our ref: **TR/Q30321**
your ref: 16O/1043
email: tim.rainbird@quod.com
date: 18 August 2016

Quod

Head of Planning
Liverpool City Council
Municipal Building
Dale Street
Liverpool
L2 2DH

FAO: Jon Woodward

By Email

Dear Sir,

FORMER RAYWARE SITE, SPEKE BOULEVARD, SPEKE, LIVERPOOL L24 9HZ
PLANNING REFERENCE 16O/1043

We write on behalf of our client, T J Morris Limited (TJM) (the applicant), in respect of the above planning application and provide a response to the comments made by Liverpool City Council's (LCC) policy team with regard to the principle of retail in this location (correspondence dated 9 June 2016).

For ease of reference, this response uses the same headings to those set out in LCC's response.

a) Enabling Development

We can confirm that the applicant is willing to accept a pre-commencement condition that requires the demolition and remediation of the entire site. It is also agreed that access and services will be brought into the business element of the site.

b) Principle of Development

It is suggested that the proposal should also be considered against 'saved' Policy S12 of the Liverpool UDP.

The Liverpool UDP was adopted in November 2002. Paragraph 214 of the NPPF states that decision takers may continue to give full weight to relevant Development Plan documents adopted under the Planning and Compulsory Act since 2004. The current UDP was adopted prior to 2004. Therefore, very little weight can be given to its 'saved' policies, particularly where they are inconsistent with national policy.

'Saved' Policy S12 ('Out of Centre Retailing') reflects the National Planning Policy Framework (NPPF) as it requires both the sequential and impact tests to be undertaken. Both these matters have been fully addressed within the Planning & Retail Assessment (PRA). Likewise, the criterion relating to traffic and accessibility has also been assessed in the submitted Transport Statement. However, reference to 'need' are not consistent with national policy and therefore are not relevant to the determination of the application.

Likewise, the reference under Saved Policy S12 for proposals for new out of centre development not prejudicing or delaying the Council's aspiration to deliver major retail and mixed use redevelopment in the

Paradise Street Development Area, is not of relevance to the determination of the application proposal. This scheme has now been developed (known as Liverpool One) and therefore it is not necessary to consider this specific criterion. Nevertheless, an assessment of the potential impact of the proposal on future in-centre investment in line with the requirements of national policy has been undertaken as part of the application submission.

Given the date when the UDP was adopted and its inconsistency with national policy, the principle of retail development in this location should be assessed against the requirements of the NPPF. This is consistent with the approach undertaken in support of the recent permitted application at the former Carcraft site (LPA ref. 15F/3120).

Critically, the absence of referring specifically to the out of date retail policies of the UDP within the application submission in no way undermines the robustness of the assessment undertaken.

c) <u>Sequential Approach</u>

In terms of the sequential approach to site selection, the Policy response agrees that there is no requirement to consider disaggregation. However, further consideration is required in relation to the vacant Co-op store on St Mary's Road in Garston district centre (Site Reference SS4 within the PRA).

The former Co-operative store is located within Garston district centre. The store is bound to the south by Garston Way (A561), to the north by St Mary's Road and to the west by a factory.

The unit extends to 2,779 square metres and is therefore too small to accommodate the scale of development being proposed (i.e. 9,000 square metres of Class B1(c), B2 and B8 uses and approximately 5,000 square metres of Class A1 floorspace with appropriate serving and car parking). Even if the adjoining car park is incorporated the developable area will continue to be too small to accommodate the quantum of floorspace being proposed.

Critically, this site has been considered in detail as part of the recent application by Aldi for a new store at Cressington House (LPA ref. 15F/2495). Following Officer's recommendation to approve the application, Members resolved to grant consent for this application at Committee on 9th August 2016.

Significantly, in granting consent, it was concluded that the application of the sequential approach has been satisfied. This position was reached by LCC following a review of significant information submitted both in support and against the application, a review by the Council's retail consultants (GL Hearn) and a legal opinion requested by LCC.

Taking all this into account, when considering availability as part of the sequential approach, the Committee Report concluded that:

> **"The Head of Planning considers therefore that there has been no clear demonstration that the site as a whole is available to Aldi to pursue within a reasonable timeframe that would be suitable to their business."**

In terms of suitability, the Committee Report identified that:

> **"Aldi have made the point that due to the poor prominence and lack of through-traffic on the main street of Garston, there is not sufficient critical mass to deliver a profitable store. They also assert that they would not locate in Garston centre, even if there were no other available out of centre sites. The question of viability and trading performance is a significant issues – the Head of Planning recognises that retailers have to operate in the real world and that if a store cannot be made to be profitable on a site, then that site is clearly not suitable for their business. The Head of Planning is of the opinion that if Aldi cannot make a store viable in Garston, it would be unrealistic to expect them to locate on an unsuitable site and would show a lack of flexibility on the part of the LPA."**

Taking into account these issues, the Committee Report concludes that *"there are no in-centre sites that are both available and suitable"* for the proposed Aldi at Cressington House.

This position is equally applicable when considering the sequential approach in respect of the current proposal at the former Rayware site.

Furthermore, the scale of development proposed is significantly greater than that proposed by Aldi. The Aldi proposal at Cressington House comprises a standalone development of just 1,754 square metres (gross internal area). This compares to the application proposal comprising c. 14,000 square metres of commercial floorspace. As has been established through the NPPF and Secretary of State decisions, there is no requirement to consider disaggregation. Given the Council's position in recently determining the Aldi application, it must follow that the former Co-op site is not suitable, available and viable for the application proposal.

It is also important to reiterate that the retail element of the scheme is critical to the delivery of the remainder of the Site for employment uses as it would act as the catalyst for the Site's wider regeneration. Without the retail floorspace proposed, the wider regeneration of this prominent site simply cannot be achieved.

Against this background, we maintain that the sequential approach to site selection has been satisfied. No sequentially site exists that can accommodate the scale of development proposed and address the site specific characteristics of the proposal.

This conclusion reflects the position of the Council in their consideration of proposals for new retail development (including significantly smaller development that being proposed) within the local area.

d) <u>Retail Impact</u>

With regard to retail impact, the Policy response notes that further work is needed in order for LCC to fully understand the potential impact. This additional information relates to:

- the sales density of Home Bargains;
- the sales density to be applied for the other retail unit;
- the likely trade draw of the proposal; and
- Cumulative Impact.

We deal with each point in turn.

i. Sales Density of Home Bargains

Reference is made to the need to apply the latest sales density for Home Bargains identified by Mintel. The sales density that has been applied within the PRA (£6,419 per square metre) was based on the most up-to-date figure published by Mintel and consistent with the figure suggested by LCC in consideration of the application at the former Carcraft site. However, it is acknowledged that after the submission of the planning application, the 2016 version of Mintel Retail Rankings was published. This identifies an updated figure for Home Bargains of £7,326 per square metre.

We maintain that a sales density of £2,500 per square metre for Home Bargains represents a robust figure in estimating the potential turnover of the unit (for the reasons set out in the PRA (para. 8.9)). This is a figure provided directly from the retailer. Despite this, we have updated our sensitivity testing based on applying the higher figure currently identified for Home Bargains (£7,326 per square metre).

ii. Sales Density for the Additional Unit

With regard to the second retail unit proposed, the Policy response suggests that a higher sales density of £7,500 per square metre for comparison goods and £10,500 per square metre for convenience goods should be applied.

In considering the suggested comparison goods sales density (£7,500 per square metre), we do not believe this is justified. Such a sales density is completely at odds with the Council's consideration of other retail schemes within the City. For example, the Council's retail evidence base ('Liverpool Retail and Commercial Leisure Study') applied an average sales density for Liverpool city centre, a regional shopping centre, of £6,073 per square metre and £5,061 per square metre for New Mersey Shopping Park (at 2014 prices). Despite the strength of both these retail destinations, the approach being advocated is to apply a much higher sales densities for the proposal at the former Rayware site.

Likewise, the suggested sales density is also much higher than the figure used (and accepted) for unrestricted comparison retail floorspace permitted elsewhere in the City. For example, in support of an application for the redevelopment of Edge Lane Retail Park (LPA ref. 13F/2313) an average sales density of £5,061 per square metre (at 2014 prices) for unrestricted A1 comparison retail floorspace was applied. Likewise, for the Cains Brewery redevelopment application (LPA ref. 13F/2178), which is specifically referred to in the Policy response, the same sales density (£5,061 per square metre at 2014 prices) for comparison goods was assumed for the proposal.

It is important for local planning authorities to adopt a consistent approach when determining planning applications.

Against this background we maintain that the sales density applied for the other comparison goods floorspace proposed (of £4,000 per square metre) is appropriate. Nevertheless, we have revised our sensitivity testing based on applying the higher sales density of £5,061 per square metre. This figure is consistent with the approach adopted (and accepted) elsewhere in the City.

With regard to the convenience goods element, the Policy response advocates that a revised sales density of £10,500 per square metre should be applied for the unit on the basis that it could all be occupied by a convenience retailer. In putting forward this figure, reference is made to the Cains Brewery application, where the same sales density has been applied for a proposed foodstore. Notably, unlike the case for comparison goods, LCC do make reference to the approach undertaken in support of other retail planning applications in seeking to arrive at an appropriate sales density to apply for the proposal.

Whilst such an approach is sensible, in comparing the Cains Brewery scheme with that being proposed by this application, it is important to note that:

- The scale of foodstore as part of the Cains Brewery scheme (3,891 square metres gross) is notably larger than that could be provided at the Application Site (2,560 square metres gross); and

- Unlike the current application, the foodstore was a key component of the Cains Brewery site was the foodstore to act as a catalyst for the delivery of the scheme. In contrast, a foodstore is not specifically being proposed by this proposal but simply the impact of all the floorspace being for the sale of convenience goods has been assessed for robustness. This is reflected by the fact that our approach assumes that all the floorspace could be for the sale of convenience goods. In reality, if a convenience retailer were to occupy the unit, an element of this will be for the sale of comparison goods. By not making an allowance for this, the identified convenience retail impact (both solus and cumulative) is overstated.

Despite this, we have updated our sensitivity testing based on applying a revised figure of £10,500 per square metre for the proposed floorspace assuming that it is occupied by a convenience goods retailer. In adopting such an approach, it is reasonable to assume a lower net to gross ratio for the floorspace, as a retailer achieving a sales density at the level being suggested (i.e. £10,500) would require a higher level of back up space. Therefore, a revised gross to net ratio of 65% has been applied. This compares to 70% for our original assessment.

Furthermore, an element of the floorspace for a foodstore of this scale will be required for sale of related comparison goods. For the sensitivity testing an allowance for 10% of the net sales floorspace being for the sale of comparison goods has been assumed.

iii. *Trade Draw of the Proposal*

In terms of the likely trade draw of the proposal, it is suggested that a larger level of comparison trade will be diverted from Speke district centre than suggested in our initial assessment.

We maintain that the approach adopted is appropriate and reflects the current offer within the centre. Despite this, we have revised our assessment based on increasing the level of trade draw from Speke district centre from 7.5% to 15.0% for comparison goods. Such an approach is considered to be very robust.

iv. *Cumulative Impact Assessment*

The assessment submitted in support of the application considered the cumulative impact of the proposal and outstanding commitments within the Catchment Area. Such an approach is wholly consistent with that undertaken (and accepted) by the Council in the determination of the recent retail application, includng the Home Bargains proposal at the former Carcraft site (LPA ref. 15F/3120).

Despite this, it is suggested by LCC that the cumulative impact assessment should be undertaken that includes all scheme that would have trading implications within the catchment. This is not consistent with that agreed and advocated by Officers in the consideration of similar planning applications elsewhere. Details of the approach that was agreed with Officers for the recent Carcraft application is enclosed with this letter. It is disappointing that the City Council are seeking an inconsisent approach when considering this planning application.

Notwithstanding, as part of our sensitvity testing we have included additional commitments within our assessment that may have an influence on trading patterns in the catchment.

The commitments to be included within the cumulative assessment have been agreed with Officers at LCC and comprise the following:

- Cains Brewery, Stanhope Street (LPA ref. 13L/2181);
- Aldi, Cressington House (LPA ref. 15F/2495);
- Edge Lane Retail Park (LPA ref. 13F/2313);
- New Mersey Retail Park (LPA ref. 15F/0808); and
- Taskers (LPA ref. 13F/2958 & 15F/0941).

In addition, the new Tesco store at Park Road (which is now open and trading) has also been included within the revised cumulative impact assessment. This store opened after the completion of the Council's latest retail evidence and is likely to have had an impact on shopping patterns in the local area.

In undertaking this assessment, with regard to the proposals at Edge Lane, two planning applications have since been submitted, which alter the composition of uses that have been approved on the Retail Park site and on the adjoining former Skelly site. These alternative proposals (LPA ref. 14F/2706, which has been approved and 14F/2707, which is pending) have the effect of reducing the turnover of the scheme when compared with the permitted scheme (as recognised in the Planning and Retail Statement submitted in support of these planning applications). By basing our assessment on the higher figure, the assessment undertaken is highly robust.

With regard to the proposals at New Mersey Retail Park, the extant permission will not result in any increase in Class A1 floorspace. This application simply seeks to replace existing floorspace. However, to maintain the robust approach we have assumed the same uplift in turnover to that set out (and accepted) in the application submission that could potentially result from the reconfiguaration of this retail park.

Consequently, the approach that has been undertaken has a tested a worst case scenario in terms of the potential cumulative impact.

v. *Sensitivity Testing*

Whilst we believe that the approach undertaken to date provides a sound basis to understand the likely trading effects of the proposal, we have updated our sensitivity assessment based on the following revised assumptions:

- A revised sales density of £7,326 per square metre for the proposed Home Bargains unit;
- A revised comparison goods sales density of £5,061 per square metre for the other unit;
- A revised convenience goods sales density of £10,500 per square metre for the foodstore, but a reduction in the net sales area of the foodstore from 70% to 65% to better reflect the trading requirement of a foodstore achieving a sales density of £10,500 per square metre;
- An allowance for 10% of the net sales area of the unit to be for the sale of comparison goods should it be occupied by a foodstore operator;
- Increased the level of comparison trade identified to be derived from Speke district centre for comparison goods – from 7.5% to 15% of the proposal's turnover; and
- Incorporated the additional commitments outlined above for the cumulative assessment.

Based on the updated analysis undertaken (including the sensitivity testing) Table 1 overleaf provides a summary of the anticipated solus impacts on existing centres by 2021.

As set out in the submitted PRA (paragraphs 8.31-8.32), it is considered wholly appropriate to assess impact of the proposal on the vitality and viability as a whole and not on particular sectors or retailers. Such an approach reflects established practice and recent appeal decisions.

Therefore, our updated assessment considers the impact on the overall turnover on existing centres based on the above revised assumptions ('sensitivity') assessment, which is contained at **Appendix 2** and compares the position based on the assumptions set out in the PRA ('baseline') assessment (**Appendix 1**).

Table 1: Solus Impact of the Proposal

Centre	Solus Impact	
	Baseline	Sensitivity
Speke district centre	-0.7%	-2.0%
Woolton district centre	-1.9%	-3.4%
Belle Vale district centre	-1.3%	-2.3%
Garston district centre	-0.3%	-0.6%
Aigburth Road district centre	-1.0%	-1.9%
Hunts Cross local centre	-1.0%	-1.8%
Smithdown Road South district centre	-0.5%	-1.0%
Liverpool city centre	-0.4%	-0.8%

Source: Table 11 at Appendix 1 and Table 11 at Appendix 2

The additional sensitivity analysis demonstrates that the solus impact on existing centres will continue be limited. Based on the very robust assessment, the impact (3.4% or less) remains at a level that is unlikely to lead to a significant adverse impact (the policy test).

Whilst this level of impact is not considered significant, our assessment (both baseline and sensitivity) assumes the robust and impossible scenario that the all the floorspace of the second retail unit proposed could be occupied by a foodstore and comparison retailers (i.e. effectively double counting the potential turnover of the unit). Clearly, by adopting such a scenario the impacts identified are overstated.

If it is assumed that the floorspace of the second unit is split equally for the sale of convenience and comparison goods, the impact on existing centres would reduce. For example, the impact on Woolton district centre reduces from 3.4% to 2.2% under the sensitivity analysis. Likewise, the impact on Speke district centre reduces from 2.0% to 1.5% under the same scenario.

Consequently, although the levels of impact identified in Table 1 increases under both scenarios, the impact remains at a level that is not significant adverse (the policy test), and these have been overstated.

Table 2 sets out the cumulative impact on the retail turnover of neighbouring centres, by taking into account the proposal and the commitments/recent developments outlined above.

Table 2: Cumulative Impact of the Proposal

Centre	Cumulative Impact	
	Baseline	Sensitivity
Speke district centre	-2.6%	-3.9%
Woolton district centre	-6.2%	-7.7%
Belle Vale district centre	-5.0%	-6.0%
Garston district centre	-14.4%	-14.6%
Aigburth Road district centre	-11.0%	-11.8%
Hunts Cross local centre	-8.0%	-8.8%
Smithdown Road South district centre	-5.8%	-6.2%
Liverpool city centre	-4.5%	-4.9%

Source: Table 11 at Appendix 1 and Table 11 at Appendix 2

Whilst a cumulative impact assessment has been undertaken, it is notable that national planning policy no longer requires such an assessment to be considered. Instead, the NPPF (at paragraph 27), which was published after the adoption of the Liverpool UDP, is clear in stating that it is whether the application is likely to have a significant adverse impact, not whether the cumulative impact is likely to have a significant adverse impact. It is therefore necessary to demonstrate that there is evidence that the application itself is likely to lead to a significant adverse impact.

In this policy context, although the cumulative impact on existing centres increases, the bulk of any impact is principally as a result of outstanding commitments rather than the application proposal itself. For example, whilst the cumulative impact on Garston district centre is identified to increase to 14.6% under the sensitivity analysis, of the collective trade diversion identified (£3.22 million), the vast majority (£3.09 million, or 96%) is as a consequence of outstanding commitments rather than the application proposal itself.

Critically, LCC has deemed that the cumulative impact of outstanding commitments is acceptable and any additional impact resulting from the proposal (even based on the sensitivity testing) is not significantly adverse. Furthermore, a significant proportion of this impact as a result of the Tesco store at Park Road, which has been trading for a number of years. Consequently, the effect of this development on existing centres has already been well established.

Likewise, the cumulative impact on Aigburth Road district centre, although identified to increase to 11.8% under the sensitivity analysis, 85% of the cumulative retail trade diversion is as a result of outstanding commitments (again predominantly as a result of the now trading Tesco at Park Road) rather than the application proposal. This underlines the modest trading effects of the proposal, even based on the overly robust assessment and impossible scenario that the second retail unit could be occupied by a foodstore and a non-food retailer at the same time.

Furthermore, it is important to reiterate that the cumulative impact assessment undertaken is very robust as it assumes that all retail commitments will be implemented and will come forward by 2021.

It is in this context that the impact figures identified, and specifically the cumulative impact figures, need to be considered.

Overall, we maintain that the scale and type of development being proposed will not lead to a significant adverse impact (the policy test). This is supported by the very robust additional analysis undertaken, including the 'sensitivity' analysis, which confirms that the findings of the PRA are robust and can be relied upon in concluding that the trading effects of the proposal are not significant adverse.

e) <u>Conclusion</u>

Relevant planning policy has been considered in detail within both the PRA and this response. It remains that there is no reason why planning permission should not be granted. All relevant planning policy has been considered and addressed and it has been demonstrated that the proposal is in accordance with it.

We trust this additional information and clarification provided is of assistance in the local authority's determination of the application. However, should you wish to discuss any matter further please do not hesitate to contact us.

Yours faithfully,

Tim Rainbird
<u>Director</u>

Enc.

cc: T J Morris Limited

APPENDIX 1

REVISED ASSESSMENT

TABLE 1: POPULATION AND EXPENDITURE WITHIN CATCHMENT AREA (CONVENIENCE GOODS)

		Zone 4	Zone 9	Zone 10	Zone 14	Total
	2014					
Expenditure per head (£)		*1,947*	*1,851*	*1,995*	*1,956*	*-*
	2016					
Population		79,672	15,175	52,082	17,158	164,087
Expenditure per head (£)		1,935	1,839	1,983	1,944	1,943
Total Expenditure (£m)		**154.20**	**27.91**	**103.27**	**33.36**	**318.74**
	2021					
Population		80,482	15,342	52,215	17,336	165,375
Expenditure per head (£)		1,924	1,828	1,971	1,932	1,931
Total Expenditure (£m)		**154.83**	**28.05**	**102.92**	**33.50**	**319.30**
Expenditure Growth - 2016 to 2021 (£m)		**0.63**	**0.14**	**-0.36**	**0.14**	**0.56**

Notes:

1. Catchment Area represents Zone 4, Zone 9, Zone 10 and Zone 14 of the Liverpool Retail and Commercial Leisure Study (2011)
2. Population and expenditure per head taken from Experian Planner Report (March 2016)
3. Deduction for Special Forms of Trading from 2014 data in line with Appendix 3 of Retail Planner Briefing Note 13 (October 2015)
4. Expenditure per head identified to increase at forecast growth rate identified in Experian Retail Planner Briefing Note 13 (October 2015). Based on growth in sales volume set out in Figure 6 ('Excluding SFT adjusted for sales via stores')
5. Total expenditure = population x expenditure per head

AT 2014 PRICES

TABLE 2: POPULATION AND EXPENDITURE WITHIN CATCHMENT AREA (COMPARISON GOODS)

		Zone 4	Zone 9	Zone 10	Zone 14	Total
	2014					
Expenditure per head (£)		*2,517*	*1,997*	*2,628*	*2,462*	*-*
	2016					
Population		79,672	15,175	52,082	17,158	164,087
Expenditure per head (£)		2,698	2,141	2,817	2,639	2,678
Total Expenditure (£m)		**214.96**	**32.49**	**146.72**	**45.28**	**439.46**
	2021					
Population		80,482	15,342	52,215	17,336	165,375
Expenditure per head (£)		3,026	2,401	3,159	2,960	3,003
Total Expenditure (£m)		**243.52**	**36.84**	**164.96**	**51.31**	**496.63**
Expenditure Growth - 2016 to 2021 (£m)		**28.56**	**4.35**	**18.24**	**6.03**	**57.17**

Notes:

1. Catchment Area represents Zone 4, Zone 9, Zone 10 and Zone 14 of the Liverpool Retail and Commercial Leisure Study (2011)
2. Population and expenditure per head taken from Experian Planner Report (September 2015)
3. Deduction for Special Forms of Trading from 2014 data in line with Appendix 3 of Retail Planner Briefing Note 13 (October 2015)
4. Expenditure per head identified to increase at forecast growth rate identified in Experian Retail Planner Briefing Note 13 (October 2015). Based on growth in sales volume set out in Figure 6 ('Excluding SFT adjusted for sales via stores')
5. Total expenditure = population x expenditure per head

AT 2014 PRICES

TABLE 3: TURNOVER OF EXISTING RETAIL FACILITIES WITHIN AND OUTSIDE CATCHMENT AREA (COMPARISON GOODS)

Destination	Zone 4		Zone 9		Zone 10		Zone 14		Total within Catchment Area		Proportion of Turnover derived from Catchment	Overall Turnover (£m)
	(%)	(£m)	(%)	(£m)	(%)	(£m)	(%)	(£m)	(%)	(£m)		
Within Catchment Area												
Defined Centres												
Speke District Centre	9.58%	20.59	32.17%	10.45	28.22%	41.40	16.33%	7.40	**18.17%**	**79.84**	45%	**177.41**
Woolton District Centre	0.12%	0.25	0.00%	0.00	1.53%	2.24	0.00%	0.00	**0.57%**	**2.50**	55%	**4.54**
Belle Vale District Centre	0.43%	0.92	0.00%	0.00	9.28%	13.62	2.65%	1.20	**3.58%**	**15.74**	55%	**28.62**
Garston District Centre	0.70%	1.50	0.00%	0.00	0.67%	0.99	0.00%	0.00	**0.57%**	**2.49**	85%	**2.93**
Aigburth Road District Centre	0.55%	1.18	0.00%	0.00	0.00%	0.00	0.00%	0.00	**0.27%**	**1.18**	70%	**1.68**
Hunts Cross Local Centre	0.67%	1.43	1.52%	0.49	1.74%	2.56	0.00%	0.00	**1.02%**	**4.48**	90%	**4.98**
Aigburth Vale Local Centre	0.14%	0.30	0.00%	0.00	0.00%	0.00	0.00%	0.00	**0.07%**	**0.30**	100%	**0.30**
Lodge Lane Local Centre	0.17%	0.37	0.00%	0.00	0.00%	0.00	0.00%	0.00	**0.08%**	**0.37**	60%	**0.62**
Park Road Local Centre	0.10%	0.21	0.00%	0.00	0.00%	0.00	0.00%	0.00	**0.05%**	**0.21**	100%	**0.21**
Smithdown Road South District Centre	2.60%	5.59	0.00%	0.00	0.00%	0.00	0.00%	0.00	**1.27%**	**5.59**	55%	**10.16**
Out-of-centre												
Hunts Cross Retail Park	1.98%	4.25	1.05%	0.34	4.73%	6.93	3.39%	1.54	**2.97%**	**13.06**	90%	**14.51**
New Mersey Shopping Park	30.90%	66.43	31.75%	10.32	12.00%	17.60	13.83%	6.26	**22.89%**	**100.61**	65%	**154.78**
Asda, Hunts Cross	0.09%	0.18	0.15%	0.05	1.14%	1.68	0.84%	0.38	**0.52%**	**2.29**	90%	**2.55**
Other	0.38%	0.81	0.00%	0.00	0.25%	0.36	0.00%	0.00	**0.27%**	**1.17**	90%	**1.30**
Sub-total within Catchment Area	**48.38%**	**104.01**	**66.64%**	**21.65**	**59.55%**	**87.38**	**37.04%**	**16.77**	**52.29%**	**229.81**	-	**404.58**
Outside Catchment Area (Main Destinations)												
Defined Centres												
Liverpool City Centre	41.40%	89.00	22.02%	7.15	31.63%	46.40	21.81%	9.88	**34.69%**	**152.44**	20%	**762.19**
Widnes Town Centre	0.30%	0.65	7.32%	2.38	1.24%	1.82	32.33%	14.64	**4.43%**	**19.49**	80%	**24.36**
Allerton Road District Centre	2.86%	6.14	0.00%	0.00	0.19%	0.28	0.00%	0.00	**1.46%**	**6.42**	45%	**14.27**
Smithdown Road North District Centre	1.61%	3.46	0.00%	0.00	0.19%	0.28	0.00%	0.00	**0.85%**	**3.74**	45%	**8.32**
Out-of-centre												
Edge Lane Retail Park	0.81%	1.73	0.77%	0.25	0.55%	0.80	0.00%	0.00	**0.63%**	**2.78**	5%	**55.60**
London Road	1.55%	3.32	1.21%	0.39	0.46%	0.67	0.00%	0.00	**1.00%**	**4.39**	20%	**21.97**
Gemini Retail Park, Warrington	0.75%	1.62	1.62%	0.53	2.14%	3.14	3.62%	1.64	**1.57%**	**6.92**	20%	**34.59**
Other	2.34%	5.03	0.42%	0.14	4.05%	5.95	5.19%	2.35	**3.06%**	**13.46**	10%	**134.64**
Sub-total outside Catchment Area	**51.62%**	**110.96**	**33.36%**	**10.84**	**40.45%**	**59.34**	**62.96%**	**28.51**	**47.71%**	**209.65**	-	**1,055.94**
Total	**100.00%**	**214.96**	**100.00%**	**32.49**	**100.00%**	**146.72**	**100.00%**	**45.28**	**100.00%**	**439.46**	-	**1,460.52**

Notes:

1. Market Shares taken from Liverpool Retail and Commercial Leisure Study (November 2011) rebased to exclude 'Mail Order/Catalogue' and 'Internet'
2. Turnover = market share x available expenditure by zone (Table 2)
3. Proportion of turnover from catchment area based on the findings of the Liverpool Retail and Commercial Leisure Study (2011)
4. Overall turnover does not allow for expenditure derived from beyond the Study Area identified for the Liverpool Retail and Commercial Leisure Study (2011)

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FORMER RAYWARE SITE, SPEKE BOULEVARD, SPEKE

TABLE 4: TURNOVER OF EXISTING RETAIL FACILITIES WITHIN AND OUTSIDE CATCHMENT AREA (CONVENIENCE GOODS)

Destination	Zone 4		Zone 9		Zone 10		Zone 14		Total within Catchment Area		Proportion of Turnover derived from Catchment	Overall Turnover
	(%)	(£m)	(%)	(£m)	(%)	(£m)	(%)	(£m)	(%)	(£m)		(£m)
Within Catchment Area												
Defined Centres												
Speke District Centre	3.93%	6.06	56.63%	15.81	3.42%	3.53	5.52%	1.84	**8.55%**	**27.24**	95%	**28.67**
Woolton District Centre	1.18%	1.82	0.00%	0.00	17.19%	17.75	0.54%	0.18	**6.20%**	**19.75**	75%	**26.33**
Belle Vale District Centre	0.19%	0.30	0.00%	0.00	26.32%	27.18	8.69%	2.90	**9.53%**	**30.38**	50%	**60.76**
Garston District Centre	9.70%	14.96	4.00%	1.12	0.00%	0.00	2.09%	0.70	**5.26%**	**16.77**	90%	**18.64**
Aigburth Road District Centre	12.45%	19.20	0.98%	0.27	0.00%	0.00	0.00%	0.00	**6.11%**	**19.47**	90%	**21.63**
Hunts Cross Local Centre	0.11%	0.17	0.00%	0.00	2.91%	3.00	1.63%	0.54	**1.17%**	**3.72**	90%	**4.13**
Aigburth Vale Local Centre	0.87%	1.34	0.00%	0.00	0.00%	0.00	0.00%	0.00	**0.42%**	**1.34**	90%	**1.49**
Park Road Local Centre	5.31%	8.19	0.00%	0.00	0.00%	0.00	0.00%	0.00	**2.57%**	**8.19**	80%	**10.24**
Smithdown Road South District Centre	15.83%	24.41	2.00%	0.56	1.37%	1.41	0.00%	0.00	**8.28%**	**26.38**	40%	**65.96**
Out-of-centre												
Asda, Hunts Cross	10.04%	15.48	21.13%	5.90	24.85%	25.66	22.71%	7.57	**17.13%**	**54.61**	85%	**64.25**
M&S New Mersey Retail Park	1.22%	1.88	1.96%	0.55	0.46%	0.48	1.00%	0.33	**1.02%**	**3.24**	50%	**6.48**
Sub-total within Catchment Area	**60.84%**	**93.81**	**86.70%**	**24.20**	**76.51%**	**79.01**	**42.19%**	**14.07**	**66.23%**	**211.10**	-	**308.58**
Outside Catchment Area (Main Destinations)												
Defined Centres												
Allerton Road	9.21%	14.20	1.03%	0.29	13.71%	14.16	2.53%	0.84	**9.25%**	**29.49**	55%	**53.62**
Liverpool City Centre	5.87%	9.04	0.00%	0.00	1.42%	1.46	0.54%	0.18	**3.35%**	**10.69**	15%	**71.26**
Wavertree High Street	0.82%	1.26	5.08%	1.42	0.00%	0.00	0.00%	0.00	**0.84%**	**2.68**	15%	**17.88**
Out-of-centre												
Asda, Widnes	0.00%	0.00	0.00%	0.00	0.00%	0.00	20.99%	7.00	**2.20%**	**7.00**	100%	**7.00**
Asda, Huyton	0.19%	0.30	0.00%	0.00	0.33%	0.34	3.53%	1.18	**0.57%**	**1.82**	2%	**90.90**
Morrisons, Widnes	0.00%	0.00	1.96%	0.55	0.89%	0.92	22.71%	7.57	**2.84%**	**9.05**	95%	**9.52**
Tesco, Allerton	17.48%	26.96	0.00%	0.00	1.19%	1.23	0.00%	0.00	**8.84%**	**28.19**	50%	**56.38**
Other	5.59%	8.62	5.23%	1.46	5.95%	6.14	7.51%	2.51	**5.87%**	**18.73**	10%	**187.26**
Sub-total outside Catchment Area	**39.16%**	**60.39**	**13.30%**	**3.71**	**23.49%**	**24.26**	**57.81%**	**19.28**	**33.77%**	**107.64**	-	**493.82**
Total	**100.00%**	**154.20**	**100.00%**	**27.91**	**100.00%**	**103.27**	**100.00%**	**33.36**	**100.00%**	**318.74**	-	**802.41**

Notes:

1. Market Shares taken from Liverpool Retail and Commercial Leisure Study (November 2011) rebased to exclude 'Mail Order/Catalogue' and 'Internet'
2. Turnover = market share x available expenditure by zone (Table 1)
3. Proportion of turnover from catchment area based on the findings of the Liverpool Retail and Commercial Leisure Study (2011)
4. Overall turnover does not allow for expenditure derived from beyond the Study Area identified for the Liverpool Retail and Commercial Leisure Study (2011)

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TABLE 5A: POTENTIAL TURNOVER OF PROPOSAL (COMPARISON)

Unit	Floorspace (sq m)		Sales Density	Expected Turnover (£m)	
	Gross Internal Area	Net Sales	(£ per sq m)	2016	2021
Unit 1 (Home Bargains)	2,413	2,172	2,500	5.43	5.98
Unit 2	2,560	2,048	4,000	8.19	9.03
Total	**4,973**	**4,220**	**-**	**13.62**	**15.01**

Notes:

1. Net floorspace based on 90% of the gross internal area for Home Bargains and 80% for the proposed non-food building
2. Sales density for Home Bargains based on information provided by TJM and typical sales density for likely non-food operators of the development
3. Turnover post 2016 increased by an annual sales density identified by Experian (Figure 4b, Retail Planner Briefing Note 13, October 2015)

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TABLE 5B: POTENTIAL TURNOVER OF PROPOSAL (CONVENIENCE)

Unit	Floorspace (sq m)		Sales Density	Expected Turnover (£m)	
	Gross Internal Area	Net Sales	(£ per sq m)	2016	2021
Unit 1 (Home Bargains)	2,413	724	2,500	1.81	1.80
Unit 2	2,560	1,792	5,500	9.86	9.81
Total	**4,973**	**2,516**	**-**	**11.67**	**11.61**

Notes:

1. Up to 30% of total floorspace of Home Bargains will be for the sale of food and drink
2. Sales density for Home Bargains based on information provided by TJM and professional assumptions should the floorspace be occupied by convenience retailers
3. Turnover post 2016 increased by an annual sales density identified by Experian (Figure 4a, Retail Planner Briefing Note 13, October 2015)

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TABLE 6: ANTICIPATED TRADING EFFECTS OF THE PROPOSAL (COMPARISON GOODS)

Destination	Turnover - Pre Development (£m)		Trade Diversion to Proposal		Turnover Post Development - 2021	Impact
	2016	2021	(%)	(£m)	(£m)	
Within Catchment Area						
Proposal					**15.01**	
Defined Centres						
Speke District Centre	177.41	200.50	7.5%	1.13	199.37	-0.6%
Woolton District Centre	4.54	5.13	0.5%	0.08	5.06	-1.5%
Belle Vale District Centre	28.62	32.34	5.0%	0.75	31.59	-2.3%
Garston District Centre	2.93	3.31	0.0%	0.00	3.31	0.0%
Aigburth Road District Centre	1.68	1.90	0.3%	0.04	1.86	-2.0%
Hunts Cross Local Centre	4.98	5.63	0.3%	0.04	5.59	-0.7%
Aigburth Vale Local Centre	0.30	0.34	0.0%	0.00	0.34	0.0%
Lodge Lane Local Centre	0.62	0.70	0.0%	0.00	0.70	0.0%
Park Road Local Centre	0.21	0.23	0.0%	0.00	0.23	0.0%
Smithdown Road South District Centre	10.16	11.48	0.5%	0.08	11.40	-0.7%
Out-of-centre						
Hunts Cross Retail Park	14.51	16.40	7.5%	1.13	15.27	-6.9%
New Mersey Shopping Park	154.78	174.92	25.0%	3.75	171.17	-2.1%
Asda, Hunts Cross	2.55	2.88	0.5%	0.08	2.80	-2.6%
Other	1.30	1.47	0.0%	0.00	1.47	0.0%
Sub-total within Catchment Area	**404.58**	**457.21**	**47.0%**	**7.05**	**465.17**	**1.7%**
Outside Catchment Area (Main Destinations)						
Defined Centres						
Liverpool City Centre	762.19	861.35	37.5%	5.63	855.73	-0.7%
Widnes Town Centre	24.36	27.53	1.0%	0.15	27.38	-0.5%
Allerton Road District Centre	14.27	16.13	0.5%	0.08	16.05	-0.5%
Smithdown Road North District Centre	8.32	9.40	0.0%	0.00	9.40	0.0%
Out-of-centre						
Edge Lane Retail Park	55.60	62.84	0.0%	0.00	62.84	0.0%
London Road	21.97	24.82	1.0%	0.15	24.67	-0.6%
Gemini Retail Park, Warrington	34.59	39.09	3.0%	0.45	38.64	-1.2%
Other	134.64	152.15	10.0%	1.50	150.65	-1.0%
Sub-total outside Catchment Area	**1,055.94**	**1,193.32**	**53.0%**	**7.96**	**1,185.36**	**-0.7%**
Total	**1,460.52**	**1,650.53**	**100.0%**	**15.01**	**1,650.53**	**0.0%**

Notes:
1. Turnover Pre-development taken from Table 3
2. Turnover of Proposal taken from Table 5A
3. Anticipated trade diversion to proposal based on professional assumptions informed by existing shopping patterns, as identified by the Liverpool Retail and Commercial Study (2011), the type of development proposed and distribution of facilities.
4. Resultant turnover = existing turnover minus trade diversion to proposal
5. Impact = reduction in turnover after allowing for the proposed development expressed as a proportion of pre-development turnover

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TABLE 7: ANTICIPATED TRADING EFFECTS OF THE PROPOSAL (CONVENIENCE)

Destination	Turnover - Pre Development (£m)		Trade Diversion to Proposal		Turnover Post Development - 2021	Impact
	2016	2021	(%)	(£m)	(£m)	
Within Catchment Area						
Proposal					**11.61**	
Defined Centres						
Speke District Centre	28.67	28.72	12.5%	1.45	27.27	-5.1%
Woolton District Centre	26.33	26.37	7.5%	0.87	25.50	-3.3%
Belle Vale District Centre	60.76	60.87	10.0%	1.16	59.70	-1.9%
Garston District Centre	18.64	18.67	1.0%	0.12	18.55	-0.6%
Aigburth Road District Centre	21.63	21.67	3.0%	0.35	21.32	-1.6%
Hunts Cross Local Centre	4.13	4.14	1.0%	0.12	4.02	-2.8%
Aigburth Vale Local Centre	1.49	1.50	0.0%	0.00	1.50	0.0%
Park Road Local Centre	10.24	10.26	1.0%	0.12	10.14	-1.1%
Smithdown Road South District Centre	65.96	66.07	5.0%	0.58	65.49	-0.9%
Out-of-centre						
Asda, Hunts Cross	64.25	64.37	22.5%	2.61	61.75	-4.1%
M&S New Mersey Retail Park	6.48	6.49	0.5%	0.06	6.43	-0.9%
Sub-total within Catchment Area	**308.58**	**309.13**	**64.0%**	**7.43**	**313.31**	**1.4%**
Outside Catchment Area (Main Destinations)						
Defined Centres						
Allerton Road	53.62	53.72	12.5%	1.45	52.26	-2.7%
Liverpool City Centre	71.26	71.38	2.5%	0.29	71.09	-0.4%
Wavertree High Street	17.88	17.92	0.0%	0.00	17.92	0.0%
Out-of-centre						
Asda, Widnes	7.00	7.01	3.0%	0.35	6.66	-5.0%
Asda, Huyton	90.90	91.06	1.5%	0.17	90.88	-0.2%
Morrisons, Widnes	9.52	9.54	2.0%	0.23	9.31	-2.4%
Tesco, Allerton	56.38	56.48	7.0%	0.81	55.67	-1.4%
Other	187.26	187.59	7.5%	0.87	186.72	-0.5%
Sub-total outside Catchment Area	**493.82**	**494.69**	**36.0%**	**4.18**	**490.51**	**-0.8%**
Total	**802.41**	**803.82**	**100.0%**	**11.61**	**803.82**	**0.0%**

Notes:

1. Turnover Pre-development taken from Table 4
2. Turnover of Proposal taken from Table 5B
3. Anticipated trade diversion to proposal based on professional assumptions informed by existing shopping patterns, as identified by the Liverpool Retail and Commercial Study (2011), the type of development proposed and distribution of facilities.
4. Resultant turnover = existing turnover minus trade diversion to proposal
5. Impact = reduction in turnover after allowing for the proposed development expressed as a proportion of pre-development turnover

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TABLE 8A: POTENTIAL TURNOVER OF OUTSTANDING COMMITMENTS WITHIN AND OUTSIDE CATCHMENT AREA (CONVENIENCE GOODS)

	Floorspace (sq m) Net Convenience Sales	Sales Density (£ per sq m)	Expected Turnover (£m)
1. Cains Brewery, Stanhope Street (Supermarket)	2,165	10,500	22.73
2. Aldi, Cressington House (LPA ref. 15F/2495)	1,003	9,808	9.84
3. Edge Lane Retail Park (LPA ref. 13F/2313)	1,219	10,500	12.80
4. Tesco, Park Road (now trading)	3,600	10,837	39.01
Total	**7,987**	**-**	**84.38**

Notes:

1. Sales density for Tesco and Aldi derived from Verdict Grocery Retailers and Mintel Retail Rankings
2. Sales density for proposals based on Quod estimate informed by the findings of Verdict Grocery Retailers and Mintel Retail Rankings where no named operator
3. Net convenience floorspace derived from application submission/Decision Notice
4. Expected turnover = net convenience floorspace x sales density

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TABLE 8B: POTENTIAL TURNOVER OF OUTSTANDING COMMITMENTS WITHIN AND OUTSIDE CATCHMENT AREA (COMPARISON GOODS)

	Floorspace (sq m) Net Comparison Sales	Sales Density (£ per sq m)	Expected Turnover (£m)
1. Cains Brewery, Stanhope Street	4,317	-	18.80
Supermarket	*382*	*8,000*	*3.06*
Designer Retail Market	*1,574*	*4,000*	*6.30*
Other Retail	*2,361*	*4,000*	*9.44*
2. Edge Lane Retail Park (LPA ref. 13F/2313)*	15,754	5,061	79.73
3. New Mersey Retail Park (LPA ref. 15F/0808)**	7,445	5,061	37.68
4. Aldi, Cressington House (LPA ref. 15F/2495)	251	8,207	2.06
5. Tesco, Park Road (now trading)	2,000	9,867	19.73
5. Taskers (LPA ref. 13F/2958 & 15F/0941)	7,291	2,000	14.58
Total	**37,058**	**-**	**172.58**

Notes:

1. Sales density for Tesco and Aldi derived from Verdict Grocery Retailers and Mintel Retail Rankings
2. Sales density for proposals based on Quod estimate informed by the findings of Verdict Grocery Retailers and Mintel Retail Rankings where no named operator
3. Net comparison floorspace derived from application submission/Decision Notice
4. Expected turnover = net convenience floorspace x sales density

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TABLE 9: ANTICIPATED CUMULATIVE TRADING EFFECTS OF THE PROPOSAL AND CAINS BREWERY (COMPARISON GOODS)

Destination	Turnover - Pre Development (£m)		Trade Diversion to Cains Brewery		Trade Diversion to Edge Lane Retail Park		Trade Diversion to New Mersey Retail Park		Trade Diversion to Aldi, Cressington House		Trade Diversion to Tesco, Park Road		Trade Diversion to Taskers		Turnover Post Commitments - 2021	Cumulative Impact -	Trade Diversion to Proposal		Turnover Post All Development - 2021	Cumulative Impact
	2016	2021	(%)	(£m)	(%)	(£m)	(%)	(£m)	(%)	(£m)	(%)	(£m)	(%)	(£m)	(£m)	Commitments Only	(%)	(£m)	(£m)	(Proposal & Commitments)
Proposal																			15.01	
Cains Brewery					0.5%	0.40	0.5%	0.19	1.0%	0.02	4.0%	0.79	0.0%	0.00	17.40		1.0%	0.15	17.25	
Edge Lane Retail Park			20.0%	3.76			20.0%	7.54	25.0%	0.51	30.0%	5.92	47.5%	6.93	55.07		15.0%	2.25	52.82	
New Mersey Retail Park			10.0%	1.88	5.0%	3.99			10.0%	0.21	10.0%	1.97	3.0%	0.44	29.20		5.0%	0.75	28.45	
Aldi, Cressington House			0.0%	0.00	0.0%	0.00	0.0%	0.00			7.5%	1.48	0.0%	0.00	0.58		0.0%	0.00	0.58	
Tesco, Park Road			7.5%	1.41	0.0%	0.00	3.0%	1.13	17.5%	0.36			1.0%	0.15	16.69		12.5%	1.88	14.81	
Taskers			0.5%	0.09	0.0%	0.00	1.0%	0.38	0.0%	0.00	1.0%	0.20			13.91		0.5%	0.08	13.84	
Within Catchment Area																				
Defined Centres																				
Speke District Centre	177.41	200.50	0.5%	0.09	0.0%	0.00	0.0%	0.00	17.5%	0.36	12.5%	2.47	0.5%	0.07	197.50	-1.5%	5.0%	0.74	196.76	-1.9%
Woolton District Centre	4.54	5.13	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	1.5%	0.30	0.0%	0.00	4.83	-5.8%	0.3%	0.05	4.79	-6.7%
Belle Vale District Centre	28.62	32.34	0.0%	0.00	0.0%	0.00	0.0%	0.00	3.0%	0.06	1.0%	0.20	0.0%	0.00	32.08	-0.8%	3.3%	0.50	31.58	-2.3%
Garston District Centre	2.93	3.31	0.0%	0.00	0.0%	0.00	0.0%	0.00	4.0%	0.08	0.5%	0.10	0.0%	0.00	3.13	-5.5%	0.0%	0.00	3.13	-5.5%
Aigburth Road District Centre	1.68	1.90	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.5%	0.01	0.3%	0.05	0.0%	0.00	1.84	-3.1%	0.2%	0.02	1.82	-4.4%
Hunts Cross Local Centre	4.98	5.63	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	1.0%	0.20	0.0%	0.00	5.43	-3.5%	0.2%	0.02	5.41	-3.9%
Aigburth Vale Local Centre	0.30	0.34	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.34	0.0%	0.0%	0.00	0.34	0.0%
Lodge Lane Local Centre	0.62	0.70	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.3%	0.05	0.0%	0.00	0.65	-7.1%	0.0%	0.00	0.65	-7.1%
Park Road Local Centre	0.21	0.23	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.3%	0.01	0.0%	0.00	0.0%	0.00	16.92	7106.0%	0.0%	0.00	15.04	6306.8%
Smithdown Road South District Centre	10.16	11.48	0.5%	0.09	0.0%	0.00	0.0%	0.00	1.0%	0.02	0.0%	0.00	0.0%	0.00	11.36	-1.0%	0.3%	0.05	11.31	-1.4%
Out-of-centre																				
Hunts Cross Retail Park	14.51	16.40	0.3%	0.05	0.0%	0.00	0.0%	0.00	1.0%	0.02	5.0%	0.99	2.0%	0.29	15.05	-8.2%	5.0%	0.74	14.31	-12.7%
New Mersey Shopping Park	154.78	174.92	5.0%	0.94	1.0%	0.80	15.0%	5.65	5.0%	0.10	8.5%	1.68	1.5%	0.22	194.73	11.3%	16.5%	2.48	191.50	9.5%
Asda, Hunts Cross	2.55	2.88	0.0%	0.00	0.0%	0.00	0.0%	0.00	7.5%	0.15	5.0%	0.99	0.3%	0.04	1.70	-40.9%	0.3%	0.05	1.65	-42.6%
Other	1.30	1.47	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.3%	0.01	0.0%	0.00	0.3%	0.04	1.43	-2.8%	0.0%	0.00	1.43	-2.8%
Outside Catchment Area (Main Destinations)																				
Defined Centres																				
Liverpool City Centre	762.19	861.35	32.5%	6.11	10.0%	7.97	40.0%	15.07	5.0%	0.10	2.0%	0.39	1.0%	0.15	831.56	-3.5%	24.8%	3.71	827.84	-3.9%
Widnes Town Centre	24.36	27.53	0.3%	0.05	0.0%	0.00	3.5%	1.32	0.0%	0.00	0.0%	0.00	1.0%	0.15	26.01	-5.5%	0.7%	0.10	25.92	-5.9%
Allerton Road District Centre	14.27	16.13	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.5%	0.01	0.0%	0.00	0.0%	0.00	16.12	-0.1%	0.3%	0.05	16.07	-0.4%
Smithdown Road North District Centre	8.32	9.40	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.5%	0.01	0.0%	0.00	0.0%	0.00	9.39	-0.1%	0.0%	0.00	9.39	-0.1%
Out-of-centre																				
Edge Lane Retail Park	55.60	62.84	0.0%	0.00	78.8%	62.84	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	55.07	-12.4%	0.0%	0.00	52.82	-15.9%
London Road	21.97	24.82	3.5%	0.66	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	2.0%	0.29	23.87	-3.8%	0.7%	0.10	23.77	-4.2%
Gemini Retail Park, Warrington	34.59	39.09	2.0%	0.38	0.0%	0.00	2.0%	0.75	0.0%	0.00	0.0%	0.00	25.0%	3.65	34.32	-12.2%	2.0%	0.30	34.02	-13.0%
Other	134.64	152.15	17.5%	3.29	4.7%	3.74	15.0%	5.65	0.5%	0.01	10.0%	1.97	15.0%	2.19	135.30	-11.1%	6.6%	0.99	134.31	-11.7%
Total	**1,460.52**	**1,650.53**	**100.0%**	**18.80**	**100.0%**	**79.73**	**100.0%**	**37.68**	**100.0%**	**2.06**	**100.0%**	**19.73**	**100.0%**	**14.58**	**1,650.53**	**-**	**100.0%**	**15.01**	**1,650.53**	**0.0%**

Notes:

1. Turnover Pre-development taken from Table 3
2. Turnover of Proposal taken from Table 5A and commitments from Table 8B
3. Anticipated trade diversion to proposal based on professional assumptions informed by existing shopping patterns, as identified by the Liverpool Retail and Commercial Study (2011), the type of development proposed and distribution of facilities.
4. Resultant turnover = existing turnover minus trade diversion to proposal and commitments
5. Impact = reduction in turnover after allowing for the proposed development and commitments expressed as a proportion of pre-development turnover

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FORMER RAYWARE SITE, SPEKE BOULEVARD, SPEKE

TABLE 10: ANTICIPATED CUMULATIVE TRADING EFFECTS OF THE PROPOSAL AND CAINS BREWERY (CONVENIENCE GOODS)

Destination	Turnover - Pre Development (£m)		Trade Diversion to Cains Brewery		Trade Diversion to Edge Lane Retail Park		Trade Diversion to Tesco, Park Road		Trade Diversion to Aldi, Cressington House		Turnover Post Commitments - 2021	Cumulative Impact - Commitments Only	Trade Diversion to Proposal		Turnover Post All Development - 2021	Cumulative Impact (Proposal & Commitments)
	2016	2021	(%)	(£m)	(%)	(£m)	(%)	(£m)	(%)	(£m)	(£m)		(%)	(£m)	(£m)	
Proposal															11.61	
Cains Brewery					5.0%	0.64	2.0%	0.78	2.5%	0.25	21.07		5.0%	0.58	20.49	
Aldi, Cressington House			0.0%	0.00	1.0%	0.13	5.0%	1.95			7.76		12.5%	1.45	6.31	
Tesco, Park Road			20.0%	4.55	10.0%	1.28			12.5%	1.23	31.96		15.0%	1.74	30.22	
Edge Lane Retail Park			3.5%	0.80			7.5%	2.93	10.0%	0.98	8.09		5.0%	0.58	7.51	
Within Catchment Area																
<u>Defined Centres</u>																
Speke District Centre	28.67	28.72	0.0%	0.00	7.5%	0.96	1.0%	0.39	0.5%	0.05	27.32	-4.9%	7.8%	0.91	26.42	-8.0%
Woolton District Centre	26.33	26.37	0.5%	0.11	4.0%	0.51	1.0%	0.39	0.5%	0.05	25.31	-4.0%	4.7%	0.54	24.77	-6.1%
Belle Vale District Centre	60.76	60.87	1.0%	0.23	6.5%	0.83	5.0%	1.95	2.0%	0.20	57.66	-5.3%	6.3%	0.73	56.93	-6.5%
Garston District Centre	18.64	18.67	1.0%	0.23	0.3%	0.03	3.0%	1.17	15.0%	1.48	15.76	-15.6%	0.6%	0.07	15.69	-16.0%
Aigburth Road District Centre	21.63	21.67	0.8%	0.17	0.5%	0.06	5.0%	1.95	1.0%	0.10	19.39	-10.5%	1.9%	0.22	19.17	-11.5%
Hunts Cross Local Centre	4.13	4.14	0.0%	0.00	0.0%	0.00	1.0%	0.39	1.0%	0.10	3.65	-11.8%	0.6%	0.07	3.58	-13.5%
Aigburth Vale Local Centre	1.49	1.50	0.0%	0.00	0.0%	0.00	0.5%	0.20	0.5%	0.05	1.25	-16.3%	0.0%	0.00	1.25	-16.3%
Park Road Local Centre	10.24	10.26	0.0%	0.00	0.0%	0.00	0.5%	0.20	2.0%	0.20	41.82	307.8%	0.6%	0.07	40.01	290.1%
Smithdown Road South District Centre	65.96	66.07	7.5%	1.70	5.0%	0.64	3.0%	1.17	4.5%	0.44	62.12	-6.0%	3.1%	0.36	61.75	-6.5%
Out-of-centre																
Asda, Hunts Cross	64.25	64.37	4.5%	1.02	35.0%	4.48	20.0%	7.80	40.0%	3.93	47.13	-26.8%	14.1%	1.63	45.49	-29.3%
New Mersey Retail Park	6.48	6.49	0.3%	0.06	2.0%	0.26	2.0%	0.78	2.0%	0.20	5.20	-19.9%	0.3%	0.04	5.17	-20.4%
Outside Catchment Area (Main Destinations)																
<u>Defined Centres</u>																
Allerton Road	53.62	53.72	3.0%	0.68	2.0%	0.26	4.0%	1.56	0.5%	0.05	51.17	-4.7%	7.8%	0.91	50.26	-6.4%
Liverpool City Centre	71.26	71.38	17.5%	3.98	3.5%	0.45	10.0%	3.90	0.5%	0.05	63.01	-11.7%	1.6%	0.18	62.82	-12.0%
Wavertree High Street	17.88	17.92	0.5%	0.11	1.0%	0.13	0.0%	0.00	0.0%	0.00	17.67	-1.3%	0.0%	0.00	17.67	-1.3%
Out-of-centre																
Asda, Widnes	7.00	7.01	0.0%	0.00	0.0%	0.00	0.5%	0.20	0.0%	0.00	6.82	-2.8%	1.9%	0.22	6.60	-5.9%
Asda, Huyton	90.90	91.06	0.0%	0.00	1.0%	0.13	1.0%	0.39	0.0%	0.00	90.54	-0.6%	0.9%	0.11	90.43	-0.7%
Morrisons, Widnes	9.52	9.54	1.0%	0.23	0.3%	0.03	1.0%	0.39	0.0%	0.00	8.89	-6.8%	1.3%	0.15	8.74	-8.3%
Tesco, Allerton	56.38	56.48	4.0%	0.91	0.5%	0.06	2.0%	0.78	0.0%	0.00	54.73	-3.1%	4.4%	0.51	54.22	-4.0%
Other	187.26	187.59	35.0%	7.96	15.0%	1.92	25.0%	9.75	5.0%	0.49	167.47	-10.7%	4.7%	0.54	166.92	-11.0%
Total	**802.41**	**803.82**	**100.0%**	**22.73**	**100.0%**	**12.80**	**100.0%**	**39.01**	**100.0%**	**9.84**	**803.82**	**0.0%**	**100.0%**	**11.61**	**803.82**	**0.0%**

Notes:

1. Turnover Pre-development taken from Table 4
2. Turnover of Proposal taken from Table 5B and commitments from Table 8A
3. Anticipated trade diversion to proposal based on professional assumptions informed by existing shopping patterns, as identified by the Liverpool Retail and Commercial Study (2011), the type of development proposed and distribution of facilities.
4. Resultant turnover = existing turnover minus trade diversion to proposal and commitments
5. Impact = reduction in turnover after allowing for the proposed development and commitments expressed as a proportion of pre-development turnover

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TABLE 11: ANTICIPATED CUMULATIVE TRADING EFFECTS OF THE PROPOSAL AND CAINS BREWERY (CONVENIENCE & COMPARISON GOODS) - MAIN CENTRES

Destination	Turnover - Pre Development (£m) 2016	2021	Trade Diversion to Commitments (£m)	Turnover Post Commitments - 2021 (£m)	Cumulative Impact - Commitments Only	Trade Diversion to Proposal (£m)	Impact of Proposal Only	Turnover Post All Development - 2021 (£m)	Cumulative Impact (Proposal & Commitments)
Within Catchment Area (Main Destinations)									
Defined Centres									
Speke District Centre	206.09	229.22	4.39	224.83	-1.9%	1.65	-0.7%	223.18	-2.6%
Woolton District Centre	30.87	31.51	1.36	30.14	-4.3%	0.59	-1.9%	29.55	-6.2%
Belle Vale District Centre	89.37	93.20	3.47	89.74	-3.7%	1.22	-1.3%	88.52	-5.0%
Garston District Centre	21.56	21.98	3.09	18.89	-14.0%	0.07	-0.3%	18.82	-14.4%
Aigburth Road District Centre	23.31	23.57	2.34	21.23	-9.9%	0.24	-1.0%	20.98	-11.0%
Hunts Cross Local Centre	9.11	9.77	0.69	9.08	-7.0%	0.10	-1.0%	8.99	-8.0%
Aigburth Vale Local Centre	1.79	1.84	0.24	1.59	-13.3%	0.00	0.0%	1.59	-13.3%
Park Road Local Centre	10.45	10.49	0.40	58.74	459.9%	3.69	524.8%	55.05	424.7%
Smithdown Road South District Centre	76.11	77.55	4.07	73.48	-5.3%	0.41	-0.5%	73.07	-5.8%
Outside Catchment Area (Main Destinations)									
Defined Centres									
Liverpool City Centre	833.45	932.74	38.17	894.56	-4.1%	3.90	-0.4%	890.67	-4.5%

Notes:

1. Turnover Pre-development taken from Table 9 and Table 10
2. Turnover of Proposal taken from Table 5A and Table 5B and commitments from Table 8A and Table 8B
3. Anticipated trade diversion to proposal based on professional assumptions informed by existing shopping patterns, as identified by the Liverpool Retail and Commercial Study (2011), the type of development proposed and distribution of facilities.
4. Resultant turnover = existing turnover minus trade diversion to proposal and commitments
5. Impact = reduction in turnover after allowing for the proposed development and commitments expressed as a proportion of pre-development turnover

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APPENDIX 2

REVISED ASSESSMENT (SENSITIVITY)

TABLE 5A: POTENTIAL TURNOVER OF PROPOSAL (COMPARISON) - SENSITIVITY

Unit	Floorspace (sq m)		Sales Density	Expected Turnover (£m)	
	Gross Internal Area	Net Sales	(£ per sq m)	2016	2021
Unit 1 (Home Bargains)	2,413	2,172	7,326	15.91	17.53
Unit 2	2,560	2,048	5,061	10.36	11.42
Total	**4,973**	**4,220**	**-**	**26.27**	**28.95**

Notes:

1. Net floorspace based on 90% of the gross internal area for Home Bargains and 80% for the proposed non-food building
2. Sales density for Home Bargains based on information provided by TJM and typical sales density for likely non-food operators of the development
3. Turnover post 2016 increased by an annual sales density identified by Experian (Figure 4b, Retail Planner Briefing Note 13, October 2015)

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TABLE 5B: POTENTIAL TURNOVER OF PROPOSAL (CONVENIENCE) - SENSITIVITY

Unit	Floorspace (sq m)		Sales Density	Expected Turnover (£m)	
	Gross Internal Area	Net Sales	(£ per sq m)	2016	2021
Unit 1 (Home Bargains)	2,413	724	7,326	5.30	5.28
Unit 2	2,560	1,498	10,500	15.72	15.65
Total	**4,973**	**2,222**	**-**	**21.03**	**20.92**

Notes:

1. Up to 30% of total floorspace of Home Bargains will be for the sale of food and drink
2. Sales density for Home Bargains based on company average from Mintel Retail Rankings (2016)
3. Sales density for Unit 2 based on figure suggested by Liverpool City Council
4. Allows for 10% of the net sales area to be for the sale of comparison goods
5. Turnover post 2016 increased by an annual sales density identified by Experian (Figure 4a, Retail Planner Briefing Note 13, October 2015)

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FORMER RAYWARE SITE, SPEKE BOULEVARD, SPEKE

TABLE 6: ANTICIPATED TRADING EFFECTS OF THE PROPOSAL (COMPARISON GOODS) - SENSITIVITY

Destination	Turnover - Pre Development (£m)		Trade Diversion to Proposal		Turnover Post Development - 2021	Impact
	2016	2021	(%)	(£m)	(£m)	
Within Catchment Area						
Proposal					**28.95**	
Defined Centres						
Speke District Centre	177.41	200.50	15.0%	4.34	196.15	-2.2%
Woolton District Centre	4.54	5.13	0.5%	0.14	4.99	-2.8%
Belle Vale District Centre	28.62	32.34	4.5%	1.30	31.04	-4.0%
Garston District Centre	2.93	3.31	0.0%	0.00	3.31	0.0%
Aigburth Road District Centre	1.68	1.90	0.3%	0.07	1.83	-3.8%
Hunts Cross Local Centre	4.98	5.63	0.3%	0.07	5.56	-1.3%
Aigburth Vale Local Centre	0.30	0.34	0.0%	0.00	0.34	0.0%
Lodge Lane Local Centre	0.62	0.70	0.0%	0.00	0.70	0.0%
Park Road Local Centre	0.21	0.23	0.0%	0.00	0.23	0.0%
Smithdown Road South District Centre	10.16	11.48	0.5%	0.14	11.33	-1.3%
Out-of-centre						
Hunts Cross Retail Park	14.51	16.40	6.5%	1.88	14.52	-11.5%
New Mersey Shopping Park	154.78	174.92	20.0%	5.79	169.13	-3.3%
Asda, Hunts Cross	2.55	2.88	0.5%	0.14	2.73	-5.0%
Other	1.30	1.47	0.0%	0.00	1.47	0.0%
Sub-total within Catchment Area	**404.58**	**457.21**	**48.0%**	**13.90**	**472.27**	**3.3%**
Outside Catchment Area (Main Destinations)						
Defined Centres						
Liverpool City Centre	762.19	861.35	36.5%	10.57	850.79	-1.2%
Widnes Town Centre	24.36	27.53	1.0%	0.29	27.24	-1.1%
Allerton Road District Centre	14.27	16.13	0.5%	0.14	15.98	-0.9%
Smithdown Road North District Centre	8.32	9.40	0.0%	0.00	9.40	0.0%
Out-of-centre						
Edge Lane Retail Park	55.60	62.84	0.0%	0.00	62.84	0.0%
London Road	21.97	24.82	1.0%	0.29	24.53	-1.2%
Gemini Retail Park, Warrington	34.59	39.09	3.0%	0.87	38.23	-2.2%
Other	134.64	152.15	10.0%	2.90	149.26	-1.9%
Sub-total outside Catchment Area	**1,055.94**	**1,193.32**	**52.0%**	**15.06**	**1,178.26**	**-1.3%**
Total	**1,460.52**	**1,650.53**	**100.0%**	**28.95**	**1,650.53**	**0.0%**

Notes:

1. Turnover Pre-development taken from Table 3
2. Turnover of Proposal taken from Table 5A
3. Anticipated trade diversion to proposal based on professional assumptions informed by existing shopping patterns, as identified by the Liverpool Retail and Commercial Study (2011), the type of development proposed and distribution of facilities. Increased trade diversion from Speke district centre as per comments from Liverpool City Council
4. Resultant turnover = existing turnover minus trade diversion to proposal
5. Impact = reduction in turnover after allowing for the proposed development expressed as a proportion of pre-development turnover

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FORMER RAYWARE SITE, SPEKE BOULEVARD, SPEKE

TABLE 7: ANTICIPATED TRADING EFFECTS OF THE PROPOSAL (CONVENIENCE) - SENSITIVITY

Destination	Turnover - Pre Development (£m)		Trade Diversion to Proposal		Turnover Post Development - 2021	Impact
	2016	2021	(%)	(£m)	(£m)	
Within Catchment Area						
Proposal					**20.92**	
Defined Centres						
Speke District Centre	28.67	28.72	12.5%	2.62	26.11	-9.1%
Woolton District Centre	26.33	26.37	7.5%	1.57	24.81	-5.9%
Belle Vale District Centre	60.76	60.87	10.0%	2.09	58.77	-3.4%
Garston District Centre	18.64	18.67	1.0%	0.21	18.46	-1.1%
Aigburth Road District Centre	21.63	21.67	3.0%	0.63	21.04	-2.9%
Hunts Cross Local Centre	4.13	4.14	1.0%	0.21	3.93	-5.1%
Aigburth Vale Local Centre	1.49	1.50	0.0%	0.00	1.50	0.0%
Park Road Local Centre	10.24	10.26	1.0%	0.21	10.05	-2.0%
Smithdown Road South District Centre	65.96	66.07	5.0%	1.05	65.03	-1.6%
Out-of-centre						
Asda, Hunts Cross	64.25	64.37	22.5%	4.71	59.66	-7.3%
M&S New Mersey Retail Park	6.48	6.49	0.5%	0.10	6.39	-1.6%
Sub-total within Catchment Area	**308.58**	**309.13**	**64.0%**	**13.39**	**316.66**	**2.4%**
Outside Catchment Area (Main Destinations)						
Defined Centres						
Allerton Road	53.62	53.72	12.5%	2.62	51.10	-4.9%
Liverpool City Centre	71.26	71.38	2.5%	0.52	70.86	-0.7%
Wavertree High Street	17.88	17.92	0.0%	0.00	17.92	0.0%
Out-of-centre						
Asda, Widnes	7.00	7.01	3.0%	0.63	6.39	-9.0%
Asda, Huyton	90.90	91.06	1.5%	0.31	90.74	-0.3%
Morrisons, Widnes	9.52	9.54	2.0%	0.42	9.12	-4.4%
Tesco, Allerton	56.38	56.48	7.0%	1.46	55.01	-2.6%
Other	187.26	187.59	7.5%	1.57	186.02	-0.8%
Sub-total outside Catchment Area	**493.82**	**494.69**	**36.0%**	**7.53**	**487.16**	**-1.5%**
Total	**802.41**	**803.82**	**100.0%**	**20.92**	**803.82**	**0.0%**

Notes:

1. Turnover Pre-development taken from Table 4
2. Turnover of Proposal taken from Table 5B
3. Anticipated trade diversion to proposal based on professional assumptions informed by existing shopping patterns, as identified by the Liverpool Retail and Commercial Study (2011), the type of development proposed and distribution of facilities.
4. Resultant turnover = existing turnover minus trade diversion to proposal
5. Impact = reduction in turnover after allowing for the proposed development expressed as a proportion of pre-development turnover

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FORMER RAYWARE SITE, SPEKE BOULEVARD, SPEKE

TABLE 9: ANTICIPATED CUMULATIVE TRADING EFFECTS OF THE PROPOSAL AND CAINS BREWERY (COMPARISON GOODS) - SENSITIVITY

Destination	Turnover - Pre Development (£m)		Trade Diversion to Cains Brewery		Trade Diversion to Edge Lane Retail Park		Trade Diversion to New Mersey Retail Park		Trade Diversion to Aldi, Cressington House		Trade Diversion to Tesco, Park Road		Trade Diversion to Taskers		Turnover Post Commitments - 2021	Cumulative Impact -	Trade Diversion to Proposal		Turnover Post All Development - 2021	Cumulative Impact
	2016	2021	(%)	(£m)	(%)	(£m)	(%)	(£m)	(%)	(£m)	(%)	(£m)	(%)	(£m)	(£m)	Commitments Only	(%)	(£m)	(£m)	(Proposal & Commitments)
Proposal																			28.95	
Cains Brewery					0.5%	0.40	0.5%	0.19	1.0%	0.02	4.0%	0.79	0.0%	0.00	17.40		1.0%	0.29	17.11	
Edge Lane Retail Park			20.0%	3.76			20.0%	7.54	25.0%	0.51	30.0%	5.92	47.5%	6.93	55.07		15.0%	4.34	50.73	
New Mersey Retail Park			10.0%	1.88	5.0%	3.99			10.0%	0.21	10.0%	1.97	3.0%	0.44	29.20		5.0%	1.45	27.75	
Aldi, Cressington House			0.0%	0.00	0.0%	0.00	0.0%	0.00			7.5%	1.48	0.0%	0.00	0.58		0.0%	0.00	0.58	
Tesco, Park Road			7.5%	1.41	0.0%	0.00	3.0%	1.13	17.5%	0.36			1.0%	0.15	16.69		12.5%	3.62	13.07	
Taskers			0.5%	0.09	0.0%	0.00	1.0%	0.38	0.0%	0.00	1.0%	0.20			13.91		0.5%	0.14	13.77	
Within Catchment Area																				
Defined Centres																				
Speke District Centre	177.41	200.50	0.5%	0.09	0.0%	0.00	0.0%	0.00	17.5%	0.36	12.5%	2.47	0.5%	0.07	197.50	-1.5%	9.9%	2.87	194.64	-2.9%
Woolton District Centre	4.54	5.13	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	1.5%	0.30	0.0%	0.00	4.83	-5.8%	0.3%	0.10	4.74	-7.6%
Belle Vale District Centre	28.62	32.34	0.0%	0.00	0.0%	0.00	0.0%	0.00	3.0%	0.06	1.0%	0.20	0.0%	0.00	32.08	-0.8%	3.0%	0.86	31.22	-3.5%
Garston District Centre	2.93	3.31	0.0%	0.00	0.0%	0.00	0.0%	0.00	4.0%	0.08	0.5%	0.10	0.0%	0.00	3.13	-5.5%	0.0%	0.00	3.13	-5.5%
Aigburth Road District Centre	1.68	1.90	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.5%	0.01	0.3%	0.05	0.0%	0.00	1.84	-3.1%	0.2%	0.05	1.79	-5.7%
Hunts Cross Local Centre	4.98	5.63	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	1.0%	0.20	0.0%	0.00	5.43	-3.5%	0.2%	0.05	5.38	-4.4%
Aigburth Vale Local Centre	0.30	0.34	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.34	0.0%	0.0%	0.00	0.34	0.0%
Lodge Lane Local Centre	0.62	0.70	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.3%	0.05	0.0%	0.00	0.65	-7.1%	0.0%	0.00	0.65	-7.1%
Park Road Local Centre	0.21	0.23	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.3%	0.01	0.0%	0.00	0.0%	0.00	16.92	7106.0%	0.0%	0.00	13.30	5564.4%
Smithdown Road South District Centre	10.16	11.48	0.5%	0.09	0.0%	0.00	0.0%	0.00	1.0%	0.02	0.0%	0.00	0.0%	0.00	11.36	-1.0%	0.3%	0.10	11.27	-1.8%
Out-of-centre																				
Hunts Cross Retail Park	14.51	16.40	0.3%	0.05	0.0%	0.00	0.0%	0.00	1.0%	0.02	5.0%	0.99	2.0%	0.29	15.05	-8.2%	4.3%	1.24	13.81	-15.8%
New Mersey Shopping Park	154.78	174.92	5.0%	0.94	1.0%	0.80	15.0%	5.65	5.0%	0.10	8.5%	1.68	1.5%	0.22	194.73	11.3%	13.2%	3.82	189.46	8.3%
Asda, Hunts Cross	2.55	2.88	0.0%	0.00	0.0%	0.00	0.0%	0.00	7.5%	0.15	5.0%	0.99	0.3%	0.04	1.70	-40.9%	0.3%	0.10	1.61	-44.2%
Other	1.30	1.47	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.3%	0.01	0.0%	0.00	0.3%	0.04	1.43	-2.8%	0.0%	0.00	1.43	-2.8%
Outside Catchment Area (Main Destinations)																				
Defined Centres																				
Liverpool City Centre	762.19	861.35	32.5%	6.11	10.0%	7.97	40.0%	15.07	5.0%	0.10	2.0%	0.39	1.0%	0.15	831.56	-3.5%	24.1%	6.97	824.58	-4.3%
Widnes Town Centre	24.36	27.53	0.3%	0.05	0.0%	0.00	3.5%	1.32	0.0%	0.00	0.0%	0.00	1.0%	0.15	26.01	-5.5%	0.7%	0.19	25.82	-6.2%
Allerton Road District Centre	14.27	16.13	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.5%	0.01	0.0%	0.00	0.0%	0.00	16.12	-0.1%	0.3%	0.10	16.02	-0.7%
Smithdown Road North District Centre	8.32	9.40	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.5%	0.01	0.0%	0.00	0.0%	0.00	9.39	-0.1%	0.0%	0.00	9.39	-0.1%
Out-of-centre																				
Edge Lane Retail Park	55.60	62.84	0.0%	0.00	78.8%	62.84	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	55.07	-12.4%	0.0%	0.00	50.73	-19.3%
London Road	21.97	24.82	3.5%	0.66	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	2.0%	0.29	23.87	-3.8%	0.7%	0.19	23.68	-4.6%
Gemini Retail Park, Warrington	34.59	39.09	2.0%	0.38	0.0%	0.00	2.0%	0.75	0.0%	0.00	0.0%	0.00	25.0%	3.65	34.32	-12.2%	2.0%	0.57	33.75	-13.7%
Other	134.64	152.15	17.5%	3.29	4.7%	3.74	15.0%	5.65	0.5%	0.01	10.0%	1.97	15.0%	2.19	135.30	-11.1%	6.6%	1.91	133.39	-12.3%
Total	**1,460.52**	**1,650.53**	**100.0%**	**18.80**	**100.0%**	**79.73**	**100.0%**	**37.68**	**100.0%**	**2.06**	**100.0%**	**19.73**	**100.0%**	**14.58**	**1,650.53**	**-**	**100.0%**	**28.95**	**1,650.53**	**0.0%**

Notes:

1. Turnover Pre-development taken from Table 3
2. Turnover of Proposal taken from Table 5A and commitments from Table 8B
3. Anticipated trade diversion to proposal based on professional assumptions informed by existing shopping patterns, as identified by the Liverpool Retail and Commercial Study (2011), the type of development proposed and distribution of facilities.
4. Resultant turnover = existing turnover minus trade diversion to proposal and commitments
5. Impact = reduction in turnover after allowing for the proposed development and commitments expressed as a proportion of pre-development turnover

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FORMER RAYWARE SITE, SPEKE BOULEVARD, SPEKE

TABLE 10: ANTICIPATED CUMULATIVE TRADING EFFECTS OF THE PROPOSAL AND CAINS BREWERY (CONVENIENCE GOODS) - SENSITIVITY

Destination	Turnover - Pre Development (£m)		Trade Diversion to Cains Brewery		Trade Diversion to Edge Lane Retail Park		Trade Diversion to Tesco, Park Road		Trade Diversion to Aldi, Cressington House		Turnover Post Commitments - 2021	Cumulative Impact - Commitments Only	Trade Diversion to Proposal		Turnover Post All Development - 2021	Cumulative Impact (Proposal & Commitments)
	2016	2021	(%)	(£m)	(%)	(£m)	(%)	(£m)	(%)	(£m)	(£m)		(%)	(£m)	(£m)	
Proposal															20.92	
Cains Brewery					5.0%	0.64	2.0%	0.78	2.5%	0.25	21.07		5.0%	1.05	20.02	
Aldi, Cressington House			0.0%	0.00	1.0%	0.13	5.0%	1.95			7.76		12.5%	2.62	5.14	
Tesco, Park Road			20.0%	4.55	10.0%	1.28			12.5%	1.23	31.96		15.0%	3.14	28.82	
Edge Lane Retail Park			3.5%	0.80			7.5%	2.93	10.0%	0.98	8.09		5.0%	1.05	7.05	
Within Catchment Area																
Defined Centres																
Speke District Centre	28.67	28.72	0.0%	0.00	7.5%	0.96	1.0%	0.39	0.5%	0.05	27.32	-4.9%	7.8%	1.63	25.69	-10.6%
Woolton District Centre	26.33	26.37	0.5%	0.11	4.0%	0.51	1.0%	0.39	0.5%	0.05	25.31	-4.0%	4.7%	0.98	24.33	-7.8%
Belle Vale District Centre	60.76	60.87	1.0%	0.23	6.5%	0.83	5.0%	1.95	2.0%	0.20	57.66	-5.3%	6.3%	1.31	56.35	-7.4%
Garston District Centre	18.64	18.67	1.0%	0.23	0.3%	0.03	3.0%	1.17	15.0%	1.48	15.76	-15.6%	0.6%	0.13	15.63	-16.3%
Aigburth Road District Centre	21.63	21.67	0.8%	0.17	0.5%	0.06	5.0%	1.95	1.0%	0.10	19.39	-10.5%	1.9%	0.39	18.99	-12.3%
Hunts Cross Local Centre	4.13	4.14	0.0%	0.00	0.0%	0.00	1.0%	0.39	1.0%	0.10	3.65	-11.8%	0.6%	0.13	3.52	-15.0%
Aigburth Vale Local Centre	1.49	1.50	0.0%	0.00	0.0%	0.00	0.5%	0.20	0.5%	0.05	1.25	-16.3%	0.0%	0.00	1.25	-16.3%
Park Road Local Centre	10.24	10.26	0.0%	0.00	0.0%	0.00	0.5%	0.20	2.0%	0.20	41.82	307.8%	0.6%	0.13	38.55	275.9%
Smithdown Road South District Centre	65.96	66.07	7.5%	1.70	5.0%	0.64	3.0%	1.17	4.5%	0.44	62.12	-6.0%	3.1%	0.65	61.46	-7.0%
Out-of-centre																
Asda, Hunts Cross	64.25	64.37	4.5%	1.02	35.0%	4.48	20.0%	7.80	40.0%	3.93	47.13	-26.8%	14.1%	2.94	44.18	-31.4%
New Mersey Retail Park	6.48	6.49	0.3%	0.06	2.0%	0.26	2.0%	0.78	2.0%	0.20	5.20	-19.9%	0.3%	0.07	5.14	-20.9%
Outside Catchment Area (Main Destinations)																
Defined Centres																
Allerton Road	53.62	53.72	3.0%	0.68	2.0%	0.26	4.0%	1.56	0.5%	0.05	51.17	-4.7%	7.8%	1.63	49.53	-7.8%
Liverpool City Centre	71.26	71.38	17.5%	3.98	3.5%	0.45	10.0%	3.90	0.5%	0.05	63.01	-11.7%	1.6%	0.33	62.68	-12.2%
Wavertree High Street	17.88	17.92	0.5%	0.11	1.0%	0.13	0.0%	0.00	0.0%	0.00	17.67	-1.3%	0.0%	0.00	17.67	-1.3%
Out-of-centre																
Asda, Widnes	7.00	7.01	0.0%	0.00	0.0%	0.00	0.5%	0.20	0.0%	0.00	6.82	-2.8%	1.9%	0.39	6.43	-8.4%
Asda, Huyton	90.90	91.06	0.0%	0.00	1.0%	0.13	1.0%	0.39	0.0%	0.00	90.54	-0.6%	0.9%	0.20	90.34	-0.8%
Morrisons, Widnes	9.52	9.54	1.0%	0.23	0.3%	0.03	1.0%	0.39	0.0%	0.00	8.89	-6.8%	1.3%	0.26	8.63	-9.6%
Tesco, Allerton	56.38	56.48	4.0%	0.91	0.5%	0.06	2.0%	0.78	0.0%	0.00	54.73	-3.1%	4.4%	0.92	53.81	-4.7%
Other	187.26	187.59	35.0%	7.96	15.0%	1.92	25.0%	9.75	5.0%	0.49	167.47	-10.7%	4.7%	0.98	166.49	-11.2%
Total	**802.41**	**803.82**	**100.0%**	**22.73**	**100.0%**	**12.80**	**100.0%**	**39.01**	**100.0%**	**9.84**	**803.82**	**0.0%**	**100.0%**	**20.92**	**803.82**	**0.0%**

Notes:

1. Turnover Pre-development taken from Table 4
2. Turnover of Proposal taken from Table 5B and commitments from Table 8A
3. Anticipated trade diversion to proposal based on professional assumptions informed by existing shopping patterns, as identified by the Liverpool Retail and Commercial Study (2011), the type of development proposed and distribution of facilities.
4. Resultant turnover = existing turnover minus trade diversion to proposal and commitments
5. Impact = reduction in turnover after allowing for the proposed development and commitments expressed as a proportion of pre-development turnover

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TABLE 11: ANTICIPATED CUMULATIVE TRADING EFFECTS OF THE PROPOSAL AND CAINS BREWERY (CONVENIENCE & COMPARISON GOODS): MAIN CENTRES - SENSITIVITY

Destination	Turnover - Pre Development (£m)		Trade Diversion to Commitments (£m)	Turnover Post Commitments - 2021 (£m)	Cumulative Impact - Commitments Only	Trade Diversion to Proposal (£m)	Impact of Proposal Only	Turnover Post All Development - 2021 (£m)	Cumulative Impact (Proposal & Commitments)
	2016	2021							
Within Catchment Area (Main Destinations)									
Defined Centres									
Speke District Centre	206.09	229.22	4.39	224.83	-1.9%	4.50	-2.0%	220.33	-3.9%
Woolton District Centre	30.87	31.51	1.36	30.14	-4.3%	1.08	-3.4%	29.07	-7.7%
Belle Vale District Centre	89.37	93.20	3.47	89.74	-3.7%	2.17	-2.3%	87.57	-6.0%
Garston District Centre	21.56	21.98	3.09	18.89	-14.0%	0.13	-0.6%	18.76	-14.6%
Aigburth Road District Centre	23.31	23.57	2.34	21.23	-9.9%	0.44	-1.9%	20.79	-11.8%
Hunts Cross Local Centre	9.11	9.77	0.69	9.08	-7.0%	0.18	-1.8%	8.90	-8.8%
Aigburth Vale Local Centre	1.79	1.84	0.24	1.59	-13.3%	0.00	0.0%	1.59	-13.3%
Park Road Local Centre	10.45	10.49	0.40	58.74	459.9%	6.89	494.3%	51.85	394.2%
Smithdown Road South District Centre	76.11	77.55	4.07	73.48	-5.3%	0.75	-1.0%	72.73	-6.2%
Outside Catchment Area (Main Destinations)									
Defined Centres									
Liverpool City Centre	833.45	932.74	38.17	894.56	-4.1%	7.30	-0.8%	887.26	-4.9%

Notes:

1. Turnover Pre-development taken from Table 9 and Table 10
2. Turnover of Proposal taken from Table 5A and Table 5B and commitments from Table 8A and Table 8B
3. Anticipated trade diversion to proposal based on professional assumptions informed by existing shopping patterns, as identified by the Liverpool Retail and Commercial Study (2011), the type of development proposed and distribution of facilities.
4. Resultant turnover = existing turnover minus trade diversion to proposal and commitments
5. Impact = reduction in turnover after allowing for the proposed development and commitments expressed as a proportion of pre-development turnover

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