

**TABLE 1**

<b>Population by Zone within the Study Area</b>		
<b>Zone</b>	<b>2009</b>	<b>2014</b>
1	2,100	2,178
2	1,252	1,299
3	4,573	4,744
4	5,096	5,286
5	6,846	7,101
<b>Total</b>	<b>19,867</b>	<b>20,607</b>

**Notes:**

- 1) Base population Population (2006) derived from MapInfo AnySite Report for Study Area (August 2008) based on 2001 Census.
- 2) Population projections based on Powys County Council projections derived from the Welsh Assembly Government's population projections for Powys (2006 based).

TABLE 2A

Convenience Goods Expenditure Per Capita (£)										
	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
All Zones	1,441	1,456	1,488	1,520	1,520	1,519	1,518	1,518	1,527	1,535

## Notes

- 1) 2005 Price Base
- 2) Special Forms of Trading deducted at 1.9% for Convenience Goods in line with MapInfo Brief 08/2
- 3) Actual Growth from 2006 to 2007 applied in line with MapInfo Brief 08/2
- 4) Growth for 2007-2008 at 2.2% per annum in line with Oxford Economics Forecast for derived from Pitney Bowes Retail Spending Outlook Revised Version March 2009.
- 5) Growth for 2009-2012 at -0.04% per annum in line with Oxford Economics Forecast for derived from Pitney Bowes Retail Spending Outlook Revised Version March 2009.
- 6) Growth for 2013-2014 at 0.57% per annum in line with Oxford Economics Forecast for derived from Pitney Bowes Retail Spending Outlook Revised Version March 2009.

TABLE 2B

Comparison Goods Expenditure Per Capita (£)										
	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
All Zones	2,338	2,464	2,585	2,712	2,720	2,728	2,737	2,745	2,864	2,989

## Notes

- 1) 2005 Price Base
- 2) Special Forms of Trading deducted at 5.4% for Comparison Goods in line with MapInfo Brief 08/2
- 3) Actual Growth from 2006 to 2007 applied in line with MapInfo Brief 08/2
- 4) Growth for 2007-2008 at 4.91% per annum in line with Oxford Economics Forecast for derived from Pitney Bowes Retail Spending Outlook Revised Version March 2009.
- 5) Growth for 2009-2012 at 0.30% per annum in line with Oxford Economics Forecast for derived from Pitney Bowes Retail Spending Outlook Revised Version March 2009.
- 6) Growth for 2013-2014 at 4.35% per annum in line with Oxford Economics Forecast for derived from Pitney Bowes Retail Spending Outlook Revised Version March 2009.

TABLE 2C

Tourism Expenditure Per Capita (£M)										
	2006	2007	2008	2009	2010	2011	2012	2013	2014	
Total Machynlleth % Growth	0.18	0.19 4.05%	0.19 4.05%	0.20 4.05%	0.21 4.05%	0.22 4.05%	0.23 4.05%	0.24 4.05%	0.25 4.05%	
Convenience Comparison	0.07 62.76%	0.07 0.12	0.07 0.12	0.08 0.13	0.08 0.13	0.08 0.14	0.08 0.14	0.09 0.15	0.09 0.15	

TABLE 3A

Total Available Convenience Goods Expenditure £M			
Zone	2009	2014	
1	3.19	3.34	
2	1.90	1.99	
3	6.95	7.28	
4	7.74	8.11	
5	10.40	10.90	
<b>Total</b>	<b>30.19</b>	<b>31.64</b>	

## Notes:

- 1) Structural outflow reflects the ability of an appropriately sized retail development to clawback expenditure currently lost to shops and centres outside of the Study Area. This is informed by the Household Survey findings of current structural outflow with professional judgement and past experience applied to adjust this figure to reflect the effect of the proposed Tesco store.

TABLE 3C

Genuinely Available Convenience Goods Expenditure £M			
	2009	2014	
<i>Structural Outflow</i>			
	2.81	2.94	
	1.39	1.46	
	6.19	6.48	
	3.95	4.14	
	8.74	9.16	
<b>Total</b>	<b>23.07</b>	<b>24.18</b>	

TABLE 3B

Total Available Comparison Goods Expenditure £M			
Zone	2009	2014	
1	5.71	6.51	
2	3.41	3.88	
3	12.44	14.18	
4	13.86	15.80	
5	18.62	21.22	
<b>Total</b>	<b>54.04</b>	<b>61.59</b>	

## Notes:

- 1) Structural outflow reflects the ability of an appropriately sized retail development to clawback expenditure currently lost to shops and centres outside of the Study Area. This is informed by the Household Survey findings of current structural outflow with professional judgement and past experience applied to adjust this figure to reflect the attraction of the proposed Tesco store.

TABLE 3D

Genuinely Available Comparison Goods Expenditure £M			
	2009	2014	
<i>Structural Outflow</i>			
	1.83	2.08	
	0.61	0.70	
	4.73	5.39	
	2.36	2.69	
	4.84	5.52	
<b>Total</b>	<b>14.37</b>	<b>16.37</b>	

**TABLE 4A**  
**Existing Convenience Goods Provision Within the Study Area**

Store	Net Sales Area		Net Sales Area Net Sq M	Net Goods Sales Area Net Sq M	Benchmark Convenience Goods Sales Density £ Sq M	Convenience Goods Turnover £ Sq M	Convenience Goods Turnover from Study Area %	Convenience Goods Turnover from Study Area £M
	Net Sq Ft	Net Sq M						
Co-op, Machynlleth	8,054	748	606	6,334	3.84	90%	3.45	
Harry Tuffins, Machynlleth	5,382	500	400	3,874	1.55	95%	1.47	
Machynlleth Town Centre	6,243	580	406	3,750	1.52	90%	1.37	
Co-op, Tywyn	10,046	933	756	6,334	4.79	90%	4.31	
Tywyn Local Centre	3,229	300	210	3,500	0.74	95%	0.70	
Scattered Stores Within Study Area			300	3,000	0.90	95%	0.86	
<b>Total</b>	<b>36,184</b>	<b>3,361</b>	<b>2,678</b>		<b>13.33</b>		<b>12.16</b>	

**Notes:**

- Floorspace for Co-op, Machynlleth and Co-op, Tywyn derived from IGD database. Convenience/comparison split based on retailers national average derived from Verdict 2009
- Floorspace for Harry Tuffins in Machynlleth derived from DPP's visit to the centre.
- Floorspace for Machynlleth town centre derived from DPP's visit to the centre.
- Allowance made for scattered stores within the Study Area.
- Benchmark sales density based on relevant company averages and for the smaller stores and centres based on average sales densities used in similar studies elsewhere. Harry Tuffins based on Kwik Save.
- Convenience Goods Sales density derived from 2009 Retail Rankings (expressed at 2005 prices).
- Turnover derived from Study Area based on professional judgement, household survey and confidential Tesco Club Card information.

**TABLE 4B**  
**Existing Comparison Goods Provision Within the Study Area**

Store	Net Sales Area		Net Sales Area		Net Comparison Goods Sales Area Net Sq M	Benchmark Comparison Goods Sales Density £ Sq M	Comparison Goods Sales (Exc VAT) £ Sq M	Turnover from Study Area	
	Net Sq Ft	Net Sq M	Net Sq Ft	Net Sq M				%	£M
Co-op, Machynlleth	8,054	748			142	2,405	0.34	90%	0.31
Harry Tuffins, Machynlleth	5,382	500			100	1,678	0.17	95%	0.16
Machynlleth Town Centre	47,481	4,411			3,088	3,000	9.26	90%	8.34
Co-op, Tywyn	10,046	933			177	2,405	0.43	90%	0.38
Tywyn Local Centre	2,691	250			175	2,750	0.48	95%	0.46
Scattered Stores Within Study Area					175	2,500	0.44	95%	0.42
<b>Total</b>	<b>76,345</b>	<b>7,092</b>			<b>3,857</b>		<b>11.12</b>		<b>10.06</b>

**Notes:**

- 1) Floorspace for Co-op, Machynlleth and Co-op, Tywyn derived from IGD database. Convenience/comparison split based on retailers national average derived from Verdict 2009
- 2) Floorspace for Machynlleth town centre derived from DPP's visit to the centre.
- 3) Allowance made for scattered stores within the Study Area.
- 4) Benchmark sales density based on relevant company averages and for the smaller stores and centres based on average sales density used in similar studies elsewhere. Harry Tuffins based on Kwik Save.
- 5) Comparison Goods Sales density derived from 2009 Retail Rankings (expressed at 2005 prices).
- 6) Turnover derived from Study Area based on professional judgement, household survey and confidential Tesco Club Card information.
- 7) Turnover derived from Study Area based on professional judgement, household survey and confidential Tesco Club Card information.

TABLE 5

## Proposed Tesco Store: Summary of Turnover at Benchmark Sales Density

	Sales Area (1) Sq M.	Benchmark Turnover	Total Turnover	Turnover from Study Area
			£	£
Convenience Goods	1,095	11,552	12,65	10,75
Comparison Goods	616	8,965	5,52	4,69
<b>Total</b>	<b>1,711</b>	<b>-</b>	<b>18,17</b>	<b>15,44</b>

**Notes:**

- 1) Total Sales Area provided by Tesco Stores Limited;
- 2) Convenience/comparison split based on Tesco company average derived from Verdict 2008.
- 3) Trade from beyond Study Area assumed to be 15% as confirmed by Tesco

**TABLE 7A**  
**Summary of Convenience Goods Capacity £M**

	2009	2014 with Tesco
Genuinely Available Expenditure within Study Area	23.07	24.18
Existing Provision within Study Area	12.16	12.16
Allocations and Commitments	-	-
Additional Convenience Goods Turnover of the Proposed Store from Study Area	0	10.75
<b>Convenience Goods Capacity</b>	<b>10.91</b>	<b>1.27</b>

**TABLE 7B**  
**Summary of Comparison Goods Capacity £M**

	2009	2014 with Tesco
Genuinely Available Expenditure within Study Area	14.37	16.37
Existing Provision within Study Area	10.06	10.06
Allocations and Commitments	-	-
Additional Comparison Goods Turnover of the Proposed Store from Study Area	0	4.69
<b>Comparison Goods Capacity</b>	<b>4.31</b>	<b>1.62</b>

DRAFT CAPACITY ASSESSMENT

Stores Limited, Machynlleth

TABLE 9

Total Trade Diversion	2009 Total Turnover		2014 Total Turnover		Diversion To		Residual
	£M		£M		£M	Tesco	
Co-op, Machynlleth	5.85		6.13		-2.01		4.12
Machynlleth Town Centre	7.57		8.44		-0.76		7.68
Harry Tuffins	1.55		1.62		-0.39		1.23
Co-op, Tywyn	4.00		4.19		-0.88		3.31
Tywyn Town Centre	5.12		5.54		-0.27		5.27
Scattered Stores Within Study Area	N/A		N/A		-0.20		N/A
Scattered Stores Outside Study Area	N/A		N/A		-7.57		N/A

**TABLE 8A**  
**Convenience Goods Trade Diversion**

	2009 Total Turnover £M	2014 Total Turnover £M	Diversion to Tesco £M	2014 Turnover with Tesco £M
Tesco, Machynlleth	N/A	N/A	9.78	9.78
Co-op, Machynlleth	5.85	6.13	-2.01	4.12
Machynlleth Town Centre	2.09	2.19	-0.49	1.70
Harry Tuffins	1.55	1.62	-0.39	1.23
Co-op, Tywyn	4.00	4.19	-0.88	3.31
Tywyn Town Centre	3.21	3.36	-0.24	3.11
Scattered Stores Within Study Area	2.62	2.74	-0.20	2.55
Stores Outside of the Study Area	N/A	N/A	-5.57	N/A

**TABLE 8B**  
**Comparison Goods Trade Diversion**

	2009 Total Turnover £M	2014 Total Turnover £M	Diversion To Tesco £M	2014 Turnover with Tesco £M
Tesco Machynlleth	N/A	N/A	2.29	2.29
Machynlleth Town Centre	5.49	6.25	-0.27	5.98
Tywyn Town Centre	1.91	2.18	-0.02	2.16
Stores Outside of the Study Area	N/A	N/A	-1.99	N/A