

# Lichfield Centres Study

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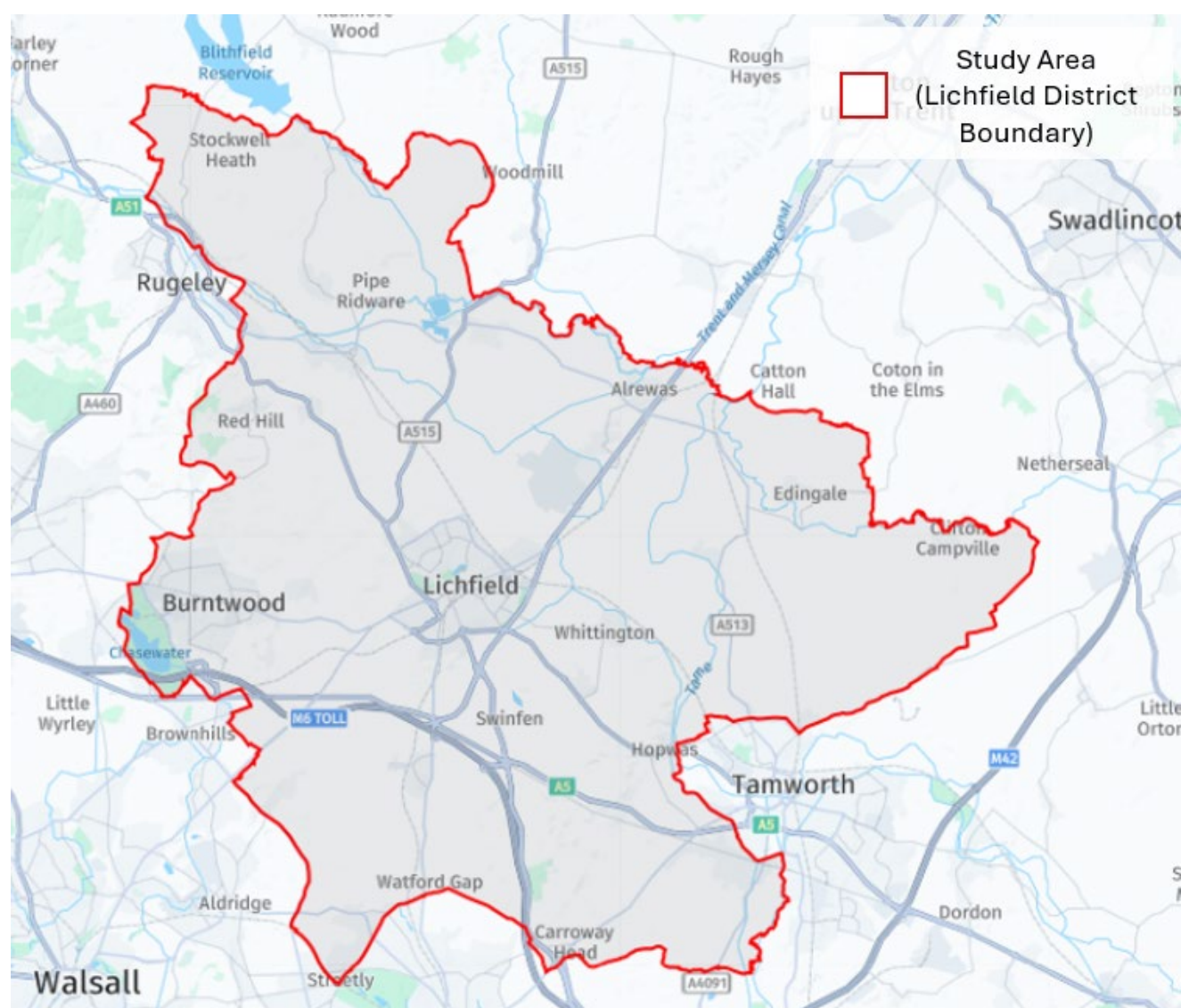
## Volume 2: Assessment Appendices – Final

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## APPENDIX 1     STUDY AREA

## Lichfield Centres Study - Study Area



## APPENDIX 2 EXPERIAN INSIGHTS RAW DATA

TABLE 1: SUPERMARKET / CONVENIENCE TRANSACTIONS

Study Area	Sub-Study Area	Merchant Area	Customer Zones	
			Study Area	Outside Study Area
Within the Study Area	Key Centres and Settlements	Lichfield City Centre	197,593	84,534
Within the Study Area	Key Centres and Settlements	Elsewhere Lichfield	1,037,870	209,940
Within the Study Area	Key Centres and Settlements	Burntwood Town Centre	676,406	222,698
Within the Study Area	Key Centres and Settlements	Elsewhere Burntwood	1,908,588	557,646
Within the Study Area	Key Centres and Settlements	Lichfield Edge of Centre Food Stores	601,857	125,355
Within the Study Area	Key Centres and Settlements	Imperial Retail Park	867,826	208,823
Within the Study Area	Key Centres and Settlements	Other Out of Centre Food Stores	2,380,337	710,971
Within the Study Area	Key Rural Centres	Alrewas	126,027	36,072
Within the Study Area	Key Rural Centres	Armitage with Handsacre	91,599	10,917
Within the Study Area	Key Rural Centres	Fazeley	45,918	52,774
Within the Study Area	Key Rural Centres	Fradley	0	0
Within the Study Area	Key Rural Centres	Little Aston	23,290	95,118
Within the Study Area	Key Rural Centres	Shenstone	110,304	69,199
Within the Study Area	Key Rural Centres	Whittington	98,339	42,573
Within the Study Area	Elsewhere in Study Area	Elsewhere in Study Area	602,308	739,891
Outside of the Study Area	Outside of the Study Area	Tamworth Town Centre	115,529	1,080,929
Outside of the Study Area	Outside of the Study Area	Tamworth Retail Parks	511,279	3,026,033
Outside of the Study Area	Outside of the Study Area	Rugeley Town Centre	191,711	1,143,327
Outside of the Study Area	Outside of the Study Area	Walsall Town Centre	18,895	2,070,674
Outside of the Study Area	Outside of the Study Area	Brownhills Town Centre	173,739	2,094,912
Outside of the Study Area	Outside of the Study Area	Cannock Town Centre	17,944	1,171,521
Outside of the Study Area	Outside of the Study Area	McArthur Glen, Cannock	10,340	126,109
Outside of the Study Area	Outside of the Study Area	Other Retail Parks Cannock	387,557	5,767,045
Outside of the Study Area	Outside of the Study Area	Birmingham City Centre	27,397	1,709,372
Outside of the Study Area	Outside of the Study Area	Birmingham Retail Parks	68,565	5,266,565
Outside of the Study Area	Elsewhere in UK	Elsewhere in UK	6,398,416	9,736,199,246
Online			3,270,265	
TOTAL			19,959,899	9,762,822,244

TABLE 2: COMPARISON RETAIL TRANSACTIONS

Study Area	Sub-Study Area	Merchant Area	Customer Zones	
			Study Area	Outside Study Area
Within the Study Area	Key Centres and Settlements	Lichfield City Centre	1,178,347	694,439
Within the Study Area	Key Centres and Settlements	Elsewhere Lichfield	1,318,373	839,839
Within the Study Area	Key Centres and Settlements	Burntwood Town Centre	45,976	25,688
Within the Study Area	Key Centres and Settlements	Elsewhere Burntwood	200,234	130,272
Within the Study Area	Key Centres and Settlements	Imperial Retail Park	0	0
Within the Study Area	Key Centres and Settlements	Other Out of Centre Food Stores	0	0
Within the Study Area	Key Centres and Settlements	Lichfield Edge of Centre Food Stores	0	0
Within the Study Area	Key Rural Centres	Alrewas	18,398	15,638
Within the Study Area	Key Rural Centres	Armitage with Handsacre	21,207	8,023
Within the Study Area	Key Rural Centres	Fazeley	7,981	112,782
Within the Study Area	Key Rural Centres	Fradley	5,640	31,398
Within the Study Area	Key Rural Centres	Little Aston	90,891	498,190
Within the Study Area	Key Rural Centres	Shenstone	130,868	206,401
Within the Study Area	Key Rural Centres	Whittington	27,459	65,091
Within the Study Area	Elsewhere in Study Area	Elsewhere in Study Area	289,354	626,019
Outside of the Study Area	Outside of the Study Area	Tamworth Town Centre	92,069	741,264
Outside of the Study Area	Outside of the Study Area	Tamworth Retail Parks	1,655,229	6,032,763
Outside of the Study Area	Outside of the Study Area	Rugeley Town Centre	139,289	650,068
Outside of the Study Area	Outside of the Study Area	Walsall Town Centre	25,575	1,590,246
Outside of the Study Area	Outside of the Study Area	Brownhills Town Centre	78,791	361,480
Outside of the Study Area	Outside of the Study Area	Cannock Town Centre	39,626	685,167
Outside of the Study Area	Outside of the Study Area	McArthur Glen, Cannock	195,165	2,169,901
Outside of the Study Area	Outside of the Study Area	Other Retail Parks Cannock	255,886	2,116,409
Outside of the Study Area	Outside of the Study Area	Birmingham City Centre	367,161	17,031,906
Outside of the Study Area	Outside of the Study Area	Birmingham Retail Parks	103,278	6,750,405
Outside of the Study Area	Elsewhere in UK	Elsewhere in UK	4,550,911	
Online			8,474,841	
TOTAL			19,312,549	41,383,389

TABLE 3: LEISURE FOOD &amp; DRINK TRANSACTIONS

Study Area	Sub-Study Area	Merchant Area	Customer Zones	
			Study Area	Outside Study Area
Within the Study Area	Key Centres and Settlements	Lichfield City Centre	1,125,771	1,085,344
Within the Study Area	Key Centres and Settlements	Elsewhere Lichfield	428,626	266,276
Within the Study Area	Key Centres and Settlements	Burntwood Town Centre	105,788	47,603
Within the Study Area	Key Centres and Settlements	Elsewhere Burntwood	191,579	74,380
Within the Study Area	Key Centres and Settlements	Lichfield Edge of Centre Food Stores	0	0
Within the Study Area	Key Centres and Settlements	Imperial Retail Park	0	0
Within the Study Area	Key Centres and Settlements	Other Out of Centre Food Stores	0	0
Within the Study Area	Key Rural Centres	Alrewas	114,048	44,025
Within the Study Area	Key Rural Centres	Armitage with Handsacre	45,656	27,313
Within the Study Area	Key Rural Centres	Fazeley	34,755	93,095
Within the Study Area	Key Rural Centres	Fradley	2,160	16,998
Within the Study Area	Key Rural Centres	Little Aston	22,543	136,321
Within the Study Area	Key Rural Centres	Shenstone	265,129	293,856
Within the Study Area	Key Rural Centres	Whittington	47,890	32,509
Within the Study Area	Elsewhere in Study Area	Elsewhere in Study Area	792,779	1,283,123
Outside of the Study Area	Outside of the Study Area	Tamworth Town Centre	46,724	585,146
Outside of the Study Area	Outside of the Study Area	Tamworth Retail Parks	83,963	462,493
Outside of the Study Area	Outside of the Study Area	Rugeley Town Centre	32,460	267,611
Outside of the Study Area	Outside of the Study Area	Walsall Town Centre	11,473	574,386
Outside of the Study Area	Outside of the Study Area	Brownhills Town Centre	8,962	107,129
Outside of the Study Area	Outside of the Study Area	Cannock Town Centre	15,958	417,842
Outside of the Study Area	Outside of the Study Area	McArthur Glen, Cannock	30,822	370,083
Outside of the Study Area	Outside of the Study Area	Other Retail Parks Cannock	12,690	230,994
Outside of the Study Area	Outside of the Study Area	Birmingham City Centre	248,066	10,598,688
Outside of the Study Area	Outside of the Study Area	Birmingham Retail Parks	13,611	816,689
Outside of the Study Area	Elsewhere in UK	Elsewhere in UK	3,876,852	
Online			1,414,602	
TOTAL			8,972,907	17,831,904

TABLE 4: ENTERTAINEMENT SERVICES

Study Area	Sub-Study Area	Merchant Area	Customer Zones	
			Study Area	Outside Study Area
Within the Study Area	Key Centres and Settlements	Lichfield City Centre	23,554	15,954
Within the Study Area	Key Centres and Settlements	Elsewhere Lichfield	7,172	45,387
Within the Study Area	Key Centres and Settlements	Burntwood Town Centre	0	0
Within the Study Area	Key Centres and Settlements	Elsewhere Burntwood	1,467	3,330
Within the Study Area	Key Centres and Settlements	Lichfield Edge of Centre Food Stores	0	0
Within the Study Area	Key Centres and Settlements	Imperial Retail Park	0	0
Within the Study Area	Key Centres and Settlements	Other Out of Centre Food Stores	0	0
Within the Study Area	Key Rural Centres	Alrewas	0	0
Within the Study Area	Key Rural Centres	Armitage with Handsacre	0	121
Within the Study Area	Key Rural Centres	Fazeley	589	1,562
Within the Study Area	Key Rural Centres	Fradley	122	315
Within the Study Area	Key Rural Centres	Little Aston	2,684	14,880
Within the Study Area	Key Rural Centres	Shenstone	8,449	1,124
Within the Study Area	Key Rural Centres	Whittington	24,665	17,630
Within the Study Area	Elsewhere in Study Area	Elsewhere in Study Area	29,629	432,082
Outside of the Study Area	Outside of the Study Area	Tamworth Town Centre	17,890	60,843
Outside of the Study Area	Outside of the Study Area	Tamworth Retail Parks	0	0
Outside of the Study Area	Outside of the Study Area	Rugeley Town Centre	0	148
Outside of the Study Area	Outside of the Study Area	Walsall Town Centre	2,190	61,777
Outside of the Study Area	Outside of the Study Area	Brownhills Town Centre	670	1,643
Outside of the Study Area	Outside of the Study Area	Cannock Town Centre	797	9,069
Outside of the Study Area	Outside of the Study Area	McArthur Glen, Cannock	33	549
Outside of the Study Area	Outside of the Study Area	Other Retail Parks Cannock	0	0
Outside of the Study Area	Outside of the Study Area	Birmingham City Centre	9,478	358,456
Outside of the Study Area	Outside of the Study Area	Birmingham Retail Parks	36	8,311
Outside of the Study Area	Elsewhere in UK	Elsewhere in UK	324,234	
Online			1,066,338	
TOTAL			1,519,997	1,033,181

## APPENDIX 3    POPULATION AND EXPENDITURE ANALYSIS



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

	2025	2030	2035	2040
Total Study Area (Lichfield District):	109,008	110,627	112,330	114,324

Notes: Population Projections from Experian Location Analyst (based on ONS)

Growth 2025 to 2035:		Growth 2025 to 2040:	
%	No.	%	No.
3.0%	3,322	4.9%	5,316

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

	Including Special Forms of Trading (SFT) (£m)			
	2025	2030	2035	2040
Expenditure per Capita	£3,031	£2,979	£2,950	£2,932
Total Available Expenditure	£330.4	£329.6	£331.3	£335.2

Notes: Average spend per capita estimates (2023 prices) are derived from Experian MMG3 'Retail Area Planner' Reports. The year-on-year expenditure growth forecasts have been informed by the latest Retail Planner Briefing Note 22 published by Experian Business Strategies (March 2025).

At the Base Year (2023) an allowance has been made for the market share of retail expenditure per capita on non-store sales (SFT - including mail order and Internet shopping) using Experian's Retail Planner Briefing Note 22 (March 2025).

Forecast growth in SFT is informed by the year-on-year national growth forecasts published by Experian Business Strategies in the most recent Retail Planner Briefing Note 22 (March 2025).

Growth 2025 to 2035:		Growth 2025 to 2040:	
%	£(m)	%	£m
0.3%	£0.98	1.5%	£4.85

**TABLE 3: CONVENIENCE GOODS EXPENDITURE PER CAPITA FORECASTS (2025 to 2040) ADJUSTED FOR SFT AND SALES IN NON-FOOD OUTLETS**

	Excluding Special Forms of Trading			
	2025	2030	2035	2040
Expenditure per Capita	£2,787	£2,717	£2,674	£2,639
Total Available Expenditure	£303.8	£300.6	£300.3	£301.6

Notes: Available convenience spend decreased by LSH estimate of sales in non-food and variety stores

-1.0% -0.1% 0.4%

Growth 2025 to 2035:		Growth 2025 to 2040:	
%	£(m)	%	£m
-1.1%	-£3.42	-0.7%	-£2.11

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

	Excluding Special Forms of Trading (SFT) (£m)			
	2025	2030	2035	2040
Expenditure per Capita	£4,602	£5,136	£5,839	£6,619
Total Available Expenditure	£501.67	£568.16	£655.91	£756.75

Notes: Average spend per capita estimates (2023 prices) are derived from Experian MMG3 'Retail Area Planner' Reports. The year-on-year expenditure growth forecasts have been informed by the latest Retail Planner Briefing Note 22 published by Experian Business Strategies (March 2025).

Growth 2025 to 2035:		Growth 2025 to 2040:	
%	£(m)	%	£m
30.7%	£154.24	50.8%	£255.07

**TABLE 5: COMPARISON GOODS EXPENDITURE PER CAPITA & AVAILABLE EXPENDITURE FORECASTS (2025 to 2040) ADJUSTED FOR SFT AND SALES IN FOOD OUTLETS**

	Excluding Special Forms of Trading (SFT) (£m)			
	2025	2030	2035	2040
Expenditure per Capita	£2,792	£2,999	£3,284	£3,581
Total Available Expenditure	£304.4	£331.8	£368.9	£409.3

Notes: Available comparison spend decreased by LSH estimate of sales in non-food and variety stores

At the Base Year (2023) an allowance has been made for the market share of retail expenditure per capita on non-store sales (SFT - including mail order and Internet shopping) using Experian's Retail Planner Briefing Note 22 (March 2025).

Forecast growth in SFT is informed by the year-on-year national growth forecasts published by Experian Business Strategies in the most recent Retail Planner Briefing Note 22 (March 2025).

Growth 2025 to 2035:		Growth 2025 to 2040:	
%	£(m)	%	£m
21.2%	£64.51	34.5%	£104.94

## APPENDIX 4      CONVENIENCE RETAIL CAPACITY ASSESSMENT TABLES

TABLE 1: CONVENIENCE GOODS TRANSACTION-BASED MARKET SHARES INCLUDING ONLINE (%) ASSESSMENT YEAR: 2025

Retail Location	Zone 1	Total Study Area	Study Area Inflow	Total Expenditure
Key Centre/Settlement	Lichfield City Centre	1.0%	2.7%	2.4%
Key Centre/Settlement	Elsewhere Lichfield	5.2%	6.6%	10.5%
Key Centre/Settlement	Burntwood Town Centre	3.4%	7.0%	7.5%
Key Centre/Settlement	Elsewhere Burntwood	9.6%	17.6%	20.7%
Out of Centre	Lichfield Edge of Centre Food Stores	3.0%	4.0%	6.1%
Out of Centre	Imperial Retail Park	4.3%	6.6%	9.0%
Out of Centre	Other Out of Centre Food Stores	11.9%	22.5%	25.9%
Key Rural Centre	Alrewas	0.6%	1.1%	1.4%
Key Rural Centre	Armitage with Handsacre	0.5%	0.3%	0.9%
Key Rural Centre	Fazeley	0.2%	1.7%	0.8%
Key Rural Centre	Fradley	0.0%	0.0%	0.0%
Key Rural Centre	Little Aston	0.1%	3.0%	1.0%
Key Rural Centre	Shenstone	0.6%	2.2%	1.5%
Key Rural Centre	Whittington	0.5%	1.3%	1.2%
Elsewhere Study Area	Elsewhere in Study Area	3.0%	23.4%	11.2%
Sub-Total Study Area		43.9%	100.0%	100.0%
Outside Study Area	Tamworth Town Centre	0.6%		
Outside Study Area	Tamworth Retail Parks	2.6%		
Outside Study Area	Rugeley Town Centre	1.0%		
Outside Study Area	Walsall Town Centre	0.1%		
Outside Study Area	Brownhills Town Centre	0.9%		
Outside Study Area	Cannock Town Centre	0.1%		
Outside Study Area	McArthur Glen, Cannock	0.1%		
Outside Study Area	Other Retail Parks Cannock	1.9%		
Outside Study Area	Birmingham City Centre	0.1%		
Outside Study Area	Birmingham Retail Parks	0.3%		
Outside Study Area	Elsewhere in UK	32.1%		
Sub-Total Outside of Study Area		39.7%		
Online Expenditure		16.4%		
Total Expenditure		100.0%	100.0%	100.0%

TABLE 2: CONVENIENCE GOODS EXPENDITURE MARKET SHARES INCLUDING ONLINE (£M) ASSESSMENT YEAR: 2025

Retail Location	Zone 1	Total Study Area	Study Area Inflow	Total Expenditure
Key Centre/Settlement	Lichfield City Centre	3.3	1.4	4.7
Key Centre/Settlement	Elsewhere Lichfield	17.2	3.5	20.7
Key Centre/Settlement	Burntwood Town Centre	11.2	3.7	14.9
Key Centre/Settlement	Elsewhere Burntwood	31.6	9.2	40.8
Out of Centre	Lichfield Edge of Centre Food Stores	10.0	2.1	12.0
Out of Centre	Imperial Retail Park	14.4	3.5	17.8
Out of Centre	Other Out of Centre Food Stores	39.4	11.8	51.2
Key Rural Centre	Alrewas	2.1	0.6	2.7
Key Rural Centre	Armitage with Handsacre	1.5	0.2	1.7
Key Rural Centre	Fazeley	0.8	0.9	1.6
Key Rural Centre	Fradley	0.0	0.0	0.0
Key Rural Centre	Little Aston	0.4	1.6	2.0
Key Rural Centre	Shenstone	1.8	1.1	3.0
Key Rural Centre	Whittington	1.6	0.7	2.3
Elsewhere Study Area	Elsewhere in Study Area	10.0	12.2	22.2
Sub-Total Study Area		145.1	52.4	197.5
Outside Study Area	Tamworth Town Centre	1.9		
Outside Study Area	Tamworth Retail Parks	8.5		
Outside Study Area	Rugeley Town Centre	3.2		
Outside Study Area	Walsall Town Centre	0.3		
Outside Study Area	Brownhills Town Centre	2.9		
Outside Study Area	Cannock Town Centre	0.3		
Outside Study Area	McArthur Glen, Cannock	0.2		
Outside Study Area	Other Retail Parks Cannock	6.4		
Outside Study Area	Birmingham City Centre	0.5		
Outside Study Area	Birmingham Retail Parks	1.1		
Outside Study Area	Elsewhere in UK	105.9		
Sub-Total Outside of Study Area		131.1		
Online Expenditure		54.1		
Total Expenditure		330.4	52.4	197.5
Total Expenditure Excluding Online		276.2	52.4	197.5

TABLE 3: CONVENIENCE GOODS EXPENDITURE MARKET SHARES EXCLUDING ONLINE (£M) ASSESSMENT YEAR: 2025

Retail Location	Zone 1	Total Study Area	Study Area Inflow	Total Expenditure
Key Centre/Settlement	Lichfield City Centre	1.2%	2.7%	2.4%
Key Centre/Settlement	Elsewhere Lichfield	6.2%	6.6%	10.5%
Key Centre/Settlement	Burntwood Town Centre	4.1%	7.0%	7.5%
Key Centre/Settlement	Elsewhere Burntwood	11.4%	17.6%	20.7%
Out of Centre	Lichfield Edge of Centre Food Stores	3.6%	4.0%	6.1%
Out of Centre	Imperial Retail Park	5.2%	6.6%	9.0%
Out of Centre	Other Out of Centre Food Stores	14.3%	22.5%	25.9%
Key Rural Centre	Alrewas	0.8%	1.1%	1.4%
Key Rural Centre	Armitage with Handsacre	0.5%	0.3%	0.9%
Key Rural Centre	Fazeley	0.3%	1.7%	0.8%
Key Rural Centre	Fradley	0.0%	0.0%	0.0%
Key Rural Centre	Little Aston	0.1%	3.0%	1.0%
Key Rural Centre	Shenstone	0.7%	2.2%	1.5%
Key Rural Centre	Whittington	0.6%	1.3%	1.2%
Elsewhere Study Area	Elsewhere in Study Area	3.6%	23.4%	11.2%
Sub-Total Study Area		52.5%	100.0%	100.0%
Outside Study Area	Tamworth Town Centre	0.7%		
Outside Study Area	Tamworth Retail Parks	3.1%		
Outside Study Area	Rugeley Town Centre	1.1%		
Outside Study Area	Walsall Town Centre	0.1%		
Outside Study Area	Brownhills Town Centre	1.0%		
Outside Study Area	Cannock Town Centre	0.1%		
Outside Study Area	McArthur Glen, Cannock	0.1%		
Outside Study Area	Other Retail Parks Cannock	2.3%		
Outside Study Area	Birmingham City Centre	0.2%		
Outside Study Area	Birmingham Retail Parks	0.4%		
Outside Study Area	Elsewhere in UK	38.3%		
Sub-Total Outside of Study Area		47.5%		
Total Expenditure		100.0%	100.0%	100.0%

CONVENIENCE GOODS EXPENDITURE MARKET SHARES EXCLUDING ONLINE (EM)

ASSESSMENT YEAR: 2025

Retail Location	Zone 1	Total Study Area	Study Area Inflow	Total Expenditure
Key Centre/Settlement	Lichfield City Centre	3.6	1.5	5.1
Key Centre/Settlement	Elsewhere Lichfield	18.9	3.8	22.7
Key Centre/Settlement	Burntwood Town Centre	12.3	4.1	16.4
Key Centre/Settlement	Elsewhere Burntwood	34.7	10.1	44.9
Out of Centre	Lichfield Edge of Centre Food Stores	11.0	2.3	13.2
Out of Centre	Imperial Retail Park	15.8	3.8	19.6
Out of Centre	Other Out of Centre Food Stores	43.3	12.9	56.3
Key Rural Centre	Alrewas	2.3	0.7	3.0
Key Rural Centre	Armitage with Handsacre	1.7	0.2	1.9
Key Rural Centre	Fazeley	0.8	1.0	1.8
Key Rural Centre	Fradley	0.0	0.0	0.0
Key Rural Centre	Little Aston	0.4	1.7	2.2
Key Rural Centre	Shenstone	2.0	1.3	3.3
Key Rural Centre	Whittington	1.8	0.8	2.6
Elsewhere Study Area	Elsewhere in Study Area	11.0	13.5	24.4
Sub-Total Study Area		159.6	57.6	217.2
Outside Study Area	Tamworth Town Centre	2.1		
Outside Study Area	Tamworth Retail Parks	9.3		
Outside Study Area	Rugeley Town Centre	3.5		
Outside Study Area	Walsall Town Centre	0.3		
Outside Study Area	Brownhills Town Centre	3.2		
Outside Study Area	Cannock Town Centre	0.3		
Outside Study Area	McArthur Glen, Cannock	0.2		
Outside Study Area	Other Retail Parks Cannock	7.1		
Outside Study Area	Birmingham City Centre	0.5		
Outside Study Area	Birmingham Retail Parks	1.2		
Outside Study Area	Elsewhere in UK	116.5		
Sub-Total Outside of Study Area		144.2		
Total Expenditure		303.8	57.6	217.2

TABLE 5: CONVENIENCE GOODS EXPENDITURE MARKET SHARES INCLUDING ONLINE (EM)

ASSESSMENT YEAR: 2030

Retail Location	Zone 1	Total Study Area	Study Area Inflow	Total Expenditure
Key Centre/Settlement	Lichfield City Centre	3.6	1.5	5.1
Key Centre/Settlement	Elsewhere Lichfield	18.7	3.8	22.5
Key Centre/Settlement	Burntwood Town Centre	12.2	4.0	16.2
Key Centre/Settlement	Elsewhere Burntwood	34.4	10.0	44.4
Out of Centre	Lichfield Edge of Centre Food Stores	10.8	2.3	13.1
Out of Centre	Imperial Retail Park	15.6	3.8	19.4
Out of Centre	Other Out of Centre Food Stores	42.9	12.8	55.7
Key Rural Centre	Alrewas	2.3	0.6	2.9
Key Rural Centre	Armitage with Handsacre	1.6	0.2	1.8
Key Rural Centre	Fazeley	0.8	1.0	1.8
Key Rural Centre	Fradley	0.0	0.0	0.0
Key Rural Centre	Little Aston	0.4	1.7	2.1
Key Rural Centre	Shenstone	2.0	1.2	3.2
Key Rural Centre	Whittington	1.8	0.8	2.5
Elsewhere Study Area	Elsewhere in Study Area	10.8	13.3	24.2
Sub-Total Study Area		157.9	57.0	215.0
Outside Study Area	Tamworth Town Centre	2.1		
Outside Study Area	Tamworth Retail Parks	9.2		
Outside Study Area	Rugeley Town Centre	3.5		
Outside Study Area	Walsall Town Centre	0.3		
Outside Study Area	Brownhills Town Centre	3.1		
Outside Study Area	Cannock Town Centre	0.3		
Outside Study Area	McArthur Glen, Cannock	0.2		
Outside Study Area	Other Retail Parks Cannock	7.0		
Outside Study Area	Birmingham City Centre	0.5		
Outside Study Area	Birmingham Retail Parks	1.2		
Outside Study Area	Elsewhere in UK	115.2		
Sub-Total Outside of Study Area		142.7		
Total Expenditure		300.6	57.0	215.0

TABLE 6: CONVENIENCE GOODS EXPENDITURE MARKET SHARES INCLUDING ONLINE (EM)

ASSESSMENT YEAR: 2035

Retail Location	Zone 1	Total Study Area	Study Area Inflow	Total Expenditure
Key Centres/Settlement	Lichfield City Centre	3.6	1.5	5.1
Key Centres/Settlement	Elsewhere Lichfield	18.7	3.8	22.5
Key Centres/Settlement	Burntwood Town Centre	12.2	4.0	16.2
Key Centres/Settlement	Elsewhere Burntwood	34.3	10.0	44.4
Out of Centre	Lichfield Edge of Centre Food Stores	10.8	2.3	13.1
Out of Centre	Imperial Retail Park	15.6	3.8	19.4
Out of Centre	Other Out of Centre Food Stores	42.8	12.8	55.6
Key Rural Centre	Alrewas	2.3	0.6	2.9
Key Rural Centre	Armitage with Handsacre	1.6	0.2	1.8
Key Rural Centre	Fazeley	0.8	0.9	1.8
Key Rural Centre	Fradley	0.0	0.0	0.0
Key Rural Centre	Little Aston	0.4	1.7	2.1
Key Rural Centre	Shenstone	2.0	1.2	3.2
Key Rural Centre	Whittington	1.8	0.8	2.5
Elsewhere Study Area	Elsewhere in Study Area	10.8	13.3	24.2
Sub-Total Study Area		157.8	57.0	214.8
Outside Study Area	Tamworth Town Centre	2.1		
Outside Study Area	Tamworth Retail Parks	9.2		
Outside Study Area	Rugeley Town Centre	3.4		
Outside Study Area	Walsall Town Centre	0.3		
Outside Study Area	Brownhills Town Centre	3.1		
Outside Study Area	Cannock Town Centre	0.3		
Outside Study Area	McArthur Glen, Cannock	0.2		
Outside Study Area	Other Retail Parks Cannock	7.0		
Outside Study Area	Birmingham City Centre	0.5		
Outside Study Area	Birmingham Retail Parks	1.2		
Outside Study Area	Elsewhere in UK	115.1		
Sub-Total Outside of Study Area		142.5		
Total Expenditure		300.3	57.0	214.8

TABLE 7: CONVENIENCE GOODS EXPENDITURE MARKET SHARES INCLUDING ONLINE (£M) ASSESSMENT YEAR: 2040

Retail Location	Zone 1	Total Study Area	Study Area Inflow	Total Expenditure
Key Centres/Settlement	Lichfield City Centre	3.6	1.5	5.1
Key Centres/Settlement	Elsewhere Lichfield	18.8	3.8	22.6
Key Centres/Settlement	Burntwood Town Centre	12.2	4.0	16.3
Key Centres/Settlement	Elsewhere Burntwood	34.5	10.1	44.6
Out of Centre	Lichfield Edge of Centre Food Stores	10.9	2.3	13.1
Out of Centre	Imperial Retail Park	15.7	3.8	19.5
Out of Centre	Other Out of Centre Food Stores	43.0	12.9	55.9
Key Rural Centre	Alrewas	2.3	0.7	2.9
Key Rural Centre	Armitage with Handsacre	1.7	0.2	1.9
Key Rural Centre	Fazeley	0.8	1.0	1.8
Key Rural Centre	Fradley	0.0	0.0	0.0
Key Rural Centre	Little Aston	0.4	1.7	2.1
Key Rural Centre	Shenstone	2.0	1.3	3.2
Key Rural Centre	Whittington	1.8	0.8	2.5
Elsewhere Study Area	Elsewhere in Study Area	10.9	13.4	24.3
Sub-Total Study Area		158.5	57.2	215.7
Outside Study Area	Tamworth Town Centre	2.1		
Outside Study Area	Tamworth Retail Parks	9.2		
Outside Study Area	Rugeley Town Centre	3.5		
Outside Study Area	Walsall Town Centre	0.3		
Outside Study Area	Brownhills Town Centre	3.1		
Outside Study Area	Cannock Town Centre	0.3		
Outside Study Area	McArthur Glen, Cannock	0.2		
Outside Study Area	Other Retail Parks Cannock	7.0		
Outside Study Area	Birmingham City Centre	0.5		
Outside Study Area	Birmingham Retail Parks	1.2		
Outside Study Area	Elsewhere in UK	115.6		
Sub-Total Outside of Study Area		143.2		
		301.6	57.2	215.7

TABLE 8: SUMMARY OF RETAINED CONVENIENCE GOODS EXPENDITURE INCLUDING EXPENDITURE INFLOW FROM OUTSIDE THE STUDY AREA (£M)

Retail Location		2025	2030	2035	2040
Key Centres/Settlement	Lichfield City Centre	5.1	5.1	5.1	5.1
Key Centres/Settlement	Elsewhere Lichfield	22.7	22.5	22.5	22.6
Key Centres/Settlement	Burntwood Town Centre	16.4	16.2	16.2	16.3
Key Centres/Settlement	Elsewhere Burntwood	44.9	44.4	44.4	44.6
Out of Centre	Lichfield Edge of Centre Food Stores	13.2	13.1	13.1	13.1
Out of Centre	Imperial Retail Park	19.6	19.4	19.4	19.5
Out of Centre	Other Out of Centre Food Stores	56.3	55.7	55.6	55.9
Key Rural Centre	Alrewas	3.0	2.9	2.9	2.9
Key Rural Centre	Armitage with Handsacre	1.9	1.8	1.8	1.9
Key Rural Centre	Fazeley	1.8	1.8	1.8	1.8
Key Rural Centre	Fradley	0.0	0.0	0.0	0.0
Key Rural Centre	Little Aston	2.2	2.1	2.1	2.1
Key Rural Centre	Shenstone	3.3	3.2	3.2	3.2
Key Rural Centre	Whittington	2.6	2.5	2.5	2.5
Elsewhere Study Area	Elsewhere in Study Area	24.4	24.2	24.2	24.3
Total		217.2	215.0	214.8	215.7

Source: Tables 4 to 7

TABLE 9: LICHFIELD DISTRICT - FORECAST CAPACITY FOR CONVENIENCE GOODS FLOORSPACE EXCLUDING COMMITMENTS

		2025	2030	2035	2040
Step 1:	Total Forecast 'Current' Turnover of All Floorspace (£m):	£217.2	£215.0	£214.8	£215.7
Step 2:	Total Forecast 'Benchmark' Turnover of All Floorspace (£m):	£217.2	£218.3	£219.4	£220.5
Step 3:	Net Residual Expenditure (£m):	-	-£3.3	-£4.6	-£4.8
Step 4:	Capacity for New Convenience Floorspace:				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,512	£12,575	£12,638	£12,701
	(ii) Net Floorspace Capacity (sq m):	-	-266	-366	-377
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		-380	-523	-539

Notes:

Step 1: The (transaction-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).

Step 2: It has been assumed for the purpose of this assessment that the District's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (2025) and other research evidence.

Step 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.

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

## APPENDIX 5      COMPARISON RETAIL CAPACITY ASSESSMENT TABLES

TABLE 1: COMPARISON GOODS TRANSACTION-BASED MARKET SHARES INCLUDING ONLINE (%)

ASSESSMENT YEAR: 2025

Retail Location		Total Study Area	Study Area Inflow	Total Expenditure
Key Centre/Settlement	Lichfield City Centre	6.1%	21.3%	28.4%
Key Centre/Settlement	Elsewhere Lichfield	6.8%	25.8%	32.8%
Key Centre/Settlement	Burntwood Town Centre	0.2%	0.8%	1.1%
Key Centre/Settlement	Elsewhere Burntwood	1.0%	4.0%	5.0%
Out of Centre	Lichfield Edge of Centre Food Stores	0.0%	0.0%	0.0%
Out of Centre	Imperial Retail Park	0.0%	0.0%	0.0%
Out of Centre	Other Out of Centre Food Stores	0.0%	0.0%	0.0%
Key Rural Centre	Alrewas	0.1%	0.5%	0.5%
Key Rural Centre	Armitage with Handsacre	0.1%	0.2%	0.4%
Key Rural Centre	Fazeley	0.0%	3.5%	1.8%
Key Rural Centre	Fradley	0.0%	1.0%	0.6%
Key Rural Centre	Little Aston	0.5%	15.3%	8.9%
Key Rural Centre	Shenstone	0.7%	6.3%	5.1%
Key Rural Centre	Whittington	0.1%	2.0%	1.4%
Elsewhere Study Area	Elsewhere in Study Area	1.5%	19.2%	13.9%
Sub-Total Study Area		17.3%	100.0%	100.0%
Outside Study Area	Tamworth Town Centre	0.5%		
Outside Study Area	Tamworth Retail Parks	8.6%		
Outside Study Area	Rugeley Town Centre	0.7%		
Outside Study Area	Walsall Town Centre	0.1%		
Outside Study Area	Brownhills Town Centre	0.4%		
Outside Study Area	Cannock Town Centre	0.2%		
Outside Study Area	McArthur Glen, Cannock	1.0%		
Outside Study Area	Other Retail Parks Cannock	1.3%		
Outside Study Area	Birmingham City Centre	1.9%		
Outside Study Area	Birmingham Retail Parks	0.5%		
Outside Study Area	Elsewhere in UK	23.6%		
Sub-Total Outside of Study Area		38.9%		
Online Expenditure		43.9%		
Total Expenditure		100.0%	100.0%	100.0%

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

ASSESSMENT YEAR: 2025

Retail Location		Total Study Area	Study Area Inflow	Total Expenditure
Key Centre/Settlement	Lichfield City Centre	30.6	18.0	48.6
Key Centre/Settlement	Elsewhere Lichfield	34.2	21.8	56.1
Key Centre/Settlement	Burntwood Town Centre	1.2	0.7	1.9
Key Centre/Settlement	Elsewhere Burntwood	5.2	3.4	8.6
Out of Centre	Lichfield Edge of Centre Food Stores	0.0	0.0	0.0
Out of Centre	Imperial Retail Park	0.0	0.0	0.0
Out of Centre	Other Out of Centre Food Stores	0.0	0.0	0.0
Key Rural Centre	Alrewas	0.5	0.4	0.9
Key Rural Centre	Armitage with Handsacre	0.6	0.2	0.8
Key Rural Centre	Fazeley	0.2	2.9	3.1
Key Rural Centre	Fradley	0.1	0.0	0.1
Key Rural Centre	Little Aston	2.4	12.9	15.3
Key Rural Centre	Shenstone	3.4	5.4	8.8
Key Rural Centre	Whittington	0.7	1.7	2.4
Elsewhere Study Area	Elsewhere in Study Area	7.5	16.3	23.8
Sub-Total Study Area		86.6	83.7	170.3
Outside Study Area	Tamworth Town Centre	2.4		
Outside Study Area	Tamworth Retail Parks	43.0		
Outside Study Area	Rugeley Town Centre	3.6		
Outside Study Area	Walsall Town Centre	0.7		
Outside Study Area	Brownhills Town Centre	2.0		
Outside Study Area	Cannock Town Centre	1.0		
Outside Study Area	McArthur Glen, Cannock	5.1		
Outside Study Area	Other Retail Parks Cannock	6.6		
Outside Study Area	Birmingham City Centre	9.5		
Outside Study Area	Birmingham Retail Parks	2.7		
Outside Study Area	Elsewhere in UK	118.2		
Sub-Total Outside of Study Area		194.9		
Online Expenditure		220.1		
Total Expenditure		501.7	83.7	170.3
Total Expenditure Excluding Online		281.5	83.7	170.3

TABLE 3: COMPARISON GOODS EXPENDITURE MARKET SHARES EXCLUDING ONLINE (£M)

ASSESSMENT YEAR: 2025

Retail Location		Total Study Area	Study Area Inflow	Total Expenditure
Key Centre/Settlement	Lichfield City Centre	10.9%	21.6%	28.6%
Key Centre/Settlement	Elsewhere Lichfield	12.2%	26.1%	32.9%
Key Centre/Settlement	Burntwood Town Centre	0.4%	0.8%	1.1%
Key Centre/Settlement	Elsewhere Burntwood	1.8%	4.0%	5.0%
Out of Centre	Lichfield Edge of Centre Food Stores	0.0%	0.0%	0.0%
Out of Centre	Imperial Retail Park	0.0%	0.0%	0.0%
Out of Centre	Other Out of Centre Food Stores	0.0%	0.0%	0.0%
Key Rural Centre	Alrewas	0.2%	0.5%	0.5%
Key Rural Centre	Armitage with Handsacre	0.2%	0.2%	0.4%
Key Rural Centre	Fazeley	0.1%	3.5%	1.8%
Key Rural Centre	Fradley	0.1%	0.0%	0.1%
Key Rural Centre	Little Aston	0.8%	15.5%	9.0%
Key Rural Centre	Shenstone	1.2%	6.4%	5.1%
Key Rural Centre	Whittington	0.3%	2.0%	1.4%
Elsewhere Study Area	Elsewhere in Study Area	2.7%	19.4%	14.0%
Sub-Total Study Area		30.8%	100.0%	100.0%
Outside Study Area	Tamworth Town Centre	0.8%		
Outside Study Area	Tamworth Retail Parks	15.3%		
Outside Study Area	Rugeley Town Centre	1.3%		
Outside Study Area	Walsall Town Centre	0.2%		
Outside Study Area	Brownhills Town Centre	0.7%		
Outside Study Area	Cannock Town Centre	0.4%		
Outside Study Area	McArthur Glen, Cannock	1.8%		
Outside Study Area	Other Retail Parks Cannock	2.4%		
Outside Study Area	Birmingham City Centre	3.4%		
Outside Study Area	Birmingham Retail Parks	1.0%		
Outside Study Area	Elsewhere in UK	42.0%		
Sub-Total Outside of Study Area		69.2%		
Total Expenditure		100.0%	100.0%	100.0%

TABLE 4: COMPARISON GOODS EXPENDITURE MARKET SHARES EXCLUDING ONLINE (£M)

ASSESSMENT YEAR: 2025

Retail Location		Total Study Area	Study Area Inflow	Total Expenditure
Key Centre/Settlement	Lichfield City Centre	33.1	19.5	52.6
Key Centre/Settlement	Elsewhere Lichfield	37.0	23.6	60.6
Key Centre/Settlement	Burntwood Town Centre	1.3	0.7	2.0
Key Centre/Settlement	Elsewhere Burntwood	5.6	3.7	9.3
Out of Centre	Lichfield Edge of Centre Food Stores	0.0	0.0	0.0
Out of Centre	Imperial Retail Park	0.0	0.0	0.0
Out of Centre	Other Out of Centre Food Stores	0.0	0.0	0.0
Key Rural Centre	Alrewas	0.5	0.4	1.0
Key Rural Centre	Armitage with Handsacre	0.6	0.2	0.8
Key Rural Centre	Fazeley	0.2	3.2	3.4
Key Rural Centre	Fradley	0.2	0.0	0.2
Key Rural Centre	Little Aston	2.6	14.0	16.5
Key Rural Centre	Shenstone	3.7	5.8	9.5
Key Rural Centre	Whittington	0.8	1.8	2.6
Elsewhere Study Area	Elsewhere in Study Area	8.1	17.6	25.7
Sub-Total Study Area		93.7	90.5	184.2
Outside Study Area	Tamworth Town Centre	2.6		
Outside Study Area	Tamworth Retail Parks	46.5		
Outside Study Area	Rugeley Town Centre	3.9		
Outside Study Area	Walsall Town Centre	0.7		
Outside Study Area	Brownhills Town Centre	2.2		
Outside Study Area	Cannock Town Centre	1.1		
Outside Study Area	McArthur Glen, Cannock	5.5		
Outside Study Area	Other Retail Parks Cannock	7.2		
Outside Study Area	Birmingham City Centre	10.3		
Outside Study Area	Birmingham Retail Parks	2.9		
Outside Study Area	Elsewhere in UK	127.8		
Outside Study Area		210.7		
Outside Study Area		304.4	90.5	184.2

TABLE 5: COMPARISON GOODS EXPENDITURE MARKET SHARES EXCLUDING ONLINE (£M)

ASSESSMENT YEAR: 2030

Retail Location		Total Study Area	Study Area Inflow	Total Expenditure
Key Centre/Settlement	Lichfield City Centre	36.1	21.3	57.3
Key Centre/Settlement	Elsewhere Lichfield	40.4	25.7	66.1
Key Centre/Settlement	Burntwood Town Centre	1.4	0.8	2.2
Key Centre/Settlement	Elsewhere Burntwood	6.1	4.0	10.1
Out of Centre	Lichfield Edge of Centre Food Stores	0.0	0.0	0.0
Out of Centre	Imperial Retail Park	0.0	0.0	0.0
Out of Centre	Other Out of Centre Food Stores	0.0	0.0	0.0
Key Rural Centre	Alrewas	0.6	0.5	1.0
Key Rural Centre	Armitage with Handsacre	0.6	0.2	0.9
Key Rural Centre	Fazeley	0.2	3.5	3.7
Key Rural Centre	Fradley	0.2	0.0	0.2
Key Rural Centre	Little Aston	2.8	15.3	18.0
Key Rural Centre	Shenstone	4.0	6.3	10.3
Key Rural Centre	Whittington	0.8	2.0	2.8
Elsewhere Study Area	Elsewhere in Study Area	8.9	19.2	28.0
Sub-Total Study Area		102.1	98.7	200.7
Outside Study Area	Tamworth Town Centre	2.8		
Outside Study Area	Tamworth Retail Parks	50.7		
Outside Study Area	Rugeley Town Centre	4.3		
Outside Study Area	Walsall Town Centre	0.8		
Outside Study Area	Brownhills Town Centre	2.4		
Outside Study Area	Cannock Town Centre	1.2		
Outside Study Area	McArthur Glen, Cannock	6.0		
Outside Study Area	Other Retail Parks Cannock	7.8		
Outside Study Area	Birmingham City Centre	11.2		
Outside Study Area	Birmingham Retail Parks	3.2		
Outside Study Area	Elsewhere in UK	139.3		
Outside Study Area		229.7		
Total Expenditure		331.8	98.7	200.7

TABLE 6: COMPARISON GOODS EXPENDITURE MARKET SHARES EXCLUDING ONLINE (£M)

ASSESSMENT YEAR: 2035

Retail Location		Total Study Area	Study Area Inflow	Total Expenditure
Key Centre/Settlement	Lichfield City Centre	40.1	23.6	63.7
Key Centre/Settlement	Elsewhere Lichfield	44.9	28.6	73.5
Key Centre/Settlement	Burntwood Town Centre	1.6	0.9	2.4
Key Centre/Settlement	Elsewhere Burntwood	6.8	4.4	11.3
Out of Centre	Lichfield Edge of Centre Food Stores	0.0	0.0	0.0
Out of Centre	Imperial Retail Park	0.0	0.0	0.0
Out of Centre	Other Out of Centre Food Stores	0.0	0.0	0.0
Key Rural Centre	Alrewas	0.6	0.5	1.2
Key Rural Centre	Armitage with Handsacre	0.7	0.3	1.0
Key Rural Centre	Fazeley	0.3	3.8	4.1
Key Rural Centre	Fradley	0.2	0.0	0.2
Key Rural Centre	Little Aston	3.1	17.0	20.1
Key Rural Centre	Shenstone	4.5	7.0	11.5
Key Rural Centre	Whittington	0.9	2.2	3.2
Elsewhere Study Area	Elsewhere in Study Area	9.8	21.3	31.2
Sub-Total Study Area		113.5	109.7	223.2
Outside Study Area	Tamworth Town Centre	3.1		
Outside Study Area	Tamworth Retail Parks	56.3		
Outside Study Area	Rugeley Town Centre	4.7		
Outside Study Area	Walsall Town Centre	0.9		
Outside Study Area	Brownhills Town Centre	2.7		
Outside Study Area	Cannock Town Centre	1.3		
Outside Study Area	McArthur Glen, Cannock	6.6		
Outside Study Area	Other Retail Parks Cannock	8.7		
Outside Study Area	Birmingham City Centre	12.5		
Outside Study Area	Birmingham Retail Parks	3.5		
Outside Study Area	Elsewhere in UK	154.9		
Outside Study Area		255.4		
Total Expenditure		368.9	109.7	223.2



TABLE 7: COMPARISON GOODS EXPENDITURE MARKET SHARES EXCLUDING ONLINE (£M)

ASSESSMENT YEAR: 2040

Retail Location		Total Study Area	Study Area Inflow	Total Expenditure
Key Centre/Settlement	Lichfield City Centre	44.5	26.2	70.7
Key Centre/Settlement	Elsewhere Lichfield	49.8	31.7	81.5
Key Centre/Settlement	Burntwood Town Centre	1.7	1.0	2.7
Key Centre/Settlement	Elsewhere Burntwood	7.6	4.9	12.5
Out of Centre	Lichfield Edge of Centre Food Stores	0.0	0.0	0.0
Out of Centre	Imperial Retail Park	0.0	0.0	0.0
Out of Centre	Other Out of Centre Food Stores	0.0	0.0	0.0
Key Rural Centre	Alrewas	0.7	0.6	1.3
Key Rural Centre	Armitage with Handsacre	0.8	0.3	1.1
Key Rural Centre	Fazeley	0.3	4.3	4.6
Key Rural Centre	Fradley	0.2	0.0	0.2
Key Rural Centre	Little Aston	3.4	18.8	22.2
Key Rural Centre	Shenstone	4.9	7.8	12.7
Key Rural Centre	Whittington	1.0	2.5	3.5
Elsewhere Study Area	Elsewhere in Study Area	10.9	23.6	34.6
Sub-Total Study Area		126.0	121.7	247.7
Outside Study Area	Tamworth Town Centre	3.5		
Outside Study Area	Tamworth Retail Parks	62.5		
Outside Study Area	Rugley Town Centre	5.3		
Outside Study Area	Walsall Town Centre	1.0		
Outside Study Area	Brownhills Town Centre	3.0		
Outside Study Area	Cannock Town Centre	1.5		
Outside Study Area	McArthur Glen, Cannock	7.4		
Outside Study Area	Other Retail Parks Cannock	9.7		
Outside Study Area	Birmingham City Centre	13.9		
Outside Study Area	Birmingham Retail Parks	3.9		
Outside Study Area	Elsewhere in UK	171.9		
Outside Study Area		283.4		
Total Expenditure		409.3	121.7	247.7

SUMMARY OF RETAINED COMPARISON GOODS EXPENDITURE EXCLUDING EXPENDITURE INFLOW FROM OUTSIDE THE STUDY AREA (£M)

Retail Location		2025	2030	2035	2040
Key Centre/Settlement	Lichfield City Centre	52.6	57.3	63.7	70.7
Key Centre/Settlement	Elsewhere Lichfield	60.6	66.1	73.5	81.5
Key Centre/Settlement	Burntwood Town Centre	2.0	2.2	2.4	2.7
Key Centre/Settlement	Elsewhere Burntwood	9.3	10.1	11.3	12.5
Out of Centre	Lichfield Edge of Centre Food Stores	0.0	0.0	0.0	0.0
Out of Centre	Imperial Retail Park	0.0	0.0	0.0	0.0
Out of Centre	Other Out of Centre Food Stores	0.0	0.0	0.0	0.0
Key Rural Centre	Alrewas	1.0	1.0	1.2	1.3
Key Rural Centre	Armitage with Handsacre	0.8	0.9	1.0	1.1
Key Rural Centre	Fazeley	3.4	3.7	4.1	4.6
Key Rural Centre	Fradley	0.2	0.2	0.2	0.2
Key Rural Centre	Little Aston	16.5	18.0	20.1	22.2
Key Rural Centre	Shenstone	9.5	10.3	11.5	12.7
Key Rural Centre	Whittington	2.6	2.8	3.2	3.5
Elsewhere Study Area	Elsewhere in Study Area	25.7	28.0	31.2	34.6
Total Study Area (Lichfield District)		184.2	200.7	223.2	247.7

Source: Tables 4 to 7

TABLE 9: LICHFIELD DISTRICT - FORECAST CAPACITY FOR COMPARISON GOODS FLOORSPACE EXCLUDING COMMITMENTS

		2025	2030	2035	2040
Step 1:	Total Forecast 'Current' Turnover of All Floorspace (£m):	£184.2	£200.7	£223.2	£247.7
Step 2:	Total Forecast 'Benchmark' Turnover of All Floorspace (£m):	£184.2	£206.7	£233.9	£264.7
Step 3:	Net Residual Expenditure (£m):	-	-£6.0	-£10.7	-£17.0
Step 4:	Capacity for New Comparison Floorspace:				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,735	£7,621	£8,622
	(ii) Net Floorspace Capacity (sq m):	-	-891	-1,406	-1,971
	(iii) Assumed Net / Gross Floorspace Ratio:		80%	80%	80%
	(iv) Gross Floorspace Capacity (sq m):		-1,114	-1,757	-2,464

Notes:

Step 1: The (transaction-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).

Step 2: It has been assumed for the purpose of this assessment that the District's comparison retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (2025) and other research evidence.

Step 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.

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

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## APPENDIX 6 LEISURE EXPENDITURE ANALYSIS

TABLE 1: BASE YEAR POPULATION & PROJECTIONS

	2025	2030	2035	2040
Total Study Area (Lichfield)	109,008	110,627	112,330	114,324
Total Study Area :	109,008	110,627	112,330	114,324

Notes: Population Projections from Experian Location Analyst (based on ONS)

TABLE 2: LEISURE EXPENDITURE PER HEAD (£)

PRICE BASE: 2023

	Hotels, B&Bs, etc	Culture	Games of chance	Personal Grooming	Recreation & sport	Restaurants, cafes etc	Total
Total Study Area (Lichfield)	£273	£458	£149	£126	£282	£1,765	£3,053
Study Area Average:	£273	£458	£149	£126	£282	£1,765	£3,053

Source: Experian Location Analyst Geographic Information System (GIS) 'Retail Area Planner Population & Expenditure Datasets'

TABLE 3: LEISURE EXPENDITURE PER HEAD (£)

ASSESSMENT YEAR: 2025

	Hotels, B&Bs, etc	Culture	Games of chance	Personal Grooming	Recreation & sport	Restaurants, cafes etc	Total
Total Study Area (Lichfield)	£269	£451	£147	£124	£277	£1,737	£3,004
Study Area Average:	£269	£451	£147	£124	£277	£1,737	£3,004

Source: Experian Location Analyst Geographic Information System (GIS) 'Retail Area Planner Population & Expenditure Datasets'

TABLE 4: TOTAL FORECAST AVAILABLE LEISURE EXPENDITURE (£m)

	2025	2030	2035	2040
Total Study Area (Lichfield)	£327.5	£341.4	£358.6	£377.9
Total Study Area:	£327.5	£341.4	£358.6	£377.9

Growth 2025-2035		Growth 2025-2040	
£31.1	9.5%	£50.5	15.4%
£31.1	9.5%	£50.5	15.4%

Note:

TABLE 5: STUDY AREA TOTAL AVAILABLE LEISURE EXPENDITURE BY LEISURE CATEGORY (£M)

	2025	2030	2035	2040
Accommodation services (hotels, guesthouses, B&Bs)	£29.3	£30.5	£32.1	£33.8
Cultural services (cinema, theatre, concerts, etc)	£49.1	£51.2	£53.8	£56.7
Games of chance (bingo, casino, betting)	£16.0	£16.7	£17.5	£18.4
Personal grooming (hairdressers, barbers, etc)	£13.5	£14.1	£14.8	£15.6
Recreational and sporting services (gym, fitness, etc)	£30.2	£31.5	£33.1	£34.9
Restaurants, cafes, bars, etc	£189.3	£197.4	£207.3	£218.5
Total Study Area:	£327.5	£341.4	£358.6	£377.9

Growth 2025-2035	Growth 2025-2040
£2.8	£4.5
£4.7	£7.6
£1.5	£2.5
£1.3	£2.1
£2.9	£4.7
£18.0	£29.2
£31.1	£50.5

TABLE 6: TOTAL FORECAST AVAILABLE EXPENDITURE FOR FOOD & BEVERAGE (£M)

	2025	2030	2035	2040
Total Study Area (Lichfield)	£189.3	£197.4	£207.3	£218.5
Total Study Area:	£189.3	£197.4	£207.3	£218.5

Growth 2025-2035		Growth 2025-2040	
£18.0	9.5%	£29.2	15.4%
£18.0	9.5%	£29.2	15.4%

TABLE 7: TOTAL FORECAST AVAILABLE EXPENDITURE FOR CULTURAL SERVICES (£M)

	2025	2030	2035	2040
Total Study Area (Lichfield)	£49.7	£52.1	£54.8	£57.7
Total Study Area:	£49.7	£52.1	£54.8	£57.7

Growth 2025-2035		Growth 2025-2040	
£5.1	10.2%	£8.0	16.1%
£5.1	10.2%	£8.0	16.1%

## APPENDIX 7      FOOD & BEVERAGE EXPENDITURE MARKET SHARE ANALYSIS

TABLE 1: FOOD & BEVERAGE TRANSACTIONS INCLUDING ONLINE: MARKET SHARES (%)

ASSESSMENT YEAR: 2025

Location		Total Study Area	Study Area Inflow	Total Expenditure
Key Centre/Settlement	Lichfield City Centre	12.5%	31.9%	27.7%
Key Centre/Settlement	Elsewhere Lichfield	4.8%	7.8%	8.7%
Key Centre/Settlement	Burntwood Town Centre	1.2%	1.4%	1.9%
Key Centre/Settlement	Elsewhere Burntwood	2.1%	2.2%	3.3%
Out of Centre	Lichfield Edge of Centre Food Stores	0.0%	0.0%	0.0%
Out of Centre	Imperial Retail Park	0.0%	0.0%	0.0%
Out of Centre	Other Out of Centre Food Stores	0.0%	0.0%	0.0%
Key Rural Centre	Alrewas	1.3%	1.3%	2.0%
Key Rural Centre	Armitage with Handsacre	0.5%	0.8%	0.9%
Key Rural Centre	Fazeley	0.4%	2.7%	1.6%
Key Rural Centre	Fradley	0.0%	0.5%	0.2%
Key Rural Centre	Little Aston	0.3%	4.0%	2.0%
Key Rural Centre	Shenstone	3.0%	8.6%	7.0%
Key Rural Centre	Whittington	0.5%	1.0%	1.0%
Elsewhere Study Area	Elsewhere in Study Area	8.8%	37.7%	26.0%
Sub-Total Study Area		35.4%	100.0%	82.3%
Outside Study Area	Tamworth Town Centre	0.5%		
Outside Study Area	Tamworth Retail Parks	0.9%		
Outside Study Area	Rugeley Town Centre	0.4%		
Outside Study Area	Walsall Town Centre	0.1%		
Outside Study Area	Brownhills Town Centre	0.1%		
Outside Study Area	Cannock Town Centre	0.2%		
Outside Study Area	McArthur Glen, Cannock	0.3%		
Outside Study Area	Other Retail Parks Cannock	0.1%		
Outside Study Area	Birmingham City Centre	2.8%		
Outside Study Area	Birmingham Retail Parks	0.2%		
Outside Study Area	Elsewhere in UK	43.2%		
Sub-Total Outside of Study Area		48.8%		
Online		15.8%		
Total Expenditure		100.0%	100.0%	82.3%

TABLE 2: FOOD & BEVERAGE EXPENDITURE MARKET SHARES INCLUDING ONLINE (£M)

ASSESSMENT YEAR: 2025

Location		Total Study Area	Study Area Inflow	Total Expenditure
Key Centre/Settlement	Lichfield City Centre	23.8	22.9	46.7
Key Centre/Settlement	Elsewhere Lichfield	9.0	5.6	14.7
Key Centre/Settlement	Burntwood Town Centre	2.2	1.0	3.2
Key Centre/Settlement	Elsewhere Burntwood	4.0	1.6	5.6
Out of Centre	Lichfield Edge of Centre Food Stores	0.0	0.0	0.0
Out of Centre	Imperial Retail Park	0.0	0.0	0.0
Out of Centre	Other Out of Centre Food Stores	0.0	0.0	0.0
Key Rural Centre	Alrewas	2.4	0.9	3.3
Key Rural Centre	Armitage with Handsacre	1.0	0.6	1.5
Key Rural Centre	Fazeley	0.7	2.0	2.7
Key Rural Centre	Fradley	0.0	0.4	0.4
Key Rural Centre	Little Aston	0.5	2.9	3.4
Key Rural Centre	Shenstone	5.6	6.2	11.8
Key Rural Centre	Whittington	1.0	0.7	1.7
Elsewhere Study Area	Elsewhere in Study Area	16.7	27.1	43.8
Sub-Total Study Area		67.0	71.8	138.8
Outside Study Area	Tamworth Town Centre	1.0		
Outside Study Area	Tamworth Retail Parks	1.8		
Outside Study Area	Rugeley Town Centre	0.7		
Outside Study Area	Walsall Town Centre	0.2		
Outside Study Area	Brownhills Town Centre	0.2		
Outside Study Area	Cannock Town Centre	0.3		
Outside Study Area	McArthur Glen, Cannock	0.7		
Outside Study Area	Other Retail Parks Cannock	0.3		
Outside Study Area	Birmingham City Centre	5.2		
Outside Study Area	Birmingham Retail Parks	0.3		
Outside Study Area	Elsewhere in UK	81.8		
Sub-Total Outside of Study Area		92.4		
Online		29.8		29.8
Total Expenditure		189.3	71.8	168.6
Total Expenditure Excluding Online		159.5		138.8

TABLE 3: FOOD & BEVERAGE EXPENDITURE MARKET SHARES INCLUDING ONLINE (£M)

ASSESSMENT YEAR: 2030

Location		Total Study Area	Study Area Inflow	Total Expenditure
Key Centre/Settlement	Lichfield City Centre	24.8	23.9	48.6
Key Centre/Settlement	Elsewhere Lichfield	9.4	5.9	15.3
Key Centre/Settlement	Burntwood Town Centre	2.3	1.0	3.4
Key Centre/Settlement	Elsewhere Burntwood	4.2	1.6	5.9
Out of Centre	Lichfield Edge of Centre Food Stores	0.0	0.0	0.0
Out of Centre	Imperial Retail Park	0.0	0.0	0.0
Out of Centre	Other Out of Centre Food Stores	0.0	0.0	0.0
Key Rural Centre	Alrewas	2.5	1.0	3.5
Key Rural Centre	Armitage with Handsacre	1.0	0.6	1.6
Key Rural Centre	Fazeley	0.8	2.0	2.8
Key Rural Centre	Fradley	0.0	0.4	0.4
Key Rural Centre	Little Aston	0.5	3.0	3.5
Key Rural Centre	Shenstone	5.8	6.5	12.3
Key Rural Centre	Whittington	1.1	0.7	1.8
Elsewhere Study Area	Elsewhere in Study Area	17.4	28.2	45.7
Sub-Total Study Area		69.9	74.8	144.7
Outside Study Area	Tamworth Town Centre	1.0		
Outside Study Area	Tamworth Retail Parks	1.8		
Outside Study Area	Rugeley Town Centre	0.7		
Outside Study Area	Walsall Town Centre	0.3		
Outside Study Area	Brownhills Town Centre	0.2		
Outside Study Area	Cannock Town Centre	0.4		
Outside Study Area	McArthur Glen, Cannock	0.7		
Outside Study Area	Other Retail Parks Cannock	0.3		
Outside Study Area	Birmingham City Centre	5.5		
Outside Study Area	Birmingham Retail Parks	0.3		
Outside Study Area	Elsewhere in UK	85.3		
Sub-Total Outside of Study Area		96.4		
Online		31.1		31.1
Total Expenditure		197.4	74.8	175.8

TABLE 4: FOOD & BEVERAGE EXPENDITURE MARKET SHARES INCLUDING ONLINE (€M)

ASSESSMENT YEAR: 2035

Location		Total Study Area	Study Area Inflow	Total Expenditure
Key Centre/Settlement	Lichfield City Centre	26.0	25.1	51.1
Key Centre/Settlement	Elsewhere Lichfield	9.9	6.2	16.1
Key Centre/Settlement	Burntwood Town Centre	2.4	1.1	3.5
Key Centre/Settlement	Elsewhere Burntwood	4.4	1.7	6.1
Out of Centre	Lichfield Edge of Centre Food Stores	0.0	0.0	0.0
Out of Centre	Imperial Retail Park	0.0	0.0	0.0
Out of Centre	Other Out of Centre Food Stores	0.0	0.0	0.0
Key Rural Centre	Alrewas	2.6	1.0	3.7
Key Rural Centre	Armitage with Handsacre	1.1	0.6	1.7
Key Rural Centre	Fazeley	0.8	2.2	3.0
Key Rural Centre	Fradley	0.0	0.4	0.4
Key Rural Centre	Little Aston	0.5	3.1	3.7
Key Rural Centre	Shenstone	6.1	6.8	12.9
Key Rural Centre	Whittington	1.1	0.8	1.9
Elsewhere Study Area	Elsewhere in Study Area	18.3	29.6	48.0
Sub-Total Study Area		73.4	78.6	152.0
Outside Study Area	Tamworth Town Centre	1.1		
Outside Study Area	Tamworth Retail Parks	1.9		
Outside Study Area	Rugeley Town Centre	0.7		
Outside Study Area	Walsall Town Centre	0.3		
Outside Study Area	Brownhills Town Centre	0.2		
Outside Study Area	Cannock Town Centre	0.4		
Outside Study Area	McArthur Glen, Cannock	0.7		
Outside Study Area	Other Retail Parks Cannock	0.3		
Outside Study Area	Birmingham City Centre	5.7		
Outside Study Area	Birmingham Retail Parks	0.3		
Outside Study Area	Elsewhere in UK	89.6		
Sub-Total Outside of Study Area		101.2		
Online		32.7		32.7
Total Expenditure		207.3	78.6	184.7

TABLE 5: FOOD & BEVERAGE EXPENDITURE MARKET SHARES INCLUDING ONLINE (€M)

ASSESSMENT YEAR: 2040

Location		Total Study Area	Study Area Inflow	Total Expenditure
Key Centre/Settlement	Lichfield City Centre	27.4	26.4	53.8
Key Centre/Settlement	Elsewhere Lichfield	10.4	6.5	16.9
Key Centre/Settlement	Burntwood Town Centre	2.6	1.2	3.7
Key Centre/Settlement	Elsewhere Burntwood	4.7	1.8	6.5
Out of Centre	Lichfield Edge of Centre Food Stores	0.0	0.0	0.0
Out of Centre	Imperial Retail Park	0.0	0.0	0.0
Out of Centre	Other Out of Centre Food Stores	0.0	0.0	0.0
Key Rural Centre	Alrewas	2.8	1.1	3.8
Key Rural Centre	Armitage with Handsacre	1.1	0.7	1.8
Key Rural Centre	Fazeley	0.8	2.3	3.1
Key Rural Centre	Fradley	0.1	0.4	0.5
Key Rural Centre	Little Aston	0.5	3.3	3.9
Key Rural Centre	Shenstone	6.5	7.2	13.6
Key Rural Centre	Whittington	1.2	0.8	2.0
Elsewhere Study Area	Elsewhere in Study Area	19.3	31.2	50.5
Sub-Total Study Area		77.4	82.8	160.2
Outside Study Area	Tamworth Town Centre	1.1		
Outside Study Area	Tamworth Retail Parks	2.0		
Outside Study Area	Rugeley Town Centre	0.8		
Outside Study Area	Walsall Town Centre	0.3		
Outside Study Area	Brownhills Town Centre	0.2		
Outside Study Area	Cannock Town Centre	0.4		
Outside Study Area	McArthur Glen, Cannock	0.8		
Outside Study Area	Other Retail Parks Cannock	0.3		
Outside Study Area	Birmingham City Centre	6.0		
Outside Study Area	Birmingham Retail Parks	0.3		
Outside Study Area	Elsewhere in UK	94.4		
Sub-Total Outside of Study Area		106.7		
Online		34.4		34.4
Total Expenditure		218.5	82.8	194.6

TABLE 6: SUMMARY OF RETAINED FOOD & BEVERAGE EXPENDITURE INCLUDING EXPENDITURE INFLOW FROM OUTSIDE THE STUDY AREA (€M)

Location	Zone 1	2025	2030	2035	2040
Key Centres and Settlements	Lichfield City Centre	46.7	48.6	51.1	53.8
Key Centres and Settlements	Elsewhere Lichfield	14.7	15.3	16.1	16.9
Key Centres and Settlements	Burntwood Town Centre	3.2	3.4	3.5	3.7
Key Centres and Settlements	Elsewhere Burntwood	5.6	5.9	6.1	6.5
Key Centres and Settlements	Lichfield Edge of Centre Food Stores	0.0	0.0	0.0	0.0
Key Centres and Settlements	Imperial Retail Park	0.0	0.0	0.0	0.0
Key Centres and Settlements	Other Out of Centre Food Stores	0.0	0.0	0.0	0.0
Key Rural Centres	Alrewas	3.3	3.5	3.7	3.8
Key Rural Centres	Armitage with Handsacre	1.5	1.6	1.7	1.8
Key Rural Centres	Fazeley	2.7	2.8	3.0	3.1
Key Rural Centres	Fradley	0.4	0.4	0.4	0.5
Key Rural Centres	Little Aston	3.4	3.5	3.7	3.9
Key Rural Centres	Shenstone	11.8	12.3	12.9	13.6
Key Rural Centres	Whittington	1.7	1.8	1.9	2.0
Elsewhere in Study Area	Elsewhere in Study Area	43.8	45.7	48.0	50.5
Study Area (Lichfield District)		138.8	144.7	152.0	160.2