Martintonks

BASSETLAW RETAIL STUDY

prepared for

Bassetlaw District Council

APPENDICES

May 2009

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Martintonks
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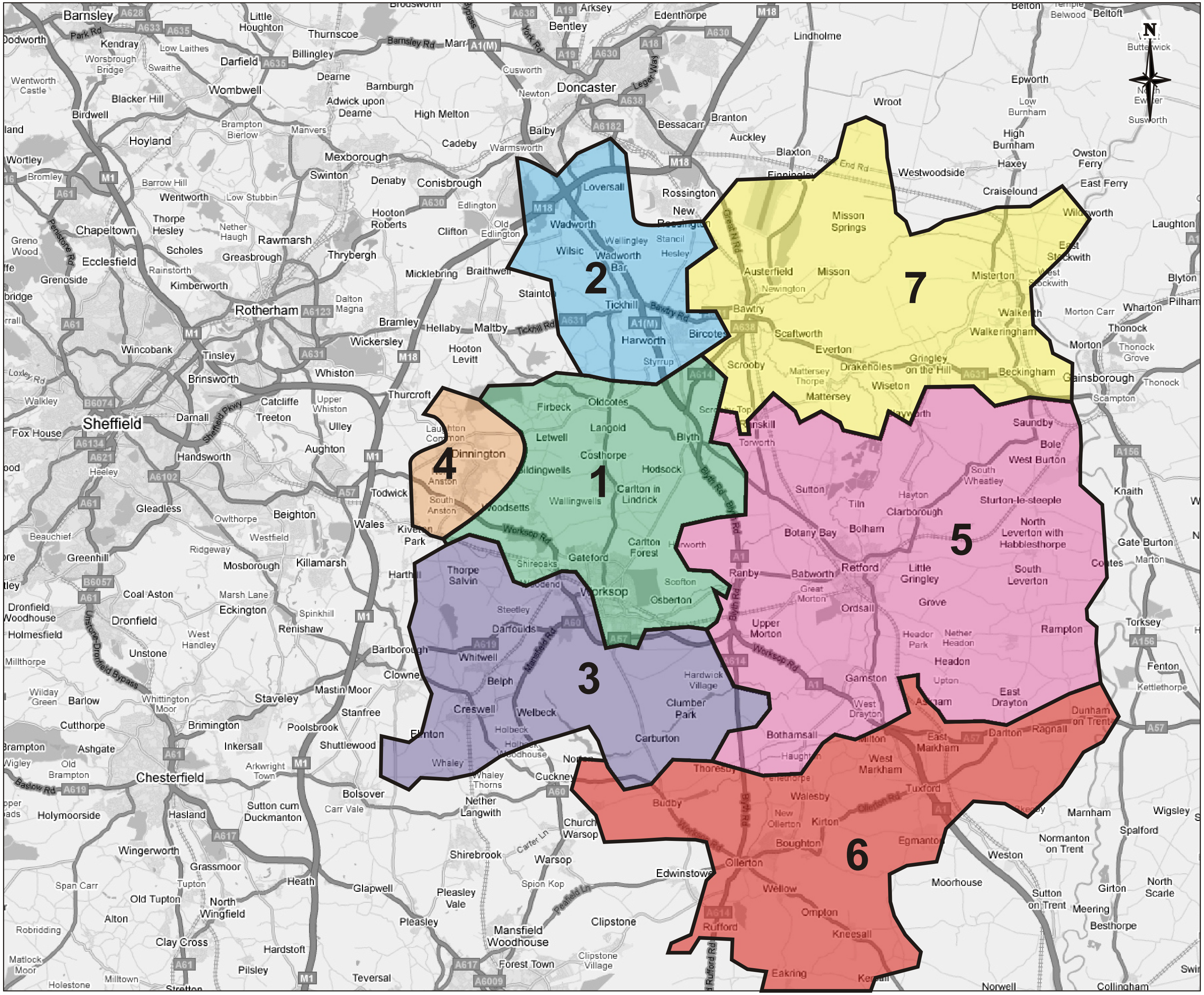
Bassetlaw Retail Study Zones



Key:

- Zone 1: Worksop
- Zone 2: Harworth/ Bircotes
- Zone 3: Whitwell/ Creswell
- Zone 4: Anston/ Dinnington
- Zone 5: Retford
- Zone 6: Markham/ Ollerton
- Zone 7: Bawtry/ Gringley

Population and Expenditure Information

Resident Population by Zone in the Study Area **Table A**

Subzone	Area	2007	2008	2011	2016	2021
1	Worksop	52,639	52,921	54,443	56,828	59,247
2	Harworth / Bircotes	14,663	14,743	14,946	15,291	15,723
3	Whitwell / Creswell	14,870	14,997	15,430	16,146	16,883
4	Anston / Dinnington	19,088	19,234	19,578	20,193	20,871
Sub-Total	**Worksop PCA & SCA**	101,260	101,895	104,397	108,458	112,724
5	Retford	35,575	35,778	36,503	37,760	39,119
6	Markham / Ollerton	18,386	18,525	19,144	20,106	21,126
7	Bawtry / Gringley	12,099	12,217	12,219	12,435	12,706
Sub-Total	**Retford PCA & SCA**	66,060	66,520	67,866	70,301	72,951
Total	**Study Area**	167,320	168,415	172,263	178,759	185,675

Notes: 1 Population Based on Experian Extraction from 2001 Census and ONS mid year estimates / projections

Estimated Expenditure Per Head On Convenience Goods in 2007 - 2021 **Table B**

Zone		2007	2008	2011	2016	2021
1	Worksop	£1,711	£1,715	£1,725	£1,742	£1,760
2	Harworth / Bircotes	£1,770	£1,774	£1,785	£1,803	£1,821
3	Whitwell / Creswell	£1,681	£1,684	£1,695	£1,712	£1,729
4	Anston / Dinnington	£1,743	£1,746	£1,757	£1,774	£1,792
5	Retford	£1,713	£1,716	£1,727	£1,744	£1,762
6	Markham / Ollerton	£1,716	£1,720	£1,730	£1,747	£1,765
7	Bawtry / Gringley	£1,866	£1,870	£1,881	£1,900	£1,919

Notes: 1 2007 Expenditure Estimates Experian
2 2008 - 2021 Expenditure Projections based on Experian forecasts as outlined in Retail Planner Brief 6.1
3 2008 to 2021 growth @ 0.2% per annum
4 All prices 2007

Total Convenience Expenditure 2008 - 2021 in the Study Area **Table C**

		2008	2011	2016	2021	Growth		
	Zone	(£m)	(£m)	(£m)	(£m)	08-11(£m)	08-16(£m)	08-21(£m)
1	Worksop	£90.8	£93.9	£99.0	£104.3	£3.2	£8.3	£13.5
2	Harworth / Bircotes	£26.2	£26.7	£27.6	£28.6	£0.5	£1.4	£2.5
3	Whitwell / Creswell	£25.3	£26.1	£27.6	£29.2	£0.9	£2.4	£3.9
4	Anston / Dinnington	£33.6	£34.4	£35.8	£37.4	£0.8	£2.2	£3.8
Sub-Total	**Worksop PCA & SCA**	£175.8	£181.1	£190.1	£199.5	£5.4	£14.3	£23.7
5	Retford	£61.4	£63.0	£65.9	£68.9	£1.6	£4.4	£7.5
6	Markham / Ollerton	£31.9	£33.1	£35.1	£37.3	£1.3	£3.3	£5.4
7	Bawtry / Gringley	£22.8	£23.0	£23.6	£24.4	£0.1	£0.8	£1.5
Sub-Total	**Retford PCA & SCA**	£116.1	£119.1	£124.6	£130.6	£3.0	£8.5	£14.5
Total	**Study Area**	£291.9	£300.3	£314.7	£330.1	£8.4	£22.8	£38.2

Notes: 1 Source Tables A & B
2 All prices 2007

Convenience Goods Retail Capacity Assessment

Convenience Turnover of Worksop Shops in 2008 **Table 1**

Destination	Gross Floorspace (sq m) [1]	Net Floorspace (sq m) [2]	Net Convenience Element (sq m) [3]	Expected Sales Density £'s per sq Metre [4]	Expected Turnover (£m) [5]	% Inflow Expenditure from beyond Study Area [6]	Expected Turnover Excluding [7] Inflows (£m)	Turnover Derived [8] from House-hold Survey	Potential [9] Over / Under Trading (£m)	Potential [10] Over / Under Trading (%)
Worksop Town Centre	5,082	3,303	3,303	£3,600	£11.9	5%	£11.3	£11.3	£0.0	0.0%
Aldi, Worksop	1,000	750	585	£5,000	£2.9	5%	£2.8	£3.5	£0.7	25.2%
Netto, Worksop	1,040	780	640	£5,000	£3.2	5%	£3.0	£5.0	£2.0	64.6%
Netto, Celtic Point, Worksop	1,031	770	631	£5,000	£3.2	5%	£3.0	£4.6	£1.6	53.4%
Tesco, Worksop	6,260	3,076	2,144	£13,315	£28.5	5%	£27.1	£48.9	£21.8	80.5%
Sainsburys, Worksop	6,396	4,148	2,838	£10,184	£28.9	5%	£27.5	£24.1	-£3.3	-12.1%
Local centres / shops in zone 1								£5.0		
Worksop Zone 1								£102.4	£22.8	23.3%

Notes:
1. Gross Floorspace from Bassetlaw Borough Council / IGD Database / Experian Goad
2. Net Floorspace from Bassetlaw Borough Council / IGD Database (range 65% to 85%)
3. Net Convenience Floorspace excludes floorspace given over to comparison goods (from MT survey November 2008)
4. Expected Sales Densities from 2008 Verdict Grocery Retailers Report and 2008 Mintel Retail Rankings (shopping centres aggregated)
5. Expected Turnovers calculated by multiplying Net Convenience Element by Expected Sales Density
6. Inflow Expenditure from surrounding area extracted from 2008 Visitor / Shopper Survey
7. Expected Turnovers Excluding Inflows calculated by deducting percentage inflow (6) from Expected Turnover (5)
8. Turnover Derived from Household Survey extracted from Table J
9. Potential Over / Undertrading calculated by deducting Expected Turnover (7) from Survey Based Turnover (8)
10. Percentage Over / Undertrading calculated by dividing Potential Over / Undertrading (9) by Expected Turnover (7)
11. All monetary values expressed in 2007 prices.

TABLE 2: CONVENIENCE GOODS QUANTITATIVE NEED ASSESSMENT 2008 to 2021

Source of Quantitative Need		2008	2011	2016	2021
	Expenditure growth in study area 2008[1]	£0.0	£8.4	£22.8	£38.2
	Minus 65% expenditure spent outside PCA[2]	£0.0	£5.5	£14.8	£24.8
1	Revised notional surplus for Worksop[3]	£0.0	£2.9	£8.0	£13.4
2	Leakage that can be clawed back[4]	£0.0	£0.0	£0.0	£0.0
3	Overtrading in out-of-centre stores in 2008[5]	£22.5	£22.7	£22.9	£23.1
1+2+3	Total potential capacity for new floorspace	£22.5	£25.6	£30.9	£36.5

Notes & Sources:
1. Expenditure Growth from Table C
2. 65% expenditure spent outside Worksop identified from Table H Market Share Analysis based on NEMS 2008 household survey
3. Revised Notional Surplus = Expenditure Growth minus Expenditure Spent Elsewhere
4. Due to high market share within Worksop and current / planned supermarket offer in zone 1 no claim is made on Leakage that can be realistically clawed back
5. Overtrading in out-of-centre stores from Table 1 based on Tesco and Aldi
6. 2007 Price Base

TABLE 3: CONVENIENCE GOODS COMMITMENTS AND CLAIMS ON CAPACITY IN 2008

	Gross[1]	Net[2]	Net Conv[3]	Net Increase[4]	Sales Density[5]	Expected Turnover[6]	Inflow[7]	Turnover from Study Area[8]
Tesco Relocation	6,677	3,572	2,500	357	£13,315	£4.7	5%	£4.5
Sainsbury	415	280	238	238	£10,184	£2.4	5%	£2.3
		3,852	2,738	595		£7.2		£6.8
Re-occupied Vacancies[9]	646	420	420	420	£3,600	£1.5	5%	£1.4
Total claims inc. Vacancies								**£8.2**

Notes & Sources:
1. Gross Floorspace from Bassetlaw Borough Council / IGD Database / Experian Goad
2. Net Floorspace from Bassetlaw Borough Council (range 60% to 65%)
3. Net Convenience Floorspace excludes floorspace given over to comparison goods based on national company averages for stores of this size
4. Net increase discounts current Tesco store understood to be redeveloped for housing
5. Expected Sales Densities from 2008 Verdict Grocery Retailers Report and 2008 Mintel Retail Rankings
6. Expected Turnovers calculated by multiplying Net Convenience Element (3) by Sales Density (4)
7. Inflow Expenditure from beyond Study Area from 2008 Visitor / Shopper Survey
8. Turnover from Study Area calculated by deducting percentage inflow (7) from Expected Turnover (6)
9. Re-occupied Vacancies from Experian Goad based on current proportion of town centre floorspace given over to convenience goods
10. All monetary values expressed in 2007 prices.

TABLE 4: REMAINING CONVENIENCE GOODS CAPACITY ALLOWING FOR COMMITMENTS AND OTHER CLAIMS 2008 - 2021

Year	Available Capacity (£m)[1]	Claims on Capacity (£m)[2]	Turnover Efficiency Improvements (£m)[3]	Remaining Capacity (£m)[4]	Worksop Town Centre Sales Density (£s psm)[5]	Town Centre Floorspace Capacity (net sq m)[6]	Average Supermarket Sales Density (£s psm)[7]	Supermarket Floorspace Capacity (net sq m)[8]
2008	£22.5	£8.2	£0.0	£14.3	£3,600	3,966	£12,000	1,190
2011	£25.6	£8.3	£0.6	£16.7	£3,622	4,608	£12,072	1,383
2016	£30.9	£8.4	£1.7	£20.8	£3,643	5,719	£12,145	1,716
2021	£36.5	£8.5	£2.7	£25.3	£3,665	6,911	£12,218	2,073

Notes & Sources:
1. Capacity from Tables 2
2. Claims on Capacity from Table 3 multiplied by 0.2% pa from 2008 onwards
3. Turnover efficiency improvements for all floorspace at 0.2% pa above inflation rate held constant at 2007 prices
4. Remaining Capacity calculated by deducting Claims (2) and Turnover efficiency improvements (3) from Available Capacity (1)
5. Town Centre Sales Density from Table 1
6. Town Centre Floorspace Capacity = quantum of net town centre floorspace that could be supported by Remaining Capacity (4)
7. Average Supermarket Sales Density from average of 'Big 4' in Verdict 2008
8. Supermarket Floorspace Capacity = quantum of net supermarket floorspace that could be supported by Remaining Capacity (4) as an alternative to Town Centre Development (6)
9. All monetary values expressed in 2007 prices.

Convenience Turnover of Retford Shops in 2008

Table 5

Destination	Gross Floorspace (sq m) [1]	Net Floorspace (sq m) [2]	Net Convenience Element (sq m) [3]	Expected Sales Density £'s per sq Metre [4]	Expected Turnover (£m) [5]	% Inflow Expenditure from beyond Study Area [6]	Expected Turnover Excluding [7] Inflows (£m)	Turnover Derived [8] from House-hold Survey	Potential [9] Over / Under Trading (£m)	Potential [10] Over / Under Trading (%)
Retford Town Centre	4,873	3,168	3,168	£2,450	£7.8	5%	£7.5	£7.5	£0.0	0.0%
Asda, Retford	3,339	2,120	1,590	£15,084	£24.0	5%	£22.8	£24.3	£1.5	6.7%
Morrisons, Retford	5,760	3,500	2,439	£12,012	£29.3	5%	£27.8	£41.4	£13.6	48.7%
Local centres / shops in zone 5								£1.6		
Retford Zone 5								£74.7	£15.1	20.6%

Notes:
1. Gross Floorspace from Bassetlaw Borough Council / IGD Database / Experian Goad
2. Net Floorspace from Bassetlaw Borough Council / IGD Database (range 65% to 85%)
3. Net Convenience Floorspace excludes floorspace given over to comparison goods (from MT survey November 2008)
4. Expected Sales Densities from 2008 Verdict Grocery Retailers Report and 2008 Mintel Retail Rankings (shopping centres aggregated)
5. Expected Turnovers calculated by multiplying Net Convenience Element by Expected Sales Density
6. Inflow Expenditure from surrounding area extracted from 2008 Visitor / Shopper Survey
7. Expected Turnovers Excluding Inflows calculated by deducting percentage inflow (6) from Expected Turnover (5)
8. Turnover Derived from Household Survey extracted from Table J
9. Potential Over / Undertrading calculated by deducting Expected Turnover (7) from Survey Based Turnover (8)
10. Percentage Over / Undertrading calculated by dividing Potential Over / Undertrading (9) by Expected Turnover (7)
11. All monetary values expressed in 2007 prices.

TABLE 6: CONVENIENCE GOODS QUANTITATIVE NEED ASSESSMENT 2008 to 2021

Source of Quantitative Need		2008	2011	2016	2021
	Expenditure growth in study area 2008[1]	£0.0	£8.4	£22.8	£38.2
	Minus 74% expenditure spent outside PCA[2]	£0.0	£6.2	£16.9	£28.3
1	Revised notional surplus for Retford[3]	£0.0	£2.9	£8.0	£13.4
2	Leakage that can be clawed back[4]	£0.0	£0.0	£0.0	£0.0
3	Overtrading in out-of-centre stores in 2008[5]	£15.1	£15.2	£15.3	£15.5
1+2+3	Total potential capacity for new floorspace	£15.1	£18.1	£23.3	£28.8

Notes & Sources:

1. Expenditure Growth from Table C
2. 74% expenditure spent outside Retford identified from Table H Market Share Analysis based on NEMS 2008 household survey
3. Revised Notional Surplus = Expenditure Growth minus Expenditure Spent Elsewhere
4. Due to high market share within Retford and current supermarket offer in zone 5 no claim is made on Leakage that can be realistically clawed back
5. Overtrading in out-of-centre stores from Table 5 based on Morrisons and Asda
6. 2007 Price Base

TABLE 7: CONVENIENCE GOODS COMMITMENTS AND CLAIMS ON CAPACITY

	Gross[1]	Net[2]	Net Conv[3]	Sales Density[4]	Expected Turnover[5]	Inflow[6]	Turnover from Study Area[7]
Re-occupied Vacancies[8]	293	190	190	£2,450	£0.5	5%	£0.4
Total claims inc. Vacancies							**£0.4**

Notes & Sources:

1. Gross Floorspace from Bassetlaw Borough Council / IGD Database / Experian Goad
2. Net Floorspace from Bassetlaw Borough Council (range 60% to 65%)
3. Net Convenience Floorspace excludes floorspace given over to comparison goods
4. Expected Sales Densities from 2008 Verdict Grocery Retailers Report and 2008 Mintel Retail Rankings aggregated)
5. Expected Turnovers calculated by multiplying Net Convenience Element by Sales Density
6. Inflow Expenditure from beyond Study Area from 2008 Visitor / Shopper Survey
7. Turnover from Study Area calculated by deducting percentage inflow (6) from Expected Turnover (5)
8. Re-occupied Vacancies from Experian Goad based on current proportion of town centre floorspace given over to convenience goods
9. All monetary values expressed in 2007 prices.

TABLE 8: REMAINING CONVENIENCE GOODS CAPACITY ALLOWING FOR COMMITMENTS AND OTHER CLAIMS 2008 - 2021

Year	Available Capacity (£m)[1]	Claims on Capacity (£m)[2]	Turnover Efficiency Improvements (£m)[3]	Remaining Capacity (£m)[4]	Retford Town Centre Sales Density (£s psm)[5]	Town Centre Floorspace Capacity (net sq m)[6]	Average Supermarket Sales Density (£s psm)[7]	Supermarket Floorspace Capacity (net sq m)[8]
2008	£15.1	£0.4	£0.0	£14.6	£2,450	5,969	£12,000	1,219
2011	£18.1	£0.4	£0.4	£17.2	£2,465	6,981	£12,072	1,425
2016	£23.3	£0.4	£1.2	£21.6	£2,480	8,726	£12,145	1,782
2021	£28.8	£0.5	£2.0	£26.4	£2,494	10,590	£12,218	2,162

Notes & Sources:

1. Capacity from Tables 6
2. Claims on Capacity from Table 7 multiplied by 0.2% pa from 2008 onwards
3. Turnover efficiency improvements for all floorspace at 0.2% pa above inflation rate held constant at 2007 prices
4. Remaining Capacity calculated by deducting Claims (2) and Turnover efficiency improvements (3) from Available Capacity (1)
5. Town Centre Sales Density from Table 5
6. Town Centre Floorspace Capacity = quantum of net town centre floorspace that could be supported by Remaining Capacity (4)
7. Average Supermarket Sales Density from average of 'Big 4' in Verdict 2008
8. Supermarket Floorspace Capacity = quantum of net supermarket floorspace that could be supported by Remaining Capacity (4) as an alternative to Town Centre Development (6)
9. All monetary values expressed in 2007 prices.

Convenience Goods Market Share Analysis

Main Food Shopping Market Share in the Study Area, 2008 **Table F**

	Zone of Origin								
Zone	**Destination**	1	2	3	4	5	6	7	SA
1	Worksop Town Centre	5.0%	0.0%	2.1%	0.0%	0.0%	0.0%	0.0%	1.7%
1	Netto, Worksop	9.3%	1.4%	5.2%	0.0%	0.0%	0.0%	0.0%	3.4%
1	Tesco, Worksop	49.8%	2.7%	20.6%	10.9%	0.7%	2.0%	0.0%	18.4%
1	Sainsburys, Worksop	17.4%	1.4%	26.8%	10.9%	1.4%	0.0%	0.0%	9.4%
1	Aldi, Worksop	2.8%	1.4%	3.1%	1.1%	0.0%	0.0%	0.0%	1.4%
1	Local centres / shops in zone 1	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%
2	Co-op, Harworth / Bircotes	0.0%	10.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%
2	Local centres / shops in zone 2	0.0%	6.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%
3	Local centres / shops in zone 3	0.0%	0.0%	4.1%	0.0%	0.0%	0.0%	0.0%	0.4%
4	Tesco, Dinnington	1.4%	0.0%	0.0%	50.0%	0.0%	0.0%	0.0%	5.2%
4	Local centres / shops in zone 4	0.0%	0.0%	0.0%	6.5%	0.0%	0.0%	0.0%	0.6%
5	Retford Town Centre	0.4%	1.4%	0.0%	0.0%	4.8%	0.0%	0.0%	1.7%
5	Morrisons, Retford	6.4%	8.1%	1.0%	0.0%	49.8%	9.8%	31.3%	20.6%
5	Asda, Retford	1.4%	1.4%	0.0%	0.0%	35.1%	17.6%	3.0%	12.4%
5	Local centres / shops in zone 5	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	0.1%
6	Ollerton	0.0%	0.0%	0.0%	0.0%	0.7%	58.8%	0.0%	3.4%
6	Local centres / shops in zone 6	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
7	Local centres / shops in zone 7	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.0%	0.4%
SA	Internet / Mail Order	0.7%	0.0%	3.1%	2.2%	2.1%	2.0%	1.5%	1.6%
	Total Study Area	**96.8%**	**35.1%**	**66.0%**	**81.5%**	**94.8%**	**90.2%**	**41.8%**	**82.6%**
L	Doncaster	1.1%	52.7%	0.0%	1.1%	1.7%	0.0%	31.3%	7.2%
L	Clowne	0.0%	0.0%	28.9%	1.1%	0.0%	0.0%	0.0%	3.0%
L	Gainsborough	0.0%	1.4%	0.0%	0.0%	3.4%	2.0%	26.9%	3.1%
L	Rotherham	0.7%	4.1%	0.0%	12.0%	0.0%	0.0%	0.0%	1.7%
L	Leakage Elsewhere	1.4%	6.8%	5.2%	4.3%	0.0%	7.8%	0.0%	2.3%
L	**Total Leakage**	**3.2%**	**64.9%**	**34.0%**	**18.5%**	**5.2%**	**9.8%**	**58.2%**	**17.4%**
	TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Top-up Food Shopping Market Share in the Study Area, 2008 **Table G**

	Zone of Origin								
Zone	**Destination**	1	2	3	4	5	6	7	SA
1	Worksop Town Centre	25.1%	0.0%	6.5%	1.5%	0.5%	2.6%	0.0%	8.9%
1	Netto, Worksop	9.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.0%
1	Tesco, Worksop	31.1%	0.0%	9.7%	5.9%	0.5%	0.0%	0.0%	11.3%
1	Sainsburys, Worksop	13.2%	0.0%	16.1%	0.0%	0.5%	0.0%	0.0%	5.7%
1	Aldi, Worksop	1.8%	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%	0.7%
1	Local centres / shops in zone 1	13.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.1%
2	Co-op, Harworth / Bircotes	1.4%	33.3%	0.0%	0.0%	0.5%	0.0%	4.1%	3.4%
2	Local centres / shops in zone 2	0.0%	44.4%	0.0%	1.5%	0.0%	0.0%	0.0%	3.6%
3	Local centres / shops in zone 3	0.0%	0.0%	43.5%	0.0%	0.0%	0.0%	0.0%	3.9%
4	Tesco, Dinnington	1.8%	0.0%	1.6%	61.8%	0.5%	0.0%	0.0%	6.9%
4	Local centres / shops in zone 4	0.0%	0.0%	0.0%	20.6%	0.0%	0.0%	0.0%	2.0%
5	Retford Town Centre	0.0%	0.0%	0.0%	0.0%	21.9%	7.7%	2.0%	7.1%
5	Morrisons, Retford	0.0%	1.9%	0.0%	0.0%	33.8%	2.6%	6.1%	10.9%
5	Asda, Retford	0.5%	0.0%	0.0%	0.0%	18.6%	0.0%	2.0%	5.9%
5	Local centres / shops in zone 5	0.0%	0.0%	0.0%	0.0%	7.6%	0.0%	0.0%	2.3%
6	Ollerton	0.0%	0.0%	0.0%	0.0%	1.4%	79.5%	0.0%	4.9%
6	Local centres / shops in zone 6	0.0%	0.0%	0.0%	0.0%	0.0%	5.1%	0.0%	0.3%
7	Local centres / shops in zone 7	0.5%	0.0%	1.6%	0.0%	0.0%	0.0%	55.1%	4.1%
SA	Internet / Mail Order	0.0%	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%	0.1%
	Total Study Area	**98.2%**	**79.6%**	**82.3%**	**91.2%**	**85.7%**	**97.4%**	**69.4%**	**89.0%**
L	Doncaster	0.0%	16.7%	0.0%	0.0%	11.9%	0.0%	12.2%	5.7%
L	Clowne	0.0%	0.0%	11.3%	0.0%	0.0%	0.0%	0.0%	1.0%
L	Gainsborough	0.0%	0.0%	0.0%	1.5%	1.9%	2.6%	14.3%	1.7%
L	Rotherham	0.9%	3.7%	0.0%	5.9%	0.0%	0.0%	0.0%	1.1%
L	Leakage Elsewhere	0.9%	0.0%	6.5%	1.5%	0.5%	0.0%	4.1%	1.4%
L	**Total Leakage**	**1.8%**	**20.4%**	**17.7%**	**8.8%**	**14.3%**	**2.6%**	**30.6%**	**11.0%**
	TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes:
1 Market Shares from Household Telephone Survey
2 SA = Study Area
3 L = Leakage 94.1%
4 Zone 1 = Worksop
5 Zone 2 = Harworth / Bircotes
6 Zone 3 = Whitwell / Creswell
7 Zone 4 = Anston / Dinnington
8 Zone 5 = Retford
9 Zone 6 = Markham / Ollerton
10 Zone 7 = Bawtry / Gringley

Overall Convenience Goods Market Share in the Study Area, 2008 **Table H**

		Zone of Origin							
Zone	**Destination**	1	2	3	4	5	6	7	SA
1	Worksop Town Centre	11.0%	0.0%	3.4%	0.4%	0.1%	0.8%	0.0%	3.8%
1	Netto, Worksop	9.4%	0.9%	3.6%	0.0%	0.0%	0.0%	0.0%	3.3%
1	Tesco, Worksop	44.2%	1.9%	17.3%	9.4%	0.6%	1.4%	0.0%	16.2%
1	Sainsburys, Worksop	16.2%	0.9%	23.6%	7.6%	1.1%	0.0%	0.0%	8.3%
1	Aldi, Worksop	2.5%	0.9%	2.6%	0.8%	0.0%	0.0%	0.0%	1.2%
1	Local centres / shops in zone 1	5.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%
2	Co-op, Harworth / Bircotes	0.4%	17.6%	0.0%	0.0%	0.1%	0.0%	1.2%	1.6%
2	Local centres / shops in zone 2	0.0%	18.1%	0.0%	0.4%	0.0%	0.0%	0.0%	1.4%
3	Local centres / shops in zone 3	0.0%	0.0%	16.0%	0.0%	0.0%	0.0%	0.0%	1.5%
4	Tesco, Dinnington	1.5%	0.0%	0.5%	53.5%	0.1%	0.0%	0.0%	5.7%
4	Local centres / shops in zone 4	0.0%	0.0%	0.0%	10.7%	0.0%	0.0%	0.0%	1.0%
5	Retford Town Centre	0.2%	0.9%	0.0%	0.0%	9.9%	2.3%	0.6%	3.3%
5	Morrisons, Retford	4.5%	6.2%	0.7%	0.0%	45.0%	7.6%	23.8%	17.7%
5	Asda, Retford	1.1%	0.9%	0.0%	0.0%	30.1%	12.4%	2.7%	10.4%
5	Local centres / shops in zone 5	0.0%	0.0%	0.0%	0.0%	2.5%	0.0%	0.0%	0.8%
6	Ollerton	0.0%	0.0%	0.0%	0.0%	0.9%	65.0%	0.0%	3.8%
6	Local centres / shops in zone 6	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	0.1%
7	Local centres / shops in zone 7	0.1%	0.0%	0.5%	0.0%	0.0%	0.0%	20.7%	1.5%
SA	Internet / Mail Order	0.5%	0.0%	2.6%	1.5%	1.4%	1.4%	1.0%	1.1%
	Total Study Area	**97.2%**	**48.5%**	**70.9%**	**84.4%**	**92.1%**	**92.4%**	**50.1%**	**84.5%**
L	Doncaster	0.7%	41.9%	0.0%	0.8%	4.8%	0.0%	25.6%	6.8%
L	Clowne	0.0%	0.0%	23.6%	0.8%	0.0%	0.0%	0.0%	2.4%
L	Gainsborough	0.0%	0.9%	0.0%	0.4%	3.0%	2.1%	23.1%	2.7%
L	Rotherham	0.8%	3.9%	0.0%	10.1%	0.0%	0.0%	0.0%	1.5%
L	Leakage Elsewhere	1.3%	4.7%	5.5%	3.5%	0.1%	5.5%	1.2%	2.0%
L	**Total Leakage**	**2.8%**	**51.5%**	**29.1%**	**15.6%**	**7.9%**	**7.6%**	**49.9%**	**15.5%**
	TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Distribution of Convenience Goods Expenditure in the Study Area, 2008 **Table J**

		Zone of Origin							
Zone	**Destination**	1	2	3	4	5	6	7	SA
1	Worksop Town Centre	£10.0	£0.0	£0.9	£0.1	£0.1	£0.2	£0.0	£11.3
1	Netto, Worksop	£8.5	£0.2	£0.9	£0.0	£0.0	£0.0	£0.0	£9.6
1	Tesco, Worksop	£40.1	£0.5	£4.4	£3.1	£0.4	£0.4	£0.0	£48.9
1	Sainsburys, Worksop	£14.7	£0.2	£6.0	£2.6	£0.7	£0.0	£0.0	£24.1
1	Aldi, Worksop	£2.3	£0.2	£0.7	£0.3	£0.0	£0.0	£0.0	£3.5
1	Local centres / shops in zone 1	£5.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£5.0
2	Co-op, Harworth / Bircotes	£0.4	£4.6	£0.0	£0.0	£0.1	£0.0	£0.3	£5.3
2	Local centres / shops in zone 2	£0.0	£4.7	£0.0	£0.1	£0.0	£0.0	£0.0	£4.9
3	Local centres / shops in zone 3	£0.0	£0.0	£4.0	£0.0	£0.0	£0.0	£0.0	£4.0
4	Tesco, Dinnington	£1.4	£0.0	£0.1	£18.0	£0.1	£0.0	£0.0	£19.6
4	Local centres / shops in zone 4	£0.0	£0.0	£0.0	£3.6	£0.0	£0.0	£0.0	£3.6
5	Retford Town Centre	£0.2	£0.2	£0.0	£0.0	£6.1	£0.7	£0.1	£7.5
5	Morrisons, Retford	£4.1	£1.6	£0.2	£0.0	£27.6	£2.4	£5.4	£41.4
5	Asda, Retford	£1.0	£0.2	£0.0	£0.0	£18.5	£3.9	£0.6	£24.3
5	Local centres / shops in zone 5	£0.0	£0.0	£0.0	£0.0	£1.6	£0.0	£0.0	£1.6
6	Ollerton	£0.0	£0.0	£0.0	£0.0	£0.6	£20.7	£0.0	£21.3
6	Local centres / shops in zone 6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.5
7	Local centres / shops in zone 7	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£4.7	£5.0
SA	Internet / Mail Order	£0.5	£0.0	£0.7	£0.5	£0.9	£0.4	£0.2	£3.2
	Total Study Area	**£88.2**	**£12.7**	**£17.9**	**£28.4**	**£56.6**	**£29.4**	**£11.4**	**£244.6**
L	Doncaster	£0.7	£11.0	£0.0	£0.3	£2.9	£0.0	£5.9	£20.7
L	Clowne	£0.0	£0.0	£6.0	£0.3	£0.0	£0.0	£0.0	£6.2
L	Gainsborough	£0.0	£0.2	£0.0	£0.1	£1.8	£0.7	£5.3	£8.2
L	Rotherham	£0.7	£1.0	£0.0	£3.4	£0.0	£0.0	£0.0	£5.1
L	Leakage Elsewhere	£1.2	£1.2	£1.4	£1.2	£0.1	£1.7	£0.3	£7.1
L	**Total Leakage**	**£2.5**	**£13.5**	**£7.4**	**£5.2**	**£4.8**	**£2.4**	**£11.4**	**£47.3**
	TOTAL	**£90.8**	**£26.2**	**£25.3**	**£33.6**	**£61.4**	**£31.9**	**£22.8**	**£291.9**

Notes:
1 Market Shares from Household Telephone Survey
2 Household Telephone Survey records 70:30 mainfood:top-up ratio in convenience goods expenditure
3 Total Available Expenditure from Table C
4 All Prices 2007
5 SA = Study Area
6 L = Leakage
7 Zone 1 = Worksop
8 Zone 2 = Harworth / Bircotes
9 Zone 3 = Whitwell / Creswell
10 Zone 4 = Anston / Dinnington
11 Zone 5 = Retford
12 Zone 6 = Markham / Ollerton
13 Zone 7 = Bawtry / Gringley

Population and Expenditure Information

Resident Population by Zone in the Study Area **Table A**

Subzone	Area	2007	2008	2011	2016	2021
1	Worksop	52,639	52,921	54,443	56,828	59,247
2	Harworth / Bircotes	14,663	14,743	14,946	15,291	15,723
3	Whitwell / Creswell	14,870	14,997	15,430	16,146	16,883
4	Anston / Dinnington	19,088	19,234	19,578	20,193	20,871
Sub-Total	**Worksop PCA & SCA**	101,260	101,895	104,397	108,458	112,724
5	Retford	35,575	35,778	36,503	37,760	39,119
6	Markham / Ollerton	18,386	18,525	19,144	20,106	21,126
7	Bawtry / Gringley	12,099	12,217	12,219	12,435	12,706
Sub-Total	**Retford PCA & SCA**	66,060	66,520	67,866	70,301	72,951
Total	**Study Area**	167,320	168,415	172,263	178,759	185,675

Notes: 1 Population Based on Experian Extraction from 2001 Census and ONS mid year estimates / projections

Estimated Expenditure Per Head On Comparison Goods in 2007 - 2021 **Table D**

Zone		2007	2008	2011	2016	2021
1	Worksop	£2,878	£2,892	£2,936	£3,233	£3,448
2	Harworth / Bircotes	£3,090	£3,105	£3,152	£3,470	£3,702
3	Whitwell / Creswell	£2,790	£2,804	£2,846	£3,134	£3,343
4	Anston / Dinnington	£3,198	£3,214	£3,262	£3,592	£3,832
5	Retford	£2,932	£2,947	£2,991	£3,294	£3,513
6	Markham / Ollerton	£2,843	£2,857	£2,901	£3,194	£3,407
7	Bawtry / Gringley	£3,367	£3,384	£3,435	£3,782	£4,034

Notes: 1 2007 Expenditure Estimates Experian
2 2008 - 2021 Expenditure Projections based on Experian projections as outlined in Retail Planner Brief 6.1
3 2008 to 2012 growth @ 0.5% per annum and 2008 to 2021 growth @ 1.3% pa
4 All prices 2007

Total Comparison Expenditure 2008 - 2021 in the Study Area **Table E**

		2008	**2011**	**2016**	**2021**	**Growth**		
	Zone	(£m)	(£m)	(£m)	(£m)	08-11(£m)	08-16(£m)	08-21(£m)
1	Worksop	£153.1	£159.8	£183.7	£204.3	£6.8	£30.6	£51.2
2	Harworth / Bircotes	£45.8	£47.1	£53.1	£58.2	£1.3	£7.3	£12.4
3	Whitwell / Creswell	£42.0	£43.9	£50.6	£56.4	£1.9	£8.5	£14.4
4	Anston / Dinnington	£61.8	£63.9	£72.5	£80.0	£2.1	£10.7	£18.2
Sub-Total	**Worksop PCA & SCA**	£302.7	£314.7	£359.9	£398.9	£12.0	£57.2	£96.2
5	Retford	£105.4	£109.2	£124.4	£137.4	£3.8	£18.9	£32.0
6	Markham / Ollerton	£52.9	£55.5	£64.2	£72.0	£2.6	£11.3	£19.0
7	Bawtry / Gringley	£41.3	£42.0	£47.0	£51.3	£0.6	£5.7	£9.9
Sub-Total	**Retford PCA & SCA**	£199.7	£206.7	£235.6	£260.7	£7.0	£35.9	£61.0
Total	**Study Area**	£502.4	£521.4	£595.5	£659.6	£19.0	£93.1	£157.2

Notes: 1 Source Tables A & D
2 All prices 2007

Comparison Goods Market Share Analysis

Total Comparison Shopping Market Share in the Study Area, 2008 — **Table K**

		Zone of Origin							
Zone	**Destination**	1	2	3	4	5	6	7	SA
1	Worksop Town Centre	39.1%	6.2%	32.9%	14.7%	4.0%	4.5%	0.2%	18.4%
1	Worksop Retail Parks / Warehouses	15.5%	3.9%	17.7%	11.1%	4.8%	3.2%	2.0%	9.7%
1	Local centres / shops in zone 1	5.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%
2	Local centres / shops in zone 2	0.1%	11.6%	0.0%	0.0%	0.0%	0.0%	0.9%	0.9%
3	Local centres / shops in zone 3	0.0%	0.0%	4.2%	0.0%	0.0%	0.0%	0.0%	0.4%
4	Local centres / shops in zone 4	0.5%	0.2%	0.0%	6.8%	0.1%	0.0%	0.0%	0.9%
5	Retford Town Centre	2.0%	2.7%	0.7%	0.5%	42.0%	17.5%	7.8%	15.3%
5	Retford Retail Parks / Warehouses	0.0%	0.0%	0.1%	0.0%	2.0%	0.2%	0.4%	0.7%
5	Local centres / shops in zone 5	0.0%	0.0%	0.0%	0.0%	2.4%	0.0%	0.0%	0.8%
6	Ollerton	0.1%	0.0%	0.0%	0.0%	0.0%	6.0%	0.0%	0.4%
6	Local centres / shops in zone 6	0.0%	0.3%	0.0%	0.0%	0.3%	7.8%	0.3%	0.6%
7	Local centres / shops in zone 7	0.0%	0.3%	0.0%	0.0%	0.0%	0.7%	7.0%	0.6%
	Total Study Area	**62.3%**	**25.2%**	**55.5%**	**33.0%**	**55.8%**	**39.9%**	**18.6%**	**49.9%**
L	Doncaster Town Centre	5.7%	40.7%	1.6%	1.9%	9.5%	2.5%	28.0%	10.0%
L	Doncaster Lakeside Outlet Centre	0.7%	3.6%	0.5%	1.1%	2.3%	0.4%	4.7%	1.7%
L	Doncaster Retail Parks / Warehouses	0.6%	7.7%	0.1%	0.1%	1.6%	0.0%	5.9%	1.6%
L	Sheffield Meadowhall	11.2%	6.9%	9.4%	23.5%	5.7%	1.2%	5.3%	9.2%
L	Sheffield City Centre	6.3%	1.9%	9.6%	15.3%	3.5%	1.0%	3.1%	5.8%
L	Sheffield Retail parks	0.4%	0.0%	0.7%	2.1%	0.2%	0.0%	0.0%	0.4%
L	Rotherham	1.0%	0.4%	0.5%	10.0%	0.1%	0.2%	0.0%	1.4%
L	Rotherham Retail Parks	0.6%	0.9%	0.3%	5.6%	0.0%	0.0%	0.0%	0.8%
L	Lincoln	0.6%	0.1%	0.1%	0.2%	6.3%	8.0%	4.5%	2.9%
L	Mansfield	1.8%	0.0%	4.9%	0.1%	0.5%	25.1%	0.0%	2.6%
L	Nottingham	0.7%	0.1%	1.4%	0.8%	1.4%	5.9%	0.3%	1.2%
L	Gainsborough	0.0%	0.8%	0.0%	0.0%	1.2%	0.5%	12.5%	1.3%
L	Chesterfield	0.6%	0.0%	5.5%	0.3%	0.0%	0.6%	0.0%	0.8%
L	Newark	0.1%	0.0%	0.0%	0.0%	0.6%	4.6%	0.0%	0.5%
L	Leakage Elsewhere	1.3%	2.3%	2.0%	1.1%	2.1%	2.3%	6.0%	2.0%
L	Internet / Mail Order	6.4%	9.5%	7.8%	4.9%	9.3%	7.7%	11.2%	7.9%
L	**Total Leakage**	**37.7%**	**74.8%**	**44.5%**	**67.0%**	**44.2%**	**60.1%**	**81.4%**	**50.1%**
	TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Overall Comparison Goods Spending in the Study Area, 2008 — **Table L**

		Zone of Origin							
Zone	**Destination**	1	2	3	4	5	6	7	SA
1	Worksop Town Centre	£59.8	£2.8	£13.8	£9.1	£4.2	£2.4	£0.1	£92.2
1	Worksop Retail Parks / Warehouses	£23.7	£1.8	£7.5	£6.9	£5.1	£1.7	£0.8	£48.6
1	Local centres / shops in zone 1	£7.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£7.5
2	Local centres / shops in zone 2	£0.1	£5.3	£0.0	£0.0	£0.0	£0.0	£0.4	£4.7
3	Local centres / shops in zone 3	£0.0	£0.0	£1.7	£0.0	£0.0	£0.0	£0.0	£2.1
4	Local centres / shops in zone 4	£0.8	£0.1	£0.0	£4.2	£0.1	£0.0	£0.0	£4.4
5	Retford Town Centre	£3.0	£1.3	£0.3	£0.3	£44.3	£9.3	£3.2	£76.8
5	Retford Retail Parks / Warehouses	£0.1	£0.0	£0.0	£0.0	£2.1	£0.1	£0.2	£3.4
5	Local centres / shops in zone 5	£0.0	£0.0	£0.0	£0.0	£2.6	£0.0	£0.0	£3.8
6	Ollerton	£0.1	£0.0	£0.0	£0.0	£0.0	£3.2	£0.0	£1.8
6	Local centres / shops in zone 6	£0.0	£0.2	£0.0	£0.0	£0.3	£4.1	£0.1	£2.9
7	Local centres / shops in zone 7	£0.1	£0.1	£0.0	£0.0	£0.0	£0.4	£2.9	£2.8
	Total Study Area	**£95.3**	**£11.5**	**£23.3**	**£20.4**	**£58.8**	**£21.1**	**£7.7**	**£250.9**
L	Doncaster Town Centre	£8.7	£18.6	£0.7	£1.2	£10.0	£1.3	£11.6	£50.2
L	Doncaster Lakeside Outlet Centre	£1.0	£1.6	£0.2	£0.7	£2.4	£0.2	£1.9	£8.3
L	Doncaster Retail Parks / Warehouses	£0.9	£3.5	£0.1	£0.1	£1.7	£0.0	£2.4	£8.3
L	Sheffield Meadowhall	£17.1	£3.2	£4.0	£14.5	£6.0	£0.7	£2.2	£46.4
L	Sheffield City Centre	£9.7	£0.9	£4.0	£9.5	£3.6	£0.6	£1.3	£29.0
L	Sheffield Retail parks	£0.5	£0.0	£0.3	£1.3	£0.2	£0.0	£0.0	£2.2
L	Rotherham	£1.5	£0.2	£0.2	£6.2	£0.1	£0.1	£0.0	£6.8
L	Rotherham Retail Parks	£0.9	£0.4	£0.1	£3.5	£0.0	£0.0	£0.0	£4.1
L	Lincoln	£0.9	£0.0	£0.0	£0.1	£6.7	£4.2	£1.9	£14.7
L	Mansfield	£2.7	£0.0	£2.1	£0.1	£0.5	£13.3	£0.0	£12.8
L	Nottingham	£1.1	£0.0	£0.6	£0.5	£1.5	£3.1	£0.1	£6.2
L	Gainsborough	£0.0	£0.4	£0.0	£0.0	£1.3	£0.3	£5.2	£6.6
L	Chesterfield	£0.9	£0.0	£2.3	£0.2	£0.0	£0.3	£0.0	£3.9
L	Newark	£0.1	£0.0	£0.0	£0.0	£0.6	£2.4	£0.0	£2.3
L	Leakage Elsewhere	£2.0	£1.0	£0.8	£0.7	£2.2	£1.2	£2.5	£10.2
L	Internet / Mail Order	£9.7	£4.4	£3.3	£3.0	£9.8	£4.1	£4.6	£39.5
L	**Total Leakage**	**£57.7**	**£34.2**	**£18.7**	**£41.4**	**£46.6**	**£31.8**	**£33.7**	**£251.5**
	TOTAL	**£153.1**	**£45.8**	**£42.0**	**£61.8**	**£105.4**	**£52.9**	**£41.3**	**£502.4**

Notes:
1 Market Shares from Household Telephone Survey
2 Expenditure from Table E
3 SA = Study Area derived from 2008 Shopper / Visitor Survey in Worksop and Retford
4 L = Leakage
5 Zone 1 = Worksop
6 Zone 2 = Harworth / Bircotes
7 Zone 3 = Whitwell / Creswell
8 Zone 4 = Anston / Dinnington
9 Zone 5 = Retford
10 Zone 6 = Markham / Ollerton
11 Zone 7 = Bawtry / Gringley
12 All Prices 2007

Comparison Goods Retail Capacity Assessment

Comparison Turnover of Worksop Shops in 2008 **Table 9**

Destination	Gross Floorspace (sq m) [1]	Net Floorspace (sq m) [2]	Expected Sales Density £'s per sq Metre [3]	Expected Turnover (£m) [4]	% Inflow Expenditure from beyond Study Area [5]	Expected Turnover Excluding [6] Inflows (£m)	Turnover Derived [7] from Household Survey	Potential [8] Over / Under Trading (£m)	Potential [9] Over / Under Trading (%)
Worksop Town Centre	25,321	18,991	£5,110	£97.0	5%	£92.2	£92.2	£0.0	0.0%
Worksop Retail Parks / Warehouses	13,072	10,458	£3,100	£32.4	5%	£30.8	£48.6	£17.8	57.7%
Floorspace in Supermarkets		2,686	£5,000	£13.4	5%	£12.8	£3.5	-£9.3	-72.9%
Local centres / shops in zone 1							£4.3		
Local centres / shops in zone 3							£2.1		
Worksop Zone 1							£150.6	£8.5	5.7%

Notes:
1. Gross Floorspace from Bassetlaw Borough Council / IGD Database / Experian Goad
2. Net Floorspace from Bassetlaw Borough Council / IGD Database (range 65% to 85%)
3. Expected Sales Densities from 2008 Verdict Grocery Retailers Report and 2008 Mintel Retail Rankings (shopping centres aggregated)
4. Expected Turnovers calculated by multiplying Net Convenience Element by Expected Sales Density
5. Inflow Expenditure from surrounding area extracted from 2008 Household Survey
6. Expected Turnovers Excluding Inflows calculated by deducting percentage inflow (5) from Expected Turnover (4)
7. Turnover Derived from Household Survey extracted from Table L
8. Potential Over / Undertrading calculated by deducting Expected Turnover (6) from Survey Based Turnover (7)
9. Percentage Over / Undertrading calculated by dividing Potential Over / Undertrading (8) by Expected Turnover (6)
10. All monetary values expressed in 2007 prices.

TABLE 10: COMPARISON GOODS QUANTITATIVE NEED ASSESSMENT 2008 to 2021

Source of Quantitative Need		2008	2011	2016	2021
	Expenditure growth in study area 2008[1]	£0.0	£19.0	£93.1	£157.2
	Minus 70% expenditure spent elsewhere[2]	£0.0	£13.3	£65.2	£110.0
1	Revised notional surplus for Worksop[3]	£0.0	£5.7	£27.9	£47.2
2	Leakage that can be clawed back[4]	£0.0	£0.0	£0.0	£0.0
3	Overtrading in out-of-centre stores in 2008[5]	£8.5	£8.6	£9.4	£10.0
1+2+3	Total potential capacity for new floorspace	£8.5	£14.3	£37.3	£57.2

Notes & Sources:
1. Expenditure Growth from Table E
2. 70% expenditure spent outside zones 1 and 3 identified from Table K Market Share Analysis based on NEMS 2008 household survey
3. Revised Notional Surplus = Expenditure Growth minus Expenditure Spent Elsewhere
4. Due to high market share within Worksop PCA (zones 1 & 3) and strength of competing centres no claim is made on Leakage that can be realistically clawed back
5. Overtrading in out-of-centre stores from Table 9 based on Sandy Lane Retail Park
6. 2007 Price Base

TABLE 11: COMPARISON GOODS COMMITMENTS AND CLAIMS ON CAPACITY

	Gross[1]	Net[2]	Net Comp[3]	Net Increase[4]	Sales Density[5]	Expected Turnover[6]	Inflow[7]	Turnover from PCA[8]
Highgrounds Estate	4,994	3,995	3,995	3,995	£3,100	£12.4	5%	£11.8
Sandy Lane Retail Park Extn	2,931	2,345	2,345	2,345	£3,100	£7.3	5%	£6.9
Tesco Relocation	6,720	3,572	1,072	139	£8,637	£1.2	5%	£1.1
Sainsbury	415	280	42	42	£6,952	£0.3	5%	£0.3
		3,852	1,114	181		£1.5		£20.1
Re-occupied Vacancies[9]	1,662	1,080	1,080	1,080	£5,110	£5.5	5%	£5.2
Total claims inc. Vacancies								**£25.3**

Notes & Sources:
1. Gross Floorspace from Bassetlaw Borough Council / IGD Database / Experian Goad
2. Net Floorspace from Bassetlaw Borough Council (range 60% to 65%)
3. Net Comparison Floorspace excludes convenience goods floorspace based on national company averages for stores of this size
4. Net increase discounts current Tesco store understood to be redeveloped for housing
5. Expected Sales Densities from 2008 Verdict Grocery Retailers Report and 2008 Mintel Retail Rankings aggregated)
6. Expected Turnovers calculated by multiplying Net Comparison Element by Sales Density
7. Inflow Expenditure from beyond Study Area from Visitor / Shopper Survey
8. Turnover from PCA calculated by deducting percentage inflow (7) from Expected Turnover (6)
9. Re-occupied Vacancies from Experian Goad based on current proportion of town centre floorspace given over to comparison goods
10. All monetary values expressed in 2007 prices.

TABLE 12: REMAINING COMPARISON GOODS CAPACITY ALLOWING FOR COMMITMENTS AND OTHER CLAIMS 2008 - 2021

Year	Available Capacity (£m)[1]	Claims on Capacity (£m)[2]	Turnover Efficiency Improvements (£m)[3]	Remaining Capacity (£m)[4]	Worksop Town Centre Sales Density (£s psm)[5]	Town Centre Floorspace Capacity (net sq m)[6]	Town Centre Floorspace Capacity (gross sq m)[7]
2008	£8.5	£25.3	£0.0	-£16.9	£5,110	n/a	n/a
2011	£14.3	£26.1	£4.6	-£16.4	£5,125	n/a	n/a
2016	£37.3	£27.4	£12.5	-£2.6	£5,141	n/a	n/a
2021	£57.2	£28.8	£20.8	£7.5	£5,156	1,464	2,195

Notes & Sources:
1. Capacity from Table 10
2. Claims on Capacity from Table 11
3. Turnover efficiency improvements for all floorspace at 1% pa above inflation rate held constant at 2007 prices
4. Remaining Capacity calculated by deducting Claims (2) and Turnover Efficiency (3) from Available Capacity (1)
5. Town Centre Sales Density from Table 9
6. Town Centre Floorspace Capacity = quantum of net town centre floorspace that could be supported by Remaining Capacity (4)
7. Gross floorspace that can be supported assumes 65% net sales area
8. All monetary values expressed in 2007 prices.

Comparison Turnover of Retford Shops in 2008

Table 13

Destination	Gross Floorspace (sq m) [1]	Net Floorspace (sq m) [2]	Expected Sales Density £'s per sq Metre [3]	Expected Turnover (£m) [4]	% Inflow Expenditure from beyond Study Area [5]	Expected Turnover Excluding [6] Inflows (£m)	Turnover Derived [7] from Household Survey	Potential [8] Over / Under Trading (£m)	Potential [9] Over / Under Trading (%)
Retford	19,778	14,834	£5,450	£80.8	5%	£76.8	£76.8	£0.0	0.0%
Retford Retail Warehouses	2,960	2,368	£1,550	£3.7	5%	£3.5	£3.4	-£0.1	0.0%
Floorspace in Supermarkets		1,591	£5,000	£8.0	5%	£7.6	£2.8	-£4.8	-63.1%
Local centres / shops in zone 5							£1.0		
Worksop Zone 1							£84.0	-£4.8	-5.8%

Notes:
1. Gross Floorspace from Bassetlaw Borough Council / IGD Database / Experian Goad
2. Net Floorspace from Bassetlaw Borough Council / IGD Database (range 65% to 85%)
3. Expected Sales Densities from 2008 Verdict Grocery Retailers Report and 2008 Mintel Retail Rankings (shopping centres aggregated)
4. Expected Turnovers calculated by multiplying Net Convenience Element by Expected Sales Density
5. Inflow Expenditure from surrounding area extracted from 2008 Household Survey
6. Expected Turnovers Excluding Inflows calculated by deducting percentage inflow (6) from Expected Turnover (7)
7. Turnover Derived from Household Survey extracted from Table L
8. Potential Over / Undertrading calculated by deducting Expected Turnover (6) from Survey Based Turnover (7)
9. Percentage Over / Undertrading calculated by dividing Potential Over / Undertrading (8) by Expected Turnover (6)
10. All monetary values expressed in 2007 prices.

TABLE 14: COMPARISON GOODS QUANTITATIVE NEED ASSESSMENT 2008 to 2021

Source of Quantitative Need		2008	2011	2016	2021
	Expenditure growth in zone 5	£0.0	£19.0	£93.1	£157.2
	Minus 83% expenditure spent elsewhere [2]	£0.0	£15.8	£77.3	£130.5
1	Revised notional surplus for Retford[3]	£0.0	£3.2	£15.8	£26.7
2	Leakage that can be clawed back[4]	£0.0	£0.0	£0.0	£0.0
3	Overtrading in out-of-centre stores in 2008[5]	£0.0	£0.0	£0.0	£0.0
1+2+3	Total potential capacity for new floorspace	£0.0	£3.2	£15.8	£26.7

Notes & Sources:
1. Expenditure Growth from Table E
2. 83% expenditure spent outside zone 5 identified from Table K Market Share Analysis based on NEMS 2008 household survey
3. Revised Notional Surplus = Expenditure Growth minus Expenditure Spent Elsewhere Improvements
4. Due to high market share within Worksop PCA (zones 1 & 3) and strength of competing centres no claim is made on Leakage that can be realistically clawed back
5. Overtrading in out-of-centre stores from Table 9 based on Sandy Lane Retail Park
6. 2007 Price Base

TABLE 15: COMPARISON GOODS COMMITMENTS AND CLAIMS ON CAPACITY

	Gross[1]	Net[2]	Net Increase[3]	Sales Density[4]	Expected Turnover[5]	Inflow[6]	Turnover from Study Area[7]
Re-occupied Vacancies[8]	1,828	1,188	1,188	£5,450	£6.5	5%	£6.2
Total claims inc. Vacancies							**£6.2**

Notes & Sources:
1. Gross Floorspace from Bassetlaw Borough Council / IGD Database / Experian Goad
2. Net Floorspace from Bassetlaw Borough Council (range 60% to 65%)
3. Net Comparison Floorspace excludes convenience goods floorspace of this size
4. Expected Sales Densities from 2008 Verdict Grocery Retailers Report and 2008 Mintel Retail Rankings aggregated)
5. Expected Turnovers calculated by multiplying Net Comparison Element by Sales Density
6. Inflow Expenditure from surrounding Study Area (and 5% beyond) extracted from 2008 Household Survey
7. Turnover from Study Area calculated by deducting percentage inflow (6) from Expected Turnover (5)
8. Re-occupied Vacancies from Experian Goad based on current proportion of town centre floorspace given over to comparison goods
9. All monetary values expressed in 2007 prices.

TABLE 16: REMAINING COMPARISON GOODS CAPACITY ALLOWING FOR COMMITMENTS AND OTHER CLAIMS 2008 - 2021

Year	Available Capacity (£m)[1]	Claims on Capacity (£m)[2]	Turnover Efficiency Improvements (£m)[3]	Remaining Capacity (£m)[4]	Retford Town Centre Sales Density (£s psm)[5]	Town Centre Floorspace Capacity (net sq m)[6]	Town Centre Floorspace Capacity (gross sq m)[7]
2008	£0.0	£6.2	£0.0	-£6.2	£5,450	n/a	n/a
2011	£3.2	£6.5	£2.5	-£5.8	£5,466	n/a	n/a
2016	£15.8	£7.2	£7.0	£1.7	£5,483	302	432
2021	£26.7	£8.0	£11.6	£7.2	£5,499	1,301	1,859

Notes & Sources:
1. Capacity from Table 14
2. Claims on Capacity from Table 15
3. Turnover efficiency improvements for all floorspace at 1% pa above inflation rate held constant at 2007 prices
4. Remaining Capacity calculated by deducting Claims (2) and Turnover Efficiency (3) from Available Capacity (1)
5. Town Centre Sales Density from Table 13
6. Town Centre Floorspace Capacity = quantum of net town centre floorspace that could be supported by Remaining Capacity (4)

1.0 Introduction

1.1. The Household Telephone Survey was undertaken in November 2008 by North East Market Surveys (NEMS). The survey had a sample of 1,001 respondents and was conducted across the same postcode sectors as the 2004 surveys for ease of comparison. However, the visitor survey indicated that Worksop and Retford were attracting visitors / shoppers from different parts of the northern zone 5 so this was divided into two zones – one based around Harworth/Bircotes and Tickhill and a second based around Bawtry and Gringley.

1.2. The visitor survey undertaken in Worksop and Retford ahead of the household survey in October 2008 also indicated that Worksop drew more visitors / shoppers from certain parts of the Worksop zone 1 so this was divided into two zones – one based around Worksop and the villages to the north and another based around Whitwell and Creswell.

1.3. Finally the 2004 study zone included only part of the postcode sector NG22 0 that excluded Ollerton, the main shopping centre for this area, therefore the entire postcode sector has been included along with NG22 9 that some visitors to Retford / Worksop came from. Apart from this minor addition, the 2008 study area shown in Appendix 1 was identical to the 2004 study area although the subdivision into zones is different. The 2008 zones are:

Zone 1	Worksop	S80 (1 & 2), S81 (7, 8 & 9)
Zone 2	Harworth / Bircotes	DN11 (8 & 9)
Zone 3	Whitwell / Creswell	S80 (3 & 4)
Zone 4	Anston / Dinnington	S25 (1, 2, 4 & 5)
Zone 5	Retford	DN22 (0-9)
Zone 6	Markham / Ollerton	NG22 0 & NG22 9
Zone 7	Bawtry / Gringley	DN10 (4-6)

1.4. The purpose of the survey was to inform the retail capacity study of market shares in various goods categories. The survey also allowed comparison with the 2004 survey and informed the health checks of the vitality and viability of the town and district / local centres.

2.0 Convenience Goods

2.1 The convenience goods market share analysis is shown in Tables F to J in Appendix 5 which can be compared with the survey results of the 2004 study. The comparison of shopping patterns between 2004 and 2008 indicates mainfood shopping patterns have only changed marginally. The Worksop Sainsbury has increased market share slightly and the Worksop Tesco has decreased although it was still the most popular destination in zone 1.

2.2 Leakage to Doncaster remains at a comparable level although some has switched from the Asda to Tesco store. The mainfood market share for the Co-op at Bircotes in zone 2 where much of the leakage to Doncaster originates has also decreased. The Kwik Save store in Worksop has closed and the Safeway at Dinnington is now a Tesco and has increased its market share slightly.

2.3 The 2004 study does not state the percentage of convenience goods delivered. In 2008 1.3% of mainfood shopping expenditure was accounted for by deliveries. In terms of top-up shopping, the trend was a slight increase in market share for the large supermarkets at the expense of the smaller stores / centres.

2.4 Within the overall study area there was considerable difference in shopping patterns between zones and the main patterns / destinations for each zone are outlined below.

Zone 1 Worksop

2.5 In zone 1 the Tesco store accounts for nearly half (49.8%) the mainfood expenditure whilst only 5% was spent in the town centre and 9.3% at the edge-of-centre Netto. Sainsburys accounts for 17.4% of the market share and overall only 3.2% leaks beyond the study area.

2.6 The town centre (25%) had a greater market share of the top-up expenditure as did the smaller centres (13.2%) in zone 1 although the large supermarkets also have a large share – Tesco (31.1%) and Sainsburys (13.2%). There was even less leakage (1.8%) from the study area for top-up expenditure. Overall zone 1 was fairly self contained in terms of convenience goods expenditure with 84.3% retained within zone 1 and 96.8% within the wider study area

Zone 2 Harworth / Bircotes

2.7 In zone 2 based around Harworth/Bircotes and Tickhill there was much more ‘leakage’ to Doncaster particularly for mainfood shopping (52.7%). Only 10.8% was spent in the Harworth / Bircotes Co-op and 6.8% in other local stores and 9.5% was spent at the Retford Supermarkets (mainly Morrisons (8.1%)). Much more top-up expenditure was retained locally (77.7%) with 33.3% spent in the Harworth / Bircotes Co-op and 44.4% in other local stores and only 16.7% ‘leaked’ to Doncaster.

2.8 Overall 35.7% of convenience goods expenditure was retained within zone 2 and 48.5% within the wider study area with 52.7% spent in Doncaster supermarkets and stores. However, as Doncaster was equidistant if not closer than Worksop / Retford to most zone 2 residents it was not really leakage and the zone really forms part of the catchment of the larger shopping centre of Doncaster and surrounding retail parks, outlets and supermarkets.

Zone 3 Whitwell / Creswell

2.9 Even less mainfood expenditure (4.1%) was retained within zone 3 than in zone 2 although a much higher level was retained within the overall study area (66%). The most popular destination was the out-of-centre Sainsbury store (26.8%) on the approach to Worksop although, despite being on the far side of the town, the Worksop Tesco had a 20.6% market share. Only 2.1% was spent in Worksop town centre and 5.2% at the edge-of-centre Netto store. The main destination for leakage was Clowne (28.9%) where Tesco and Aldi have stores.

2.10 Much more top-up expenditure was retained locally (43.5%) and overall in the study area (82.3%) with the Worksop Sainsbury (16.1%) and Tesco (9.7%) store being the main destinations elsewhere in zone 3 and only 17.7% leakage (mainly to Clowne (11.3%)).

2.11 Overall 16% of convenience goods expenditure was spent within zone 3 and 70.9% was retained within the study area. Clowne (23.6%) was the main destination for leakage.

Zone 4 Anston / Dinnington

2.12 The majority of mainfood expenditure in this zone was spent locally – 50% at the Dinnington Tesco and 6.5% in local shops / centres. 21.8% of mainfood expenditure was divided equally between the Worksop Tesco and Sainsbury stores. Overall 81.5% of mainfood expenditure was spent within the study area and Rotherham (12%) was the main destination for leakage. There were even higher retention levels for top-up expenditure with 61.8% spent at the Dinnington Tesco and 20.6% in local shops / centres. Overall 82.4% of convenience goods expenditure was spent within zone 4 and 91.2% was retained within the study area.

Zone 5 Retford

2.13 Nearly all the mainfood expenditure in Retford was spent locally with 89.7% spent in zone 5 and 94.8% in the study area. However, less top-up expenditure was retained in the study area 85.7% with greater expenditure in Doncaster (11.9%) compared to its mainfood market share (1.7%). The most popular mainfood destinations were the supermarkets – Morrisons (49.8%) and Asda (35.1%) with only 4.8% spent in the town centre. The town centre had a larger market share for top-up shopping (21.9%) along with local shops (7.6% compared to 0.3% of mainfood expenditure) but the supermarkets still have a generous market share - Morrisons (33.8%) and Asda (18.6%).

2.14 Overall 85% of convenience goods expenditure was spent within Retford and 92.1% was retained within the study area. Doncaster (4.8%) and Gainsborough (3%) were the main destinations for the limited leakage that was not surprising given the extent of zone 5.

Zone 6 Markham / Ollerton

2.15 Ollerton was the main shopping centre within this zone for convenience goods expenditure, partly due to the presence of a Tesco supermarket, accounting for 58.8% of the mainfood expenditure, followed by the Retford supermarkets – Asda (17.6%) and Morrisons (9.9%). Overall 90.2% of mainfood expenditure was spent within the study area with Mansfield (Leakage Elsewhere) accounting for much of the remainder. Even more top-up expenditure (84.6%) was retained locally and overall in the study area (97.4%).

Zone 7 Bawtry / Gringley

2.16 Only 41.8% of mainfood expenditure was retained within the study area, 31.3% ‘leaks’ to Doncaster and 26.9% to Gainsborough. Expenditure that was retained was mainly spent in the Retford supermarkets – Morrisons (31.3%) and Asda (3%). More top-up expenditure was retained with 55.1% spent in local shops (compared to 0% mainfood expenditure). Overall 69.4% of top-up expenditure was spent within the study area and Gainsborough (14.3%) and Doncaster (12.2%) were the main destinations for ‘leakage’. However, given the extent of zone 7 peripheral parts of this zone will actually be closer to Doncaster and / or Gainsborough forming part of those centres catchment areas.

Worksop Convenience Goods Catchment Area

2.17 Zone 1 forms the primary catchment area (PCA) for Worksop for convenience goods although it was the out-of-centre supermarkets that attracted most of the mainfood expenditure. Zone 3 Whitwell / Creswell also forms part of the PCA for Worksop, partly due to the location of Sainsbury on this side of the town, but also forms part of the catchment of the smaller centre of Clowne that has a Tesco and Aldi store. Zone 2 Harworth / Bircotes does not generate much expenditure for Worksop and forms more Doncaster's catchment area although local stores / centres retain a high percentage of top-up expenditure. Zone 4 Anston / Dinnington generated slightly more expenditure for the Worksop supermarkets than zone 2 but it was still only a very weak secondary catchment area (SCA) due to the popularity of the local Tesco store in Dinnington. The peripheral part of zone 4 also forms of the Rotherham catchment area for convenience goods.

2.18 There was very little convenience goods expenditure in Worksop or its supermarkets that originated from Retford (zone 5) or the surrounding zone 6 Markham / Ollerton and zone 7 Bawtry / Gringley. Zones 1 and 3 (Whitwell / Creswell) therefore form the PCA for Worksop with zone 4 (Anston / Dinnington) forming the SCA.

Retford Convenience Goods Catchment Area

2.19 Zone 5 forms the PCA for Retford for convenience goods although like Worksop it was the out-of-centre supermarkets that attracted most of the mainfood expenditure. Zone 7 Bawtry / Gringley forms a weak SCA for Retford. The NW part of zone 7 around Bawtry forms part of the Doncaster catchment area, where there are several superstores as well as the town centre, and the NE part around Gringley forms part of the Gainsborough catchment area where Tesco and Morrisons both have superstores. Zone 6 Markham / Ollerton forms an even weaker SCA for Retford due to the popularity of the Ollerton Tesco store in this area.

2.20 There was a small amount of convenience goods expenditure in Retford and its supermarkets that originates from Worksop (zone 1) as well as zone 2 Harworth / Bircotes that forms part of Doncaster's rather than Worksop's SCA. Therefore only zones 6 and 7 form the SCA for Retford, and this SCA overlaps with other centres such as Doncaster, Gainsborough and Ollerton. The Retford PCA for convenience goods was formed by zone 5 alone.

3.0 Comparison Goods

3.1 The comparison goods market share analysis is shown in Tables K to Z in Appendix *. Some of these tables can be compared with the equivalent tables in the 2004 study. The same study area was also used as for convenience goods and there was much more inflow expenditure to Worksop and Retford town centres from their respective SCAs. The stronger offer of Worksop was reflected in the greater penetration of Retford's PCA and SCA than vice versa. Worksop Retail Park also has a bulky goods offer that is largely unavailable in Retford or its catchment area. Despite this there was a lower overall retention rate (49.9%) for comparison goods than for convenience goods (84.5%). This was due to the attraction of higher tier shopping centres the catchment areas of which overlap and compete with those of Worksop and Retford.

3.2 In particular Sheffield city centre and Meadowhall, Doncaster town centre and outlet centre / retail parks have a significant market share in the study area. In addition, considerably more comparison goods expenditure (7.9%) was spent on the internet than convenience goods (1.1%) that was largely accounted for by local supermarkets whereas the comparison goods etailing was likely to be 'leakage' from the study area.

3.3 The shopping patterns for comparison goods and market shares vary enormously between the different classes or subcategories of goods. The following sections outline the main trends and then the overall market shares and catchment areas are summarized at the end.

Fashion Goods

3.4 This class of goods generates more frequent and distant shopping trips than most classes within comparison goods category and was divided into two questions asking about first and second choice destinations. Non respondents to the second question were discounted from the market share analysis

3.5 Table P shows that both Worksop (16.3%) and Retford (12.2%) appear to have increased their market share for this class of goods since 2004 (14% and 7% respectively) but the 2004 survey only asked about one main destination so isn't directly comparable. Overall 30.7% of expenditure for clothes / fashion goods was retained in the study area.

3.6 Shopping patterns were similar to food shopping as Worksop enjoyed the greatest market share in PCA zones 1 (32.1%) and 3 (31.8%). However, the town centre enjoyed a greater market share in the SCA zone 4 (18%) than elsewhere in the catchment. In particular the market share was bolstered by the town centre's second choice destination status (Table N) for many residents in the wider study area.

3.7 Retford also had a similar PCA and SCA for fashion / clothes shopping as for convenience goods. In the PCA (zone 5) Retford had a 28.5% market share and in the SCA zones 6 (17.9%) and 7 (10.1%) a slightly lower market share. Retford does not draw as much fashion / clothes expenditure from the wider study area as Worksop due to the weaker offer.

3.8 In terms of destinations for leakage this varied between zones. Sheffield city centre and The Meadowhall Centre combined were the main destination in zones 1, 3 and 4 whereas Doncaster and the Lakeside Outlet Centre were the main destination in zones 2 and 7. In Retford (zone 5) leakage was split between Doncaster / Lakeside (22.2%) and Sheffield / Meadowhall (20.5%) and Lincoln (11.4%) to a lesser extent. In zone 6 (Markham & Ollerton) Mansfield (25.6%) and Lincoln (13%) were the main destinations for leakage. Across the study area 7.9% of clothes / fashion goods expenditure was spent on the internet / mail order shopping.

Toys, Games and Hobby Goods

3.9 The 2004 survey only asked a question about other non-food goods so the responses weren't comparable. Table Q shows that in 2008 19.9% of expenditure for this class of goods was spent in Worksop and 12.2% in Retford and overall 37.3% was retained within the study area. In its PCA (zone 1) Worksop attracted 44% of expenditure and 37.5% in PCA zone 3 but only 10.5% in SCA zone 4. Worksop's market share in the other study area zones was much lower ranging from 0% in zone 7 to 8.9% in (SCA) zone 2. In its PCA (zone 5) Retford attracted 36.2% of expenditure and 18.4% in zone 6 but only 2.6% in the other SCA zone 7. Retford's market share for toys and games in the other study area zones was negligible.

3.10 Destinations for leakage varied between zones but followed similar patterns to clothes shopping. Sheffield city centre and The Meadowhall Centre combined were the main destination in zones 1, 3 and 4 whereas Doncaster and the Lakeside Outlet Centre were the main destination in zones 2 and 7. In Retford (zone 5) leakage was split between Doncaster / Lakeside (22%) and Sheffield / Meadowhall (11.8%) and Lincoln (8.7%) to a lesser extent. In zone 6 (Markham & Ollerton) Mansfield (21.1%), Lincoln (10.5%) and Nottingham (7.9%) were the main destinations for leakage. Overall in the study area 10.1% of expenditure for this class of goods was spent on the internet / mail order shopping.

Books and Stationary Goods

3.11 The 2004 survey didn't ask a question about this class of comparison goods either so there were no comparable results. Table R shows that in 2008 26.6% of expenditure for books and stationary goods was spent in Worksop and 24.7% in Retford and overall 60.9% was retained within the study area. In zone 1 Worksop retained 61.5% of expenditure and 61.4% in zone 3 but only 15.7% in the SCA zone 4. Worksop's market share in the other study area zones was much lower ranging from 0% in zone 7 to 6% in zone 2. In its PCA (zone 5) Retford retained 65.7% of expenditure and 31.3% in zone 6 and 14% in the other SCA zone 7. Retford's market share in the other study area zones was much lower ranging from 0% in zone 4 to 6% in zone 2.

3.12 Leakage for this class of goods was much lower than for clothes and toys shopping in most zones and varied between them with high leakage levels from the study area in zones 7 (71.9%), 2 (71.6%), 4 (67.5%) and 6 (45.8%) in particular. There was much lower leakage from the two main centres of Worksop (26.8%) and Retford (28.4%) or Worksop PCA zone 3 (31.3%).

3.13 Again Sheffield city centre and The Meadowhall Centre combined were the main destination in zones 1, 3 and 4 whereas Doncaster and the Lakeside Outlet Centre were the main destination in zones 2 and 7 although Gainsborough also drew significant expenditure (15.8%) from zone 7. In Retford (zone 5) the limited leakage was split between Doncaster / Lakeside (4.4%) and Sheffield / Meadowhall (4.1%) and Lincoln (3.3%). In zone 6 (Markham & Ollerton) Mansfield (12.5%) and Nottingham (8.3%) were the main destinations for leakage. Overall in the study area 10.5% of expenditure for this class of goods was spent on the internet / mail order shopping.

CDs, DVDs, Tapes and Computer Games

3.14 Again the 2004 survey didn't ask a direct question about this class of comparison goods so there were no comparable results. One of the most striking results in 2008 was the 22.6% market share for etailing within this class of goods with variations between zones from 15.7% (zone 4) to 32.1% (zone 2). Another feature was that smaller centres / local shops within each of the zones retained a high percentage of expenditure ranging from 14.3% in zone 4 (Anston / Dinnington) to 30.8% (Markham / Ollerton)

3.15 Table S also shows that in 2008 17.1% of expenditure for this class of goods was spent in Worksop and 14.9% in Retford and overall 51.7% was retained within the study area. In zone 1 Worksop attracted 41% of expenditure and 37.8% in zone 2 but only 5.7% in SCA zone 4. Worksop's market share in the other study area zones was much lower ranging from 0% in zone 7 to 3.6% in zone 2. In its PCA (zone 5) Retford attracted 40.2% of expenditure but only 15.1% in zone 7 and 7.7% in zone 6. Retford's market share for CDs / DVDs in the other study area zones was negligible.

3.16 Destinations for leakage varied between zones but followed similar patterns to other classes of comparison goods. Sheffield city centre and The Meadowhall Centre combined were the main destination in zones 1, 3 and 4 whereas Doncaster and the Lakeside Outlet Centre were the main destination in zones 2 and 7. In Retford (zone 5) leakage was split between Sheffield / Meadowhall (5.3%), Doncaster / Lakeside (4%) and Lincoln (3.1%). In zone 6 (Markham & Ollerton) Mansfield (20.5%) and Nottingham (10.3%) were the main destinations for leakage.

Pharmacy Goods

3.17 The 2004 survey didn't ask a question about this class of comparison goods either so there were no comparable results. Table T shows that in 2008 25.8% of expenditure for pharmacy goods and toiletries was spent in Worksop and 27.7% in Retford and overall 85.9% was retained within the study area reflecting the localised shopping patterns this class of goods generates. Another feature of this class of goods was that smaller centres / local shops within each of the zones retained a high percentage of expenditure ranging from 10.5% in Retford (zone 5) to 63% in zone 2 (Harworth / Bircotes).

3.18 In PCA zone 1 Worksop town centre retained 58.7% of expenditure and a further 32.5% was spent elsewhere in zone 1 including the supermarkets that have pharmacy counters. 58.3% of expenditure in PCA zone 3 was also spent in Worksop town centre but only 12.8% in SCA zone 4. Worksop's market share in the other study area zones was much lower ranging from 0.7% in zone 5 to 6.8% in zone 2. In its PCA (zone 5) Retford retained 82.2% of expenditure and 28% in zone 6 and 9% in the other SCA zone 7. Retford's market share in the other study area zones was much lower ranging from 0% in zone 4 to 4.1% in zone 2. Leakage for this class of goods was much lower than for all other classes of comparison goods and there was very little (2.4%) expenditure lost to etailing / mail order.

Hardware and Tableware

3.19 The 2004 survey did not ask about shopping destinations for these goods so no comparison can be made. Table U shows that in 2008 23.8% of expenditure on hardware and tableware was spent in Worksop and 17.7% in Retford and overall 54.4% was retained within the study area. In PCA zone 1 Worksop retained 53.6% of expenditure, 43.1% in PCA zone 3 and 25.4% in SCA zone 4. Worksop's market share in the other study area zones was much lower ranging from 0% in zone 7 to 8.7% in zone 2. In its PCA (zone 5) Retford retained 48.4% of expenditure, 21.1% in zone 6 and 8% in the other SCA zone 7. Retford's market share in the other study area zones was negligible.

3.20 Leakage for this class of goods (44.6%) from the study area was below the average for comparison goods (50.1%) and varied between zones with high leakage levels in zones 7 (74%), 2 (63%), 4 (62.7%) and 3 (49.2%) in particular. There was much lower leakage from the two main centres of Worksop (34%) and Retford (38.9%) and zone 6 (39.5%) where 34.2% was spent in local shops / centres.

3.21 Again Sheffield city centre and The Meadowhall Centre combined were the main destination in zones 1, 3 and 4 whereas Doncaster and the Lakeside Outlet Centre were the main destination in zones 2 and 7 although Gainsborough also drew significant expenditure (20%) from zone 7. In Retford (zone 5) leakage was split between Doncaster / Lakeside (13.6%), Sheffield / Meadowhall (7.2%) and Lincoln (5%). In zone 6 (Markham & Ollerton) Mansfield (13.2%), Nottingham (7.9%) and Lincoln (7.9%) were the main destinations for leakage. Overall in the study area 5.4% of expenditure for this class of goods was spent on the internet / mail order shopping which was below the comparison goods average (7.9%).

Jewellery and Watches

3.22 This was another class of goods the 2004 survey did not ask a question about. Table V shows that in 2008 25.4% of expenditure for this class of goods was spent in Worksop and 18.2% in Retford and overall 55.4% was retained within the study area. In PCA zone 1 Worksop attracted 53.2% of expenditure, 56.9% in PCA zone 3 and 20.3% in SCA zone 4. Worksop's market share in the other study area zones was much lower ranging from 0% in zone 7 to 8.7% in zone 2. In its PCA (zone 5) Retford attracted 48.4% of expenditure, 21.1% in zone 6 and 8% in zone 7. Retford's market share in the other study area zones was much lower ranging from 0% in zone 3 to 3.2% in zone 1.

3.23 Destinations for leakage varied between zones but followed similar patterns to other classes of comparison goods. Sheffield city centre and The Meadowhall Centre combined were the main destination in zones 1, 3 and 4 whereas Doncaster and the Lakeside Outlet Centre were the main destination in zones 2 and 7. In Retford (zone 5) leakage was split between Doncaster / Lakeside (10.2%) and Sheffield / Meadowhall (12.4%) and Lincoln (3.8%) to a lesser extent. In zone 6 (Markham & Ollerton) Mansfield (24.2%) was the main destination for leakage. Overall in the study area 9.6% of expenditure for this class of goods was spent on the internet / mail order shopping.

Soft Furnishings

3.24 This was another class of goods the 2004 survey did not ask a question about. Table W shows that in 2008 20.9% of expenditure on soft furnishings was spent in Worksop and 16.7% in Retford and overall 42.3% was retained within the study area. In PCA zone 1 Worksop retained 47.7% of expenditure, 36% in PCA zone 3 but only 14.1% in SCA zone 4. Worksop's market share in the other study area zones was much lower ranging from 0% in zone 7 to 8.5% in zone 2. In its PCA (zone 5) Retford retained 46.3% of expenditure, 19.6% in zone 6 and 13.6% in zone 7. Retford's market share in the other study area zones was negligible.

3.25 Leakage for this class of goods from the study area (57.7%) was above the average for comparison goods (50.1%) and varied between zones with high leakage levels in zones 7 (81.4%), 2 (81.4%), 4 (80%), 6 (60.9%) and 3 (57.3%). Only in the two main centres was there much lower leakage – Worksop (48.1%) and Retford (47.9%). Again Sheffield city centre and The Meadowhall Centre combined were the main destination in zones 1, 3 and 4 whereas Doncaster and the Lakeside Outlet Centre were the main destination in zones 2 and 7. In Retford (zone 5) leakage was split between Doncaster / Lakeside (10.9%), Sheffield / Meadowhall (7.8%) and Lincoln (8.9%). In zone 6 (Markham & Ollerton) Lincoln (10.9%) also drew a significant percentage of expenditure along with Mansfield (8.7%). Overall in the study area 11.4% of expenditure for this class of goods was spent on the internet / mail order shopping which was above the comparison goods average (7.9%).

Furniture and Carpets

3.26 Both the 2004 and 2008 surveys asked questions about this class of (bulky) goods so the survey results were comparable. The main difference between the 2004 and 2008 surveys was the slightly higher market shares for Worksop and Retford town centres and lower levels of leakage to Lincoln and Meadowhall but higher leakage to Doncaster, Sheffield and Rotherham. However, the 2004 study doesn't identify a destination for 43% of expenditure that includes those who said they didn't buy these goods or that destinations varies that were factored out of the 2008 analysis so the results were still not directly comparable. In addition the 2008 questionnaire gave a lot more destinations for respondents to chose from which will have reduced this 'other' category.

3.27 Like other bulky goods, furniture tends to generate localised shopping patterns often influenced by the presence of specialist retail warehouses, in the case of Worksop the stores at Burbage Lane (Currys, Comet, B&Q, Wickes and CarpetRight, etc.). However, there was also a town centre presence in the form of specialist retailers such as Eyres furniture store, Walmsleys and Rossingtons Carpets.

3.28 The specialist retail presence in the town centre was reflected in a higher market share than other bulky goods in all zones (25.3% in the study area) and particularly in zone 1 (53.7%). A further 11.9% of zone 1 expenditure was spent at the retail park and 1.3% elsewhere in the zone giving a retention level of 64.9%. In the wider study area 41.7% of PCA zone 3 (Whitwell / Creswell) expenditure was spent in Worksop town centre and 15.5% in SCA zone 4. Expenditure from zones Outside the catchment area varied from 0% in zones 2 and 7 to 9.4% in zone 5 (Retford).

3.29 Retford had a much lower retention level than Worksop reflecting its weaker offer for this class of goods. In addition there were no retail parks / warehouses selling furniture in Retford. In zone 5 51.3% of expenditure was spent in the town centre but there was much lower retention in the SCA zones 6 (14%) and 7 (7.1%) and the market share in other zones was negligible. Overall in the study area Retford had an 18.1% market share.

3.30 Leakage from the SCA zones varied from 88.1% in zone 7 to 62.8% in zone 6 as did destinations that were not identical to non-bulky goods destinations as the retail parks attracted a considerable proportion of the expenditure. In zones 1, 3 and 4 retail parks in Sheffield as well as the city centre were the most popular destination. However, Rotherham that has a strong retail warehouse offer also had a significant market share in these zones and in zone 4 (29.6%) in particular. In zones 2 and 7 Doncaster and surrounding retail parks were the most popular destinations although Gainsborough (16.7%) also had a significant market share in zone 7 (Bawtry / Gringley). In zone 6 Mansfield (that also has a good retail warehouse offer) was the most popular destination for leakage (27.9%) followed by Nottingham (9.3%). Overall only 2.8% of expenditure was spent on the internet / mail order for this class of goods in the study area.

Electrical Goods

3.31 This was another class of (bulky) goods that both the 2004 and 2008 surveys asked questions about so the survey results were comparable. The main difference between the 2004 and 2008 surveys was again the slightly higher market shares for Worksop (including the retail park) and Retford and lower levels of leakage to all destinations and particularly Doncaster. However, the 2004 study didn't identify a destination for 28% of expenditure so the results are still not directly comparable.

3.32 Like other bulky goods, electrical goods tend to generate localised shopping patterns influenced by the presence of specialist retail warehouses (e.g. Currys and Comet in Worksop) but a high proportion were also bought via the internet / mail order (12.5% in the study area). The retail warehouses in Worksop accounted for 28.7% of expenditure in the study area and drew significant trade from across the study area reflecting a weaker offer elsewhere.

3.33 In zone 1 Worksop town centre accounted for 26.7% of expenditure and the retail parks 44.3%. In PCA zone 3 the Worksop retail parks had 51.6% market share but only 15.1% was spent in the town centre and in SCA zone 4 28.1 % was spent in the retail parks but only 11.2% in the town centre. Elsewhere in the study area the town centre's market share was fairly low ranging from 0% in zones 6 and 7 to 4.8% in zone 2. However, the retail parks had a significant market share throughout the study area (overall 28.7%) and outside the catchment area it ranged from 8.2% in zones 6 and 7 to 17.3% in Retford (zone 5).

3.34 Retford had a much lower retention level than Worksop reflecting its weaker offer for electrical goods. In addition there were no retail parks / warehouses selling these goods in Retford. In zone 5 41.9% of expenditure was spent in the town centre but there was much lower retention in the SCA zones 6 (14.3%) and 7 (6.6%) and the market share in other zones was negligible. Overall in the study area Retford had a 13.9% market share.

3.35 Leakage from the SCA zones varied from 82% in zone 7 to 52.8% in zone 4 as did destinations that again were different to non-bulky goods destinations as the retail parks attracted a considerable proportion of the expenditure. In zones 1, 3 and 4 retail parks in Sheffield as well as the city centre were the most popular destination. However, Rotherham that has a strong retail warehouse offer also had a significant market share in these zones and in zone 4 (21.3%) in particular. In zones 2 and 7 Doncaster and surrounding retail parks were the most popular destinations although Gainsborough (14.8%) also had a significant market share in zone 7 (Bawtry / Gringley). In zone 6 Mansfield (that also has a good retail warehouse offer) was the most popular destination for leakage (34.7%) followed by Nottingham (9.3%). Overall 12.5% of expenditure was spent on the internet / mail order for electrical goods in the study area.

DIY Goods

3.36 This final class of (bulky) goods generated the most localised of shopping patterns with very low internet / mail order sales (1.6%). Both the 2004 and 2008 surveys asked questions about DIY shopping destinations so the survey results were comparable. The main difference between the 2004 and 2008 surveys was the slightly higher market share for Worksop and significantly higher share for Retford town centres and lower levels of leakage to most destinations. However, the 2004 study didn't identify a destination for 24% of expenditure and it was unclear whether the Focus Store at Retford was included within the town or town centre's market share so the results may still not be directly comparable.

3.37 In zone 1 (Worksop) 32% of expenditure was spent in the town centre and 58.9% in the retail parks (B&Q and Wickes). An even higher percentage (64.6%) was attracted from PCA zone 3 (Whitwell / Creswell) to the Worksop retail parks which was unusual in that they are on the far side of the town from this zone but there was less expenditure spent in the town centre (22%). In SCA zone 4 17.9% of expenditure was spent in the town centre and 46.2% in the retail parks. Outside the catchment area the town centre had much lower market shares ranging from 0% in zone 7 to 7.5% in Retford (zone 5) but the Worksop retail parks enjoyed a much greater share and overall 33.4% of DIY expenditure in the study area was spent here.

3.38 Retford had a much lower retention level than Worksop reflecting its weaker offer for DIY goods. In addition there is only one retail warehouse selling DIY goods in Retford compared to two in Worksop. In zone 5 45.3% of expenditure was spent in the town centre and 24% in the retail parks but there was lower retention in the SCA zones 6 (19.5%) and 7 (10.4%) for the combined town centre / retail warehouse offer and the market share in other zones was negligible. Overall in the study area Retford town centre had a 15.3% market share and the retail park 8.1%.

3.39 Leakage from the SCA zones varied from 74.1% in zone 7 to 33.3% in zone 4 as did destinations that were similar to other bulky goods destinations as the retail parks attracted a considerable proportion of the expenditure. In zone 1 there was more leakage to Doncaster than Sheffield which was a reverse of the shopping patterns for most classes of goods. In zone 3 there was very little leakage and it was widely distributed. In zone 4 retail parks in Sheffield as well as the city centre were the most popular destination. However, Rotherham that has a strong retail warehouse offer also had a reasonable market share in zone 4 (9%). In zones 2 and 7 Doncaster and surrounding retail parks were the most popular destinations although again Gainsborough (24.7%) also had a significant market share in zone 7 (Bawtry / Gringley). In zone 6 Mansfield (that also has a good DIY offer) was the most popular destination for leakage (29.3%) followed by Lincoln (7.3%) and Gainsborough (4.9%). Overall only 1.6% of expenditure was spent on the internet / mail order for this class of goods in the study area.

Overall Comparison Goods Market Share in the Study Area

3.40 The overall results of the various classes of comparison goods were combined weighting them by the proportion of comparison goods expenditure given over to each class within the study area as recorded by Experian. The overall results are shown in Table K. This indicates that just under half (49.9%) of comparison goods expenditure was retained within the study area. Worksop (18.4%) was the most popular comparison goods destination within the study area followed by Retford (15.3%) and Worksop Retail Parks (9.7%).

3.41 In terms of leakage, Doncaster town centre (10%) was the most frequent destination (13.3% combined with surrounding retail parks and the outlet centre, followed by Meadowhall (9.2%) and Sheffield City Centre (5.8%) (Sheffield and Meadowhall combined were 15%). 7.9% of comparison goods expenditure in the study area was spent on the internet / mail order which is below the Experian estimated national average of 11.3% for 2008. As with the various classes of goods shopping patterns within zones and leakage from them varies considerably in the different zones from 81.4% in zone 7 (Bawtry / Gringley) to 37.7% in Worksop (zone 1).

3.42 In zone 1 (Worksop) the town centre (39.1%) followed by the retail parks (15.5%) had the greatest market share and 62.3% was retained within the study area. The most popular destination for leakage was Meadowhall (11.2% or 17.9% combined with the city centre (6.3%) and retail parks (0.4%)) followed by Doncaster (5.7% or 7% combined with the outlet centre (0.7%) and retail parks (0.6%)). Zone 1 forms the PCA for Worksop town centre.

3.43 In zone 2 (Harworth / Bircotes) 74.8% of expenditure leaked mainly to Doncaster (40.7%), surrounding retail parks (7.7%) and the Lakeside Outlet Centre (3.6%). A further 6.9% leaked to Meadowhall and 1.9% to Sheffield city centre. Of the 25.2% comparison goods expenditure that was retained 11.6% was spent in local centres / shops, 6.2% in Worksop, 3.9% in Worksop retail parks and 2.7% in Retford town centre. Clearly this zone forms part of Doncaster's catchment area rather than that of Worksop or Retford.

3.44 In zone 3 (Whitwell / Creswell) 55.5% of expenditure was retained within the study area. 32.9% was spent in Worksop town centre, 17.7% in Worksop retail parks and 4.2% in local centres / shops. Of the 44.5% comparison goods expenditure that leaked from the study area 19% was spent in either or Sheffield city centre (9.6%) or Meadowhall (9.4%), 5.5% in Chesterfield and 4.9% in Mansfield. For comparison goods this zone appears to form part of Worksop's PCA although, as shown earlier, less so for convenience goods.

3.45 In zone 4 (Anston / Dinnington) 67% of expenditure leaked mainly to Meadowhall (23.5%) and Sheffield city centre (15.3%). A further 10% leaked to Rotherham and 5.6% to retail parks there. Of the 33% comparison goods expenditure that was retained 14.7% was spent in Worksop, 11.1% in Worksop retail parks and 4.2% in local centres / shops. This zone appears to form a SCA for Worksop but also overlaps with the catchment areas of the higher tier centres of Sheffield / Meadowhall and Rotherham.

3.46 In Retford (zone 5) the town centre (42%) had the greatest market share and 55.8% was retained within the study area. Worksop town centre (4%) and retail parks (4.8%) drew some trade from Retford, 2% was spent in local retail warehouses and 2.4% in other centres / stores within zone 5. The most popular destination for leakage was Doncaster (9.5% or 13.4% combined with the outlet centre (2.3%) and retail parks (1.6%)). Sheffield / Meadowhall (3.7%), Lincoln (6.3%), Nottingham (1.4%) and Gainsborough (1.2%) drew trade from zone 5 to a lesser extent.

3.47 In zone 6 (Markham / Ollerton) 60.1% of expenditure leaked mainly to Mansfield (25.1%), Lincoln (8%), Nottingham (5.9%) and Newark (4.6%). A further 2.9% leaked to Doncaster and 2.2% to Meadowhall / Sheffield city centre. Of the 39.9% comparison goods expenditure that was retained 17.5% was spent in Retford, 7.8% in local centres / shops, 6% in Ollerton, 4.5% in Worksop and 3.2% in Worksop retail parks. This zone appears to form part of Mansfield's catchment more than of Retford or Worksop.

3.48 In zone 7 (Bawtry / Gringley) 81.4% of expenditure leaked mainly to Doncaster (28%) (37.6% including retail parks (5.9%) and Lakeside Outlet (4.7%)), Gainsborough (12.5%), Sheffield / Meadowhall (8.4%) and Lincoln (4.5%). Of the 18.6% comparison goods expenditure that was retained 7.8% was spent in Retford, 7% in local centres / shops and 2% in Worksop retail parks. This zone appears to form part of Doncaster's catchment, overlapping with that of Gainsborough, more than that of Retford or Worksop.

Worksop Comparison Goods Catchment Area

3.49 Worksop town centre draws most of its trade from zone 1, however, it also enjoys the greatest market share of any centre in zone 3 (Whitwell / Creswell) particularly when combined with the retail parks. Zone 3 therefore also forms part of the PCA of Worksop. Zone 4 (Anston / Dinnington) appears to be part of the Sheffield / Meadowhall catchment but Worksop and Rotherham also significant draw trade from this zone and in the case of Worksop it also forms part of the SCA. Zone 2 (Harworth / Bircotes) forms part of Doncaster's catchment area rather than Worksop which only draws a small amount of trade from here. The PCA for Worksop for comparison goods is therefore formed by zones 1 and 3 and zone 4 forms a SCA although for the purposes of this study zone 2 is also treated as a (weak) SCA zone.

Retford Comparison Goods Catchment Area

3.50 Retford town centre draws most of its trade from zone 5 and does not have the greatest market share of any centre in any other zone within the study area. The town centre does draw some trade from zone 6 (Markham / Ollerton) but this zone appears to form part of Mansfield's catchment more than Retford or Worksop. Retford draws less trade from zone 7 (Bawtry / Gringley) that really forms part of the catchment of Doncaster and Gainsborough to a lesser extent. The PCA for Retford for comparison goods is therefore formed by zone 5 alone with zones 6 and 7 forming a weak SCA shared with competing centres.

4.0 Perceptions of Worksop as a Shopping Centre

4.1 Questions 18 to 23 in the household survey asked respondents about how frequently they visited Worksop town centre (Q18), for those who never visited the town centre their reasons (Q19), whether shopping trips were combined with other activities (Q20), how satisfied people were with Worksop as a town centre (Q21), what they particularly liked (Q22) and dislike (Q23) about Worksop town centre.

4.2 The result can be cross referenced to the visitor survey although they are not directly comparable as the household survey included people who rarely / never visited Worksop whereas the visitor survey is likely to sample more frequent visitors. One of the purposes of the visitor survey was to record the postcode origin of visitors to inform the extent of the household survey and study area.

4.3 The household survey recorded less frequent visiting rates (61% weekly or more frequent) than the visitor survey (88% weekly or more often) as it included people who live in the secondary catchment and are more likely to shop elsewhere than people actually stopped and interviewed within the town centre as part of the visitor survey.

4.4 Positive aspects of the centre rated by visitors included the range of banks and financial services (153 on a 100 average index), the ease of walking around (150) and the variety of places to eat and drink (147). Other positive aspects included access by bus (144), access by car (142) and signposting within the centre. There was only one negative issue raised in the visitor survey responses and that was the quality of the market (84) although the frequency and location both scored positively.

4.5 Positive aspects of the centre recorded in the household survey included the convenience of the centre (34%), the range and choice of shops (8%), familiarity with the centre (5%), good parking (4%), the environment (4%) and the pedestrianised area (2%). Unpopular aspects of the centre included the lack of a department / variety stores (14%), the limited choice and range of shops (11%), the cost and availability of parking (11%), the poor quality environment (8%) and the discount / budget orientation of many shops (8%). However, 32% of respondents were wholly positive in their response.

4.6 Respondents in the household survey who didn't visit Worksop (13%) were asked 'why not?' and the most common reasons were the time taken to get there (27%), the poor quality and choice of goods in shops (12%), difficulty in parking (7%), the unattractive environment (7%) and too few major retailers (5%).

The Visitor Survey

4.7 The visitor survey also asked questions about the mode of travel to the centre (Q1), where they came from (Q21 and Q22); frequency of visits (Q2); length of time spent in the centre (Q3); purpose of trip to centre (Q4); perceptions of safety (Q5, Q8 and Q9); whether people visited the centre at night (Q6) and what for (Q7); whether the centre was the mainfood shopping destination (Q10) and if not where they shopped (Q11); whether people are likely to use the new Tesco in Worksop as their mainfood store (Q12); how they rated various aspects of the centre (Q13) and areas for improvement (Q14); which was their favourite store in Worksop (Q15); which new shops (Q16) and leisure facilities (Q17) they would like to see in the town centre; use of the market (Q18) and how it could be improved (Q19); and, whether Bridge Street should be closed to traffic (Q20).

Origin of Visitors

4.8 The visitor survey found that 80% of visitors to Worksop came from postcode areas S80 or S81, the two postcode areas that comprise the primary catchment area (PCA) zones 1 and 3. In terms of the breakdown between the two PCA zones 64% came from zone 1, the main urban area of Worksop, and 16% came from zone 3, the Whitwell Creswell area to the south of the town. The remaining 20% of visitors came from elsewhere in the study area or beyond.

Purpose of Trip

4.9 In a multiple response question the most common reason given for visiting Worksop was for non-food shopping (59%) followed by food shopping (44%), meeting friends / relatives (17%), eating out (10%), visiting the bank / building society (10%) or going to work (7%).

4.10 The household survey also asked which other activities people undertook in Worksop when shopping there. The most frequent response was personal business (27%) such as visiting the bank, building society, doctor, hospital, post office, etc. followed by visiting restaurants, cafes, pubs or other social places (15%). Other frequent responses were visiting the market (12%), meeting friends / relatives (11%) and visiting the retail park (10% – presumably carborne lined trips to Sandy Lane). Only 12% of visitors did not combine their shopping trip with another activity whilst in the town centre.

4.11 Clearly shopping is the most important reason for visiting the town centre but most visitors are also undertaking combined trips, with visits to businesses other than shops highlighting the importance of diversity in the town centre offer.

Mainfood Shopping Destinations

4.12 52% of respondents to the visitor survey advised the town centre was their mainfood shopping destination. Of the 48% who shopped elsewhere the Morrisons at Retford was the most frequent response (20%) followed by the Worksop Sainsbury's store (18%) and the Worksop Tesco (13%), the Retford Asda (5%) and Tesco Dinnington (5%). The results differ from the household survey where Tesco had the greatest market share within the PCA.

4.13 Responses to Q12 on whether visitors are likely to make the new Tesco store their mainfood shopping destination indicate the proposed relocation of the existing store is likely to increase its market share. 30% of respondents indicated they were likely to make the new Tesco their mainfood destination, compared to the current 13%, and a further 24% indicated they might make it their mainfood shopping destination.

Views on Worksop Town Centre

4.14 The visitor survey recorded that most respondents were fairly frequent visitors (88% weekly or more often) but didn't spend very long in the centre (72% no more than 2 hours). Nearly half the visitors (46%) had travelled by car, 27% had walked and 22% came on the bus. The most common reason for visiting was non-food shopping (mentioned by 59% of visitors in a multiple response Q4) followed closely by food shopping (44%), meeting friends / relatives (16%), visiting the bank / building society (10%), eating out (10%) and browsing / window shopping (9%).

4.15 Positive aspects of the centre rated by visitors included the range of banks and financial services (153 on a 100 average index), the ease of walking around (150) and the variety of places to eat and drink (147). Other positive aspects included access by bus (144), access by car (142) and signposting within the centre. There was only one negative issue raised in the visitor survey responses and that was the quality of the market (84) although the frequency and location both scored positively.

Perceptions of Safety

4.16 The visitor survey recorded 84% of respondents felt safe in the centre during the day. 25% of respondents also visited at night mainly to go to pubs (94%) and / or eating out (32%) and / or late night shopping (10%). Most of these evening visitors (68%) felt safe in the evening too and those who didn't gave fear for their personal safety as the main reason for not feeling safe.

4.17 The business survey also recorded most businesses felt the centre was safe during the daytime (scoring 127 on a 100 average index) but less so in the evening (102 just above average). The business survey also recorded security problems (8%) as the third biggest problem for businesses in the centre after low footfall (23%) and car parking (10%), however, 49% of respondents couldn't think of any problems with the centre. Security improvements such as more policing / CCTV were recorded as the highest priority for investment in the business survey.

4.18 There appears to be a slight security problem in Worksop although this may be no worse than any other shopping centre as it is part of a national problem. For shoppers during the daytime there appear to be no major security problems, however, the low numbers visiting at night and the feeling of insecurity amongst some who do suggests there is a problem in the evening although again this is not unique to Worksop.

Areas for Improvement

4.19 The market in the town centre was fairly popular in terms of visitor levels with 42% visiting it and a further 17% occasionally visiting it. However, 41% of respondents thought it needed to be bigger with more stalls and 31% of respondents thought it needed a greater variety of stalls and 17% thought it could be in a better location and 2% suggested it should be under cover. In addition, 88% of respondents in the visitor survey thought that Bridge Street should be completely closed to traffic.

Satisfaction with Shopping in Worksop

4.20 The visitor survey recorded more satisfied shoppers (49.5%) than dissatisfied (30.5%). However, there were more very dissatisfied shoppers (11%) than very satisfied (7.5%). Combined with the people in the catchment area recorded in the household survey who rarely or never visit Worksop this indicates fairly high dissatisfaction levels with the current shopping offer in the town centre that need to be addressed if the centre is to become more competitive.

4.21 Overall the visitor surveys recorded generally positive views of the centre although there are clearly some problems with the centre such as safety and security, the quality of the market and availability of parking. The town centre is clearly an attractive place to visit and shop in, as recorded in the positive responses in the survey. There are many positive aspects to the centre recognised by businesses and visitors alike, although the limited shopping offer is a problem as this is the main function of the centre.

5.0 Worksop Town Centre Business Survey

5.1 The business survey questionnaires were completed by 100 (30%) of the 330 businesses in Worksop town centre. A few of the questions in the business survey were the same as a earlier business survey undertaken in Worksop in two previous years that allows a degree of comparison between surveys such as on business performance / confidence.

5.2 Retail businesses were slightly over-represented amongst respondents to the business survey – 58% of respondents compared to 46% of businesses in the centre recorded in the Experian Goad category report. Most respondents were long established businesses – 59% over ten years and a further 11% over five years. In terms of why businesses were located in Worksop town centre (Q7) most were for commercial reasons – the local market, accessibility, high footfall and proximity of other businesses. Together the responding businesses employed c. 1,000 people of whom over half worked full time.

Business Confidence and Investment Plans

5.3 The survey recorded a decline in business confidence in the centre in the last year particularly compared to the earlier studies with 57% stating it had declined and only 18% stating it had improved. However, only 15% of respondents reported currently poor trading performance and 35% reported it had declined in the last year whilst only 26% reported an improvement. Overall future business confidence in the centre looks like improving according to 32% of respondents with only 19% expecting a decline. Clearly there are mixed fortunes in the centre at the moment and business confidence has taken a dip but local businesses are still optimistic about the future.

5.4 Very few respondents had plans to refit, extend or improve their premises (4%), 6% intended to relocate within new premises within the centre and 1% intended to close but the vast majority (87%) had no plans. This perhaps reflects the uncertainty of the national economic climate as much as local conditions in Worksop town centre.

Perceptions of Worksop as a Business Location

5.5 Businesses were also asked to rate Worksop as a shopping centre on various criteria and these were converted to 100 average index for comparison. This indicated that affordable rent was regarded as being of some benefit to Worksop town centre as a business location (110 on the 100 average index) behind accessibility, variety of shops and the local market. Conversely, rents and overheads were reported as the fourth highest problem in the centre after low footfall, availability of car parking and security issues although nearly half the respondents (49%) did not list a single disadvantage.

5.6 In terms of positive aspects of Worksop as a location, responses to Q13 indicated accessibility and the strength of the local market as the main benefit, followed by the variety of shops, local workforce and the presence of other businesses. Respondents were also asked to rank various aspects of the centre and these indicated that the most positive aspect was the safety during the daytime (127 on an average 100 index). Other positive aspects included street cleaning (126), the upkeep and appearance of older buildings (126), town centre management and maintenance (125), co-operation between businesses (125) and the quality of parks and open spaces (119). Negative aspects of Worksop as a business location included the lack of events (93), the limited leisure offer (97), the lack of interest from the Council / Local Authorities (98) and security and crime (97). On balance businesses reported far more positive aspects than negative.

Priorities for Investment in Worksop

5.7 In response to Q19 on what improvements to the centre businesses would like to see, security measures such as CCTV and policing were ranked highest (139) followed by car parking improvements (131), an effective town centre forum (123), better marketing and promotion (121), an events and special promotions programme (114), business support / advice (105) and better delivery arrangements (105). The redevelopment of the market area for new shopping floorspace (105) was ranked as the joint 6th priority. Lesser priorities included improved street cleaning (103) 9th, shop front improvements (93) 10th, the complete pedestrianisation of Bridge Street (88) 11th and streetscape improvements to Bridge Street (69) 12th.

Safety and Security Issues

5.8 The business survey also recorded most businesses felt the centre was safe during the daytime (scoring 127 on a 100 average index) but less so in the evening (102 just above average). The business survey also recorded security problems (8%) as the third biggest problem for businesses in the centre after low footfall (23%) and car parking (10%), however, 49% of respondents had no problems with the centre. Security improvements such as more policing / CCTV were recorded as the highest priority for investment in the business survey.

Conclusions

5.9 Overall the business survey recorded generally positive views of the centre although there are clearly some problems such as safety and security and availability of parking. The town centre management team was seen as a positive aspect of the centre by businesses although the suggestions for investment in events programmes and better marketing and promotion suggest the business community want to see the team performing a wider role. The town is clearly an attractive place to visit and shop in as recorded in the positive responses in the survey.

6.0 Perceptions of Retford as a Shopping Centre

6.1 In zones 5 to 7 questions 18 to 23 in the household survey also asked respondents about how frequently they visited Retford town centre (Q18), for those who never visited the town centre their reasons (Q19), whether shopping trips were combined with other activities (Q20), how satisfied people were with Retford as a town centre (Q21), what they particularly liked (Q22) and dislike (Q23) about Retford town centre. Again the results can be cross referenced to the visitor survey, however, they are not directly comparable as the household survey included people who rarely / never visited Retford whereas the visitor survey is likely to sample more frequent visitors.

6.2 Positive aspects of the centre rated by visitors included access by bus (152 on a 100 average index), the ease of walking around (152) and the variety of places to eat and drink (148). Other positive aspects included the range of banks and financial services (146), access by car (145), the choice of food shops and supermarkets (144) and signposting within the centre (142). Like responses to a similar question in the business survey, visitors did not give negative scores to any aspect of the centre.

6.3 Positive aspects of the centre recorded in the household survey included the convenience of the centre (30%), the compactness of the centre (14%), the range and choice of shops (10%), the environment (9%), the market (8%), good parking (5%) and familiarity with the centre (4%). Unpopular aspects of the centre recorded in the household survey included the cost and availability of parking (17%), the lack of a department / variety stores (8%), the limited choice and range of shops (7%), the discount / budget orientation of many shops (7%) and access difficulties such as congestion (3%). However, 40% of respondents in the Retford visitor survey were wholly positive in their responses.

6.4 Respondents in the household survey who didn't visit Retford (6%) were asked 'why not?' and preferring to shop in other centres was the most common reason (22%) followed by the distance to the centre (12%), the poor quality and choice of goods in shops (12%) and the difficulty in parking (4%).

The Visitor Survey

6.5 The visitor survey also asked questions about the mode of travel to the centre (Q1), where they came from (Q21 and Q22); frequency of visits (Q2); length of time spent in the centre (Q3); purpose of trip to centre (Q4); perceptions of safety (Q5, Q8 and Q9); whether people visited the centre at night (Q6) and what for (Q7); whether the centre was the mainfood shopping destination (Q10) and if not where they shopped (Q11); whether they shopped regularly at Marshall's Yard in Gainsborough (Q12), how they rated various aspects of the centre (Q13) which was their favourite store in Retford (Q15); which new shops (Q16) and leisure facilities (Q17) they would like to see in the town centre; use of the market (Q18) and how it could be improved (Q19).

Origin of Visitors

6.6 The visitor survey found that 72% of visitors to Retford came from the PCA zone 5 (postcode area DN22), 5% came from the SCA zones 6 and 7 (postcode areas DN10 and NG22) and the remaining 23% of visitors came from elsewhere in the study area or beyond.

Purpose of Trip

6.7 In a multiple response question the most common reason given for visiting Retford was for non-food shopping (48%) followed by food shopping (41%), visiting the bank / building society (29%), browsing / window shopping (26%), meeting friends / relatives (24%), going to work (11%) or eating out (5%).

6.8 The household survey also asked which other activities people undertook in Retford when shopping there. The most frequent response was personal business (24%) such as visiting the bank, building society, doctor, hospital, post office, etc. followed by visiting the market (22%). Other frequent responses were visiting restaurants, cafes, pubs or other social places (16%), meeting friends / relatives (12%), visiting the Library (8%) and visiting the theatre (5%). Only 3% of visitors did not combine their shopping trip with another activity whilst in the town centre.

6.9 Clearly shopping is the most important reason for visiting the town centre but nearly all visitors are undertaking combined trips with visits to businesses and leisure services other than shops highlighting the importance of diversity in the town centre offer.

Mainfood Shopping Destinations

6.10 42% of respondents to the visitor survey advised the town centre was their mainfood shopping destination. Of the 58% who shopped elsewhere the Asda store was the most frequent response (45%) followed by Morrisons (12%) and the remainder shopped in a wide range of destinations.

Views on Retford Town Centre

6.11 The visitor survey recorded that most respondents were fairly frequent visitors (78% weekly or more often) but didn't spend very long in the centre (69% no more than 2 hours). The household survey recorded a comparable visiting frequency rate – 77% weekly or more frequent. Over half the respondents in the visitor survey (57%) had travelled by car, 35% had walked and only 2% came on the bus. The most common reason for visiting was non-food shopping (mentioned by 48% of visitors in a multiple response Q4) followed closely by food shopping (41%), visiting the bank / building society (29%), browsing / window shopping (26%), meeting friends / relatives (24%), to work (11%) and eating out (5%).

6.12 Positive aspects of the centre rated by visitors included access by bus (152 on a 100 average index), the ease of walking around (152) and the variety of places to eat and drink (148). Other positive aspects included the range of banks and financial services (146), access by car (145), the choice of food shops and supermarkets (144) and signposting within the centre (142). Like responses to a similar question in the business survey, visitors did not give negative scores to any aspect of the centre.

Perceptions of Safety

6.13 The visitor survey recorded 94% of respondents felt safe in the centre during the day. 32% of respondents also visited at night mainly to go to pubs (83%) and / or eating out (55%) and / or to get a take-away meal (35%) and / or late night shopping (23%) and / or to visit the theatre (13%). Nearly all of these evening visitors (90%) felt safe in the evening too and those who didn't gave the presence of threatening individuals / groups as the main reason for not feeling safe.

6.14 The business survey also recorded most businesses felt the centre was safe during the daytime (scoring 155 on a 100 average index) and slightly less safe in the evening (130). The business survey also recorded very few security problems in the centre although security improvements such as more policing / CCTV were recorded as the fourth highest priority for investment. Overall Retford town centre appears to be a very safe place.

Areas for Improvement

6.15 Suggested areas for improvement in Retford included more policing (12%), the condition and surface of the pedestrianised area (10%), better cleaning services (6%) and a wider range of clothes shops (6%). The open market in the town centre was very popular in terms of visitor levels with 50% visiting it regularly and a further 12% occasionally visiting it. Only 22% of visitors thought it could be improved mainly through a wider variety / range of stores.

Satisfaction with Shopping in Retford

6.16 The household survey recorded far more satisfied shoppers (72%) than dissatisfied (14%) and there were also far more very satisfied shoppers (21%) than very dissatisfied (7%). There were very few people in the catchment who rarely or never visit Retford indicating fairly high satisfaction levels with the centre.

6.17 Overall the visitor surveys mostly recorded very positive views of the centre although there are some problems with the choice and range of shops and the availability of parking. The town centre is clearly an attractive place to visit and shop in as recorded in the positive responses in the visitor and household surveys.

7.0 Retford Town Centre Business Survey

7.1 The business survey questionnaires were completed by 76 (33%) of the 230 businesses in Retford town centre. In addition a visitor survey was also undertaken by NEMS Market Research with a sample of 125 respondents.

7.2 Retail businesses were slightly under-represented amongst respondents to the business survey – 42% of respondents compared to 51% of businesses in the centre recorded in the Experian Goad category report. Most respondents were long established businesses – 59% over ten years and a further 18% over five years. In terms of why businesses were located in Retford town centre (Q7) most were for commercial reasons – the local market, accessibility, high footfall and proximity of other businesses. Together the responding businesses employed c. 700 people of whom over 400 worked full time.

Business Confidence and Investment Plans

7.3 The business survey recorded a decline in business confidence in the centre in the last year with 41% stating it had declined and only 18% stating it had improved. Overall future business confidence in the centre looks like improving according to 33% of respondents with fewer (25%) expecting a decline. Clearly there are mixed fortunes in the centre at the moment and business confidence has fallen but many local businesses are still optimistic about the future.

7.4 Very few respondents had plans to refit, extend or improve their premises (7%), 4% intended to relocate within new premises within the centre and 3% intended to close but the vast majority (84%) had no plans. This perhaps reflects the uncertainty of the national economic climate as much as local conditions in Retford town centre.

Perceptions of Retford as a Business Location

7.5 In terms of positive aspects of Retford as a location, responses to Q13 indicated accessibility and the strength of the local market as the main benefit, followed by the road network, local workforce, the presence of other businesses and the variety of shops. Respondents were also asked to rank various aspects of the centre and these indicated that the most positive aspect was the parks and opens spaces (163 on a 100 average index). This reflects the quality of the town centre environment and the proximity of Kings Park with the river running through it.

7.6 The survey indicated that affordable rent was regarded as a benefit of Retford town centre as a business location behind accessibility, variety of shops and the local market. Businesses were asked to rate Retford on various criteria including rents / rates and they gave it a 125 score on a 100 average index. Conversely, rents and overheads were reported as the second highest problem in the centre after low footfall although nearly half the respondents (49%) did not list a single disadvantage.

7.7 Other positive aspects of Retford town centre recorded in the business survey included safety during the daytime (155), street cleaning (152) and town centre management and maintenance (148). In fact businesses in Retford were much more positive about their town centre than businesses in Worksop and all responses were well above the 100 average. The least positive aspect of the centre was the leisure and entertainment offer (102).

7.8 Accessibility for staff and customers was also seen as a key strength of the centre and 52% of respondents reported good bus services were a benefit to their business but the availability of parking was considered to be poor by 25% and very poor by 21%.

Priorities for Investment in Retford

7.9 In response to Q19 on what improvements to the centre businesses would like to see better marketing and promotion was ranked highest (147), an effective town centre forum (144), improved car parking (140) and security measures such as TV and policing (137).

Safety and Security Issues

7.10 The business survey also recorded most businesses felt the centre was safe during the daytime (scoring 155 on a 100 average index) and slightly less safe in the evening (130). The survey also recorded very few security problems in the centre although security improvements such as more policing / CCTV were recorded as the fourth highest priority for investment.

Conclusions

7.11 Overall the business survey recorded very positive views of Retford town centre with very few problems mentioned although there are obviously some concerns related to the state of the national economy. Like Worksop, the town centre management team was seen as a very positive aspect of the centre by businesses although the suggestions for priority investment in better marketing and promotion and a more effective town centre forum suggest the business community want to see the team performing a wider role. The town is a very attractive place to visit and live in as recorded in the positive responses in both surveys. There are many positive aspects to the centre recognised by businesses and visitors alike with very few negative comments and Retford town centre is obviously a very successful business location.

Convenience Goods Market Share Analysis

Main Food Shopping Market Share in the Study Area, 2008 — **Table F**

	Zone of Origin								
Zone	**Destination**	1	2	3	4	5	6	7	SA
1	Worksop Town Centre	5.0%	0.0%	2.1%	0.0%	0.0%	0.0%	0.0%	1.7%
1	Netto, Worksop	9.3%	1.4%	5.2%	0.0%	0.0%	0.0%	0.0%	3.4%
1	Tesco, Worksop	49.8%	2.7%	20.6%	10.9%	0.7%	2.0%	0.0%	18.4%
1	Sainsburys, Worksop	17.4%	1.4%	26.8%	10.9%	1.4%	0.0%	0.0%	9.4%
1	Aldi, Worksop	2.8%	1.4%	3.1%	1.1%	0.0%	0.0%	0.0%	1.4%
1	Local centres / shops in zone 1	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%
2	Co-op, Harworth / Bircotes	0.0%	10.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%
2	Local centres / shops in zone 2	0.0%	6.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%
3	Local centres / shops in zone 3	0.0%	0.0%	4.1%	0.0%	0.0%	0.0%	0.0%	0.4%
4	Tesco, Dinnington	1.4%	0.0%	0.0%	50.0%	0.0%	0.0%	0.0%	5.2%
4	Local centres / shops in zone 4	0.0%	0.0%	0.0%	6.5%	0.0%	0.0%	0.0%	0.6%
5	Retford Town Centre	0.4%	1.4%	0.0%	0.0%	4.8%	0.0%	0.0%	1.7%
5	Morrisons, Retford	6.4%	8.1%	1.0%	0.0%	49.8%	9.8%	31.3%	20.6%
5	Asda, Retford	1.4%	1.4%	0.0%	0.0%	35.1%	17.6%	3.0%	12.4%
5	Local centres / shops in zone 5	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	0.1%
6	Ollerton	0.0%	0.0%	0.0%	0.0%	0.7%	58.8%	0.0%	3.4%
6	Local centres / shops in zone 6	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
7	Local centres / shops in zone 7	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.0%	0.4%
SA	Internet / Mail Order	0.7%	0.0%	3.1%	2.2%	2.1%	2.0%	1.5%	1.6%
	Total Study Area	**96.8%**	**35.1%**	**66.0%**	**81.5%**	**94.8%**	**90.2%**	**41.8%**	**82.6%**
L	Doncaster	1.1%	52.7%	0.0%	1.1%	1.7%	0.0%	31.3%	7.2%
L	Clowne	0.0%	0.0%	28.9%	1.1%	0.0%	0.0%	0.0%	3.0%
L	Gainsborough	0.0%	1.4%	0.0%	0.0%	3.4%	2.0%	26.9%	3.1%
L	Rotherham	0.7%	4.1%	0.0%	12.0%	0.0%	0.0%	0.0%	1.7%
L	Leakage Elsewhere	1.4%	6.8%	5.2%	4.3%	0.0%	7.8%	0.0%	2.3%
L	**Total Leakage**	**3.2%**	**64.9%**	**34.0%**	**18.5%**	**5.2%**	**9.8%**	**58.2%**	**17.4%**
	TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Top-up Food Shopping Market Share in the Study Area, 2008 — **Table G**

	Zone of Origin								
Zone	**Destination**	1	2	3	4	5	6	7	SA
1	Worksop Town Centre	25.1%	0.0%	6.5%	1.5%	0.5%	2.6%	0.0%	8.9%
1	Netto, Worksop	9.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.0%
1	Tesco, Worksop	31.1%	0.0%	9.7%	5.9%	0.5%	0.0%	0.0%	11.3%
1	Sainsburys, Worksop	13.2%	0.0%	16.1%	0.0%	0.5%	0.0%	0.0%	5.7%
1	Aldi, Worksop	1.8%	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%	0.7%
1	Local centres / shops in zone 1	13.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.1%
2	Co-op, Harworth / Bircotes	1.4%	33.3%	0.0%	0.0%	0.5%	0.0%	4.1%	3.4%
2	Local centres / shops in zone 2	0.0%	44.4%	0.0%	1.5%	0.0%	0.0%	0.0%	3.6%
3	Local centres / shops in zone 3	0.0%	0.0%	43.5%	0.0%	0.0%	0.0%	0.0%	3.9%
4	Tesco, Dinnington	1.8%	0.0%	1.6%	61.8%	0.5%	0.0%	0.0%	6.9%
4	Local centres / shops in zone 4	0.0%	0.0%	0.0%	20.6%	0.0%	0.0%	0.0%	2.0%
5	Retford Town Centre	0.0%	0.0%	0.0%	0.0%	21.9%	7.7%	2.0%	7.1%
5	Morrisons, Retford	0.0%	1.9%	0.0%	0.0%	33.8%	2.6%	6.1%	10.9%
5	Asda, Retford	0.5%	0.0%	0.0%	0.0%	18.6%	0.0%	2.0%	5.9%
5	Local centres / shops in zone 5	0.0%	0.0%	0.0%	0.0%	7.6%	0.0%	0.0%	2.3%
6	Ollerton	0.0%	0.0%	0.0%	0.0%	1.4%	79.5%	0.0%	4.9%
6	Local centres / shops in zone 6	0.0%	0.0%	0.0%	0.0%	0.0%	5.1%	0.0%	0.3%
7	Local centres / shops in zone 7	0.5%	0.0%	1.6%	0.0%	0.0%	0.0%	55.1%	4.1%
SA	Internet / Mail Order	0.0%	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%	0.1%
	Total Study Area	**98.2%**	**79.6%**	**82.3%**	**91.2%**	**85.7%**	**97.4%**	**69.4%**	**89.0%**
L	Doncaster	0.0%	16.7%	0.0%	0.0%	11.9%	0.0%	12.2%	5.7%
L	Clowne	0.0%	0.0%	11.3%	0.0%	0.0%	0.0%	0.0%	1.0%
L	Gainsborough	0.0%	0.0%	0.0%	1.5%	1.9%	2.6%	14.3%	1.7%
L	Rotherham	0.9%	3.7%	0.0%	5.9%	0.0%	0.0%	0.0%	1.1%
L	Leakage Elsewhere	0.9%	0.0%	6.5%	1.5%	0.5%	0.0%	4.1%	1.4%
L	**Total Leakage**	**1.8%**	**20.4%**	**17.7%**	**8.8%**	**14.3%**	**2.6%**	**30.6%**	**11.0%**
	TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes:	1	Market Shares from Household Telephone Survey	6	Zone 3 = Whitwell / Creswell
	2	SA = Study Area	7	Zone 4 = Anston / Dinnington
	3	L = Leakage 94.1%	8	Zone 5 = Retford
	4	Zone 1 = Worksop	9	Zone 6 = Markham / Ollerton
	5	Zone 2 = Harworth / Bircotes	10	Zone 7 = Bawtry / Gringley

Comparison Goods Market Share Analysis

Total Comparison Shopping Market Share in the Study Area, 2008 **Table K**

		Zone of Origin							
Zone	**Destination**	1	2	3	4	5	6	7	SA
1	Worksop Town Centre	39.1%	6.2%	32.9%	14.7%	4.0%	4.5%	0.2%	18.4%
1	Worksop Retail Parks / Warehouses	15.5%	3.9%	17.7%	11.1%	4.8%	3.2%	2.0%	9.7%
1	Local centres / shops in zone 1	5.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%
2	Local centres / shops in zone 2	0.1%	11.6%	0.0%	0.0%	0.0%	0.0%	0.9%	0.9%
3	Local centres / shops in zone 3	0.0%	0.0%	4.2%	0.0%	0.0%	0.0%	0.0%	0.4%
4	Local centres / shops in zone 4	0.5%	0.2%	0.0%	6.8%	0.1%	0.0%	0.0%	0.9%
5	Retford Town Centre	2.0%	2.7%	0.7%	0.5%	42.0%	17.5%	7.8%	15.3%
5	Retford Retail Parks / Warehouses	0.0%	0.0%	0.1%	0.0%	2.0%	0.2%	0.4%	0.7%
5	Local centres / shops in zone 5	0.0%	0.0%	0.0%	0.0%	2.4%	0.0%	0.0%	0.8%
6	Ollerton	0.1%	0.0%	0.0%	0.0%	0.0%	6.0%	0.0%	0.4%
6	Local centres / shops in zone 6	0.0%	0.3%	0.0%	0.0%	0.3%	7.8%	0.3%	0.6%
7	Local centres / shops in zone 7	0.0%	0.3%	0.0%	0.0%	0.0%	0.7%	7.0%	0.6%
	Total Study Area	**62.3%**	**25.2%**	**55.5%**	**33.0%**	**55.8%**	**39.9%**	**18.6%**	**49.9%**
L	Doncaster Town Centre	5.7%	40.7%	1.6%	1.9%	9.5%	2.5%	28.0%	10.0%
L	Doncaster Lakeside Outlet Centre	0.7%	3.6%	0.5%	1.1%	2.3%	0.4%	4.7%	1.7%
L	Doncaster Retail Parks / Warehouses	0.6%	7.7%	0.1%	0.1%	1.6%	0.0%	5.9%	1.6%
L	Sheffield Meadowhall	11.2%	6.9%	9.4%	23.5%	5.7%	1.2%	5.3%	9.2%
L	Sheffield City Centre	6.3%	1.9%	9.6%	15.3%	3.5%	1.0%	3.1%	5.8%
L	Sheffield Retail parks	0.4%	0.0%	0.7%	2.1%	0.2%	0.0%	0.0%	0.4%
L	Rotherham	1.0%	0.4%	0.5%	10.0%	0.1%	0.2%	0.0%	1.4%
L	Rotherham Retail Parks	0.6%	0.9%	0.3%	5.6%	0.0%	0.0%	0.0%	0.8%
L	Lincoln	0.6%	0.1%	0.1%	0.2%	6.3%	8.0%	4.5%	2.9%
L	Mansfield	1.8%	0.0%	4.9%	0.1%	0.5%	25.1%	0.0%	2.6%
L	Nottingham	0.7%	0.1%	1.4%	0.8%	1.4%	5.9%	0.3%	1.2%
L	Gainsborough	0.0%	0.8%	0.0%	0.0%	1.2%	0.5%	12.5%	1.3%
L	Chesterfield	0.6%	0.0%	5.5%	0.3%	0.0%	0.6%	0.0%	0.8%
L	Newark	0.1%	0.0%	0.0%	0.0%	0.6%	4.6%	0.0%	0.5%
L	Leakage Elsewhere	1.3%	2.3%	2.0%	1.1%	2.1%	2.3%	6.0%	2.0%
L	Internet / Mail Order	6.4%	9.5%	7.8%	4.9%	9.3%	7.7%	11.2%	7.9%
L	**Total Leakage**	**37.7%**	**74.8%**	**44.5%**	**67.0%**	**44.2%**	**60.1%**	**81.4%**	**50.1%**
	TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Overall Comparison Goods Spending in the Study Area, 2008 **Table L**

		Zone of Origin							
Zone	**Destination**	1	2	3	4	5	6	7	SA
1	Worksop Town Centre	£59.8	£2.8	£13.8	£9.1	£4.2	£2.4	£0.1	£92.2
1	Worksop Retail Parks / Warehouses	£23.7	£1.8	£7.5	£6.9	£5.1	£1.7	£0.8	£48.6
1	Local centres / shops in zone 1	£7.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£7.5
2	Local centres / shops in zone 2	£0.1	£5.3	£0.0	£0.0	£0.0	£0.0	£0.4	£4.7
3	Local centres / shops in zone 3	£0.0	£0.0	£1.7	£0.0	£0.0	£0.0	£0.0	£2.1
4	Local centres / shops in zone 4	£0.8	£0.1	£0.0	£4.2	£0.1	£0.0	£0.0	£4.4
5	Retford Town Centre	£3.0	£1.3	£0.3	£0.3	£44.3	£9.3	£3.2	£76.8
5	Retford Retail Parks / Warehouses	£0.1	£0.0	£0.0	£0.0	£2.1	£0.1	£0.2	£3.4
5	Local centres / shops in zone 5	£0.0	£0.0	£0.0	£0.0	£2.6	£0.0	£0.0	£3.8
6	Ollerton	£0.1	£0.0	£0.0	£0.0	£0.0	£3.2	£0.0	£1.8
6	Local centres / shops in zone 6	£0.0	£0.2	£0.0	£0.0	£0.3	£4.1	£0.1	£2.9
7	Local centres / shops in zone 7	£0.1	£0.1	£0.0	£0.0	£0.0	£0.4	£2.9	£2.8
	Total Study Area	**£95.3**	**£11.5**	**£23.3**	**£20.4**	**£58.8**	**£21.1**	**£7.7**	**£250.9**
L	Doncaster Town Centre	£8.7	£18.6	£0.7	£1.2	£10.0	£1.3	£11.6	£50.2
L	Doncaster Lakeside Outlet Centre	£1.0	£1.6	£0.2	£0.7	£2.4	£0.2	£1.9	£8.3
L	Doncaster Retail Parks / Warehouses	£0.9	£3.5	£0.1	£0.1	£1.7	£0.0	£2.4	£8.3
L	Sheffield Meadowhall	£17.1	£3.2	£4.0	£14.5	£6.0	£0.7	£2.2	£46.4
L	Sheffield City Centre	£9.7	£0.9	£4.0	£9.5	£3.6	£0.6	£1.3	£29.0
L	Sheffield Retail parks	£0.5	£0.0	£0.3	£1.3	£0.2	£0.0	£0.0	£2.2
L	Rotherham	£1.5	£0.2	£0.2	£6.2	£0.1	£0.1	£0.0	£6.8
L	Rotherham Retail Parks	£0.9	£0.4	£0.1	£3.5	£0.0	£0.0	£0.0	£4.1
L	Lincoln	£0.9	£0.0	£0.0	£0.1	£6.7	£4.2	£1.9	£14.7
L	Mansfield	£2.7	£0.0	£2.1	£0.1	£0.5	£13.3	£0.0	£12.8
L	Nottingham	£1.1	£0.0	£0.6	£0.5	£1.5	£3.1	£0.1	£6.2
L	Gainsborough	£0.0	£0.4	£0.0	£0.0	£1.3	£0.3	£5.2	£6.6
L	Chesterfield	£0.9	£0.0	£2.3	£0.2	£0.0	£0.3	£0.0	£3.9
L	Newark	£0.1	£0.0	£0.0	£0.0	£0.6	£2.4	£0.0	£2.3
L	Leakage Elsewhere	£2.0	£1.0	£0.8	£0.7	£2.2	£1.2	£2.5	£10.2
L	Internet / Mail Order	£9.7	£4.4	£3.3	£3.0	£9.8	£4.1	£4.6	£39.5
L	**Total Leakage**	**£57.7**	**£34.2**	**£18.7**	**£41.4**	**£46.6**	**£31.8**	**£33.7**	**£251.5**
	TOTAL	**£153.1**	**£45.8**	**£42.0**	**£61.8**	**£105.4**	**£52.9**	**£41.3**	**£502.4**

Notes:
1 Market Shares from Household Telephone Survey
2 Expenditure from Table E
3 SA = Study Area derived from 2008 Shopper / Visitor Survey in Worksop and Retford
4 L = Leakage
5 Zone 1 = Worksop
6 Zone 2 = Harworth / Bircotes
7 Zone 3 = Whitwell / Creswell
8 Zone 4 = Anston / Dinnington
9 Zone 5 = Retford
10 Zone 6 = Markham / Ollerton
11 Zone 7 = Bawtry / Gringley
12 All Prices 2007

Fashion Goods Market Share Analysis

Main Fashion / Clothes Shopping Destination Market Share in the Study Area, 2008 **Table M**

		Zone of Origin							
Zone	**Destination**	1	2	3	4	5	6	7	SA
1	Worksop Town Centre	39.0%	4.2%	35.5%	18.9%	2.4%	4.1%	0.0%	18.1%
1	Worksop Retail Parks / Warehouses	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
1	Local centres / shops in zone 1	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%
2	Local centres / shops in zone 2	0.0%	5.6%	0.0%	0.0%	0.0%	0.0%	1.4%	0.5%
3	Local centres / shops in zone 3	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
4	Local centres / shops in zone 4	0.0%	0.0%	0.0%	2.1%	0.0%	0.0%	0.0%	0.2%
5	Retford Town Centre	3.2%	4.2%	0.0%	0.0%	34.7%	20.4%	7.2%	13.5%
5	Retford Retail Parks / Warehouses	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Local centres / shops in zone 5	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
6	Ollerton	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	0.1%
6	Local centres / shops in zone 6	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	0.1%
7	Local centres / shops in zone 7	0.0%	0.0%	0.0%	0.0%	0.0%	4.1%	0.0%	0.2%
	Total Study Area	**44.8%**	**14.1%**	**35.5%**	**21.1%**	**37.1%**	**30.6%**	**10.1%**	**33.5%**
L	Doncaster Town Centre	8.7%	64.8%	4.3%	4.2%	17.9%	2.0%	46.4%	17.2%
L	Doncaster Lakeside Outlet Centre	1.4%	0.0%	1.1%	0.0%	3.8%	2.0%	7.2%	2.3%
L	Doncaster Retail Parks / Warehouses	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
L	Sheffield Meadowhall	25.6%	11.3%	22.6%	46.3%	14.1%	0.0%	10.1%	20.3%
L	Sheffield City Centre	10.5%	1.4%	12.9%	15.8%	5.2%	0.0%	2.9%	7.8%
L	Sheffield Retail parks	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
L	Rotherham	1.1%	0.0%	0.0%	9.5%	0.0%	0.0%	0.0%	1.3%
L	Rotherham Retail Parks	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
L	Lincoln	0.0%	0.0%	0.0%	0.0%	10.7%	14.3%	7.2%	4.6%
L	Mansfield	1.4%	0.0%	8.6%	0.0%	0.3%	30.6%	0.0%	3.0%
L	Nottingham	1.1%	0.0%	1.1%	1.1%	2.4%	6.1%	0.0%	1.6%
L	Gainsborough	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	7.2%	0.6%
L	Chesterfield	0.7%	0.0%	6.5%	0.0%	0.0%	0.0%	0.0%	0.8%
L	Newark	0.0%	0.0%	0.0%	0.0%	0.0%	6.1%	0.0%	0.3%
L	Leakage Elsewhere	0.4%	2.8%	1.1%	1.1%	3.1%	2.0%	1.4%	1.7%
L	Internet / Mail Order	4.3%	5.6%	6.5%	1.1%	5.2%	6.1%	7.2%	4.9%
L	**Total Leakage**	**55.2%**	**85.9%**	**64.5%**	**78.9%**	**62.9%**	**69.4%**	**89.9%**	**66.5%**
	TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Second Choice Fashion / Clothes Shopping Destination Market Share in the Study Area, 2008 **Table N**

		Zone of Origin							
Zone	**Destination**	1	2	3	4	5	6	7	SA
1	Worksop Town Centre	15.9%	18.1%	23.3%	15.9%	4.6%	14.0%	1.9%	12.1%
1	Worksop Retail Parks / Warehouses	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
1	Local centres / shops in zone 1	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%
2	Local centres / shops in zone 2	0.4%	2.8%	0.0%	0.0%	0.0%	0.0%	1.9%	0.5%
3	Local centres / shops in zone 3	0.0%	0.0%	4.1%	0.0%	0.0%	0.0%	0.0%	0.4%
4	Local centres / shops in zone 4	0.0%	0.0%	0.0%	5.8%	0.0%	0.0%	0.0%	0.5%
5	Retford Town Centre	5.2%	11.1%	4.1%	0.0%	14.1%	12.0%	16.7%	9.1%
5	Retford Retail Parks / Warehouses	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Local centres / shops in zone 5	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.1%
6	Ollerton	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	0.1%
6	Local centres / shops in zone 6	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	0.1%
7	Local centres / shops in zone 7	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.6%	0.4%
	Total Study Area	**23.4%**	**31.9%**	**31.5%**	**21.7%**	**19.1%**	**30.0%**	**25.9%**	**23.9%**
L	Doncaster Town Centre	20.6%	22.2%	1.4%	8.7%	19.5%	4.0%	16.7%	16.5%
L	Doncaster Lakeside Outlet Centre	2.8%	8.3%	1.4%	7.2%	4.2%	0.0%	5.6%	4.0%
L	Doncaster Retail Parks / Warehouses	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
L	Sheffield Meadowhall	20.6%	25.0%	12.3%	14.5%	13.7%	10.0%	13.0%	16.5%
L	Sheffield City Centre	10.7%	4.2%	6.8%	20.3%	9.5%	4.0%	11.1%	9.9%
L	Sheffield Retail parks	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
L	Rotherham	1.6%	0.0%	2.7%	20.3%	0.4%	0.0%	0.0%	2.5%
L	Rotherham Retail Parks	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
L	Lincoln	2.8%	0.0%	1.4%	0.0%	13.0%	10.0%	7.4%	6.1%
L	Mansfield	6.7%	0.0%	12.3%	0.0%	1.1%	14.0%	0.0%	4.3%
L	Nottingham	0.8%	0.0%	9.6%	1.4%	3.8%	14.0%	1.9%	3.4%
L	Gainsborough	0.0%	0.0%	0.0%	0.0%	3.4%	0.0%	1.9%	1.2%
L	Chesterfield	1.6%	0.0%	15.1%	0.0%	0.0%	0.0%	0.0%	1.8%
L	Newark	0.4%	0.0%	0.0%	0.0%	1.1%	4.0%	0.0%	0.7%
L	Leakage Elsewhere	5.6%	5.6%	0.0%	2.9%	5.0%	0.0%	13.0%	4.8%
L	Internet / Mail Order	2.4%	2.8%	5.5%	2.9%	6.1%	10.0%	3.7%	4.4%
L	**Total Leakage**	**76.6%**	**68.1%**	**68.5%**	**78.3%**	**80.9%**	**70.0%**	**74.1%**	**76.1%**
	TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Fashion Goods Market Share Analysis

Overall Fashion Goods Market Share, 2008 **Table P**

		Zone of Origin							
Zone	**Destination**	1	2	3	4	5	6	7	SA
1	Worksop Town Centre	32.1%	8.4%	31.8%	18.0%	3.1%	7.1%	0.6%	16.3%
1	Worksop Retail Parks / Warehouses	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
1	Local centres / shops in zone 1	2.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%
2	Local centres / shops in zone 2	0.1%	4.8%	0.0%	0.0%	0.0%	0.0%	1.6%	0.5%
3	Local centres / shops in zone 3	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.1%
4	Local centres / shops in zone 4	0.0%	0.0%	0.0%	3.2%	0.0%	0.0%	0.0%	0.3%
5	Retford Town Centre	3.8%	6.3%	1.2%	0.0%	28.5%	17.9%	10.1%	12.2%
5	Retford Retail Parks / Warehouses	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Local centres / shops in zone 5	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%
6	Ollerton	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	0.1%
6	Local centres / shops in zone 6	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	1.0%	0.1%
7	Local centres / shops in zone 7	0.0%	0.0%	0.0%	0.0%	0.0%	2.9%	1.7%	0.3%
	Total Study Area	**38.4%**	**19.4%**	**34.3%**	**21.3%**	**31.7%**	**30.4%**	**14.9%**	**30.7%**
L	Doncaster Town Centre	12.3%	52.0%	3.4%	5.6%	18.3%	2.6%	37.5%	17.0%
L	Doncaster Lakeside Outlet Centre	1.8%	2.5%	1.2%	2.2%	3.9%	1.4%	6.7%	2.8%
L	Doncaster Retail Parks / Warehouses	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
L	Sheffield Meadowhall	24.1%	15.4%	19.5%	36.8%	14.0%	3.0%	11.0%	19.2%
L	Sheffield City Centre	10.5%	2.2%	11.1%	17.1%	6.5%	1.2%	5.4%	8.4%
L	Sheffield Retail parks	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
L	Rotherham	1.2%	0.0%	0.8%	12.7%	0.1%	0.0%	0.0%	1.6%
L	Rotherham Retail Parks	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
L	Lincoln	0.8%	0.0%	0.4%	0.0%	11.4%	13.0%	7.3%	5.0%
L	Mansfield	3.0%	0.0%	9.7%	0.0%	0.6%	25.6%	0.0%	3.4%
L	Nottingham	1.0%	0.0%	3.6%	1.2%	2.8%	8.5%	0.6%	2.1%
L	Gainsborough	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	5.6%	0.8%
L	Chesterfield	1.0%	0.0%	9.0%	0.0%	0.0%	0.0%	0.0%	1.1%
L	Newark	0.1%	0.0%	0.0%	0.0%	0.3%	5.5%	0.0%	0.4%
L	Leakage Elsewhere	1.9%	3.6%	0.8%	1.6%	3.7%	1.4%	4.9%	2.6%
L	Internet / Mail Order	3.7%	4.8%	6.2%	1.6%	5.4%	7.3%	6.2%	4.7%
L	**Total Leakage**	**61.6%**	**80.6%**	**65.7%**	**78.7%**	**68.3%**	**69.6%**	**85.1%**	**69.3%**
	TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes:
1 Market Shares from Household Telephone Survey
2 Assumes 70:30 split in expenditure spent at main destination and secondary destination
3 SA = Study Area
4 L = Leakage
5 Zone 1 = Worksop
6 Zone 2 = Harworth / Bircotes
7 Zone 3 = Whitwell / Creswell
8 Zone 4 = Anston / Dinnington
9 Zone 5 = Retford
10 Zone 6 = Markham / Ollerton
11 Zone 7 = Bawtry / Gringley

Toys Books and Stationary Goods Market Share Analysis

Toys, games and hobby goods (excl. computer games), 2008 **Table Q**

		Zone of Origin							
Zone	**Destination**	1	2	3	4	5	6	7	SA
1	Worksop Town Centre	44.0%	8.9%	37.5%	10.5%	3.6%	5.3%	0.0%	19.9%
1	Worksop Retail Parks / Warehouses	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
1	Local centres / shops in zone 1	3.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%
2	Local centres / shops in zone 2	0.0%	4.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%
3	Local centres / shops in zone 3	0.0%	0.0%	4.7%	0.0%	0.0%	0.0%	0.0%	0.5%
4	Local centres / shops in zone 4	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Retford Town Centre	2.2%	0.0%	1.6%	0.0%	36.2%	18.4%	2.6%	13.5%
5	Retford Retail Parks / Warehouses	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Local centres / shops in zone 5	0.0%	0.0%	0.0%	0.0%	2.6%	0.0%	0.0%	0.8%
6	Ollerton	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
6	Local centres / shops in zone 6	0.0%	0.0%	0.0%	0.0%	0.5%	10.5%	0.0%	0.8%
7	Local centres / shops in zone 7	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.3%	0.3%
	Total Study Area	**50.0%**	**13.3%**	**43.8%**	**10.5%**	**42.9%**	**34.2%**	**7.9%**	**37.3%**
L	Doncaster Town Centre	7.1%	46.7%	0.0%	0.0%	14.3%	5.3%	42.1%	12.9%
L	Doncaster Lakeside Outlet Centre	1.1%	20.0%	1.6%	3.5%	7.7%	0.0%	10.5%	5.3%
L	Doncaster Retail Parks / Warehouses	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
L	Sheffield Meadowhall	18.5%	6.7%	15.6%	45.6%	7.7%	2.6%	5.3%	14.6%
L	Sheffield City Centre	7.6%	0.0%	18.8%	17.5%	4.1%	2.6%	2.6%	7.4%
L	Sheffield Retail parks	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
L	Rotherham	0.0%	0.0%	0.0%	12.3%	0.0%	0.0%	0.0%	1.1%
L	Rotherham Retail Parks	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
L	Lincoln	2.2%	0.0%	0.0%	0.0%	8.7%	10.5%	5.3%	4.3%
L	Mansfield	2.7%	0.0%	3.1%	0.0%	0.5%	21.1%	0.0%	2.6%
L	Nottingham	1.6%	0.0%	1.6%	1.8%	0.0%	7.9%	0.0%	1.3%
L	Gainsborough	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	7.9%	0.6%
L	Chesterfield	0.0%	0.0%	3.1%	1.8%	0.0%	0.0%	0.0%	0.5%
L	Newark	0.0%	0.0%	0.0%	0.0%	0.0%	5.3%	0.0%	0.3%
L	Leakage Elsewhere	1.1%	0.0%	1.6%	0.0%	1.5%	2.6%	7.9%	1.6%
L	Internet / Mail Order	8.2%	13.3%	10.9%	7.0%	12.2%	7.9%	10.5%	10.1%
L	**Total Leakage**	**50.0%**	**86.7%**	**56.3%**	**89.5%**	**57.1%**	**65.8%**	**92.1%**	**62.7%**
	TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Books and Stationery, 2008 **Table R**

		Zone of Origin							
Zone	**Destination**	1	2	3	4	5	6	7	SA
1	Worksop Town Centre	61.5%	6.0%	61.4%	15.7%	0.7%	4.2%	0.0%	26.6%
1	Worksop Retail Parks / Warehouses	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
1	Local centres / shops in zone 1	8.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%
2	Local centres / shops in zone 2	0.0%	16.4%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%
3	Local centres / shops in zone 3	0.0%	0.0%	6.0%	0.0%	0.0%	0.0%	0.0%	0.6%
4	Local centres / shops in zone 4	0.4%	0.0%	0.0%	16.9%	0.0%	0.0%	0.0%	1.7%
5	Retford Town Centre	3.1%	6.0%	1.2%	0.0%	65.7%	31.3%	14.0%	24.7%
5	Retford Retail Parks / Warehouses	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Local centres / shops in zone 5	0.0%	0.0%	0.0%	0.0%	5.2%	0.0%	0.0%	1.6%
6	Ollerton	0.0%	0.0%	0.0%	0.0%	0.0%	10.4%	0.0%	0.6%
6	Local centres / shops in zone 6	0.0%	0.0%	0.0%	0.0%	0.0%	8.3%	0.0%	0.5%
7	Local centres / shops in zone 7	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	14.0%	0.9%
	Total Study Area	**73.2%**	**28.4%**	**68.7%**	**32.5%**	**71.6%**	**54.2%**	**28.1%**	**60.9%**
L	Doncaster Town Centre	2.7%	47.8%	0.0%	2.4%	3.7%	2.1%	22.8%	7.5%
L	Doncaster Lakeside Outlet Centre	0.4%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.3%
L	Doncaster Retail Parks / Warehouses	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
L	Sheffield Meadowhall	7.4%	7.5%	8.4%	34.9%	3.0%	0.0%	5.3%	8.2%
L	Sheffield City Centre	3.5%	0.0%	6.0%	16.9%	1.1%	0.0%	0.0%	3.6%
L	Sheffield Retail parks	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
L	Rotherham	0.4%	0.0%	0.0%	7.2%	0.0%	0.0%	0.0%	0.8%
L	Rotherham Retail Parks	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
L	Lincoln	0.8%	0.0%	0.0%	1.2%	3.3%	2.1%	5.3%	1.8%
L	Mansfield	0.0%	0.0%	1.2%	0.0%	0.0%	12.5%	0.0%	0.8%
L	Nottingham	0.4%	1.5%	0.0%	0.0%	1.1%	8.3%	0.0%	1.0%
L	Gainsborough	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	15.8%	1.4%
L	Chesterfield	0.4%	0.0%	3.6%	0.0%	0.0%	0.0%	0.0%	0.5%
L	Newark	0.0%	0.0%	0.0%	0.0%	0.4%	4.2%	0.0%	0.3%
L	Leakage Elsewhere	1.6%	6.0%	1.2%	0.0%	2.2%	2.1%	7.0%	2.3%
L	Internet / Mail Order	9.3%	9.0%	10.8%	4.8%	11.8%	14.6%	15.8%	10.5%
L	**Total Leakage**	**26.8%**	**71.6%**	**31.3%**	**67.5%**	**28.4%**	**45.8%**	**71.9%**	**39.1%**
	TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes:
1 Market Shares from Household Telephone Survey
2 SA = Study Area
3 L = Leakage
4 Zone 1 = Worksop
5 Zone 2 = Harworth / Bircotes
6 Zone 3 = Whitwell / Creswell
7 Zone 4 = Anston / Dinnington
8 Zone 5 = Retford
9 Zone 6 = Markham / Ollerton
10 Zone 7 = Bawtry / Gringley

CDS / DVDs and Pharmacy Goods Market Share Analysis

CDs, DVDs, tapes and computer games, 2008 — **Table S**

		Zone of Origin							
Zone	**Destination**	1	2	3	4	5	6	7	SA
1	Worksop Town Centre	41.0%	3.6%	37.8%	5.7%	1.3%	2.6%	0.0%	17.1%
1	Worksop Retail Parks / Warehouses	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
1	Local centres / shops in zone 1	18.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.2%
2	Local centres / shops in zone 2	0.0%	23.2%	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%
3	Local centres / shops in zone 3	0.0%	0.0%	14.9%	0.0%	0.0%	0.0%	0.0%	1.5%
4	Local centres / shops in zone 4	0.5%	0.0%	0.0%	14.3%	0.0%	0.0%	0.0%	1.5%
5	Retford Town Centre	2.9%	1.8%	0.0%	0.0%	40.2%	7.7%	15.1%	14.9%
5	Retford Retail Parks / Warehouses	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Local centres / shops in zone 5	0.0%	0.0%	0.0%	0.0%	19.6%	0.0%	0.0%	6.1%
6	Ollerton	0.0%	0.0%	0.0%	0.0%	0.0%	2.6%	0.0%	0.1%
6	Local centres / shops in zone 6	0.0%	0.0%	0.0%	0.0%	0.0%	30.8%	0.0%	1.7%
7	Local centres / shops in zone 7	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	24.5%	1.8%
	Total Study Area	**62.4%**	**28.6%**	**52.7%**	**20.0%**	**61.2%**	**43.6%**	**39.6%**	**51.7%**
L	Doncaster Town Centre	2.9%	37.5%	0.0%	1.4%	3.6%	2.6%	22.6%	6.7%
L	Doncaster Lakeside Outlet Centre	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.1%
L	Doncaster Retail Parks / Warehouses	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
L	Sheffield Meadowhall	7.1%	0.0%	8.1%	34.3%	3.1%	2.6%	5.7%	7.7%
L	Sheffield City Centre	5.7%	0.0%	5.4%	12.9%	2.2%	0.0%	0.0%	4.1%
L	Sheffield Retail parks	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
L	Rotherham	1.0%	0.0%	0.0%	12.9%	0.0%	0.0%	0.0%	1.5%
L	Rotherham Retail Parks	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
L	Lincoln	1.0%	0.0%	0.0%	0.0%	3.1%	2.6%	1.9%	1.5%
L	Mansfield	0.5%	0.0%	4.1%	0.0%	0.0%	20.5%	0.0%	1.7%
L	Nottingham	0.5%	0.0%	1.4%	0.0%	0.4%	10.3%	0.0%	1.0%
L	Gainsborough	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.5%	0.6%
L	Chesterfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
L	Newark	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.1%
L	Leakage Elsewhere	0.0%	1.8%	1.4%	2.9%	0.4%	0.0%	0.0%	0.7%
L	Internet / Mail Order	19.0%	32.1%	27.0%	15.7%	25.0%	17.9%	22.6%	22.6%
L	**Total Leakage**	**37.6%**	**71.4%**	**47.3%**	**80.0%**	**38.8%**	**56.4%**	**60.4%**	**48.3%**
	TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Non Prescription Pharmacy Goods, Beauty Products and Toiletries, 2008 — **Table T**

		Zone of Origin							
Zone	**Destination**	1	2	3	4	5	6	7	SA
1	Worksop Town Centre	58.7%	6.8%	58.3%	12.8%	0.7%	6.0%	1.5%	25.8%
1	Worksop Retail Parks / Warehouses	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
1	Local centres / shops in zone 1	32.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	9.7%
2	Local centres / shops in zone 2	0.0%	63.0%	0.0%	0.0%	0.0%	0.0%	1.5%	4.9%
3	Local centres / shops in zone 3	0.0%	0.0%	29.2%	0.0%	0.0%	0.0%	0.0%	2.9%
4	Local centres / shops in zone 4	1.1%	0.0%	0.0%	58.5%	0.0%	0.0%	0.0%	6.1%
5	Retford Town Centre	1.1%	4.1%	1.0%	0.0%	82.2%	28.0%	9.0%	27.7%
5	Retford Retail Parks / Warehouses	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Local centres / shops in zone 5	0.0%	0.0%	0.0%	0.0%	10.5%	0.0%	0.0%	3.2%
6	Ollerton	0.0%	0.0%	0.0%	0.0%	0.0%	28.0%	0.0%	1.5%
6	Local centres / shops in zone 6	0.0%	0.0%	0.0%	0.0%	0.0%	24.0%	0.0%	1.3%
7	Local centres / shops in zone 7	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	40.3%	2.8%
	Total Study Area	**93.3%**	**74.0%**	**88.5%**	**71.3%**	**93.4%**	**86.0%**	**52.2%**	**85.9%**
L	Doncaster Town Centre	0.7%	17.8%	0.0%	1.1%	1.0%	0.0%	11.9%	2.8%
L	Doncaster Lakeside Outlet Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
L	Doncaster Retail Parks / Warehouses	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
L	Sheffield Meadowhall	1.4%	4.1%	4.2%	10.6%	0.0%	0.0%	4.5%	2.5%
L	Sheffield City Centre	2.1%	0.0%	0.0%	11.7%	0.3%	0.0%	0.0%	1.9%
L	Sheffield Retail parks	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
L	Rotherham	0.0%	0.0%	0.0%	3.2%	0.0%	0.0%	0.0%	0.3%
L	Rotherham Retail Parks	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
L	Lincoln	0.4%	0.0%	0.0%	0.0%	1.4%	0.0%	0.0%	0.5%
L	Mansfield	0.4%	0.0%	2.1%	0.0%	0.0%	8.0%	0.0%	0.7%
L	Nottingham	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
L	Gainsborough	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	25.4%	1.9%
L	Chesterfield	0.0%	0.0%	2.1%	0.0%	0.0%	0.0%	0.0%	0.2%
L	Newark	0.0%	0.0%	0.0%	0.0%	0.3%	4.0%	0.0%	0.3%
L	Leakage Elsewhere	0.4%	0.0%	1.0%	0.0%	0.0%	0.0%	1.5%	0.3%
L	Internet / Mail Order	1.1%	2.7%	2.1%	2.1%	3.5%	2.0%	4.5%	2.4%
L	**Total Leakage**	**6.7%**	**26.0%**	**11.5%**	**28.7%**	**6.6%**	**14.0%**	**47.8%**	**14.1%**
	TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes:
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10 Zone 7 = Bawtry / Gringley

Hardware and Jewellery Goods Market Share Analysis

Hardware and tableware, 2008 **Table U**

		Zone of Origin							
Zone	**Destination**	1	2	3	4	5	6	7	SA
1	Worksop Town Centre	53.6%	8.7%	43.1%	25.4%	1.8%	2.6%	0.0%	23.8%
1	Worksop Retail Parks / Warehouses	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
1	Local centres / shops in zone 1	10.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.2%
2	Local centres / shops in zone 2	0.0%	28.3%	0.0%	0.0%	0.0%	0.0%	0.0%	1.9%
3	Local centres / shops in zone 3	0.0%	0.0%	7.7%	0.0%	0.0%	0.0%	0.0%	0.7%
4	Local centres / shops in zone 4	0.5%	0.0%	0.0%	11.9%	0.0%	0.0%	0.0%	1.2%
5	Retford Town Centre	1.4%	0.0%	0.0%	0.0%	48.4%	21.1%	8.0%	17.7%
5	Retford Retail Parks / Warehouses	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Local centres / shops in zone 5	0.0%	0.0%	0.0%	0.0%	10.4%	0.0%	0.0%	3.3%
6	Ollerton	0.0%	0.0%	0.0%	0.0%	0.5%	2.6%	0.0%	0.3%
6	Local centres / shops in zone 6	0.0%	0.0%	0.0%	0.0%	0.0%	34.2%	0.0%	1.9%
7	Local centres / shops in zone 7	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	18.0%	1.3%
	Total Study Area	**66.0%**	**37.0%**	**50.8%**	**37.3%**	**61.1%**	**60.5%**	**26.0%**	**55.4%**
L	Doncaster Town Centre	5.7%	34.8%	1.5%	1.7%	10.9%	0.0%	24.0%	9.6%
L	Doncaster Lakeside Outlet Centre	1.0%	4.3%	0.0%	0.0%	2.7%	0.0%	6.0%	1.9%
L	Doncaster Retail Parks / Warehouses	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
L	Sheffield Meadowhall	11.0%	8.7%	9.2%	18.6%	3.6%	0.0%	10.0%	8.3%
L	Sheffield City Centre	8.1%	2.2%	10.8%	20.3%	3.6%	0.0%	2.0%	6.7%
L	Sheffield Retail parks	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
L	Rotherham	0.0%	2.2%	0.0%	13.6%	0.0%	0.0%	0.0%	1.3%
L	Rotherham Retail Parks	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
L	Lincoln	0.0%	0.0%	0.0%	0.0%	5.0%	7.9%	4.0%	2.3%
L	Mansfield	0.0%	0.0%	4.6%	0.0%	0.0%	13.2%	0.0%	1.2%
L	Nottingham	1.9%	0.0%	3.1%	3.4%	2.7%	7.9%	0.0%	2.5%
L	Gainsborough	0.0%	2.2%	0.0%	0.0%	1.4%	2.6%	20.0%	2.2%
L	Chesterfield	0.0%	0.0%	7.7%	1.7%	0.0%	2.6%	0.0%	1.0%
L	Newark	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%	0.0%	0.4%
L	Leakage Elsewhere	1.0%	4.3%	4.6%	0.0%	1.8%	0.0%	4.0%	1.9%
L	Internet / Mail Order	5.3%	4.3%	7.7%	3.4%	5.9%	5.3%	4.0%	5.4%
L	**Total Leakage**	**34.0%**	**63.0%**	**49.2%**	**62.7%**	**38.9%**	**39.5%**	**74.0%**	**44.6%**
	TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Jewellery and Watches, 2008 **Table V**

		Zone of Origin							
Zone	**Destination**	1	2	3	4	5	6	7	SA
1	Worksop Town Centre	53.2%	10.4%	56.9%	20.3%	1.1%	3.0%	0.0%	25.4%
1	Worksop Retail Parks / Warehouses	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
1	Local centres / shops in zone 1	0.0%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
2	Local centres / shops in zone 2	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
3	Local centres / shops in zone 3	0.0%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%	0.2%
4	Local centres / shops in zone 4	0.0%	0.0%	0.0%	3.1%	0.0%	0.0%	0.0%	0.3%
5	Retford Town Centre	3.2%	2.1%	0.0%	1.6%	52.4%	24.2%	2.4%	18.2%
5	Retford Retail Parks / Warehouses	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Local centres / shops in zone 5	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	0.2%
6	Ollerton	0.0%	0.0%	0.0%	0.0%	0.0%	9.1%	0.0%	0.5%
6	Local centres / shops in zone 6	0.0%	0.0%	0.0%	0.0%	0.0%	6.1%	0.0%	0.3%
7	Local centres / shops in zone 7	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.9%	0.3%
	Total Study Area	**56.3%**	**14.6%**	**58.5%**	**25.0%**	**54.1%**	**42.4%**	**7.3%**	**45.5%**
L	Doncaster Town Centre	5.8%	41.7%	1.5%	0.0%	8.6%	3.0%	29.3%	9.7%
L	Doncaster Lakeside Outlet Centre	0.0%	0.0%	0.0%	0.0%	1.6%	0.0%	2.4%	0.6%
L	Doncaster Retail Parks / Warehouses	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
L	Sheffield Meadowhall	15.3%	12.5%	12.3%	48.4%	8.6%	0.0%	9.8%	15.0%
L	Sheffield City Centre	4.2%	2.1%	6.2%	9.4%	3.8%	3.0%	0.0%	4.3%
L	Sheffield Retail parks	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
L	Rotherham	0.5%	0.0%	0.0%	6.3%	0.0%	0.0%	0.0%	0.8%
L	Rotherham Retail Parks	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
L	Lincoln	0.5%	2.1%	0.0%	0.0%	3.8%	3.0%	2.4%	1.8%
L	Mansfield	1.1%	0.0%	3.1%	0.0%	0.0%	24.2%	0.0%	1.9%
L	Nottingham	1.1%	0.0%	0.0%	0.0%	2.2%	0.0%	4.9%	1.3%
L	Gainsborough	0.0%	0.0%	0.0%	0.0%	1.6%	0.0%	14.6%	1.4%
L	Chesterfield	0.0%	0.0%	4.6%	0.0%	0.5%	0.0%	0.0%	0.6%
L	Newark	1.1%	0.0%	0.0%	0.0%	1.1%	3.0%	0.0%	0.8%
L	Leakage Elsewhere	4.2%	14.6%	6.2%	7.8%	4.3%	12.1%	12.2%	6.5%
L	Internet / Mail Order	10.0%	12.5%	7.7%	3.1%	9.7%	9.1%	17.1%	9.6%
L	**Total Leakage**	**43.7%**	**85.4%**	**41.5%**	**75.0%**	**45.9%**	**57.6%**	**92.7%**	**54.5%**
	TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes: 1 Market Shares from Household Telephone Survey
2 SA = Study Area
3 L = Leakage
4 Zone 1 = Worksop
5 Zone 2 = Harworth / Bircotes
6 Zone 3 = Whitwell / Creswell
7 Zone 4 = Anston / Dinnington
8 Zone 5 = Retford
9 Zone 6 = Markham / Ollerton
10 Zone 7 = Bawtry / Gringley

Soft Furnishings, Furniture & Carpets Market Share Analysis

Soft Furnishings, 2008 **Table W**

		Zone of Origin							
Zone	**Destination**	1	2	3	4	5	6	7	SA
1	Worksop Town Centre	47.7%	8.5%	36.0%	14.1%	3.5%	4.3%	0.0%	20.9%
1	Worksop Retail Parks / Warehouses	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
1	Local centres / shops in zone 1	3.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%
2	Local centres / shops in zone 2	0.0%	8.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%
3	Local centres / shops in zone 3	0.0%	0.0%	5.6%	0.0%	0.0%	0.0%	0.0%	0.6%
4	Local centres / shops in zone 4	0.0%	0.0%	0.0%	4.7%	0.0%	0.0%	0.0%	0.5%
5	Retford Town Centre	0.4%	1.7%	1.1%	1.2%	46.3%	19.6%	13.6%	16.7%
5	Retford Retail Parks / Warehouses	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Local centres / shops in zone 5	0.0%	0.0%	0.0%	0.0%	1.9%	0.0%	0.0%	0.6%
6	Ollerton	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.1%
6	Local centres / shops in zone 6	0.0%	0.0%	0.0%	0.0%	0.0%	15.2%	0.0%	0.8%
7	Local centres / shops in zone 7	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.1%	0.4%
	Total Study Area	**51.9%**	**18.6%**	**42.7%**	**20.0%**	**52.1%**	**39.1%**	**18.6%**	**42.3%**
L	Doncaster Town Centre	5.4%	49.2%	4.5%	1.2%	8.6%	6.5%	37.3%	11.2%
L	Doncaster Lakeside Outlet Centre	0.4%	5.1%	0.0%	1.2%	2.3%	0.0%	6.8%	1.8%
L	Doncaster Retail Parks / Warehouses	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
L	Sheffield Meadowhall	13.7%	8.5%	7.9%	17.6%	4.7%	0.0%	10.2%	9.3%
L	Sheffield City Centre	7.5%	0.0%	7.9%	27.1%	3.1%	2.2%	5.1%	7.2%
L	Sheffield Retail parks	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
L	Rotherham	9.1%	3.4%	4.5%	25.9%	1.6%	0.0%	0.0%	6.5%
L	Rotherham Retail Parks	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
L	Lincoln	0.4%	0.0%	0.0%	0.0%	8.9%	10.9%	5.1%	3.8%
L	Mansfield	1.2%	0.0%	3.4%	0.0%	0.0%	8.7%	0.0%	1.2%
L	Nottingham	0.0%	0.0%	0.0%	0.0%	3.1%	2.2%	1.7%	1.2%
L	Gainsborough	0.0%	1.7%	0.0%	0.0%	0.8%	0.0%	6.8%	0.8%
L	Chesterfield	0.4%	0.0%	9.0%	0.0%	0.0%	2.2%	0.0%	1.2%
L	Newark	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	0.0%	0.1%
L	Leakage Elsewhere	0.0%	1.7%	2.2%	1.2%	3.1%	2.2%	5.1%	1.9%
L	Internet / Mail Order	10.0%	11.9%	18.0%	5.9%	11.7%	23.9%	3.4%	11.4%
L	**Total Leakage**	**48.1%**	**81.4%**	**57.3%**	**80.0%**	**47.9%**	**60.9%**	**81.4%**	**57.7%**
	TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Furniture and carpets, 2008 **Table X**

		Zone of Origin							
Zone	**Destination**	1	2	3	4	5	6	7	SA
1	Worksop Town Centre	53.7%	0.0%	41.7%	15.5%	9.4%	7.0%	0.0%	25.3%
1	Worksop Retail Parks / Warehouses	11.9%	1.9%	13.9%	12.7%	3.8%	4.7%	2.4%	8.0%
1	Local centres / shops in zone 1	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%
2	Local centres / shops in zone 2	0.4%	9.4%	0.0%	0.0%	0.0%	0.0%	2.4%	0.9%
3	Local centres / shops in zone 3	0.0%	0.0%	2.8%	0.0%	0.0%	0.0%	0.0%	0.3%
4	Local centres / shops in zone 4	0.4%	1.9%	0.0%	1.4%	0.4%	0.0%	0.0%	0.5%
5	Retford Town Centre	0.9%	3.8%	0.0%	1.4%	51.3%	14.0%	7.1%	18.1%
5	Retford Retail Parks / Warehouses	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Local centres / shops in zone 5	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
6	Ollerton	0.0%	0.0%	0.0%	0.0%	0.0%	9.3%	0.0%	0.5%
6	Local centres / shops in zone 6	0.0%	0.0%	0.0%	0.0%	0.0%	2.3%	0.0%	0.1%
7	Local centres / shops in zone 7	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Total Study Area	**68.7%**	**17.0%**	**58.3%**	**31.0%**	**65.0%**	**37.2%**	**11.9%**	**54.2%**
L	Doncaster Town Centre	4.4%	49.1%	4.2%	1.4%	6.4%	0.0%	21.4%	8.6%
L	Doncaster Lakeside Outlet Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%	0.1%
L	Doncaster Retail Parks / Warehouses	3.1%	18.9%	1.4%	0.0%	9.4%	0.0%	21.4%	6.6%
L	Sheffield Meadowhall	2.6%	3.8%	1.4%	7.0%	0.4%	0.0%	2.4%	2.2%
L	Sheffield City Centre	5.3%	1.9%	8.3%	19.7%	1.7%	2.3%	7.1%	5.5%
L	Sheffield Retail parks	2.6%	0.0%	2.8%	5.6%	0.0%	0.0%	0.0%	1.6%
L	Rotherham	2.2%	1.9%	1.4%	12.7%	0.0%	2.3%	0.0%	2.3%
L	Rotherham Retail Parks	3.5%	1.9%	2.8%	16.9%	0.0%	0.0%	0.0%	3.1%
L	Lincoln	0.0%	0.0%	0.0%	1.4%	2.6%	4.7%	2.4%	1.3%
L	Mansfield	1.8%	0.0%	5.6%	1.4%	1.7%	27.9%	0.0%	3.4%
L	Nottingham	0.9%	0.0%	1.4%	1.4%	2.1%	9.3%	0.0%	1.8%
L	Gainsborough	0.0%	1.9%	0.0%	0.0%	2.6%	0.0%	16.7%	1.9%
L	Chesterfield	0.4%	0.0%	5.6%	0.0%	0.0%	2.3%	0.0%	0.8%
L	Newark	0.0%	0.0%	0.0%	0.0%	2.1%	4.7%	0.0%	0.9%
L	Leakage Elsewhere	1.8%	1.9%	4.2%	0.0%	3.4%	2.3%	9.5%	2.8%
L	Internet / Mail Order	2.6%	1.9%	2.8%	1.4%	2.6%	7.0%	4.8%	2.8%
L	**Total Leakage**	**31.3%**	**83.0%**	**41.7%**	**69.0%**	**35.0%**	**62.8%**	**88.1%**	**45.8%**
	TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes:
1 Market Shares from Household Telephone Survey
2 SA = Study Area
3 L = Leakage
4 Zone 1 = Worksop
5 Zone 2 = Harworth / Bircotes
6 Zone 3 = Whitwell / Creswell
7 Zone 4 = Anston / Dinnington
8 Zone 5 = Retford
9 Zone 6 = Markham / Ollerton
10 Zone 7 = Bawtry / Gringley

Electrical & DIY Goods Market Share Analysis

Electrical Goods, 2008 **Table Y**

		Zone of Origin							
Zone	**Destination**	1	2	3	4	5	6	7	SA
1	Worksop Town Centre	26.7%	4.8%	15.1%	11.2%	3.8%	0.0%	0.0%	12.4%
1	Worksop Retail Parks / Warehouses	44.3%	11.1%	51.6%	28.1%	17.3%	8.2%	8.2%	28.7%
1	Local centres / shops in zone 1	4.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%
2	Local centres / shops in zone 2	0.0%	6.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%
3	Local centres / shops in zone 3	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.1%
4	Local centres / shops in zone 4	1.8%	0.0%	0.0%	6.7%	0.4%	0.0%	0.0%	1.4%
5	Retford Town Centre	0.7%	0.0%	0.0%	1.1%	41.9%	14.3%	6.6%	13.9%
5	Retford Retail Parks / Warehouses	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
5	Local centres / shops in zone 5	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.2%
6	Ollerton	0.0%	0.0%	0.0%	0.0%	0.0%	10.2%	0.0%	0.6%
6	Local centres / shops in zone 6	0.0%	1.6%	0.0%	0.0%	1.2%	8.2%	0.0%	0.9%
7	Local centres / shops in zone 7	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.3%	0.2%
	Total Study Area	**78.0%**	**23.8%**	**67.7%**	**47.2%**	**65.4%**	**40.8%**	**18.0%**	**60.1%**
L	Doncaster Town Centre	1.1%	31.7%	0.0%	0.0%	3.5%	2.0%	19.7%	5.1%
L	Doncaster Lakeside Outlet Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.3%	0.2%
L	Doncaster Retail Parks / Warehouses	0.4%	15.9%	0.0%	0.0%	2.3%	0.0%	9.8%	2.6%
L	Sheffield Meadowhall	1.8%	1.6%	2.2%	6.7%	1.2%	0.0%	0.0%	1.9%
L	Sheffield City Centre	4.4%	4.8%	9.7%	10.1%	2.7%	0.0%	1.6%	4.6%
L	Sheffield Retail parks	0.4%	0.0%	2.2%	4.5%	0.8%	0.0%	0.0%	1.0%
L	Rotherham	0.4%	0.0%	0.0%	5.6%	0.0%	0.0%	0.0%	0.7%
L	Rotherham Retail Parks	1.1%	3.2%	0.0%	15.7%	0.0%	0.0%	0.0%	2.1%
L	Lincoln	0.0%	0.0%	0.0%	0.0%	4.6%	6.1%	4.9%	2.0%
L	Mansfield	1.1%	0.0%	3.2%	0.0%	0.4%	34.7%	0.0%	2.7%
L	Nottingham	0.0%	0.0%	0.0%	0.0%	0.8%	2.0%	0.0%	0.3%
L	Gainsborough	0.0%	1.6%	0.0%	0.0%	1.5%	0.0%	14.8%	1.6%
L	Chesterfield	0.4%	0.0%	5.4%	0.0%	0.0%	0.0%	0.0%	0.7%
L	Newark	0.0%	0.0%	0.0%	0.0%	0.8%	6.1%	0.0%	0.6%
L	Leakage Elsewhere	1.1%	0.0%	2.2%	1.1%	0.4%	2.0%	4.9%	1.2%
L	Internet / Mail Order	9.9%	17.5%	7.5%	9.0%	15.8%	6.1%	23.0%	12.5%
L	**Total Leakage**	**22.0%**	**76.2%**	**32.3%**	**52.8%**	**34.6%**	**59.2%**	**82.0%**	**39.9%**
	TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

DIY Goods, 2008 **Table Z**

		Zone of Origin							
Zone	**Destination**	1	2	3	4	5	6	7	SA
1	Worksop Town Centre	32.0%	4.8%	22.0%	17.9%	7.5%	4.9%	0.0%	16.5%
1	Worksop Retail Parks / Warehouses	58.9%	15.9%	64.6%	46.2%	9.4%	12.2%	0.0%	33.4%
1	Local centres / shops in zone 1	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
2	Local centres / shops in zone 2	0.0%	25.4%	0.0%	0.0%	0.0%	0.0%	1.7%	2.1%
3	Local centres / shops in zone 3	0.0%	0.0%	2.4%	0.0%	0.0%	0.0%	0.0%	0.2%
4	Local centres / shops in zone 4	0.0%	0.0%	0.0%	2.6%	0.0%	0.0%	0.0%	0.2%
5	Retford Town Centre	0.4%	1.6%	0.0%	0.0%	45.3%	17.1%	5.2%	15.3%
5	Retford Retail Parks / Warehouses	0.4%	0.0%	1.2%	0.0%	24.0%	2.4%	5.2%	8.1%
5	Local centres / shops in zone 5	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.2%
6	Ollerton	0.0%	0.0%	0.0%	0.0%	0.0%	4.9%	0.0%	0.2%
6	Local centres / shops in zone 6	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
7	Local centres / shops in zone 7	0.4%	3.2%	0.0%	0.0%	0.0%	0.0%	13.8%	1.3%
	Total Study Area	**92.5%**	**50.8%**	**90.2%**	**66.7%**	**87.0%**	**41.5%**	**25.9%**	**77.8%**
L	Doncaster Town Centre	1.2%	15.9%	0.0%	0.0%	3.1%	2.4%	15.5%	3.7%
L	Doncaster Lakeside Outlet Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%	0.1%
L	Doncaster Retail Parks / Warehouses	2.0%	28.6%	0.0%	1.3%	2.0%	0.0%	19.0%	4.8%
L	Sheffield Meadowhall	0.4%	0.0%	0.0%	1.3%	0.4%	0.0%	0.0%	0.4%
L	Sheffield City Centre	0.4%	0.0%	1.2%	11.5%	0.4%	0.0%	0.0%	1.4%
L	Sheffield Retail parks	0.0%	0.0%	0.0%	6.4%	0.0%	0.0%	0.0%	0.6%
L	Rotherham	0.0%	0.0%	0.0%	2.6%	0.0%	0.0%	0.0%	0.2%
L	Rotherham Retail Parks	0.0%	0.0%	0.0%	6.4%	0.0%	0.0%	0.0%	0.6%
L	Lincoln	0.0%	0.0%	0.0%	0.0%	2.0%	7.3%	0.0%	1.0%
L	Mansfield	1.2%	0.0%	1.2%	0.0%	0.0%	29.3%	0.0%	1.9%
L	Nottingham	0.0%	0.0%	0.0%	0.0%	0.4%	2.4%	0.0%	0.2%
L	Gainsborough	0.0%	1.6%	0.0%	0.0%	1.2%	4.9%	24.1%	2.4%
L	Chesterfield	2.0%	0.0%	2.4%	0.0%	0.0%	2.4%	0.0%	1.0%
L	Newark	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%	0.0%	0.1%
L	Leakage Elsewhere	0.4%	3.2%	2.4%	1.3%	1.6%	4.9%	8.6%	2.1%
L	Internet / Mail Order	0.0%	0.0%	2.4%	2.6%	2.0%	2.4%	5.2%	1.6%
L	**Total Leakage**	**7.5%**	**49.2%**	**9.8%**	**33.3%**	**13.0%**	**58.5%**	**74.1%**	**22.2%**
	TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes:
1 Market Shares from Household Telephone Survey
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