

CACI



RETAIL **FOOTPRINT**

2008 User Guide

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Introduction

What is Retail Footprint?

Retail Footprint is the most extensive and expansive retail centre catchment model available.

It is a gravity model that defines catchments for shopping centres selling Comparison Goods in Great Britain.

These catchments overlap because, as in reality, people living in a postal sector will shop at a range of different shopping centres.

Retail Footprint calculates comparison expenditure and shopper populations for each centre based on the principles that:

- People are more likely to visit larger, more attractive centres.
- People are more likely to visit centres that are easily accessible to them (based on a combination of distance and drive-time).

This Comparison Goods model looks specifically at catchments for 'comparison shopping' products, such as clothing and footwear, books and DVDs. The system has been built using data from January 2007.

Why use Retail Footprint?

Everyday business decisions through to long-term strategies are made using Retail Footprint. Over 200 major clients and retailers within the United Kingdom use Retail Footprint. Below are just some of the ways Retail Footprint has been applied:

- To see the size and extent of shopping centre catchments.
- To calculate the 'real' number of shoppers who visit each shopping centre (as opposed to people who live near a centre but may go elsewhere).
- To estimate available expenditure in each centre.
- To understand the demographics of each centre's catchment.
- As the basis for 'What If' modelling - to understand the impact of changes to centres using CACI's 'Spatial Modeller' software.
- To understand overlaps and cannibalisation between store catchments.
- To assist in location planning decisions for new and existing stores.
- To assess market share and store performance.
- To aid in the optimisation of a retailer's portfolio.

How was Retail Footprint Built?

Gravity Modelling

Retail Footprint is a gravity model. Gravity modelling is based on four general principles, which influence the level of spatial interaction between retail centres:

- Physical distance to (or time taken to reach) the centre.
- The 'attractiveness' of the centre's facilities.
- The degree of intervening opportunities or level of competition.
- The size of the population within an area.

Each of these is detailed below.

Distance or Time Taken

Perhaps the most important determinant of the level of interaction between residential areas and retail centres is the physical distance that separates them. Shoppers do not like to travel long distances, or more importantly, travel for a long period of time if they can visit a similarly attractive centre more conveniently.

Using drive distance alone proves insufficient in dense urban areas, where, despite a centre seeming to be located close by, the 'cost' in terms of time and effort to get to that centre are under-estimated.

Using drive time alone under-estimates the importance of the 'perceived' cost of getting to a centre in areas where road speeds are high. Models based on drive time alone would not pick up the fact that despite relatively fast roads crossing the Pennines, the large physical and 'perceived' distance between Leeds and Manchester will reduce flows between the two centres.

Therefore, CACI use a combination of both drive distance and drive time within Retail Footprint.

Attractiveness

Set against the important effect of drive time/distance decay is the 'attractiveness' of a particular retail centre. That is that a larger high street shopping centre will have much greater 'pulling power' than a smaller suburban centre. As a result people will be willing to travel a greater distance to enjoy the increased benefits of shopping in a larger centre (where there is clearly more choice of outlets and goods, greater presence of key or multiple retailers and perhaps easier car parking facilities).

In Retail Footprint the centre attractiveness is a 'score' based on:

- The turnover from relevant multiple and independent retailers in each centre.
- The turnover from relevant department stores in each centre.
- The number of 'footfall generators' in each centre, e.g. banks.

Retail Branch Scoring

Consumers shop at different outlets, depending on their disposable income and thus retail centre. Retail Footprint is unique in reflecting this like no other product in the market place.

Average outlet turnover was obtained from published sources. An equation was calculated using the average turnover to derive a proportional score across all scoring fascias e.g House of Fraser's average outlet turnover is £13,379,000 which in the equation equals a score of 13.4. Where outliers within the market existed, CACI's market knowledge allowed us to adjust the scores in accordance with real market conditions.

As seen in the example below Selfridges in West End scores nearly double the other national stores reflecting the distribution of Selfridges' national turnover.

A few examples:

- Selfridges West End 39.4
- Selfridges Trafford Centre 20.5
- Carphone Warehouse 4.8
- East 2.4
- WHSmith 5.0
- Wilkinson 7.7

Key local retail services such as banks, optometrists, chemists and travel agents increase the attractiveness and therefore the footfall to a retail centre. To reflect this additional magnetism from these retail services each branch is awarded a score of 1. Independent retailers are also awarded a score of 1, which represents average revenue for this type of outlet.

This approach is better than a simple count of the retailers within the shopping centre, as it reflects the performance and quality of the outlets within the centre and determines the attractiveness of an individual retail destination.

Furthermore each retail fascia has been given a quality allocation; premium, mass or value. This was based on market knowledge, fascia turnover and shopper perception. This allows for analysis based on the quality of the retail provision.

A few examples:

- | | | |
|---------|---|----------------------------------------------------|
| Value | - | Wilkinson, TK Maxx, Argos, Primark |
| Mass | - | WHSmith, Top Shop, Clinton Cards, Boots |
| Premium | - | House of Fraser, Selfridges, Hugo Boss, Paul Smith |

Classification and Interaction

Intervening Opportunities or Competition

The attraction of a particular centre is also connected to the degree of competition (or lack of it) which that centre faces. People will not generally travel to a given centre if the same facilities are available much closer to home. Thus the level of intervening opportunities is important.

Retail Footprint models this complex interaction and is calibrated to reflect real customer shopping patterns using millions of pounds of debit and credit card transactions i.e. the model was calibrated using real world data.

Retail Centre Classification

Retail Footprint classifies centres into 14 major and 52 minor classes, an increase of six minor classes from 2007. This reflects retail mix, market positioning, evolving markets and changing competitors in those markets, such as the increasing strength of supermarkets (particularly the Asda and Tesco fascia) in the non-food sector. Each retail centre has been meticulously assessed in order to position it in its correct classification. The classification of a retail centre and the individual score assigned determines how each centre interacts.

A few examples of Retail Classes include:

- Premium Centres
- Premium Metropolitan Towns
- Premium London Non-residential Centres
- Value Urban Centres
- Major FOCs Premium Brands
- Retail Parks with Fashion
- Super Parks

Retail Footprint's classification is the most transparent ever and allows for evolving and new developments in the market place. It is now the most extensive and expansive retail centre catchment model available, covering 3,726 retail centres.

The minor classes Average Retail Parks and International Transport Terminus are not strictly comparison-shopping destinations and therefore have no catchments. These minor classes account for 383 centres and are only included as seed points.

The largest class change for 2008 involves the reclassification of some of the largest retail centres in the country. To add increased differentiation of these largest centres, the 'Regional Centres' class has been split into 'Quality Regional Centres' and 'Average Regional Centres'. In the same way, 'Average Centres' have been split to include 'Lower Average Centres', as have 'Average Metropolitan Towns'.

As in 2007, supermarkets are scored in the model by allocating fascia-specific percentages of net selling space to the non-food offer (based on average

observed food / non-food sales area splits at various store sizes), then allocating sales per square foot, again based on observed trading patterns, to obtain annual turnover. Supermarket figures are then directly comparable to other comparison goods operators and are scored for Retail Footprint in the same way. Stores of above 50,000 square feet net selling space can potentially become retail centres in their own right when they do not fall within another retail centre.

Retail Footprint provides the most up to date picture of retail centre catchments incorporating new shopping centre openings and developments. Improved retail offers such as those in Hull (St Stephen's), Derby (Eagle Centre), High Wycombe (Eden) and Pollok (Silverburn) are incorporated into the 2008 rankings.

(See appendix 1 for a Retail Classification Summary)

Shopper Demand

The Building Blocks

People who live in a particular area make up the 'demand' for the products sold in the retail centres. The extent of that demand is primarily a function of population size. The greater the population then the higher the levels of spatial interaction with surrounding retail centres. Residential flows and thus expenditure are applied within the model but not workers or tourism spend, these are available from CACI Ltd as modelled estimates and bespoke models.

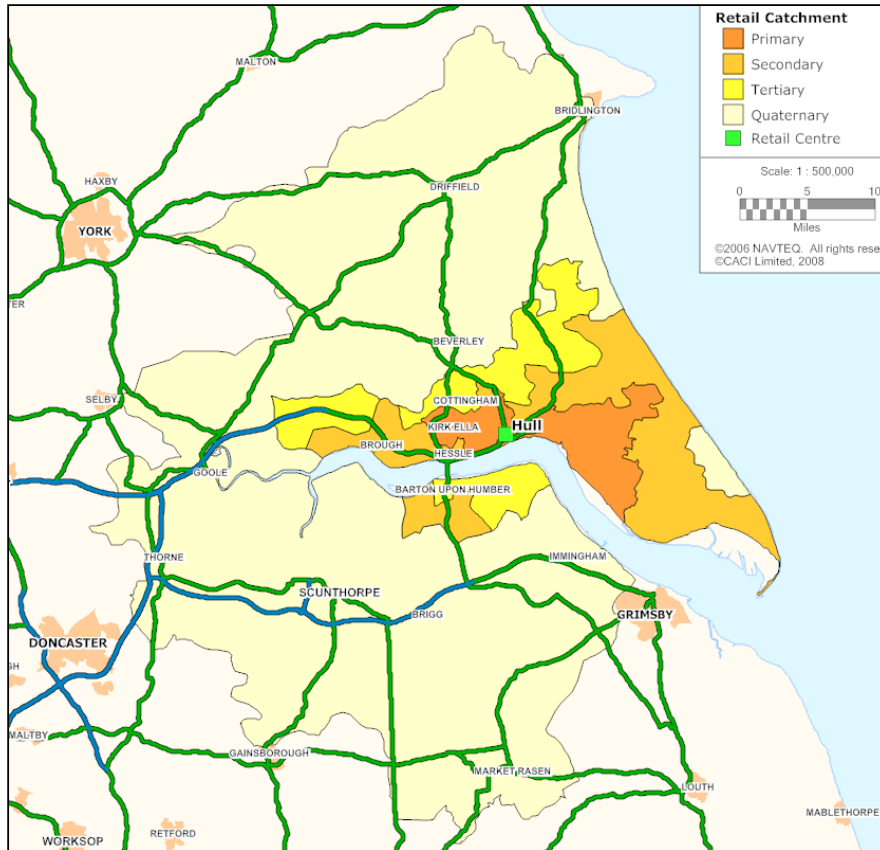
Retail Footprint has been built using Postcode Sectors as standard, but can be supplied in other geographic components. Postcode Sectors are the most popular unit for retail centre gravity models but CACI will soon create a Retail Footprint model using Super Output Area, the new area being adopted for store performance assessment by some major retailers.

Market Share: The Shopper Population and Comparison Expenditure

Retail Footprint calculates the share of population from each postcode sector in the UK to each available centre, based on the above factors. By aggregating these 'flows' to each centre we calculate the 'Shopper Population'.

The Shopper Population is the number of people in the UK that the model calculates will shop in a particular centre. This represents the shopping activity of consumers, equivalent to shopper's total expenditure. It accounts for the fact that, as in reality, catchments overlap, and that the population of a given sector will visit different centres. Therefore, the Shopper Population will always be smaller than the 'Resident Population' found within the catchment.

For example, the catchment for Hull (see below) contains a Resident Population of approximately 803,000, whilst the modelled 'Shopper Population' is just below 283,000. In other words Hull has a market share of approximately 35% of the total residential population in its catchment area.



The Comparison Expenditure for centres, which we generally base our Retail Centre rankings on, is calculated in much the same way as population. Retail Footprint calculates the share assigned to each centre, based on the previously mentioned factors and aggregates these weighted expenditures to Retail Centre level. This then gives you the Total Comparison Expenditure. As different areas of the country will spend different amounts on different products due to demographic make-up, it is possible for a centre to rank above another centre in terms of expenditure but not in terms of Shopper Population and vice versa.

Advice for Model Users

The Four Catchments Explained

Postcode Sector to Centre Weights

Every postcode sector that sends flows of people to a centre will have a weight attached. This is the proportion of that sector that goes to the centre. For example in Figure 1:

Postal Sector	% Flows Go to:	Retail Centre	Minor Class
SW 3 3	33	London - Kings Road	Premium London Centres
	19	London - West End	National Centres
	11	London - Knightsbridge	Premium London Non-residential Centres
	8	London - Victoria	Average London Non-residential Centres
	6	London - South Kensington	Premium London Centres
	6	London - Kensington	Premium London Centres

Fig 1 – Example of Retail Centre Flows above 5% for Sector SW 3 3

Calculating the Four Catchments

- The model calculates the total flow of population to each centre based on *the sector to centre weight* E.g. For Kings Road this is a shopper population of 135,827.
- All sectors going to a centre are then ordered according to this *sector weight*, with the biggest weight at the top.
- For every sector going to a particular centre the model then calculates *the share of the centre's total population* - in the case of SW 3 3 this is $(1,960/135,827) * 100 = 1.4\%$.
- These proportions are accumulated *until at least 50%* of flows have been assigned - this defines the primary catchment.
- The remaining sectors are then accumulated to define the 3 remaining catchments at 75%, 90% and 100% respectively.

Use all Four Catchments?

Centres have 4 catchments – these are defined as follows:

1. Primary - At least 50% of flows to a centre
 2. Secondary - At least 75% of flows to a centre
 3. Tertiary - At least 90% of flows to a centre
 4. Quaternary - Remaining flows to a centre
- When *analysing* data (population figures, expenditure estimates etc.) you should use all 4 catchments – as this represents the whole catchment for the centre.
 - For *mapping* purposes you may wish to just show catchments 1, 2 & 3 as it can look tidier and the flows from the quaternary catchment are often very small.

Only if you have carried out analysis of observed flows, and know that your catchments are smaller, would we recommend excluding any of the catchments from analysis.

“One of my catchments is missing”

- Based on the above methodology ‘Calculating the Four Catchments’ it is possible for some small centres not to have all 4 catchments. For example, if a single sector takes you from 55% to 100% you would get a secondary catchment, as this sector gives you *at least 75%* of flows. This centre would not have a tertiary or quaternary catchment.

In short – the primary catchment is where at least 50% of a centre’s flows come from – based on the sectors that give *the greatest share of their shoppers* to that centre.

It *does not* mean that at least 50% of a sector’s shoppers go to that centre.

Making Changes to Retail Footprint

When using the SpatialModeller/Impact application (see separate guide) you may wish to alter the provision being offered in the centre, which determines the retail centre score.

Spatial Modeller users can use scores for individual retail fascias in order to change a centre’s attractiveness, by either adding or taking away the score for the retailer under consideration from the centre depending on the situation. Then if required the classification of the centre could be changed to reflect its new attributes following the centre classification rules.

If a retailer is relocating, it is important to remember this when adding additional scores to a centre, in order to remove the old contributing retailer’s score. For example many retailers in Birmingham relocated to the Bull Ring from outlets in New Street and Corporation Street, and the same phenomenon is expected in Liverpool (L1), Nottingham (Broadmarsh) and Leicester (Highcross Leicester) in the future.

The model can then be run to determine the impact and change to the national retail environment.

Spatial Modeller/Impact users receive a separate user guide for Impact and also all fascia scores and Retail Footprint centre classification rules.

Appendix 1 - The Retail Footprint Classification

The following summarises the characteristics and rules classifying retail centres into their 14 major and 52 minor classes.

1. Primary Centres

These are the largest of the UK's traditional shopping High Streets in terms of both the number of comparison retailers and the number of shoppers visiting the centre. They are all located in the heart of a major city and are dominant in the regional shopping hierarchy. Their average Retail Footprint centre attractiveness score is 938 with a 15% market share of shoppers within the centre catchments. There are 29 retail centres in the Primary Centres classification and average comparison goods expenditure is £1.2 billion.

1. National Centres

These are the most significant retail centres in the whole country and demonstrate an immense influence at both local and national level. Retail Footprint scores are in excess of 1,275. This indicates the wealth and breadth of the retail offer covering all qualities of retailer. These centres pull from geographic areas well in excess of their regional location. Only four centres fall within this top tier and they are London-West End, Glasgow, Manchester and Birmingham.

2. Principal Centres

This is a nationally represented centre usually described as a major city. They demonstrate high regional influence but can also extend beyond this range and have Retail Footprint attractiveness score greater than 825. This indicates the wealth and breadth of the retail offer covering all qualities of retailer. Examples of retail centres currently falling within this retail class are Leeds, Nottingham and Edinburgh.

3. Quality Regional Centres

These are centres with a mainly regional influence but including some larger cities. Retail Footprint scores are in excess of 610. These centres tend to have less of a shopper pull than Principal Centres due to the smaller number of retailers, and tend to be located a reasonable drive time away from Principal Centres. New for 2008, the Regional Centres class has been split into Quality Regional Centres and Average Regional Centres in order to represent the different catchment characteristics of centres of this type, based upon the amount of premium retail provision they possess. Quality Regional Centres have in excess of 20% premium

retailing, and examples include Southampton, Guildford and Cambridge.

4. Average Regional Centres

The remaining Regional Centres, which also have a score in excess of 610 but have less than 20% premium retail provision, fall into the Average Regional Centres classification. These centres are less attractive than Quality Regional Centres, and are not able to pull shoppers from such great distances. Examples of Average Regional Centres include Bristol, Hull and Leicester.

2. Major Centres

These are large 'traditional' High Street centres located in the middle of either large towns or 'secondary' regional cities. These are the second tier in the regional shopping hierarchy in terms of both the number of comparison outlets and shopper numbers. Major Centres have an average Retail Footprint attractiveness score of 375 and a catchment market share of 10%. 125 retail centres are classified as Major Centres and average comparison goods expenditure is £267 million.

5. Premium Centres

These centres demonstrate a high proportion of premium quality retail provision (greater than 20%) and a significant number of retailers. Retail Footprint attractiveness scores are in excess of 400. The combined size and quality of the offer ensures that shoppers can be drawn from a wide area. Premium retail centres include Tunbridge Wells, Solihull and Bournemouth.

6. Quality Centres

These centres still demonstrate a relatively high proportion of premium quality retail provision (greater than 15%) but have a smaller number of retailers. Retail centres within this class have an attractiveness score greater than 400. Quality retail centres include Watford, Lincoln and Peterborough.

7. Average Centres

Retail centres in this classification are typically mass-market in profile, displaying some element of all three retail offer types. These centres display neither a premium nor value retail provision bias, though there is usually more of the latter present. Average retail centres include such locations as Preston, Coventry and Stockport.

8. Lower Average Centres

Centres within this class have a majority of mass retailing, but also greater than 35% value retailing and hence possess a slight bias towards the lower end of the market. Examples of these retail centres include Burton-on-Trent, Grimsby and Blackpool.

9. Value Centres

Centres within this classification display a high proportion of value retailers (greater than 40%) and little premium provision (less than 10%). Attractiveness scores are below 400, though this is still large enough to ensure that a substantial change in retail mix would be needed to change the perception of a town. Centres within this classification include Barnsley, Scunthorpe and Harlow.

10. Town Centre Malls

Milton Keynes is unique, being the only retail centre falling into this classification. Due to the nature of the town's development, the facilities and access at the centre, its behaviour is unlike any other retail centre, in that it is the only in-town shopping venue that behaves like an out-of-town regional shopping mall. It is easily accessible from areas located outside of Milton Keynes and excellent parking facilities exist. It sits in the middle of the country's most successful New Town and the residential population will double by 2015. It is also home to many company headquarters and has a large workforce centrally located.

11. Mall-Dominated Town Centres

This new class represents in-town retail centres, with a large proportion of their retail provision falling within shopping centres. There are 8 centres within this class, and as these are generally new towns they offer easy car access to their town centres, with considerable car parking provision attracting shoppers from considerable distances. Examples of these centres include Crawley, Telford, Redditch and East Kilbride.

3. Metropolitan Towns

Metropolitan Town locations, just outside the suburban fringe of city centres, mean that their catchments are more influenced by the dominant centres in the area. The average Retail Footprint score for Metropolitan Towns is 166 with an average market share of 5% and a shopper population of 39,000. There are 133 retail centres within the Metropolitan Towns classification and average comparison expenditure is £105 million.

12. Premium Metropolitan Towns

Premium Metropolitan Towns contain the most high-end offer within this major class. Centres are large (attractiveness score above 650) and have a strong focus on fashion – over 50% of the attractiveness score comes from clothing and footwear retailers. Centres have a premium retailer proportion of greater than 13%. This class currently consists of three retail centres – Croydon, Kingston-upon-Thames and Bromley.

13. Quality London Metropolitan Towns

These centres are located around London and tend to be smaller retail centres with an upmarket bias. These centres have scores of above 150 and greater than 10% premium retailing. The three centres in this class are Ealing Broadway, Richmond and Walton-on-Thames.

14. Quality Non-London Metropolitan Towns

This class incorporates upmarket centres outside the London boundary with more than 10% premium retailing. This class is separate to its London counterpart in order to ensure that the different dynamics in the marketplace between London and other metropolitan areas are successfully represented in Retail Footprint. Centres such as Beverley, Marlow and Wilmslow are included in this class.

15. Average Metropolitan Towns

These centres display neither a premium nor value retail provision bias, although some small premium centres fall into this class if their score is less than 100. Retail centres in this classification are typically mass-market centres displaying elements from all three shopping offer types. Examples include Romford, Braintree and Enfield.

16. Lower Average Metropolitan Towns

These centres have a bias towards the value end of the market, with between 40% and 60% of value retailing, and little if any premium retailing. Examples of Lower Average Metropolitan Towns include Redcar, Trowbridge and Letchworth.

17. Value Metropolitan Towns

These centres are effectively a converse of Premium Metropolitan Towns, having a very strong bias towards value retail (which comprises more than 60% of the centre offer) and no premium retailing. Value Metropolitan Towns include Leigh, Port Talbot and Skelmersdale.

4. Regional Towns

Regional Towns, often called market towns, have a similar retail offering to Metropolitan Towns. They tend to be the dominant centres in suburban areas, and as such are the main destination for a large share of the shoppers in the immediate areas around the centre. Shopper numbers are on average 54,000 and are influenced by the suburban location. The Retail Footprint average attractiveness score for this class is 229 with a market share of 10% - this figure is, however, not really comparable with Primary and Major centres as the market size is much smaller. There are 92 centres within the Regional Towns class and average comparison expenditure is £135 million.

18. Quality Regional Towns

These upmarket destinations have a retail mix with notably less value provision than other Regional Towns. Some centres benefit from tourism, which may in turn have enticed premium retailers to locate within them. The greater premium and mass offer leads to a value provision of less than 30% and premium provision greater 12%. Quality Regional Towns include Salisbury, Stratford-upon-Avon and Windsor.

19. Average Regional Towns

These centres are oriented towards a middle of the road retail offer and represent the average position within this major class. The retail provision within these towns typically display greater than a 50% proportion of mass-market retailers, with the majority of remaining retail provision accented towards value. A number of these centres do not reflect the affluence in surrounding residential areas with their retail offer, having fallen behind bigger and better centres nearby. Examples of Average Regional Towns include Hereford, Redhill and Taunton.

20. Value Regional Towns

These are below average regional town destinations, featuring centres that contain a high proportion of value retail. Centres within the Value Regional Town class have more than 40% value retail and little, if any, premium retailing. These centres are used by decent numbers of shoppers, however they are mostly drawn from areas close to the centre as the retail mix does little to attract shoppers from further away. Examples of Value Regional Towns include Wrexham, Bridgend and Bridlington.

5. Urban Centres

Urban Centres by definition are located in large urban areas. The size of centre varies considerably, from London - King's Road (525) to small centres such as Norbiton (18), thus the average Retail Footprint score is only 33 and the market share 1.7%. The share of the residential population visiting these centres is low due to the close proximity of more dominant centres. There are 715 centres within this class and average comparison expenditure is only £15 million, though this can vary considerably – exceptions include Kings Road (£413m), Kensington (£371m) and Knightsbridge (£331m). Workers and tourists are not measured within the shopping populations as the model is allocating the residential population.

21. Premium London Non-residential Centres

These are the principal destinations for a large share of the shoppers in the immediate area of the catchment. These centres, by location, have a large concentration of workers and / or tourists and benefit greatly from the transient population close by. Premium retail provision is equal to or greater than 25% of the offer, and the retail centre must have a score of at least 100. Examples of Premium London Non-residential Centres include London - Knightsbridge, London - Covent Garden and London – Canary Wharf.

22. Average London Non-residential Centres

In their immediate locality these are the primary destinations for shopping. Each of these centres are located in or around central London, with major central London centres such as the West End, Covent Garden and Knightsbridge affecting their catchments. These centres have a decent concentration of workers. Premium retail provision typically makes up less than 25% of the offer. Examples of this retail class include London - Victoria and London – Paddington.

23. Premium London Centres

These London Centres are located in the large upmarket urban areas of London and are unique in their offer and behaviour. These centres benefit from a high proportion of premium retail provision (greater than 30%) and low levels of value provision (less than 5% in any centre). The Retail Footprint attractiveness score must also be equal to or greater than 120. Centres in this class can attract shoppers from some distance away, particularly affluent ones – this effect varies in strength according to centre size. Premium London Centres include London – Kings Road, London – Kensington and London - Hampstead.

24. Larger London Urban Centres

This new class represents sizeable residential retail centres within the London area which lack significant proportions of premium retailing. Centres within this class have a score in excess of 200, and have a mass-orientated offer (representing at least 60% of provision). Examples of these centres include London – Hammersmith, London – Camden Town and Wimbledon.

25. Average London Urban Centres

These Urban Centres are located in and around London, with a Retail Footprint score of between 30 and 200. Centres of this size typically perform a very localised function. The value provision for these centres is less than or equal to 35% of the retail on offer, though within this context, centre profiles can vary. This class includes centres such as London – Fulham Broadway, London – Brixton and Southgate.

26. Average Urban Centres Non-London

This class mirrors the Average London Urban Centres class, but instead containing centres outside of London. Centres in this class also have a score of between 30 and 200, and no more than 35% value retailing. As these centres are outside of London, shopping patterns are less localised, due to less retail competition. Examples of centres within this class include Bristol - Clifton and Cardiff – Penarth.

27. Value Urban Centres

Centres within this class have a score of 30 or above, but consist of at least 35% value retailing. These centres can attract trade within their local catchment, and some of the larger centres will attract shoppers from further afield, although the lack of quality retailing at the centre limits this effect. Value Urban Centres include London – Lewisham, Liverpool – Old Swan and Edinburgh - Leith.

28. Small Urban Centres

These are the smallest of the Urban Centres, serving a very localised neighbourhood area. Retail Footprint attractiveness scores are lower than 30, and are often considerably less. The quality of the retail offer varies between centres within this class. Examples include Norbiton, Tamworth – Bonehill and Glasgow - Govan.

6. Local Centres

Local Centres are located within easy striking distance of a city centre, but outside of the core urban area, illustrating their difference from Urban Centres. They tend to have fewer comparison outlets and are lower in the local shopping hierarchy. The average Retail Footprint attractiveness score is only 17 and the market share 2.1%. The average shopper population across this major class is very low (3,672). There are 1,024 centres within the Local Centres classification and average comparison expenditure is £9.4 million.

29. Better Local Centres

These centres have a bias towards a mass retail offer, with value provision making up less than 30%. Their Retail Footprint score is greater than 20 reflecting the slightly larger offer of a Better Local Centre. Examples include Berkhamsted, Pershore and Hull – Cottingham.

30. Average Local Centres

These centres are primarily mass and value oriented, with greater than 30% value provision and a Retail Footprint score of at least 20. Owing to their size and retail mix, centres of this type would be expected to draw most of their trade from the local area. Average Local Centres include Spalding, Arbroath and Urmston.

31. Small Local Centres

The majority of these centres are very small, with a limited retail offer. All centres have a Retail Footprint score of below 20 and most are much lower than this, with the average being only 6. Examples of these Small Local Centres include Guiseley, Frodsham and Hebden Bridge.

7. Rural Centres

Rural Centres are located in similar areas to Regional Towns. However, they have a lower level of retail provision and corresponding smaller catchments. These isolated centres tend to serve the local community effectively but do not have the mix of outlets to encourage shoppers from further distances. Conversely, these centres tend to have fairly high levels of loyalty from locals due to the 'cost' of travelling to an alternative centre; the average market share is 8.4%. Some of these centres are highly isolated and have a small but loyal and relatively static retail catchment.

Rural Centres tend to be large enough to support the basic needs of just the very local catchment. Similar sized centres in less remote areas would see much higher levels of competition from nearby more attractive centres

and would compete poorly. The average Retail Footprint attractiveness score is 22 and the shopper population of 6,041. There are 606 centres falling into this classification and average comparison expenditure is £14.9 million.

32. Rural Centres

Rural Centres within this minor classification have a Retail Footprint score greater than or equal to 25. Examples of centres within this classification include Rushden, Blackwood and Tiverton.

33. Small Rural Centres

Rural Centres within this minor classification would play second fiddle to any Rural Centres nearby, as Small Rural Centres are those centres with a score of less than 25. Examples of centres within this classification include Market Rasen, Stow-on-the-Wold and Axminster.

8. Out of Town Regional Malls

Out of Town Regional Malls, such as the Trafford Centre and Bluewater are located in 'non-traditional' retail locations, usually on the edge of large urban areas. They tend to offer a strong core range of comparison outlets within a confined and clearly defined centre.

These centres often have a catchment that covers a very large physical area, with shoppers drawn from a considerable distance due to the attraction of a single centre that meets their retail needs in full. Additional leisure facilities, plentiful parking and the modern conveniences that these centres offer, along with in many cases dedicated feeder roads just off main arterial routes, further attract shoppers.

The average Retail Footprint attractiveness score is 514 with a shopper population of 287,000. Market shares are low (average 5.8%) with Out of Town Regional Malls tending to be used for large-scale leisure and event driven shopping trips by people throughout the region. The majority of shoppers use more traditional centres for their regular comparison-shopping trips. In recognition of the average scope of such centres, there are only 11 Out of Town Regional Malls nationally with average comparison expenditure of £739 million.

34. Premium Out of Town Regional Malls

The emphasis for any centre of this type is quality; premium provision must be equal to or greater than 35%. Bluewater is the only Out of Town Regional Mall that currently displays these premium attributes.

35. Average Out of Town Regional Malls

These centres are typically mass-market malls, displaying elements from all three retail offer types. Though not a rule, centres of this type comprise 60%+ mass retail; generally, premium retail makes up the majority of the remaining offer at centres. Typical examples include Cribbs Causeway, Meadowhall and Trafford Centre.

36. Urban Regional Malls

Brent Cross and Dudley – Merry Hill are special in their behaviour and attractiveness and are therefore the only centres in this classification. While being nestled in urban areas they attract trade from large sections of their immediate catchment and demonstrate relatively high market shares in their core catchment. Customers display a high loyalty with these schemes and they appeal to a broad spectrum of consumers with their eclectic mix of retailers.

37. Small Out of Town Regional Malls

These centres are small regional malls and thus have a Retail Footprint score no greater than 350. Leeds – White Rose and the new Silverburn scheme are the only two Out of Town Regional Mall to have this smaller number of retailers and turnover.

9. Purpose Built District Centres

Purpose Built District Centres are essentially smaller regional malls serving a more localised area. They are located in areas serving several towns or districts. The retail offer is more limited than a regional mall.

The average Retail Footprint score is 134 highlighting the smaller amount of retailers when compared to regional malls. Market share for the catchment is 3.4%. There are 15 centres within this classification with average comparison expenditure of £113 million.

38. Average Purpose Built District Centres

These centres make up the majority of District Centres, offering major retailers for a mass localised market. A number of these centres also contain a large supermarket, whose non-food offer (if applicable) is now incorporated into the attractiveness score. Examples of Average Purpose Built Centres include Peterborough – Serpentine Green and Edinburgh – Ocean Terminal.

39. Value Purpose Built District Centres

These centres have a higher proportion of value retailers with value provision making up at least 35% of the retail mix. Their average attractiveness score is 122, however these centres are recognised as inferior to the main town centre offer in their location and may also be secondary to other non-town centre locations. Examples of Value Purpose Built District Centres are Glasgow – Parkhead Forge and Sheffield – Crystal Peaks.

10. Factory Outlet Centres

Factory Outlet Centres offer a distinct retail mix, focused around providing branded goods at discounted prices. Because the full range of comparison goods is not available, shoppers tend to only visit such centres for a minority of their shopping trips. As a result the average market share is just 2.3%. There are 47 Factory Outlet Centres with an average comparison expenditure of £103 million.

Catchments tend to cover a large geographical area with bargain hunters willing to travel considerable distances for this unique retail offer. Due to the nature of their offer, Factory Outlet Centres scores are calculated differently. The score is based on the number of brands/outlets available, as opposed to the national average outlet turnover used for regular high street stores.

40. Major FOCs Premium Dominated

Centres of this type are dominated by premium retail - 70% or more of the outlets in the centre belong to this offer type. Only Bicester Village Outlet Centre currently falls within this classification.

41. Major FOCs Premium Brands

Centres such as these have a significant premium offer, representing at least 20% of retailers, and have an attractiveness score of at least 70. This ensures that they are of sufficient size to take advantage of the good retail mix. An example of such a centre is Cheshire Oaks - McArthurGlen Outlet Centre.

42. Major Urban FOCs Premium Market

Gunwharf Quays (Portsmouth) is the only centre in this class, as it is the only Factory Outlet Centre located within a town centre. Whilst the majority of the retail offer is mass, the proportion of premium retail is much higher than that of value retail. Due to the centre location close to a town centre, the catchment shows characteristics of more traditional retail centres.

43. Major FOCs Mass Market

Centres in this class are much more mass-market oriented, with less of an emphasis on premium retail. Indeed, in each centre, the largest retail type is mass, followed by value and then premium. With an average attractiveness score of 55 compared with 90 at Premium Brands FOCs, these centres are smaller in scope and breadth of offer. Examples include Hornsea Freeport Outlet Centre and Colne – Boundary Mills.

44. Medium Sized FOCs

These FOCs are smaller with an average Retail Footprint score of 33 (minimum attractiveness score of 21), and in many cases are smaller than the town centre offer closest to them. Ebbw Vale - Festival Park Outlet Centre is a prime example of these centres, as is the Brighton Marina Outlet Centre.

45. Small Sized FOCs

These are the smallest FOCs and tend to take the form of 'under-one-roof' concessions, with a Retail Footprint score of less than 20. St Asaph – The Tweedmill and Wilton Outlet Centre are examples of centres in this classification.

11. Fashion Parks

Centres in this major class, such as Leicester - Fosse Park, provide a fashion-based out of town offer, giving residents an additional shopping destination for High Street non-discount comparison goods. As opposed to Out of Town Regional Malls, these shopping parks are uncovered and tend to be large sheds occupied by individual High Street retailers. Due to the out of town location, parking and food services are usually provided. Supermarkets are also often present, sometimes including a non-food element that has been incorporated into the attractiveness score where applicable.

The average Retail Footprint score for this classification is 108, indicating the number of retailers with large units taking up space on the majority of parks. Due to their location and offer type, shoppers tend to travel to these destinations infrequently, resulting in an average market share of 2.8%. There are 64 centres within the Fashion Park classification with an average comparison expenditure of £102 million.

46. Super Parks

These are large parks with the emphasis on fashion and offer size – all centres in this class have a fashion offer comprising at least 50% of the total retail offer, and an attractiveness score of over 140. Leicester - Fosse Park, Bournemouth – Castlepoint and York – Monks Cross are examples of Super Parks.

47. Major Shopping Parks

These parks make up the majority of Fashion Parks. Retail Footprint attractiveness scores are greater than 60; fashion retailers generally make up at least 20% of the centre offer, and often much more. Examples include Preston - Deepdale Shopping Park and Bolton – Middlebrook Retail Park.

12. Retail Parks

Retail Parks tend to be located in edge of town locations. They offer a very different retail mix from traditional High Streets, with more outlets serving the household goods market (furniture, large electrical) than the comparison goods market. Over recent years though, Retail Parks with comparison High Street outlets have emerged in the retail environment along with the supermarket non-grocery offer.

There are 758 Retail Parks in total, with 393 of these also having fashion as part of their retail offer. These centres have an average comparison expenditure of £19 million.

Retail Footprint splits out the 393 retail parks with a fashion element into two classes, Retail Parks Majority Fashion and Retail Parks Minority Fashion. The split helps to represent the difference in the attractiveness of Retail Parks' comparison goods offer relating to the level of fashion retailing present.

Retail Parks without any fashion have no catchments. This is because they behave differently and are not strictly comparison-shopping destinations. These are assigned a Retail Footprint score and seed point but are not an influence within the model.

48. Retail Parks Majority Fashion

These are retail parks containing a fashion and / or other comparison offer. A park must have an offer comprising at least 50% fashion and have a score of less than 60. Examples of these centre types include Yeovil – Bablyon Retail Park and Nottingham – Chilwell Retail Park.

49. Retail Parks Minority Fashion

These retail parks contain a fashion and / or other comparison offer, however it comprises the minority offer within the retail park and is currently outweighed by the non-comparison offer. Llandudno - Mostyn Champneys Retail Park and Derby - Kingsway Retail Park are examples of this type of centre.

50. Retail Parks

These are traditional bulky goods parks usually containing retail sheds offering household goods such as furniture and large electrical products. Centres in this class include Portsmouth - Ocean Retail Park and Shrewsbury - Sundorne Retail Park.

13. Supermarkets

This major class was introduced in order to represent standalone supermarket locations with an element of comparison goods retailing. There are 89 supermarkets included, with an average attractiveness score of 16.

51. Supermarkets

These are supermarket locations where the store sits in isolation and contains a large enough non-food offer to act as a comparison goods offer in its own right. Four fascias can qualify for this class – Asda, Sainsburys, Tesco and Waitrose – and to do so, the individual store size must be greater than 50,000 square feet (net selling space). Non-food sales area and sales per square foot is allocated using industry knowledge of space and trading ratios at supermarkets, enabling CACI to award scores to supermarkets in the same way as attractiveness scores are awarded to other retailers. Catchments can thus be produced and compared in the same way as other centres.

14. International Transport Termini

These are travel based convenience destinations and have no catchments. This is because of their unique behaviour. These centres are assigned a Retail Footprint attractiveness score and seed point but are not an influence within the model. There are 17 Airports in this class, along with the Eurotunnel Terminal at Folkestone.

52. International Transport Termini

Travel based convenience destination.