
Zone 5	£4,436	£3,103	£3,359	£3,696	£4,066
Total Study Area:	£4,598	£3,217	£3,482	£3,831	£4,215
Total CWaC:	£4,854	£3,396	£3,676	£4,044	£4,449

Source: Average spend per capita estimates (2023 prices) are derived from an Experian MMG3 'Location Analyst' report. The year-on-year expenditure growth forecasts have been informed by the latest Retail Planner Briefing Note 22 (RPBN 22) published by Experian (March 2025).

Notes: At the Base Year (2025) spend per capita is adjusted to exclude the market share of retail expenditure per capita on online sales based on online market share identified for the Study Area (derived from the Experian Insights transaction data). The online market share is adjusted to reflect online sales sourced from physical store, which is based on adjustments published in RPBN 22.

Forecast growth in online transactions is informed by the year-on-year national growth forecasts published by Experian Business Strategies in RPBN 22 for Special Forms of Trading (comprising sales via the internet, mail order, stalls and markets, door-to-door and telephone sales).

TABLE 5: TOTAL AVAILABLE COMPARISON GOODS EXPENDITURE (£million) (2025 to 2040)

	Including Online	Excluding Online Transactions			
	2025	2025	2030	2035	2040
Zone 1	£1,088.59	£761.62	£869.22	£1,005.81	£1,160.98
Zone 2	£843.66	£590.26	£673.65	£779.50	£899.76
Zone 3	£1,281.22	£896.40	£987.30	£1,103.57	£1,235.39
Zone 4	£1,457.45	£1,019.70	£1,106.84	£1,221.71	£1,350.55
Zone 5	£1,443.40	£1,009.87	£1,100.32	£1,218.46	£1,351.85
Total Study Area:	£6,239.35	£4,277.85	£4,737.34	£5,329.06	£5,998.52
Total CWaC:	£1,797.49	£1,257.60	£1,440.22	£1,671.71	£1,935.02

Growth 2025 to 2035	
%	No.
32.1%	£244.19
32.1%	£189.25
23.1%	£207.18
19.8%	£202.01
20.7%	£208.59
24.6%	£1,051.21
32.9%	£414.11

Growth 2025 to 2040	
%	No.
52.4%	£399.35
52.4%	£309.50
37.8%	£338.99
32.4%	£330.85
33.9%	£341.98
40.2%	£1,720.68
53.9%	£677.42

APPENDIX 3: CONVENIENCE RETAIL CAPACITY

TABLE 2: CONVENIENCE GOODS EXPENDITURE MARKET SHARES INCLUDING ONLINE (£M)

ASSESSMENT YEAR: 2025

	Retail Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Total Study Area	Uplift in Study Area Spend from Outside the Study Area	Trade from outside (£m of Total Inflow)	% of Total Turnover from Outside the Study Area	Total Turnover
Zone 1	Cheshire Oaks	£31.79	£3.63	£1.32	£3.27	£6.19	£42.29	24.6%	£10.38	19.7%	£52.67
Zone 1	Chester	£23.38	£1.40	£0.37	£3.02	£0.70	£25.89	14.4%	£3.74	12.6%	£29.62
Zone 1	Chester - Caldley Valley Retail Park	£49.10	£2.19	£0.24	£3.07	£0.32	£48.69	3.9%	£1.88	3.7%	£50.57
Zone 1	Chester - Faulkner Street	£5.54	£0.12	£0.05	£0.22	£0.11	£5.29	11.3%	£0.60	10.2%	£5.88
Zone 1	Chester - Greyhound Retail Park	£38.62	£0.99	£0.18	£8.75	£0.59	£43.47	4.3%	£1.86	4.1%	£45.33
Zone 1	Ellesmere Port	£36.97	£0.55	£0.12	£0.77	£2.13	£35.31	2.8%	£1.00	2.8%	£36.31
Zone 1	Ellesmere Port Retail Park	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	0.0%	£0.00	0.0%	£0.00
Zone 1	Little Sutton	£5.69	£0.03	£0.00	£0.11	£0.36	£5.36	4.1%	£0.22	3.9%	£5.58
Zone 1	Neston	£35.18	£0.06	£0.02	£0.26	£3.43	£33.64	2.1%	£0.71	2.1%	£34.35
Zone 1	Out of Centre shopping - CWAC	£215.93	£8.64	£1.13	£14.05	£5.76	£217.17	5.0%	£10.91	4.8%	£228.08
Zone 1	Out of Centre shopping - Outside CWAC	£17.65	£0.15	£0.06	£7.20	£0.14	£22.29	2.5%	£0.56	2.5%	£22.85
Zone 1	Total	£459.86	£17.75	£3.48	£40.71	£19.73	£479.39		£31.86	6.2%	£511.25
Zone 2	Middlewich	£0.04	£6.21	£6.55	£0.03	£0.04	£15.97	8.4%	£1.34	7.7%	£17.31
Zone 2	Northwich	£0.50	£101.35	£9.39	£0.16	£0.06	£150.83	2.9%	£4.41	2.8%	£155.24
Zone 2	Northwich - Northwich Retail Park	£0.06	£33.46	£4.08	£0.05	£0.03	£50.80	3.6%	£1.84	3.5%	£52.64
Zone 2	Tarporley	£1.62	£9.36	£0.49	£0.17	£0.04	£15.03	5.4%	£0.81	5.1%	£15.84
Zone 2	Winsford	£0.49	£52.58	£3.48	£0.13	£0.22	£77.11	2.9%	£2.24	2.8%	£79.35
Zone 2	Winsford - Wharton Retail Park	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	0.0%	£0.00	0.0%	£0.00
Zone 2	Frodsham	£0.65	£10.42	£1.40	£0.05	£0.05	£16.56	7.3%	£1.21	6.8%	£17.77
Zone 2	Out of Centre shopping - CWAC	£10.32	£116.04	£7.70	£0.67	£0.37	£178.39	4.1%	£7.36	4.0%	£185.75
Zone 2	Out of Centre shopping - Outside CWAC	£0.79	£13.34	£12.46	£0.17	£0.21	£33.31	9.3%	£3.11	8.5%	£36.42
Zone 2	Total	£14.47	£342.76	£45.54	£1.43	£1.00	£538.00		£22.32	4.0%	£560.32
Zone 3	Crewe	£0.14	£1.94	£49.05	£0.21	£0.04	£57.78	26.0%	£15.05	20.7%	£72.82
Zone 3	Crewe - Edleston Road	£0.04	£18.15	£0.06	£0.02	£0.02	£20.81	17.7%	£3.69	15.0%	£24.50
Zone 3	Crewe - Grand Junction Retail Park	£0.01	£4.36	£0.03	£0.00	£0.00	£5.38	34.4%	£1.92	25.6%	£7.50
Zone 3	Knutsford	£0.12	£5.14	£27.99	£0.06	£0.06	£38.54	22.7%	£8.74	18.5%	£47.29
Zone 3	Lymm	£0.00	£0.02	£1.41	£0.02	£0.01	£1.63	66.5%	£1.08	39.9%	£2.71
Zone 3	Nantwich	£0.61	£1.99	£38.06	£0.84	£0.04	£46.57	18.3%	£8.53	15.5%	£55.10
Zone 3	Runcorn - Old Town	£0.04	£0.19	£6.23	£0.01	£0.03	£7.28	7.9%	£0.58	7.3%	£7.85
Zone 3	Runcorn - Runcorn Shopping City	£0.41	£5.82	£47.15	£0.12	£0.19	£61.29	6.5%	£3.96	6.1%	£65.25
Zone 3	Sandbach	£0.01	£19.21	£0.02	£0.01	£0.01	£22.07	49.4%	£10.90	33.1%	£32.97
Zone 3	Stockton Heath	£0.16	£8.29	£56.97	£0.13	£0.13	£75.40	50.8%	£38.33	33.7%	£113.73
Zone 3	Out of Centre shopping	£2.19	£18.11	£203.22	£1.29	£0.36	£255.25	23.8%	£60.68	19.2%	£315.93
Zone 3	Total	£3.72	£42.72	£471.80	£2.78	£0.89	£552.20		£153.45	26.6%	£745.65
Zone 4	Chester - Broughton Shopping Park	£10.06	£0.76	£0.16	£25.40	£0.53	£33.99	5.5%	£1.87	5.2%	£35.87
Zone 4	Denbigh	£0.00	£0.00	£0.00	£1.61	£0.00	£1.51	23.7%	£0.36	19.2%	£1.87
Zone 4	Flint	£0.18	£0.01	£0.01	£11.33	£0.05	£10.77	3.9%	£0.42	3.8%	£11.19
Zone 4	Flint - Flintshire Retail Centre	£0.26	£0.02	£0.02	£21.95	£0.16	£20.85	5.2%	£1.09	5.0%	£21.94
Zone 4	Holywell	£0.06	£0.00	£0.01	£10.09	£0.03	£9.49	4.3%	£0.41	4.1%	£9.90
Zone 4	Mold	£0.52	£0.05	£0.06	£62.23	£0.34	£58.82	4.3%	£2.51	4.1%	£61.33
Zone 4	Prestatyn	£0.38	£0.19	£0.26	£37.90	£0.33	£36.47	78.4%	£28.59	43.9%	£65.06
Zone 4	Ruthin	£0.01	£0.00	£0.00	£4.04	£0.02	£3.79	15.7%	£0.59	0.0%	£4.38
Zone 4	Shotton	£0.04	£0.00	£0.00	£2.85	£0.00	£2.89	2.0%	£0.05	2.0%	£2.75
Zone 4	Shotton - Connahs Quay	£0.10	£0.00	£0.01	£2.43	£0.02	£2.38	4.9%	£0.12	4.7%	£2.50
Zone 4	Whitchurch	£11.13	£1.15	£2.82	£29.51	£0.12	£41.89	22.3%	£9.34	18.2%	£51.23
Zone 4	Wrexham	£0.09	£0.00	£0.00	£3.81	£0.01	£3.64	7.4%	£0.27	6.9%	£3.91
Zone 4	Wrexham - Border Retail Park	£2.66	£0.10	£0.08	£72.63	£0.09	£70.22	6.1%	£4.31	5.8%	£74.53
Zone 4	Wrexham - Central Retail Park	£0.25	£0.00	£0.00	£1.22	£0.01	£1.36	9.6%	£0.13	8.7%	£1.50
Zone 4	Wrexham - Plas Coch Retail Park	£2.90	£0.13	£0.09	£59.27	£0.09	£58.03	5.9%	£3.41	5.6%	£61.45
Zone 4	Out of Centre shopping	£0.18	£2.22	£1.73	£445.16	£1.19	£448.22	19.5%	£87.61	16.3%	£535.82
Zone 4	Total	£58.83	£4.63	£5.25	£791.44	£5.01	£804.12		£141.10	14.9%	£945.22
Zone 5	Bebington	£0.02	£0.00	£0.00	£0.01	£2.32	£2.05	2.6%	£0.05	2.5%	£2.10
Zone 5	Birkenhead	£0.28	£0.01	£0.04	£0.05	£23.47	£20.87	4.9%	£1.03	4.7%	£21.90
Zone 5	Birkenhead - Rock Retail Park	£0.13	£0.00	£0.00	£0.01	£6.27	£5.62	3.0%	£0.17	2.9%	£5.79
Zone 5	Bromborough - The Croft Retail & Leisure Park	£6.46	£0.10	£0.03	£0.35	£60.17	£58.68	3.0%	£1.77	2.9%	£60.45
Zone 5	Heswall	£10.46	£0.08	£0.07	£0.30	£76.39	£76.28	3.9%	£2.98	3.8%	£79.26
Zone 5	Hoylake	£0.18	£0.00	£0.01	£0.04	£8.97	£8.05	3.6%	£0.29	3.4%	£8.34
Zone 5	Moreton	£0.04	£0.00	£0.00	£0.02	£6.92	£6.11	3.9%	£0.24	3.7%	£6.35
Zone 5	New Ferry	£0.01	£0.00	£0.00	£0.00	£2.04	£1.80	2.2%	£0.04	2.2%	£1.84
Zone 5	Upton - Upton By-Pass Retail Park	£0.72	£0.06	£0.04	£0.09	£59.16	£52.57	2.2%	£1.18	2.2%	£53.75
Zone 5	Wallasey (Liscard)	£0.15	£0.06	£0.01	£0.14	£58.24	£51.29	2.1%	£1.08	2.1%	£52.36
Zone 5	Wallasey (Liscard) - Junction 1 Retail Park	£1.82	£0.12	£0.13	£0.28	£83.69	£75.33	3.5%	£2.60	3.3%	£77.93
Zone 5	West Kirby	£0.51	£0.04	£0.03	£0.09	£33.29	£29.71	4.5%	£1.34	4.3%	£31.05
Zone 5	Out of Centre shopping	£12.59	£0.36	£0.29	£1.28	£338.16	£308.55	3.8%	£11.72	3.7%	£320.26
Zone 5	Total	£33.38	£0.85	£0.66	£2.67	£759.10	£696.91		£24.48	3.4%	£721.39
Out of Area	Congleton	£0.01	£0.07	£0.73	£0.01	£0.00	£0.93				
Out of Area	Liverpool - Central	£0.55	£0.20	£0.28	£0.26	£3.39	£4.27				
Out of Area	Macclesfield	£0.11	£0.40	£5.67	£0.13	£0.08	£7.17				
Out of Area	Macclesfield - Lyme Green Retail Park	£0.00	£0.02	£0.23	£0.00	£0.00	£0.29				
Out of Area	Macclesfield - Silk Retail Park	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00				
Out of Area	Manchester - Central Retail Park	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00				
Out of Area	Manchester Central	£0.47	£0.72	£1.30	£0.38	£0.40	£3.54				
Out of Area	Market Drayton	£0.05	£0.03	£0.57	£0.92	£0.01	£1.59				
Out of Area	Newcastle-under-Lyme	£0.02	£0.14	£0.83	£0.07	£0.01	£1.21				
Out of Area	Oswestry	£0.15	£0.02	£0.02	£11.02	£0.03	£10.47				
Out of Area	Stoke-on-Trent - City Centre (Hanley)	£0.00	£0.01	£0.03	£0.00	£0.00	£0.04				
Out of Area	Trafford Centre	£0.07	£0.32	£0.67	£0.09	£0.05	£1.38				
Out of Area	Warrington	£0.02	£0.37	£2.06	£0.02	£0.03	£2.88				
Out of Area	All Other	£34.17	£48.28	£188.03	£129.31	£61.34	£474.93				
Out of Area	Total	£35.61	£48.58	£198.43	£142.21	£65.35	£508.71				
Online Expenditure		£85.41	£63.83	£96.70	£126.08	£107.84	£481.16				
Total Zonal & Study Area Expenditure		£691.28	£521.12	£821.87	£1,107.31	£958.91	£4,100.49				
Total Uplift in Study Area Expenditure from Outside								£373.20			
Total Retained Study Area Expenditure											£3,483.82
Total Expenditure Excluding Online		£605.87	£457.29	£725.17	£981.23	£851.07	£3,619.33		£373.20		£3,992.53

TABLE 3:	CONVENIENCE GOODS EXPENDITURE MARKET SHARES EXCLUDING ONLINE (%)	ASSESSMENT YEAR: 2025
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	Retail Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Total Study Area	Trade from outside (% of Total Inflow)	Total Turnover
Zone 1	Cheshire Oaks	5.2%	0.8%	0.2%	0.3%	0.7%	1.2%	2.8%	1.3%
Zone 1	Chester	3.9%	0.3%	0.1%	0.3%	0.1%	0.7%	1.0%	0.7%
Zone 1	Chester - Caldý Valley Retail Park	8.1%	0.5%	0.0%	0.3%	0.0%	1.3%	0.5%	1.3%
Zone 1	Chester - Faulkner Street	0.9%	0.0%	0.0%	0.0%	0.0%	0.1%	0.2%	0.1%
Zone 1	Chester - Greyhound Retail Park	6.4%	0.2%	0.0%	0.9%	0.1%	1.2%	0.5%	1.1%
Zone 1	Ellesmere Port	6.1%	0.1%	0.0%	0.1%	0.3%	1.0%	0.3%	0.9%
Zone 1	Ellesmere Port Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 1	Little Sutton	0.9%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%	0.1%
Zone 1	Neston	5.8%	0.0%	0.0%	0.0%	0.4%	0.9%	0.2%	0.9%
Zone 1	Out of Centre shopping - CWAC	35.6%	1.9%	0.2%	1.4%	0.7%	6.0%	2.9%	5.7%
Zone 1	Out of Centre shopping - Outside CWAC	2.9%	0.0%	0.0%	0.7%	0.0%	0.6%	0.2%	0.6%
Zone 1	Total	75.9%	3.9%	0.5%	4.1%	2.3%	13.2%	8.5%	12.8%
Zone 2	Middlewich	0.0%	1.4%	0.9%	0.0%	0.0%	0.4%	0.4%	0.4%
Zone 2	Northwich	0.1%	22.2%	1.3%	0.0%	0.0%	4.2%	1.2%	3.9%
Zone 2	Northwich - Northwich Retail Park	0.0%	7.3%	0.6%	0.0%	0.0%	1.4%	0.5%	1.3%
Zone 2	Tarporley	0.3%	2.0%	0.1%	0.0%	0.0%	0.4%	0.2%	0.4%
Zone 2	Winsford	0.1%	11.5%	0.5%	0.0%	0.0%	2.0%	0.6%	2.0%
Zone 2	Winsford - Wharton Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 2	Frodsham	0.1%	2.3%	0.2%	0.0%	0.0%	0.5%	0.3%	0.4%
Zone 2	Out of Centre shopping - CWAC	1.7%	25.4%	1.1%	0.1%	0.0%	4.9%	2.0%	4.7%
Zone 2	Out of Centre shopping - Outside CWAC	0.1%	2.9%	1.7%	0.0%	0.0%	0.9%	0.8%	0.9%
Zone 2	Total	2.4%	75.0%	6.3%	0.1%	0.1%	14.9%	6.0%	14.0%
Zone 3	Crewe	0.0%	0.4%	6.8%	0.0%	0.0%	1.6%	4.0%	1.8%
Zone 3	Crewe - Edleston Road	0.0%	0.1%	2.5%	0.0%	0.0%	0.6%	1.0%	0.6%
Zone 3	Crewe - Grand Junction Retail Park	0.0%	0.1%	0.6%	0.0%	0.0%	0.2%	0.5%	0.2%
Zone 3	Knutsford	0.0%	1.1%	3.9%	0.0%	0.0%	1.1%	2.3%	1.2%
Zone 3	Lymm	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.3%	0.1%
Zone 3	Nantwich	0.1%	0.4%	5.2%	0.1%	0.0%	1.3%	2.3%	1.4%
Zone 3	Runcorn - Old Town	0.0%	0.0%	0.9%	0.0%	0.0%	0.2%	0.2%	0.2%
Zone 3	Runcorn - Runcorn Shopping City	0.1%	1.3%	6.5%	0.0%	0.0%	1.7%	1.1%	1.6%
Zone 3	Sandbach	0.0%	0.1%	2.6%	0.0%	0.0%	0.6%	2.9%	0.8%
Zone 3	Stockton Heath	0.0%	1.8%	7.9%	0.0%	0.0%	2.1%	10.3%	2.8%
Zone 3	Out of Centre shopping	0.4%	9.0%	28.0%	0.1%	0.0%	7.1%	16.3%	7.9%
Zone 3	Total	0.6%	9.3%	65.1%	0.3%	0.1%	16.4%	41.1%	18.7%
Zone 4	Chester - Broughton Shopping Park	1.7%	0.2%	0.0%	2.0%	0.0%	0.5%	0.9%	0.9%
Zone 4	Denbigh	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.1%	0.0%
Zone 4	Flint	0.0%	0.0%	0.0%	1.2%	0.0%	0.3%	0.1%	0.3%
Zone 4	Flint - Flintshire Retail Centre	0.0%	0.0%	0.0%	2.2%	0.0%	0.6%	0.3%	0.5%
Zone 4	Holywell	0.0%	0.0%	0.0%	1.0%	0.0%	0.3%	0.1%	0.2%
Zone 4	Mold	0.1%	0.0%	0.0%	6.3%	0.0%	1.6%	0.7%	1.5%
Zone 4	Prestatyn	0.1%	0.0%	0.0%	3.9%	0.0%	1.0%	7.7%	1.6%
Zone 4	Ruthin	0.0%	0.0%	0.0%	0.4%	0.0%	0.1%	0.2%	0.1%
Zone 4	Shotton	0.0%	0.0%	0.0%	0.3%	0.0%	0.1%	0.0%	0.1%
Zone 4	Shotton - Connahs Quay	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.1%
Zone 4	Whitchurch	1.8%	0.3%	0.4%	3.0%	0.0%	1.2%	2.5%	1.3%
Zone 4	Wrexham	0.0%	0.0%	0.0%	0.4%	0.0%	0.1%	0.1%	0.1%
Zone 4	Wrexham - Border Retail Park	0.4%	0.0%	0.0%	7.4%	0.0%	1.9%	1.2%	1.9%
Zone 4	Wrexham - Central Retail Park	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%
Zone 4	Wrexham - Plas Coch Retail Park	0.5%	0.0%	0.0%	6.0%	0.0%	1.6%	0.9%	1.5%
Zone 4	Out of Centre shopping	5.0%	0.5%	0.2%	45.4%	0.4%	12.4%	23.5%	13.4%
Zone 4	Total	9.7%	1.0%	0.7%	80.7%	0.6%	22.2%	37.8%	23.7%
Zone 5	Bebbington	0.0%	0.0%	0.0%	0.0%	0.3%	0.1%	0.0%	0.5%
Zone 5	Birkenhead	0.0%	0.0%	0.0%	0.0%	2.8%	0.3%	0.3%	0.5%
Zone 5	Birkenhead - Rock Retail Park	0.0%	0.0%	0.0%	0.0%	0.7%	0.2%	0.0%	0.1%
Zone 5	Bromborough - The Croft Retail & Leisure Park	1.1%	0.0%	0.0%	0.0%	7.1%	1.6%	0.5%	1.5%
Zone 5	Heswall	1.7%	0.0%	0.0%	0.0%	9.0%	2.1%	0.8%	2.0%
Zone 5	Hoylake	0.0%	0.0%	0.0%	0.0%	1.1%	0.2%	0.1%	0.2%
Zone 5	Moreton	0.0%	0.0%	0.0%	0.0%	0.8%	0.2%	0.1%	0.2%
Zone 5	New Ferry	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%
Zone 5	Upton - Upton By-Pass Retail Park	0.1%	0.0%	0.0%	0.0%	7.0%	1.5%	0.3%	1.3%
Zone 5	Wallasey (Liscard)	0.0%	0.0%	0.0%	0.0%	6.8%	1.4%	0.3%	1.3%
Zone 5	Wallasey (Liscard) - Junction 1 Retail Park	0.3%	0.0%	0.0%	0.0%	9.8%	2.1%	0.7%	2.0%
Zone 5	West Kirby	0.1%	0.0%	0.0%	0.0%	3.9%	0.8%	0.4%	0.8%
Zone 5	Out of Centre shopping	2.1%	0.1%	0.0%	0.1%	39.7%	8.5%	3.1%	8.0%
Zone 5	Total	5.5%	0.2%	0.1%	0.3%	89.2%	19.3%	6.6%	18.1%
Out of Area	Congleton	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%		
Out of Area	Liverpool - Central	0.1%	0.0%	0.0%	0.0%	0.4%	0.1%		
Out of Area	Macclesfield	0.0%	0.1%	0.8%	0.0%	0.0%	0.2%		
Out of Area	Macclesfield - Lyme Green Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%		
Out of Area	Macclesfield - Silk Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%		
Out of Area	Manchester - Central Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%		
Out of Area	Manchester Central	0.1%	0.2%	0.2%	0.0%	0.0%	0.1%		
Out of Area	Market Drayton	0.0%	0.0%	0.1%	0.1%	0.0%	0.0%		
Out of Area	Newcastle-under-Lyme	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%		
Out of Area	Oswestry	0.0%	0.0%	0.0%	1.1%	0.0%	0.3%		
Out of Area	Stoke-on-Trent - City Centre (Hanley)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%		
Out of Area	Trafford Centre	0.0%	0.1%	0.1%	0.0%	0.0%	0.0%		
Out of Area	Warrington	0.0%	0.1%	0.3%	0.0%	0.0%	0.1%		
Out of Area	All Other	5.6%	10.1%	25.7%	13.2%	7.2%	13.1%		
Out of Area	Total	5.9%	10.6%	27.4%	14.5%	7.7%	14.1%		
Total Zonal & Study Area Expenditure		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%		
Total Uplift in Study Area Expenditure from Outside								100.0%	
Total Retained Study Area Expenditure									87.3%

TABLE 4: CONVENIENCE GOODS EXPENDITURE MARKET SHARES EXCLUDING ONLINE (EM)

ASSESSMENT YEARS: 2025-2040

Zone	Retail Location	Convenience Market Shares - Total Study Area	Uplift in Study Area Convenience Market Share	2025 Total Turnover												Total Expenditure
				2025			2030			2035			2040			
				Retained Resident Study Area Expenditure	Uplift from Outside Study Area	Total Expenditure	Retained Resident Study Area Expenditure	Uplift from Outside Study Area	Total Expenditure	Retained Resident Study Area Expenditure	Uplift from Outside Study Area	Total Expenditure	Retained Resident Study Area Expenditure	Uplift from Outside Study Area	Total Expenditure	
Zone 1	Cheshire Oaks	1.2%	24.6%	£46.23	£11.35	£57.58	£46.14	£11.33	£57.47	£46.40	£11.39	£57.80	£46.72	£11.47	£58.20	
Zone 1	Chester	0.7%	14.4%	£28.30	£4.08	£32.38	£28.24	£4.08	£32.32	£28.40	£4.10	£32.50	£28.60	£4.13	£32.73	
Zone 1	Chester - Caldys Valley Retail Park	1.3%	3.9%	£53.22	£2.06	£55.28	£53.12	£2.06	£55.17	£53.43	£2.07	£55.49	£53.79	£2.08	£55.87	
Zone 1	Chester - Faulkner Street	0.1%	11.3%	£5.78	£0.65	£6.43	£5.77	£0.65	£6.42	£5.80	£0.66	£6.46	£5.84	£0.66	£6.50	
Zone 1	Chester - Greyhound Retail Park	1.2%	4.3%	£47.52	£2.03	£49.55	£47.43	£2.03	£49.46	£47.70	£2.04	£49.74	£48.03	£2.05	£50.08	
Zone 1	Ellesmere Port	1.0%	2.8%	£38.59	£1.09	£39.69	£38.52	£1.09	£39.61	£38.74	£1.10	£39.84	£39.01	£1.11	£40.11	
Zone 1	Ellesmere Port Retail Park	0.0%	0.0%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	
Zone 1	Little Sutton	0.1%	4.1%	£5.86	£0.24	£6.10	£5.85	£0.24	£6.09	£5.88	£0.24	£6.12	£5.92	£0.24	£6.16	
Zone 1	Neston	0.9%	2.1%	£36.77	£0.77	£37.54	£36.70	£0.77	£37.47	£36.91	£0.78	£37.69	£37.16	£0.78	£37.95	
Zone 1	Out of Centre shopping - CWAC	6.0%	5.0%	£237.38	£11.93	£249.31	£236.93	£11.90	£248.83	£238.30	£11.97	£250.27	£239.93	£12.05	£251.99	
Zone 1	Out of Centre shopping - Outside CWAC	0.6%	2.5%	£24.36	£0.61	£24.98	£24.32	£0.61	£24.93	£24.46	£0.62	£25.08	£24.63	£0.62	£25.25	
Zone 1	Total	13.2%	6.6%	£524.00	£34.82	£558.83	£523.01	£34.75	£557.76	£526.04	£34.96	£560.99	£529.64	£35.20	£564.84	
Zone 2	Middlewich	0.4%	8.4%	£17.45	£1.46	£18.92	£17.42	£1.46	£18.88	£17.52	£1.47	£18.99	£17.64	£1.48	£19.12	
Zone 2	Northwich	4.2%	2.9%	£164.87	£4.82	£169.69	£164.55	£4.81	£169.37	£165.51	£4.84	£170.35	£166.64	£4.87	£171.51	
Zone 2	Northwich - Northwich Retail Park	1.4%	3.6%	£55.53	£2.01	£57.54	£55.42	£2.01	£57.43	£55.74	£2.02	£57.76	£56.12	£2.03	£58.16	
Zone 2	Tarporley	0.4%	5.4%	£16.43	£0.88	£17.31	£16.40	£0.88	£17.28	£16.49	£0.89	£17.38	£16.61	£0.89	£17.50	
Zone 2	Winsford	2.1%	2.9%	£86.28	£2.45	£88.73	£86.12	£2.44	£88.57	£86.61	£2.46	£87.07	£85.19	£2.47	£87.66	
Zone 2	Winsford - Wharton Retail Park	0.0%	0.0%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	
Zone 2	Frodsham	0.5%	7.3%	£18.10	£1.32	£19.42	£18.07	£1.32	£19.39	£18.17	£1.33	£19.50	£18.30	£1.33	£19.63	
Zone 2	Out of Centre shopping - CWAC	4.9%	4.1%	£194.99	£8.05	£203.04	£194.62	£8.03	£202.65	£196.75	£8.08	£203.83	£197.09	£8.13	£205.22	
Zone 2	Out of Centre shopping - Outside CWAC	0.9%	9.3%	£38.41	£36.34	£74.75	£38.41	£36.34	£74.75	£38.55	£36.35	£74.90	£38.80	£36.36	£75.16	
Zone 2	Total	14.9%	4.1%	£588.07	£24.39	£612.46	£586.85	£24.35	£611.30	£590.35	£24.42	£614.84	£594.39	£24.66	£619.05	
Zone 3	Crewe	1.6%	26.0%	£63.16	£16.45	£79.61	£63.04	£16.41	£79.45	£63.40	£16.51	£79.91	£63.83	£16.62	£80.46	
Zone 3	Crewe - Edleston Road	0.6%	17.7%	£22.75	£4.03	£26.77	£22.70	£4.02	£26.72	£22.83	£4.05	£26.88	£22.99	£4.07	£27.06	
Zone 3	Crewe - Grand Junction Retail Park	0.2%	34.4%	£6.10	£2.10	£8.20	£6.09	£2.09	£8.18	£6.12	£2.11	£8.23	£6.16	£2.12	£8.28	
Zone 3	Knutsford	1.1%	22.7%	£42.13	£9.56	£51.69	£42.05	£9.54	£51.59	£42.29	£9.59	£51.89	£42.58	£9.66	£52.24	
Zone 3	Lymm	0.0%	66.5%	£1.78	£1.18	£2.96	£1.77	£1.18	£2.95	£1.78	£1.19	£2.97	£1.80	£1.19	£2.99	
Zone 3	Nantwich	1.3%	18.3%	£50.90	£9.32	£60.23	£50.81	£9.31	£60.11	£51.10	£9.36	£60.46	£51.45	£9.42	£60.87	
Zone 3	Runcom - Old Town	0.2%	7.9%	£7.96	£0.63	£8.59	£7.94	£0.63	£8.57	£7.99	£0.63	£8.62	£8.04	£0.64	£8.68	
Zone 3	Runcom - Runcom Shopping City	1.7%	6.5%	£66.99	£4.33	£71.32	£66.87	£4.32	£71.19	£67.25	£4.35	£71.60	£67.71	£4.38	£72.09	
Zone 3	Sandbach	0.6%	49.4%	£24.12	£11.92	£36.04	£24.07	£11.89	£35.97	£24.21	£11.96	£36.18	£24.38	£12.04	£36.42	
Zone 3	Stockton Heath	2.1%	50.8%	£82.41	£41.90	£124.31	£82.26	£41.82	£124.08	£82.73	£42.06	£124.80	£83.30	£42.35	£125.65	
Zone 3	Out of Centre shopping	7.1%	23.8%	£279.01	£66.33	£345.33	£278.48	£66.20	£344.68	£280.09	£66.58	£346.67	£282.01	£67.04	£349.05	
Zone 3	Total	16.4%	25.9%	£647.30	£167.73	£815.04	£646.07	£167.41	£813.49	£649.81	£168.38	£818.20	£654.27	£169.54	£823.80	
Zone 4	Chester - Broughton Shopping Park	0.9%	5.5%	£27.15	£2.05	£29.20	£27.08	£2.05	£29.13	£27.30	£2.06	£29.36	£27.45	£2.07	£29.53	
Zone 4	Denbigh	0.0%	23.7%	£1.65	£0.39	£2.04	£1.65	£0.39	£2.04	£1.66	£0.39	£2.05	£1.67	£0.40	£2.06	
Zone 4	Flint	0.3%	3.9%	£11.77	£0.46	£12.23	£11.75	£0.46	£12.20	£11.81	£0.46	£12.28	£11.89	£0.46	£12.36	
Zone 4	Flint - Flintshire Retail Centre	0.6%	5.2%	£22.79	£1.19	£23.98	£22.72	£1.19	£23.94	£22.88	£1.20	£23.08	£22.93	£1.21	£23.14	
Zone 4	Holywell	0.3%	4.3%	£10.38	£0.45	£10.82	£10.36	£0.45	£10.80	£10.42	£0.45	£10.87	£10.49	£0.45	£10.94	
Zone 4	Mold	1.6%	4.3%	£64.29	£2.75	£67.04	£64.17	£2.74	£66.91	£64.54	£2.76	£67.30	£64.99	£2.78	£67.76	
Zone 4	Presatyn	1.0%	78.4%	£38.86	£31.25	£70.11	£38.78	£31.19	£70.08	£40.01	£31.37	£71.39	£40.29	£31.59	£71.88	
Zone 4	Ruthin	0.1%	15.7%	£4.14	£4.13	£8.27	£4.14	£4.13	£8.28	£4.16	£4.19	£8.35	£4.19	£4.22	£8.41	
Zone 4	Shotton	0.1%	2.0%	£2.94	£0.06	£3.00	£2.94	£0.06	£3.00	£2.95	£0.06	£3.01	£2.97	£0.06	£3.03	
Zone 4	Shotton - Connahs Quay	0.1%	4.9%	£2.60	£0.13	£2.73	£2.60	£0.13	£2.72	£2.61	£0.13	£2.74	£2.63	£0.13	£2.76	
Zone 4	Whitchurch	1.2%	22.3%	£45.79	£10.21	£56.00	£45.70	£10.19	£55.89	£45.97	£10.25	£56.22	£46.28	£10.32	£56.60	
Zone 4	Wrexham	0.1%	7.4%	£3.98	£0.30	£4.27	£3.97	£0.30	£4.27	£3.99	£0.30	£4.29	£4.02	£0.30	£4.32	
Zone 4	Wrexham - Border Retail Park	1.9%	6.1%	£76.75	£4.71	£81.47	£76.61	£4.71	£81.31	£77.05	£4.73	£81.78	£77.58	£4.77	£82.34	
Zone 4	Wrexham - Central Retail Park	0.0%	9.6%	£1.49	£0.14	£1.63	£1.49	£0.14	£1.63	£1.50	£0.14	£1.64	£1.51	£0.14	£1.65	
Zone 4	Wrexham - Plas Coch Retail Park	1.6%	5.9%	£63.43	£3.73	£67.16	£63.31	£3.72	£67.04	£63.68	£3.74	£67.42	£64.12	£3.77	£67.89	
Zone 4	Out of Centre shopping	12.4%	19.5%	£489.93	£95.76	£585.69	£489.00	£95.58	£584.57	£491.83	£96.13	£587.96	£495.20	£96.79	£591.99	
Zone 4	Total	22.2%	17.5%	£878.95	£154.23	£1,033.18	£877.28	£153.94	£1,031.21	£882.35	£154.83	£1,037.18	£888.40	£155.89	£1,044.29	
Zone 5	Bebington	0.1%	2.6%	£2.24	£0.06	£2.30	£2.24	£0.06	£2.30	£2.25	£0.06	£2.31	£2.27	£0.06	£2.32	
Zone 5	Birkenhead	0.6%	4.9%	£22.81	£1.13	£23.94	£22.77	£1.12	£23.89	£22.90	£1.13	£23.03	£22.95	£1.14	£23.10	
Zone 5	Birkenhead - Rock Retail Park	0.2%	3.0%	£6.14	£0.19	£6.33	£6.13	£0.18	£6.31	£6.16	£0.19	£6.35	£6.21	£0.19	£6.39	
Zone 5	Bromborough - The Croft Retail & Leisure Park	1.6%	3.0%	£64.15	£1.93	£66.08	£64.02	£1.93	£65.95	£64.39	£1.94	£66.34	£64.94	£1.95	£66.79	
Zone 5	Heswall	2.1%	3.9%	£83.38	£3.25	£86.64	£83.22	£3.25	£86.47	£83.70	£3.27	£86.97	£84.28	£3.29	£87.57	
Zone 5	Hoylake	0.2%	3.6%	£8.80	£0.31	£9.12	£8.79	£0.31	£9.10	£8.84	£0.31	£9.15	£8.90	£0.32	£9.21	
Zone 5	Moreton	0.2%	3.9%	£6.68	£0.26	£6.94	£6.67	£0.26	£6.93	£6.71	£0.26	£6.97	£6.75	£0.26	£6.99	
Zone 5	New Ferry	0.0%	2.2%	£1.97	£0.04	£2.01	£1.96	£0.04	£2.01	£1.98	£0.04	£2.02	£1.99	£0.04	£2.03	
Zone 5	Upton - Upton By-Pass Retail Park	1.5%	2.2%	£57.46	£1.29	£58.75	£57.35	£1.29	£58.64	£57.69	£1.29	£58.98	£58.08	£1.30	£59.39	
Zone 5	Wallasey (Licard)	1.4%	2.1%	£56.06	£1.18	£57.24	£55.95	£1.17	£57.13	£56.28	£1.18	£57.46	£56.66	£1.19	£57.85	
Zone 5	Wallasey (Licard) - Junction 1 Retail Park	2.1%	3.5%	£82.34	£2.84	£85.18	£82.24	£2.84								

TABLE 5: TOTAL ALLOCATED CONVENIENCE GOODS EXPENDITURE BASED ON MARKET SHARE ANALYSIS (£m)

	2025	2030	2035	2040
Chester City Centre	£32.38	£32.32	£32.50	£32.73
Other Zone 1	£501.47	£500.52	£503.41	£506.86
All Zone 2	£553.73	£552.68	£555.88	£559.69
TOTAL CONVENIENCE TURNOVER OF BOROUGH STORES/CENTRES:	£1,087.58	£1,085.51	£1,091.80	£1,099.28

Notes:
Excludes SFT & includes 'inflow' from outside Study Area
Assume constant market shares over forecast period.

TABLE 6: CWaC - FORECAST CAPACITY FOR CONVENIENCE GOODS FLOORSPACE EXCLUDING COMMITMENTS

	2025	2030	2035	2040
Step 1: Total Forecast 'Current' Turnover of All Floorspace (£m):	£1,087.6	£1,085.5	£1,091.8	£1,099.3
Step 2: Total Forecast 'Benchmark' Turnover of All Floorspace (£m):	£1,087.6	£1,093.0	£1,098.5	£1,104.0
Step 3: Net Residual Expenditure (£m):	-	-£7.5	-£6.7	-£4.7
Step 4: Capacity for New Convenience Floorspace:				
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,512	£12,575	£12,638	£12,701
(ii) Net Floorspace Capacity (sq m):	-	-598	-531	-373
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-854	-758	-532

Notes:
Step 1: The (transaction-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
Step 2: It has been assumed for the purpose of this assessment that the District's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (2025) and other research evidence.
Step 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
Step 4: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on average sales performance of convenience goods retailers.

TABLE 7: CHESTER CITY CENTRE - FORECAST CAPACITY FOR CONVENIENCE GOODS FLOORSPACE EXCLUDING COMMITMENTS

	2025	2030	2035	2040
Step 1: Total Forecast 'Current' Turnover of All Floorspace (£m):	£32.4	£32.3	£32.5	£32.7
Step 2: Total Forecast 'Benchmark' Turnover of All Floorspace (£m):	£32.4	£32.5	£32.7	£32.9
Step 3: Net Residual Expenditure (£m):	-	-£0.2	-£0.2	-£0.1
Step 4: Capacity for New Convenience Floorspace:				
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,512	£12,575	£12,638	£12,701
(ii) Net Floorspace Capacity (sq m):	-	-18	-16	-11
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-25	-23	-16

TABLE 8: OTHER ZONE 1 - FORECAST CAPACITY FOR CONVENIENCE GOODS FLOORSPACE EXCLUDING COMMITMENTS

	2025	2030	2035	2040
Step 1: Total Forecast 'Current' Turnover of All Floorspace (£m):	£501.5	£500.5	£503.4	£506.9
Step 2: Total Forecast 'Benchmark' Turnover of All Floorspace (£m):	£501.5	£504.0	£506.5	£509.0
Step 3: Net Residual Expenditure (£m):	-	-£3.5	-£3.1	-£2.2
Step 4: Capacity for New Convenience Floorspace:				
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,512	£12,575	£12,638	£12,701
(ii) Net Floorspace Capacity (sq m):	-	-276	-245	-172
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-394	-350	-245

TABLE 9: ALL ZONE 2 - FORECAST CAPACITY FOR CONVENIENCE GOODS FLOORSPACE EXCLUDING COMMITMENTS

	2025	2030	2035	2040
Step 1: Total Forecast 'Current' Turnover of All Floorspace (£m):	£553.7	£552.7	£555.9	£559.7
Step 2: Total Forecast 'Benchmark' Turnover of All Floorspace (£m):	£553.7	£556.5	£559.3	£562.1
Step 3: Net Residual Expenditure (£m):	-	-£3.8	-£3.4	-£2.4
Step 4: Capacity for New Convenience Floorspace:				
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,512	£12,575	£12,638	£12,701
(ii) Net Floorspace Capacity (sq m):	-	-304	-270	-190
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-435	-386	-271

TABLE 10: COMMITTED CONVENIENCE GOODS FLOORSPACE

Location	Planning Application Reference	Gross Floorspace (sqm)	Net Sales Area (sqm)	Sales Density (£/sqm) (2025)	2024	2025	2030	2035	2040
Caldy Valley Retail Park, Great Boughton, Chester	22/00579/FUL	2,126	1,123	£8,585	£9.64	£9.64	£9.69	£9.74	£9.79
TOTAL COMMITTED CONVENIENCE GOODS TURNOVER			1,374		£9.6	£9.6	£9.7	£9.7	£9.8

Source: CWaC, LSH

TABLE 11: CWaC FORECAST CAPACITY FOR CONVENIENCE GOODS FLOORSPACE INCLUDING COMMITMENTS

	2025	2030	2035	2040
Step 1: Net Residual Expenditure - Excluding Commitments (£m):	-	-£7.5	-£6.7	-£4.7
Step 2: Turnover of Committed Convenience Floorspace (£m)		£9.7	£9.7	£9.8
Step 3: Net Residual Expenditure After Commitments (£m):		-£17.2	-£16.4	-£14.5
Step 4: Capacity for New Convenience Floorspace:				
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,512	£12,575	£12,638	£12,701
(ii) Net Floorspace Capacity (sq m):	-	-1,368	-1,301	-1,143
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-1,955	-1,859	-1,633

Step 1: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
Step 2: It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2030.
Step 3: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 2).
Step 4: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on average sales performance of comparison goods retailers.

TABLE 12: CHESTER CITY CENTRE - FORECAST CAPACITY FOR CONVENIENCE GOODS FLOORSPACE INCLUDING COMMITMENTS

	2025	2030	2035	2040
Step 1: Net Residual Expenditure - Excluding Commitments (£m):	-	-£0.2	-£0.2	-£0.1
Step 2: Turnover of Committed Convenience Floorspace (£m)		£0.0	£0.0	£0.0
Step 3: Net Residual Expenditure After Commitments (£m):		-£0.2	-£0.2	-£0.1
Step 4: Capacity for New Convenience Floorspace:				
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,512	£12,575	£12,638	£12,701
(ii) Net Floorspace Capacity (sq m):	-	-18	-16	-11
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-25	-23	-16

TABLE 13: OTHER ZONE 1 - FORECAST CAPACITY FOR CONVENIENCE GOODS FLOORSPACE INCLUDING COMMITMENTS

	2025	2030	2035	2040
Step 1: Net Residual Expenditure - Excluding Commitments (£m):	-	-£3.5	-£3.1	-£2.2
Step 2: Turnover of Committed Convenience Floorspace (£m)		£9.7	£9.7	£9.8
Step 3: Net Residual Expenditure After Commitments (£m):		-£13.2	-£12.8	-£12.0
Step 4: Capacity for New Convenience Floorspace:				
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,512	£12,575	£12,638	£12,701
(ii) Net Floorspace Capacity (sq m):	-	-1,046	-1,015	-942
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-1,494	-1,450	-1,346

TABLE 14: ALL ZONE 2 - FORECAST CAPACITY FOR CONVENIENCE GOODS FLOORSPACE INCLUDING COMMITMENTS

	2025	2030	2035	2040
Step 1: Net Residual Expenditure - Excluding Commitments (£m):	-	-£3.8	-£3.4	-£2.4
Step 2: Turnover of Committed Convenience Floorspace (£m)		£0.0	£0.0	£0.0
Step 3: Net Residual Expenditure After Commitments (£m):		-£3.8	-£3.4	-£2.4
Step 4: Capacity for New Convenience Floorspace:				
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,512	£12,575	£12,638	£12,701
(ii) Net Floorspace Capacity (sq m):	-	-304	-270	-190
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-435	-386	-271

APPENDIX 4: COMPARISON RETAIL CAPACITY

TABLE 1: COMPARISON GOODS TRANSACTION-BASED MARKET SHARES INCLUDING ONLINE (%)		ASSESSMENT YEAR: 2025
Category	Market Share (%)	
Food & Beverage	15.2	
Retail	12.8	
Health & Wellness	8.5	
Travel & Hospitality	7.1	
Automotive	6.3	
Electronics	5.9	
Home & Garden	4.7	
Services	3.2	
Other	2.1	
Total	68.8	

	Retail Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Total Study Area	Trade from outside (% of Total Inflow)	Total Turnover
Zone 1	Cheshire Oaks	6.6%	2.9%	1.5%	2.3%	3.0%	3.0%	39.2%	14.7%
Zone 1	Chester	10.5%	2.4%	0.8%	3.4%	1.1%	3.2%	10.3%	8.6%
Zone 1	Chester - Caldwy Valley Retail Park	0.6%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.2%
Zone 1	Chester - Faulkner Street	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 1	Chester - Greyhound Retail Park	8.6%	1.1%	3.1%	3.8%	0.5%	2.4%	1.2%	5.0%
Zone 1	Ellesmere Port	0.6%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.2%
Zone 1	Ellesmere Port Retail Park	2.6%	0.1%	0.0%	0.0%	0.3%	0.5%	0.2%	1.0%
Zone 1	Little Sutton	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 1	Neston	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 1	Out of Centre shopping - CWAC	13.7%	3.1%	0.4%	3.8%	4.3%	4.5%	4.9%	9.9%
Zone 1	Out of Centre shopping - Outside CWAC	0.5%	0.1%	0.0%	0.4%	0.1%	0.2%	0.3%	0.4%
Zone 1	Total	43.8%	9.8%	2.9%	13.4%	9.4%	14.1%	56.2%	40.1%
Zone 2	Middlewich	0.0%	0.7%	0.6%	0.0%	0.0%	0.3%	0.1%	0.5%
Zone 2	Northwich	0.0%	7.5%	0.6%	0.0%	0.0%	1.4%	2.6%	2.9%
Zone 2	Northwich - Northwich Retail Park	0.0%	3.9%	0.6%	0.0%	0.0%	0.8%	0.3%	1.7%
Zone 2	Tarporley	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 2	Winsford	0.0%	1.7%	0.1%	0.0%	0.0%	0.3%	0.2%	0.6%
Zone 2	Winsford - Wharton Retail Park	0.0%	1.1%	0.1%	0.0%	0.0%	0.2%	0.1%	0.4%
Zone 2	Frodsham	0.0%	0.4%	0.1%	0.0%	0.0%	0.1%	0.1%	0.2%
Zone 2	Out of Centre shopping - CWAC	0.1%	4.7%	0.3%	0.0%	0.0%	0.9%	0.2%	1.8%
Zone 2	Out of Centre shopping - Outside CWAC	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
Zone 2	Total	0.3%	19.9%	2.3%	0.1%	0.0%	4.1%	1.6%	8.2%
Zone 3	Crewe	0.0%	0.3%	2.5%	0.0%	0.7%	2.0%	0.7%	1.7%
Zone 3	Crewe - Edleston Road	0.0%	0.1%	0.8%	0.0%	0.0%	0.2%	0.5%	0.5%
Zone 3	Crewe - Grand Junction Retail Park	0.0%	1.4%	5.9%	0.1%	0.0%	1.7%	5.5%	4.5%
Zone 3	Knutsford	0.0%	0.3%	0.6%	0.0%	0.0%	0.2%	0.5%	0.5%
Zone 3	Lymm	0.0%	0.1%	0.1%	0.0%	0.0%	0.0%	0.2%	0.1%
Zone 3	Nantwich	0.0%	0.2%	1.7%	0.0%	0.0%	0.5%	0.9%	1.1%
Zone 3	Runcorn - Old Town	0.0%	0.0%	0.2%	0.0%	0.0%	0.1%	0.0%	0.1%
Zone 3	Runcorn - Runcorn Shopping City	0.0%	0.0%	1.4%	0.0%	0.4%	0.4%	1.0%	1.0%
Zone 3	Sandbach	0.0%	0.0%	0.4%	0.0%	0.0%	0.1%	0.4%	0.3%
Zone 3	Stockton Heath	0.0%	0.0%	0.2%	0.0%	0.0%	0.1%	0.3%	0.2%
Zone 3	Out of Centre shopping	0.2%	1.5%	7.1%	0.2%	0.0%	2.0%	10.6%	6.3%
Zone 3	Total	0.3%	4.5%	21.0%	0.3%	0.1%	5.9%	21.5%	16.3%
Zone 4	Chester - Broughton Shopping Park	1.9%	0.7%	0.1%	4.2%	0.3%	1.5%	1.8%	3.3%
Zone 4	Denbigh	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 4	Flint	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 4	Flint - Flintshire Retail Centre	0.0%	0.0%	0.0%	1.9%	0.0%	0.5%	0.2%	0.9%
Zone 4	Holywell	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.3%
Zone 4	Mold	0.0%	0.0%	0.0%	0.8%	0.0%	0.2%	0.1%	0.4%
Zone 4	Prestatyn	0.0%	0.0%	0.0%	2.0%	0.0%	0.5%	5.0%	2.1%
Zone 4	Ruthin	0.0%	0.0%	0.0%	0.4%	0.0%	0.1%	0.2%	0.2%
Zone 4	Shotton	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.1%
Zone 4	Shotton - Connahs Quay	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 4	Whitchurch	0.2%	0.0%	0.0%	0.4%	0.0%	0.1%	0.4%	0.4%
Zone 4	Wrexham	0.3%	0.0%	0.0%	5.4%	0.0%	1.3%	1.4%	2.8%
Zone 4	Wrexham - Border Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%	0.3%
Zone 4	Wrexham - Central Retail Park	0.0%	0.0%	0.0%	0.9%	0.0%	0.2%	0.2%	0.5%
Zone 4	Wrexham - Plas Coch Retail Park	0.2%	0.0%	0.0%	3.0%	0.0%	0.7%	0.7%	1.5%
Zone 4	Out of Centre shopping	1.5%	0.2%	0.1%	14.1%	0.2%	3.6%	6.5%	8.4%
Zone 4	Total	4.2%	1.0%	0.4%	34.4%	0.5%	8.9%	16.7%	21.0%
Zone 5	Bebington	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 5	Birkenhead	0.1%	0.0%	0.0%	0.0%	4.1%	0.9%	0.5%	1.8%
Zone 5	Birkenhead - Rock Retail Park	0.1%	0.0%	0.0%	0.0%	3.5%	0.7%	0.3%	1.5%
Zone 5	Bromborough - The Croft Retail & Leisure Park	1.8%	0.1%	0.0%	0.2%	8.3%	2.0%	0.7%	4.1%
Zone 5	Heswall	0.1%	0.0%	0.0%	0.4%	0.0%	0.1%	0.1%	0.3%
Zone 5	Hoylelake	0.0%	0.0%	0.0%	0.0%	0.5%	0.1%	0.0%	0.2%
Zone 5	Moreton	0.0%	0.0%	0.0%	0.0%	0.2%	0.1%	0.0%	0.1%
Zone 5	New Ferry	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 5	Upton - Upton By-Pass Retail Park	0.0%	0.0%	0.0%	0.0%	0.9%	0.2%	0.1%	0.4%
Zone 5	Wallasey (Liscard)	0.0%	0.0%	0.0%	0.0%	2.1%	0.4%	0.2%	0.9%
Zone 5	Wallasey (Liscard) - Junction 1 Retail Park	0.3%	0.0%	0.0%	0.0%	4.5%	1.0%	0.3%	2.0%
Zone 5	West Kirby	0.0%	0.0%	0.0%	0.0%	0.5%	0.1%	0.0%	0.2%
Zone 5	Out of Centre shopping	0.6%	0.1%	0.0%	0.1%	1.3%	0.9%	0.3%	1.2%
Zone 5	Total	3.2%	0.2%	0.1%	0.3%	30.5%	6.9%	4.1%	14.3%
Out of Area	Congleton	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%		
Out of Area	Liverpool - Central	1.8%	1.1%	0.8%	0.9%	8.5%	2.6%		
Out of Area	Macclesfield	0.1%	0.1%	0.4%	0.0%	0.0%	0.1%		
Out of Area	Macclesfield - Lyme Green Retail Park	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%		
Out of Area	Macclesfield - Silk Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%		
Out of Area	Manchester - Central Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%		
Out of Area	Manchester Central	0.5%	0.3%	0.4%	0.4%	0.0%	0.8%		
Out of Area	Market Drayton	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%		
Out of Area	Newcastle-under-Lyme	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%		
Out of Area	Oswestry	0.0%	0.0%	0.0%	0.6%	0.0%	0.1%		
Out of Area	Stoke-on-Trent - City Centre (Hanley)	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%		
Out of Area	Trafford Centre	0.5%	2.6%	2.7%	0.5%	0.3%	1.3%		
Out of Area	Warrington	0.0%	0.8%	1.4%	0.0%	0.0%	0.5%		
Out of Area	All Other	8.5%	16.6%	24.4%	12.2%	8.0%	14.4%		
Out of Area	Total	11.4%	22.4%	31.7%	14.5%	17.3%	20.1%		
Online Expenditure		31.69%	41.69%	41.61%	37.11%	40.00%			
Total Zonal & Study Area Expenditure		100.0%	100.0%	100.0%	100.0%	100.0%			
Total Uplift in Study Area Expenditure from Outside								100.0%	
Total Retained Study Area Expenditure									100.0%

	Retail Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Total Study Area	% Uplift in Study Area Spend from Outside the Study Area	Trade from outside	% of Total Turnover from Outside the Study Area	Total Turnover
Zone 1	Cheshire Oaks	£71.48	£24.30	£19.01	£34.00	£43.46	£188.32	151.4%	£285.17	60.2%	£473.50
Zone 1	Chester	£114.33	£20.48	£10.25	£48.85	£16.58	£201.66	37.3%	£75.24	27.2%	£276.89
Zone 1	Chester - Caldý Valley Retail Park	£6.79	£0.36	£0.04	£0.46	£0.07	£7.02	4.5%	£0.32	4.3%	£7.33
Zone 1	Chester - Faulkner Street	£0.10	£0.00	£0.00	£0.00	£0.00	£0.10	7.3%	£0.01	6.8%	£0.11
Zone 1	Chester - Greyhound Retail Park	£93.77	£9.06	£1.65	£49.10	£6.89	£150.53	6.0%	£8.98	5.6%	£159.51
Zone 1	Ellesmere Port	£6.90	£0.16	£0.04	£0.41	£0.70	£7.37	3.4%	£0.25	3.3%	£7.62
Zone 1	Ellesmere Port Retail Park	£28.63	£1.03	£0.17	£0.61	£4.64	£35.05	3.5%	£1.09	3.3%	£33.65
Zone 1	Little Sutton	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	0.0%	£0.00	0.0%	£0.00
Zone 1	Neston	£1.14	£0.00	£0.00	£0.02	£0.20	£1.21	3.3%	£0.04	3.2%	£1.25
Zone 1	Out of Centre shopping - CWAC	£148.87	£26.32	£5.61	£55.56	£62.05	£281.41	12.8%	£35.91	11.3%	£317.33
Zone 1	Out of Centre shopping - Outside CWAC	£4.95	£0.69	£0.14	£6.09	£1.21	£12.46	15.3%	£1.90	13.2%	£14.36
Zone 1	Total	£476.97	£82.41	£36.90	£195.11	£135.81	£881.63	15.3%	£408.91	31.7%	£1,290.53
Zone 2	Midwich	£0.02	£5.74	£7.84	£0.00	£0.02	£16.48	46.4%	£7.64	31.7%	£24.13
Zone 2	Northwich	£0.31	£0.88	£7.85	£0.09	£0.02	£9.07	4.8%	£0.43	4.5%	£9.57
Zone 2	Northwich - Northwich Retail Park	£0.15	£33.21	£7.08	£0.09	£0.02	£51.04	0.0%	£0.00	0.0%	£51.04
Zone 2	Tarporley	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	0.0%	£0.00	0.0%	£0.00
Zone 2	Winsford	£0.13	£14.19	£1.09	£0.04	£0.03	£19.65	0.0%	£0.00	0.0%	£19.65
Zone 2	Winsford - Wharton Retail Park	£0.05	£8.97	£0.81	£0.04	£0.01	£12.53	0.0%	£0.00	0.0%	£12.53
Zone 2	Frodsham	£0.39	£3.25	£0.66	£0.07	£0.06	£5.41	3.5%	£0.19	3.4%	£5.60
Zone 2	Out of Centre shopping - CWAC	£1.48	£39.41	£3.80	£0.30	£0.15	£56.70	13.1%	£7.40	11.5%	£64.10
Zone 2	Out of Centre shopping - Outside CWAC	£0.23	£0.53	£0.49	£0.11	£0.05	£1.51	2.1%	£0.03	2.0%	£1.63
Zone 2	Total	£2.76	£168.18	£29.62	£0.81	£0.43	£253.67	13.1%	£19.57	7.2%	£273.24
Zone 3	Crewe	£0.10	£2.94	£32.50	£0.16	£0.02	£41.63	2.1%	£0.85	2.0%	£42.49
Zone 3	Crewe - Edleston Road	£0.01	£0.63	£10.31	£0.04	£0.03	£12.81	43.5%	£5.57	30.3%	£18.38
Zone 3	Crewe - Grand Junction Retail Park	£0.38	£12.05	£74.97	£0.96	£0.11	£103.56	4.5%	£4.63	4.3%	£108.20
Zone 3	Knutsford	£0.07	£2.58	£8.24	£0.04	£0.04	£12.98	34.9%	£4.53	25.9%	£17.50
Zone 3	Lymsington	£0.06	£0.49	£0.70	£0.06	£0.00	£1.54	28.5%	£0.44	22.2%	£1.98
Zone 3	Nantwich	£0.38	£1.69	£22.09	£0.41	£0.08	£26.55	39.8%	£11.99	21.9%	£37.55
Zone 3	Runcom - Old Town	£0.01	£0.11	£2.85	£0.00	£0.00	£3.46	26.1%	£0.90	20.7%	£4.37
Zone 3	Runcom - Runcom Shopping City	£0.21	£4.69	£18.26	£0.12	£0.14	£27.58	93.0%	£25.65	48.2%	£53.23
Zone 3	Sandbach	£0.01	£0.16	£4.94	£0.01	£0.93	£5.93	23.4%	£1.39	19.0%	£7.32
Zone 3	Stockton Heath	£0.01	£0.38	£3.12	£0.00	£0.01	£4.11	10.4%	£0.43	9.5%	£4.54
Zone 3	Out of Centre shopping	£1.66	£12.63	£91.57	£2.20	£0.44	£126.14	13.5%	£16.99		

	Retail Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Total Study Area	Trade from outside (% of Total Inflow)	Total Turnover
Zone 1	Cheshire Oaks	10.41%	4.97%	2.54%	3.71%	5.20%	5.03%	45.63%	15.21%
Zone 1	Chester	16.65%	4.19%	1.37%	5.33%	1.98%	5.39%	12.04%	8.89%
Zone 1	Chester - Caldys Valley Retail Park	0.99%	0.07%	0.01%	0.05%	0.01%	0.19%	0.05%	0.24%
Zone 1	Chester - Faulkner Street	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Zone 1	Chester - Greyhound Retail Park	13.65%	1.85%	0.22%	5.36%	0.83%	4.02%	1.44%	5.12%
Zone 1	Ellesmere Port	1.01%	0.03%	0.01%	0.04%	0.08%	0.20%	0.04%	0.24%
Zone 1	Ellesmere Port Retail Park	4.17%	0.21%	0.02%	0.07%	0.56%	0.84%	0.17%	1.05%
Zone 1	Little Sutton	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Zone 1	Neston	0.17%	0.00%	0.00%	0.00%	0.02%	0.03%	0.01%	0.04%
Zone 1	Out of Centre shopping - CWAC	21.68%	5.38%	0.75%	6.06%	7.43%	7.52%	5.75%	10.19%
Zone 1	Out of Centre shopping - Outside CWAC	0.72%	0.14%	0.02%	0.66%	0.15%	0.33%	0.30%	0.46%
Zone 1	Total	69.45%	18.85%	4.93%	21.89%	18.26%	23.57%	65.43%	41.45%
Zone 2	Middlewich	0.00%	1.37%	0.00%	0.00%	0.00%	0.44%	1.22%	0.77%
Zone 2	Northwich	0.04%	12.86%	1.05%	0.02%	0.01%	2.41%	0.69%	3.04%
Zone 2	Northwich - Northwich Retail Park	0.02%	6.79%	0.95%	0.01%	0.00%	1.36%	0.00%	1.64%
Zone 2	Tarporley	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Zone 2	Winsford	0.02%	2.90%	0.15%	0.00%	0.00%	0.53%	0.00%	0.63%
Zone 2	Winsford - Wharton Retail Park	0.01%	1.83%	0.11%	0.00%	0.00%	0.34%	0.00%	0.40%
Zone 2	Frodsham	0.06%	0.67%	0.09%	0.01%	0.01%	0.14%	0.03%	0.18%
Zone 2	Out of Centre shopping - CWAC	0.22%	8.06%	0.51%	0.03%	0.02%	1.52%	1.18%	2.06%
Zone 2	Out of Centre shopping - Outside CWAC	0.03%	0.11%	0.07%	0.01%	0.01%	0.04%	0.05%	0.11%
Zone 2	Total	0.40%	34.39%	3.96%	0.02%	0.05%	6.78%	3.31%	8.78%
Zone 3	Crewe	0.01%	0.60%	4.35%	0.09%	0.00%	1.11%	0.14%	1.36%
Zone 3	Crewe - Edleston Road	0.00%	0.13%	1.38%	0.00%	0.00%	0.34%	0.89%	0.59%
Zone 3	Crewe - Grand Junction Retail Park	0.06%	2.46%	10.03%	0.10%	0.01%	2.77%	0.74%	3.47%
Zone 3	Knutsford	0.01%	0.53%	1.10%	0.00%	0.01%	0.35%	0.72%	0.56%
Zone 3	Lymm	0.01%	0.10%	0.09%	0.01%	0.00%	0.04%	0.07%	0.06%
Zone 3	Nantwich	0.05%	0.35%	2.95%	0.05%	0.01%	0.76%	1.77%	1.27%
Zone 3	Runcorn - Old Town	0.00%	0.02%	0.38%	0.00%	0.00%	0.09%	0.14%	0.14%
Zone 3	Runcorn - Runcorn Shopping City	0.03%	0.96%	2.44%	0.01%	0.02%	0.74%	1.71%	1.11%
Zone 3	Sandbach	0.00%	0.03%	0.66%	0.00%	0.00%	0.16%	0.22%	0.24%
Zone 3	Stockton Heath	0.00%	0.08%	0.42%	0.00%	0.00%	0.11%	0.07%	0.15%
Zone 3	Out of Centre shopping	0.24%	2.58%	12.25%	0.24%	0.05%	3.37%	2.72%	4.60%
Zone 3	Total	0.42%	7.84%	36.04%	0.44%	0.11%	9.85%	11.60%	14.16%
Zone 4	Chester - Broughton Shopping Park	3.08%	1.23%	0.21%	6.66%	0.54%	2.46%	7.98%	4.55%
Zone 4	Denbigh	0.00%	0.00%	0.00%	0.05%	0.00%	0.01%	0.04%	0.02%
Zone 4	Flint	0.00%	0.00%	0.00%	0.07%	0.00%	0.02%	0.04%	0.03%
Zone 4	Flint - Flintshire Retail Centre	0.00%	0.00%	0.00%	3.09%	0.00%	0.76%	1.04%	0.60%
Zone 4	Holywell	0.00%	0.00%	0.00%	0.90%	0.01%	0.22%	0.45%	0.35%
Zone 4	Mold	0.03%	0.00%	0.00%	1.32%	0.01%	0.33%	0.07%	0.41%
Zone 4	Prestatyn	0.06%	0.05%	0.04%	3.18%	0.03%	0.80%	0.22%	1.00%
Zone 4	Ruthin	0.01%	0.00%	0.00%	0.61%	0.00%	0.15%	0.00%	0.18%
Zone 4	Shotton	0.00%	0.00%	0.00%	0.18%	0.00%	0.04%	0.02%	0.

TABLE 4: COMPARISON GOODS EXPENDITURE MARKET SHARES EXCLUDING ONLINE (EM) ASSESSMENT YEARS: 2025-2040

	Retail Location	Comparison Market Shares - Total Study Area	Uplift in Study Area Comparison Turnover Market Share	Comparison Turnover (Em) from Study area														
				2025			2030			2035			2040					
				Retained Resident Study Area Expenditure	Uplift from Outside Study Area	Total Retained Expenditure	Retained Resident Study Area Expenditure	Uplift from Outside Study Area	Total Retained Expenditure	Retained Resident Study Area Expenditure	Uplift from Outside Study Area	Total Retained Expenditure	Retained Resident Study Area Expenditure	Uplift from Outside Study Area	Total Retained Expenditure			
Zone 1	Cheshire Oaks	5.0%	45.6%	£215.37	£98.28	£313.65	£238.50	£108.84	£347.34	£268.29	£122.43	£390.72	£302.00	£137.81	£439.81			
Zone 1	Chester	5.4%	12.0%	£230.62	£27.76	£258.38	£255.39	£30.75	£286.14	£287.29	£34.59	£321.88	£323.38	£38.93	£362.31			
Zone 1	Chester - Caldys Valley Retail Park	0.2%	0.1%	£8.02	£0.00	£8.03	£8.88	£0.00	£8.89	£9.99	£0.01	£10.00	£11.25	£0.01	£11.26			
Zone 1	Chester - Faulkner Street	0.0%	0.0%	£0.11	£0.00	£0.11	£0.12	£0.00	£0.12	£0.14	£0.00	£0.14	£0.16	£0.00	£0.16			
Zone 1	Chester - Greyhound Retail Park	4.0%	1.4%	£172.14	£2.47	£174.62	£190.63	£2.74	£193.37	£214.45	£3.08	£217.53	£241.39	£3.47	£244.85			
Zone 1	Ellesmere Port	0.2%	0.0%	£8.43	£0.00	£8.43	£9.33	£0.00	£9.33	£10.50	£0.00	£10.50	£11.81	£0.00	£11.82			
Zone 1	Ellesmere Port Retail Park	0.8%	0.2%	£36.09	£0.06	£36.15	£39.96	£0.07	£40.03	£44.95	£0.08	£45.03	£50.60	£0.09	£50.69			
Zone 1	Little Sutton	0.0%	0.0%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00			
Zone 1	Neston	0.0%	0.0%	£1.38	£0.00	£1.38	£1.53	£0.00	£1.53	£1.72	£0.00	£1.72	£1.94	£0.00	£1.94			
Zone 1	Out of Centre shopping - CWAC	7.5%	5.7%	£321.83	£18.49	£340.32	£356.40	£20.48	£376.88	£400.91	£23.04	£423.95	£451.28	£25.93	£477.21			
Zone 1	Out of Centre shopping - Outside CWAC	0.3%	0.3%	£14.25	£0.04	£14.29	£15.78	£0.05	£15.83	£17.75	£0.05	£17.80	£19.98	£0.06	£20.04			
Zone 1	Total	23.6%	65.4%	£1,008.24	£147.13	£1,155.37	£1,116.53	£162.93	£1,279.47	£1,256.00	£183.28	£1,439.28	£1,413.78	£206.31	£1,620.09			
Zone 2	Middlewich	0.4%	1.2%	£18.85	£0.23	£19.08	£20.97	£0.26	£21.13	£23.48	£0.29	£23.77	£26.43	£0.32	£26.75			
Zone 2	Northwich	2.4%	0.7%	£103.23	£0.71	£103.94	£114.32	£0.79	£115.11	£138.60	£0.88	£139.48	£144.75	£1.00	£145.75			
Zone 2	Northwich - Northwich Retail Park	1.4%	0.0%	£58.37	£0.00	£58.37	£64.64	£0.00	£64.64	£72.72	£0.00	£72.72	£81.85	£0.00	£81.85			
Zone 2	Tarporley	0.0%	0.0%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00			
Zone 2	Winsford	0.5%	0.0%	£22.47	£0.00	£22.47	£24.88	£0.00	£24.88	£27.99	£0.00	£27.99	£31.51	£0.00	£31.51			
Zone 2	Winsford - Wharston Retail Park	0.3%	0.0%	£14.33	£0.00	£14.33	£15.87	£0.00	£15.87	£17.85	£0.00	£17.85	£20.10	£0.00	£20.10			
Zone 2	Frodsham	0.1%	0.0%	£6.19	£0.00	£6.19	£6.85	£0.00	£6.85	£7.71	£0.00	£7.71	£8.68	£0.00	£8.68			
Zone 2	Out of Centre shopping - CWAC	1.5%	1.2%	£64.84	£0.77	£65.61	£71.80	£0.85	£72.65	£80.77	£0.96	£81.73	£90.92	£1.08	£92.00			
Zone 2	Out of Centre shopping - Outside CWAC	0.0%	0.0%	£1.82	£0.00	£1.82	£2.02	£0.00	£2.02	£2.27	£0.00	£2.27	£2.55	£0.00	£2.55			
Zone 2	Total	6.8%	3.1%	£290.10	£1.71	£291.81	£321.26	£1.89	£323.16	£361.39	£2.13	£363.52	£406.79	£2.40	£409.19			
Zone 3	Crewes	1.1%	0.1%	£47.61	£0.07	£47.68	£52.73	£0.07	£52.80	£59.31	£0.08	£59.39	£66.76	£0.09	£66.86			
Zone 3	Crewes - Edleston Road	0.3%	0.9%	£14.65	£0.13	£14.78	£16.22	£0.14	£16.37	£18.25	£0.16	£18.41	£20.54	£0.18	£20.72			
Zone 3	Crewes - Grand Junction Retail Park	2.8%	0.7%	£118.44	£0.88	£119.31	£131.16	£0.97	£132.13	£147.54	£1.09	£148.63	£166.07	£1.23	£167.31			
Zone 3	Knutsford	0.3%	0.7%	£14.84	£0.16	£15.00	£16.43	£0.12	£16.55	£18.49	£0.13	£18.62	£20.81	£0.15	£20.96			
Zone 3	Lymm	0.1%	0.0%	£1.76	£0.00	£1.76	£1.95	£0.00	£1.95	£2.19	£0.00	£2.20	£2.47	£0.00	£2.47			
Zone 3	Nantwich	0.8%	1.8%	£32.64	£0.58	£33.22	£36.15	£0.64	£36.79	£40.67	£0.72	£41.39	£45.78	£0.81	£46.59			
Zone 3	Runcorn - Old Town	0.1%	0.1%	£3.96	£0.01	£3.96	£4.38	£0.01	£4.39	£4.93	£0.01	£4.94	£5.55	£0.01	£5.56			
Zone 3	Runcorn - Runcorn Shopping City	0.7%	4.1%	£31.54	£1.29	£32.83	£34.93	£1.43	£36.36	£39.29	£1.61	£40.90	£44.23	£1.82	£46.04			
Zone 3	Sandbach	0.2%	0.2%	£6.79	£0.02	£6.80	£7.51	£0.02	£7.53	£8.45	£0.02	£8.47	£9.51	£0.02	£9.54			
Zone 3	Stockton Heath	0.1%	0.1%	£4.70	£0.00	£4.71	£5.21	£0.00	£5.21	£5.86	£0.00	£5.87	£6.60	£0.00	£6.60			
Zone 3	Out of Centre shopping	3.4%	2.7%	£144.26	£3.92	£148.18	£159.76	£4.34	£164.10	£179.71	£4.89	£184.60	£207.79	£5.50	£207.79			
Zone 3	Total	9.8%	53.5%	£421.19	£7.00	£428.19	£466.43	£7.75	£474.18	£524.69	£8.72	£533.41	£590.61	£9.82	£600.42			
Zone 4	Chester - Broughton Shopping Park	2.5%	8.0%	£105.10	£8.38	£113.49	£116.39	£9.28	£125.68	£130.93	£10.44	£141.37	£147.38	£11.75	£159.13			
Zone 4	Denbigh	0.0%	0.0%	£0.51	£0.00	£0.51	£0.57	£0.00	£0.57	£0.64	£0.00	£0.64	£0.72	£0.00	£0.72			
Zone 4	Flint	0.0%	0.0%	£0.73	£0.00	£0.73	£0.81	£0.00	£0.81	£0.91	£0.00	£0.91	£1.02	£0.00	£1.02			
Zone 4	Flint - Flintshire Retail Centre	0.8%	0.7%	£32.36	£0.21	£32.58	£35.84	£0.24	£36.08	£40.32	£0.27	£40.58	£45.38	£0.30	£45.68			
Zone 4	Holywell	0.2%	0.4%	£9.33	£0.04	£9.37	£10.33	£0.05	£10.38	£11.62	£0.05	£11.67	£13.08	£0.06	£13.14			
Zone 4	Mold	0.3%	0.1%	£13.95	£0.01	£13.96	£15.45	£0.01	£15.46	£17.38	£0.01	£17.39	£19.57	£0.01	£19.58			
Zone 4	Prestatyn	0.8%	0.2%	£34.02	£0.07	£34.09	£37.57	£0.08	£37.65	£42.38	£0.09	£42.47	£47.70	£0.10	£47.81			
Zone 4	Ruthin	0.1%	0.0%	£6.31	£0.00	£6.31	£6.98	£0.00	£6.98	£7.86	£0.00	£7.86	£8.84	£0.00	£8.84			
Zone 4	Shotton	0.1%	0.0%	£1.86	£0.00	£1.86	£2.06	£0.00	£2.06	£2.32	£0.00	£2.32	£2.61	£0.00	£2.61			
Zone 4	Shotton - Connahs Quay	0.0%	0.0%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00			
Zone 4	Whitchurch	0.2%	0.0%	£10.03	£0.00	£10.03	£11.11	£0.00	£11.11	£12.50	£0.00	£12.50	£14.07	£0.00	£14.07			
Zone 4	Wrexham	2.2%	0.2%	£92.31	£0.18	£92.50	£102.23	£0.20	£102.43	£114.99	£0.23	£115.22	£129.44	£0.26	£129.70			
Zone 4	Wrexham - Border Retail Park	0.2%	0.0%	£8.63	£0.00	£8.63	£9.56	£0.00	£9.56	£10.75	£0.00	£10.75	£12.10	£0.00	£12.10			
Zone 4	Wrexham - Central Retail Park	0.4%	0.7%	£15.44	£0.11	£15.54	£17.09	£0.12	£17.21	£19.23	£0.13	£19.36	£21.64	£0.15	£21.79			
Zone 4	Wrexham - Plas Coch Retail Park	1.2%	0.9%	£50.63	£0.46	£51.09	£56.07	£0.51	£56.58	£63.07	£0.57	£63.65	£70.99	£0.65	£71.64			
Zone 4	Out of Centre shopping	5.9%	4.1%	£253.46	£10.50	£263.96	£280.68	£11.63	£292.31	£315.74	£13.08	£328.82	£355.41	£14.72	£370.13			
Zone 4	Total	14.8%	10.8%	£634.67	£19.97	£654.64	£702.84	£22.12	£724.96	£790.63	£24.88	£815.51	£889.95	£28.01	£917.96			
Zone 5	Beblington	0.0%	0.0%	£0.56	£0.00	£0.56	£0.62	£0.00	£0.62	£0.70	£0.00	£0.70	£0.78	£0.00	£0.78			
Zone 5	Birkenhead	1.5%	1.9%	£62.03	£1.15	£63.18	£68.69	£1.27	£69.97	£77.27	£1.43	£78.71	£86.98	£1.61	£88.60			
Zone 5	Birkenhead - Rock Retail Park	1.2%	1.6%	£53.04	£0.86	£53.90	£58.74	£0.95	£59.69	£66.08	£1.07	£67.15	£74.38	£1.21	£75.59			
Zone 5	Bromborough - The Croft Retail & Leisure Park	3.4%	0.8%	£146.16	£1.16	£147.32	£161.86	£1.28	£163.14	£182.07	£1.44	£183.52	£204.95	£1.63	£206.57			
Zone 5	Heswall	0.2%	0.1%	£6.62	£0.00	£6.62	£7.33	£0.00	£7.33	£8.24	£0.00	£8.25	£9.28	£0.01	£9.29			
Zone 5	Hoylake	0.2%	0.1%	£8.04	£0.00	£8.05	£8.90	£0.01	£8.91	£10.02	£0.01	£10.02	£11.27	£0.01	£11.28			
Zone 5	Moreton	0.1%	0.0%	£3.58	£0.00	£3.58	£3.96	£0.00	£3.96	£4.46	£0.00	£4.46	£5.02	£0.00	£5.02			
Zone 5	New Ferry	0.0%	0.0%	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00			
Zone 5	Upton - Upton By-Pass Retail Park	0.3%	0.0%	£13.19	£0.00	£13.19	£14.61	£0.00	£14.61	£16.44	£0.00	£16.44	£18.50	£0.00	£18.50			
Zone 5	Wallasey (Liscard)	0.7%	0.0%	£31.83	£0.00	£31.83	£35.25	£0.00	£35.25	£39.65	£0.00	£39.65	£44.63	£0.00	£44.63			
Zone 5	Wallasey (Liscard) - Junction 1 Retail Park	1.6%	0.0%	£70.21	£0.00	£70.21	£77.75	£0.00	£77.75	£87.46	£0.00	£87.46	£98.45	£0.00	£98.45			
Zone 5	West Kirby	0.2%	0.0%	£7.57	£0.00	£7.57	£8.39	£0.00	£8.39	£9.43	£0.00	£9.43	£10.62	£0.				

TABLE 5: TOTAL ALLOCATED COMPARISON GOODS EXPENDITURE BASED ON MARKET SHARE ANALYSIS (£m)

	2025	2030	2035	2040
Chester	£258.38	£286.14	£321.88	£362.31
Other Zone 1	£882.69	£977.50	£1,099.60	£1,237.73
Other Zone 2	£270.91	£300.01	£337.48	£379.88
TOTAL COMPARISON TURNOVER OF BOROUGH STORES/CENTRES:	£1,411.98	£1,563.65	£1,758.96	£1,979.93

Notes:
Excludes SFT & includes 'Inflow' from outside Study Area
Assume constant market shares over forecast period.

TABLE 6: CWaC - FORECAST CAPACITY FOR COMPARISON GOODS FLOORSACE EXCLUDING COMMITMENTS

	2025	2030	2035	2040
Step 1: Total Forecast 'Current' Turnover of All Floorspace (£m):	£1,412.0	£1,563.6	£1,759.0	£1,979.9
Step 2: Total Forecast 'Benchmark' Turnover of All Floorspace (£m):	£1,412.0	£1,585.1	£1,793.4	£2,029.0
Step 3: Net Residual Expenditure (£m):	-	-£21.4	-£34.4	-£49.1
Step 4: Capacity for New Comparison Floorspace:				
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,735	£7,621	£8,622
(ii) Net Floorspace Capacity (sq m):	-	-3,179	-4,513	-5,693
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-4,542	-6,448	-8,133

Notes:
Step 1: The (transaction-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).
Step 2: It has been assumed for the purpose of this assessment that the Borough's comparison retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (2025) and other research evidence.
Step 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.
Step 4: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on average sales performance of comparison goods retailers.

TABLE 7: CHESTER CITY CENTRE - FORECAST CAPACITY FOR COMPARISON GOODS FLOORSACE EXCLUDING COMMITMENTS

	2025	2030	2035	2040
Step 1: Total Forecast 'Current' Turnover of All Floorspace (£m):	£258.4	£286.1	£321.9	£362.3
Step 2: Total Forecast 'Benchmark' Turnover of All Floorspace (£m):	£258.4	£290.1	£328.2	£371.3
Step 3: Net Residual Expenditure (£m):	-	-£3.9	-£6.3	-£9.0
Step 4: Capacity for New Comparison Floorspace:				
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,735	£7,621	£8,622
(ii) Net Floorspace Capacity (sq m):	-	-582	-826	-1,042
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-831	-1,180	-1,488

TABLE 8: OTHER ZONE 1 - FORECAST CAPACITY FOR COMPARISON GOODS FLOORSACE EXCLUDING COMMITMENTS

	2025	2030	2035	2040
Step 1: Total Forecast 'Current' Turnover of All Floorspace (£m):	£882.7	£977.5	£1,099.6	£1,237.7
Step 2: Total Forecast 'Benchmark' Turnover of All Floorspace (£m):	£882.7	£990.9	£1,121.1	£1,268.4
Step 3: Net Residual Expenditure (£m):	-	-£13.4	-£21.5	-£30.7
Step 4: Capacity for New Comparison Floorspace:				
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,735	£7,621	£8,622
(ii) Net Floorspace Capacity (sq m):	-	-1,988	-2,822	-3,559
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-2,839	-4,031	-5,084

TABLE 9: ALL ZONE 2 - FORECAST CAPACITY FOR COMPARISON GOODS FLOORSACE EXCLUDING COMMITMENTS

	2025	2030	2035	2040
Step 1: Total Forecast 'Current' Turnover of All Floorspace (£m):	£270.9	£300.0	£337.5	£379.9
Step 2: Total Forecast 'Benchmark' Turnover of All Floorspace (£m):	£270.9	£304.1	£344.1	£389.3
Step 3: Net Residual Expenditure (£m):	-	-£4.1	-£6.6	-£9.4
Step 4: Capacity for New Comparison Floorspace:				
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,735	£7,621	£8,622
(ii) Net Floorspace Capacity (sq m):	-	-610	-866	-1,092
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-871	-1,237	-1,560

TABLE 10: COMMITTED COMPARISON GOODS FLOORSPACE

	Planning Application Reference	Gross Floorspace (sqm)	Net Sales Area (Sqm)	Sales Density (£/sqm) (2024)	2024	2025	2030	2035	2040
Caldy Valley Retail Park, Great Boughton, Chester	22/00579/FUL	2126	281	£4,620	£1.3	£1.3	£1.5	£1.7	£1.9
Tarporley Garden Centre, Tarporley Road, Delamere	24/01386/NMA	2258	1806	£3,000	£5.4	£5.4	£6.1	£6.9	£7.8
TOTAL COMMITTED COMPARISON GOODS TURNOVER						£6.8	£7.6	£8.6	£9.7

Source: LBC, LSH

Notes: Net sales assumed to be 80% of gross

TABLE 11: CWaC FORECAST CAPACITY FOR COMPARISON GOODS FLOORSPACE INCLUDING COMMITMENTS

	2025	2030	2035	2040
Step 1: Net Residual Expenditure - Excluding Commitments (£m):	-	£21.4	£34.4	£49.1
Step 2: Turnover of Committed Comparison Floorspace (£m)		£7.6	£8.6	£9.7
Step 3: Net Residual Expenditure After Commitments (£m):		£29.0	£43.0	£58.8
Step 4: Capacity for New Comparison Floorspace:				
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,735	£7,621	£8,622
(ii) Net Floorspace Capacity (sq m):	-	-4,304	-5,639	-6,818
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-6,149	-8,055	-9,741

Step 1: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.

Step 2: It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2030.

Step 3: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 2).

Step 4: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on average sales performance of comparison goods retailers.

TABLE 12: CHESTER CITY CENTRE - FORECAST CAPACITY FOR COMPARISON GOODS FLOORSPACE INCLUDING COMMITMENTS

	2025	2030	2035	2040
Step 1: Net Residual Expenditure - Excluding Commitments (£m):	-	£3.9	£6.3	£9.0
Step 2: Turnover of Committed Comparison Floorspace (£m)		£0.0	£0.0	£0.0
Step 3: Net Residual Expenditure After Commitments (£m):		£3.9	£6.3	£9.0
Step 4: Capacity for New Comparison Floorspace:				
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,735	£7,621	£8,622
(ii) Net Floorspace Capacity (sq m):	-	-582	-826	-1,042
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-831	-1,180	-1,488

TABLE 13: OTHER ZONE 1 - FORECAST CAPACITY FOR COMPARISON RETAIL FLOORSPACE INCLUDING COMMITMENTS

	2025	2030	2035	2040
Step 1: Net Residual Expenditure - Excluding Commitments (£m):	-	£13.4	£21.5	£30.7
Step 2: Turnover of Committed Comparison Floorspace (£m)		£1.5	£1.7	£1.9
Step 3: Net Residual Expenditure After Commitments (£m):		£14.9	£23.2	£32.6
Step 4: Capacity for New Comparison Floorspace:				
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,735	£7,621	£8,622
(ii) Net Floorspace Capacity (sq m):	-	-2,205	-3,039	-3,777
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-3,150	-4,341	-5,395

TABLE 14: ALL ZONE 2 - FORECAST CAPACITY FOR COMPARISON GOODS FLOORSPACE INCLUDING COMMITMENTS

	2025	2030	2035	2040
Step 1: Net Residual Expenditure - Excluding Commitments (£m):	-	£4.1	£6.6	£9.4
Step 2: Turnover of Committed Comparison Floorspace (£m)		£6.1	£6.9	£7.8
Step 3: Net Residual Expenditure After Commitments (£m):		£10.2	£13.5	£17.2
Step 4: Capacity for New Comparison Floorspace:				
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,735	£7,621	£8,622
(ii) Net Floorspace Capacity (sq m):	-	-1,518	-1,774	-2,000
(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):		-2,168	-2,534	-2,857

APPENDIX 5: LEISURE EXPENDITURE ANALYSIS

TABLE 1: BASE YEAR POPULATION & PROJECTIONS (2025 - 2040)

		2025	2030	2035	2040
Zone 1	CWAC West	228,470	240,917	253,364	265,811
Zone 2	CWAC East	166,600	175,676	184,753	193,829
Zone 3	Cheshire East and Halton	269,460	274,216	278,570	283,437
Zone 4	N Wales and Shropshire	367,034	368,103	369,269	371,027
Zone 5	Wirral	325,408	327,591	329,696	332,470
Total Study Area		1,356,972	1,386,503	1,415,651	1,446,573
Cheshire West and Chester Total		370,321	391,844	413,367	434,890

Source: Experian Business Strategies - Location Analyst Geographic Information System (GIS) Retail Area Planner Population & Expenditure Datasets
Notes: Population projections (2025 to 2040) derived from Experian and based on ONS 2018-based Sub-National Population Projections

TABLE 2: LEISURE EXPENDITURE PER HEAD AT 2023 (2023 PRICES)

		Hotels, B&Bs, etc	Culture	Games of chance	Personal Grooming	Recreation & sport	Restaurants, cafes etc	Total
Zone 1	CWAC West	£274	£494	£197	£124	£281	£2,156	£3,526
Zone 2	CWAC East	£303	£526	£210	£138	£306	£2,202	£3,685
Zone 3	Cheshire East and Halton	£267	£495	£197	£126	£280	£2,038	£3,403
Zone 4	N Wales and Shropshire	£257	£415	£149	£93	£192	£1,569	£2,675
Zone 5	Wirral	£223	£461	£191	£108	£257	£1,930	£3,170
Cheshire West and Chester Average		£282	£504	£201	£129	£289	£2,158	£3,563

Source: Experian Business Strategies - Location Analyst Geographic Information System (GIS) Retail Area Planner Population & Expenditure Datasets
Note: 2023 prices

TABLE 3: LEISURE EXPENDITURE PER HEAD AT 2025 (2023 PRICES)

		Hotels, B&Bs, etc	Culture	Games of chance	Personal Grooming	Recreation & sport	Restaurants, cafes etc	Total
Zone 1	CWAC West	£270	£486	£194	£122	£277	£2,122	£3,470
Zone 2	CWAC East	£298	£518	£207	£136	£301	£2,167	£3,626
Zone 3	Cheshire East and Halton	£263	£487	£194	£124	£276	£2,005	£3,349
Zone 4	N Wales and Shropshire	£253	£408	£147	£92	£189	£1,544	£2,632
Zone 5	Wirral	£219	£454	£188	£106	£253	£1,899	£3,119
Study Area Average		£255	£461	£181	£112	£250	£1,894	£3,154
Cheshire West and Chester Average		£277	£496	£198	£127	£284	£2,123	£3,506

Source: Experian Business Strategies - Location Analyst Geographic Information System (GIS) Retail Area Planner Population & Expenditure Datasets
Note: 2023 prices

TABLE 4: TOTAL AVAILABLE LEISURE EXPENDITURE - 2025 TO 2040

		2025	2030	2035	2040	Growth 2025-2035		Growth 2025-2040	
Zone 1	CWAC West	£792.7	£858.7	£934.2	£1,014.9	£141.5	17.8%	£222.2	28.0%
Zone 2	CWAC East	£604.1	£654.4	£711.9	£773.4	£107.8	17.8%	£169.3	28.0%
Zone 3	Cheshire East and Halton	£902.3	£943.3	£991.3	£1,044.4	£89.0	9.9%	£142.1	15.7%
Zone 4	N Wales and Shropshire	£966.1	£995.4	£1,032.9	£1,074.7	£66.8	6.9%	£108.6	11.2%
Zone 5	Wirral	£1,015.0	£1,049.7	£1,092.9	£1,141.2	£77.9	7.7%	£126.2	12.4%
Study Area Total		£4,280.2	£4,501.5	£4,763.2	£5,048.6	£483.0	11.3%	£768.3	18.0%
Cheshire West and Chester Total		£1,298.3	£1,411.3	£1,540.1	£1,677.8	£241.8	18.6%	£379.5	29.2%

Notes: Derived from zonal populations (Table 1) multiplied by available per capita expenditure (Table 3) and accounts for projected expenditure growth in leisure sector; 2023 prices

TABLE 5: STUDY AREA LEISURE EXPENDITURE GROWTH BY LEISURE CATEGORY - 2025 TO 2040

		2025	2030	2035	2040	Growth (£m):	
						2025-2035	2025-2040
Accommodation services (hotels, guesthouses, B&Bs)		£346.3	£364.0	£385.0	£407.9	£38.7	£61.6
Cultural services (cinema, theatre, concerts, etc)		£626.0	£658.0	£695.9	£737.2	£69.8	£111.2
Games of chance (bingo, casino, betting)		£245.9	£258.6	£273.5	£289.9	£27.6	£43.9
Personal grooming (hairdressers, barbers, etc)		£152.1	£160.0	£169.4	£179.6	£17.3	£27.5
Recreational and sporting services (gym, fitness, etc)		£339.2	£356.9	£377.9	£400.7	£38.7	£61.5
Restaurants, cafes, bars, etc		£2,570.7	£2,703.9	£2,861.5	£3,033.3	£290.8	£462.6
Total Study Area:		£4,280.2	£4,501.5	£4,763.2	£5,048.6	£483.0	£768.3

Notes: Relates to Experian's sub-division of leisure sector expenditure and takes account of Study Area population growth and projected expenditure growth in leisure sector; 2023 prices

TABLE 6: TOTAL FORECAST AVAILABLE EXPENDITURE FOR FOOD & BEVERAGE BY ZONE - 2025 TO 2037

		2025	2030	2035	2040	Growth (£m)	
						2025-2035	2025-2040
Zone 1	CWAC West	£484.7	£525.1	£571.2	£620.5	£86.5	£135.8
Zone 2	CWAC East	£361.0	£391.0	£425.4	£462.2	£64.4	£101.2
Zone 3	Cheshire East and Halton	£540.4	£564.9	£593.7	£625.5	£53.3	£85.1
Zone 4	N Wales and Shropshire	£566.7	£583.8	£605.9	£630.3	£39.2	£63.7
Zone 5	Wirral	£618.0	£639.1	£665.4	£694.8	£47.4	£76.8
Total Study Area		£2,570.7	£2,703.9	£2,861.5	£3,033.3	£290.8	£462.6
Cheshire West and Chester Average		£786.4	£854.8	£932.8	£1,016.2	£146.4	£229.8

Notes: Sub-divides food and drink growth by zone (accounting for forecast population growth and expenditure growth in that zone); 2023 prices

TABLE 7: TOTAL FORECAST AVAILABLE EXPENDITURE FOR CULTURAL SERVICES BY ZONE - 2025 TO 20340

		2025	2030	2035	2040	Growth (£m)	
						2025-2035	2025-2037
Zone 1	CWAC West	£111.1	£120.3	£130.9	£142.2	£19.8	£31.1
Zone 2	CWAC East	£86.2	£93.4	£101.6	£110.4	£15.4	£24.2
Zone 3	Cheshire East and Halton	£131.2	£137.2	£144.2	£151.9	£12.9	£20.7
Zone 4	N Wales and Shropshire	£149.9	£154.4	£160.2	£166.7	£10.4	£16.8
Zone 5	Wirral	£147.6	£152.7	£158.9	£166.0	£11.3	£18.3
Total Study Area		£626.0	£658.0	£695.9	£737.2	£69.8	£111.2
Cheshire West and Chester Total		£183.7	£199.6	£217.9	£237.3	£34.2	£53.7

Notes: Sub-divides cultural services growth by zone (accounting for forecast population growth and expenditure growth in that zone); 2023 prices

TABLE 1: BASE YEAR POPULATION & PROJECTIONS (2025 - 2040)

		2025	2030	2035	2040
Zone 1	CWAC West	228,470	240,917	253,364	265,811
Zone 2	CWAC East	166,600	175,676	184,753	193,829
Zone 3	Cheshire East and Halton	269,460	274,216	278,570	283,437
Zone 4	N Wales and Shropshire	367,034	368,103	369,269	371,027
Zone 5	Wirral	325,408	327,591	329,696	332,470
Total Study Area		1,356,972	1,386,503	1,415,651	1,446,573
Cheshire West and Chester Total		370,321	391,844	413,367	434,890

Source: Experian Business Strategies - Location Analyst Geographic Information System (GIS) Retail Area Planner Population & Expenditure Datasets
Notes: Population projections (2025 to 2040) derived from Experian and based on ONS 2018-based Sub-National Population Projections

TABLE 2: LEISURE EXPENDITURE PER HEAD AT 2023 (2023 PRICES)

		Hotels, B&Bs, etc	Culture	Games of chance	Personal Grooming	Recreation & sport	Restaurants, cafes etc	Total
Zone 1	CWAC West	£274	£494	£197	£124	£281	£2,156	£3,526
Zone 2	CWAC East	£303	£526	£210	£138	£306	£2,202	£3,685
Zone 3	Cheshire East and Halton	£267	£495	£197	£126	£280	£2,038	£3,403
Zone 4	N Wales and Shropshire	£257	£415	£149	£93	£192	£1,569	£2,675
Zone 5	Wirral	£223	£461	£191	£108	£257	£1,930	£3,170
Cheshire West and Chester Average		£282	£504	£201	£129	£289	£2,158	£3,563

Source: Experian Business Strategies - Location Analyst Geographic Information System (GIS) Retail Area Planner Population & Expenditure Datasets
Note: 2023 prices

TABLE 3: LEISURE EXPENDITURE PER HEAD AT 2025 (2023 PRICES)

		Hotels, B&Bs, etc	Culture	Games of chance	Personal Grooming	Recreation & sport	Restaurants, cafes etc	Total
Zone 1	CWAC West	£270	£486	£194	£122	£277	£2,122	£3,470
Zone 2	CWAC East	£298	£518	£207	£136	£301	£2,167	£3,626
Zone 3	Cheshire East and Halton	£263	£487	£194	£124	£276	£2,005	£3,349
Zone 4	N Wales and Shropshire	£253	£408	£147	£92	£189	£1,544	£2,632
Zone 5	Wirral	£219	£454	£188	£106	£253	£1,899	£3,119
Study Area Average		£255	£461	£181	£112	£250	£1,894	£3,154
Cheshire West and Chester Average		£277	£496	£198	£127	£284	£2,123	£3,506

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