

East Staffordshire Borough Council RETAIL AND LEISURE CAPACITY STUDY Additional Retail Model - Summary Paper



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1 INTRODUCTION AND PURPOSE OF THE SUMMARY PAPER

Introduction

- 1.1 We submitted our draft Final Report for the Borough-wide Retail and Leisure Capacity Study to the Council in May 2007, and submitted a revised draft of the report in July 2007.
- 1.2 For our Draft Final Report, we identified comparison and convenience retail floorspace requirements ('quantitative need') using two alternative population scenarios. The first scenario - which we term Scenario A, 'low population growth' - assumes that the population in East Staffordshire in the period to 2026 will increase in accordance with the proposed West Midlands RSS Spatial Option 1. The second scenario - which we term Scenario B, 'high population growth' - assumes that the East Staffordshire population will grow in accordance with RSS Spatial Option 3¹.
- 1.3 Our quantitative capacity work is based on a static retention rate, which we consider to be the most realistic scenario to plan for given the healthy current retention rate in both the comparison and convenience sectors (67 per cent and 87 per cent, respectively).
- 1.4 In the comparison retail sector, we identified a goods based capacity for additional comparison sector sales floorspace up to 2021 in the range 16,900 sq.m (181,800 sq.ft) net when assessed on the basis of low future population growth (Scenario A), to around 22,750 sq.m (244,800 sq.ft) net based on high future population growth (Scenario B). In the longer 2007-26 period, the overall comparison retail floorspace requirement range increases to around 33,700 sq.m (362,000 sq.ft) net under Scenario A, to around 42,800 sq.m (460,200 sq.ft) under Scenario B.
- 1.5 The convenience requirements arising by 2021 are more modest, ranging from 2,800 sq.m (30,300 sq.ft) net under Scenario A to 4,800 sq.m (51,700 sq.ft) net under Scenario B. In the longer-term period 2007-26, there is scope for around 5,300 sq.m (57,600 sq.ft) under the low population growth Scenario A, rising to around 8,100 sq.m (87,300 sq.ft) under the high population growth Scenario B. Thus, as in the comparison sector, a significant proportion of the comparison retail floorspace requirements identified for the overall study period 2007-26 arise in the post-2021 period, under both the 'low' and the 'high' population scenarios.

Purpose of this Summary Paper

- 1.6 Following submission of our Draft Final Report, SCC has produced a further population for East Staffordshire, based on an assumption of 20,000 houses being built in the period 2001 to 2026. This underlying assumption in the latest SCC projection is higher than the levels of housing growth which underpinned SCC's previous projections. East Staffordshire BC instructed us to undertake a third retail capacity modelling exercise using these new (higher) population figures, by way of email on 22 June 2007.
- 1.7 This Paper summarises the retail capacity that arises using the latest higher-growth population figures. Appendices 1 and 2 contain the associated spreadsheets. As requested, the Paper is free-standing, rather than being integrated with the main report.

¹ The population projections data that underpinned our two retail scenarios were provided by Staffordshire County Council (SCC). The cover email from SCC (12 March 2007) states '*the growth scenarios under Options 2 and 3 in East Staffordshire are the same*'. Hence the reason for two retail forecasts rather than three.

2 QUANTITATIVE RETAIL CAPACITY ANALYSIS - COMPARISON SECTOR (RSS 'OPTION 4')

Introduction

- 2.1 As made clear in Section 1, our Scenario C forecasts utilise SCC's latest population projection for East Staffordshire, which is based on an assumption of 20,000 houses being built in the period 2001 to 2026. All of the other data inputs - expenditure growth rates, future retention rates, allowances for claims on expenditure, commitments, turnover efficiency ratios, and so on - are the same as the inputs that we used for the Scenario A and B forecasts.
- 2.2 For consistency with the comparison retail forecasts that we produced for the Main Report, we refer in this Paper to the additional retail capacity forecasts as 'Scenario C'.

Forecast Growth in Comparison Expenditure of OCA Residents

- 2.3 Spreadsheets 2 to 10 of Appendix 1 provide the projections for population, per capita spending and the overall comparison goods spend for residents of each of the nine zones, using utilise SCC's latest population projection for East Staffordshire as described in paragraph 2.1 above. Table 2.1 below summarises the projected growth in comparison spending for residents in the whole of the East Staffordshire OCA, derived by applying the MapInfo/OEF forecast comparison expenditure growth rate of 4.4 per cent, per capita, per annum. The total increase in comparison goods expenditure that arises over the 2007-26 study period under Scenario C (RSS 'Option 4' population growth) (£1,003.9m) equates to a growth of 163.6 per cent.

Table 2.1 Projected Growth in the Comparison Expenditure of Residents of the East Staffordshire Overall Catchment Area, £m (2004 Prices)

	2007	2011	2016	2021	2026	Change 2007-11	Change 2011-16	Change 2016-21	Change 2021-26	Change 2007-26
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m
Scenario C - 'RSS Option 4' Population Growth	613.6	727.8	949.6	1241.1	1617.5	114.2	221.8	291.4	376.4	1003.9

- 2.4 Table 2.2 below sets out the amount of comparison expenditure which is retained by all centres and stores located within the catchment area and the resulting growth in retained expenditure. Thus, the overall growth in retained expenditure in the OCA up to 2026 would amount to £679.7m under Scenario C.

Table 2.2 Comparison Expenditure Retained by Centres/Stores Located in the East Staffordshire Overall Catchment Area, £m (2004 Prices)

	2007	2011	2016	2021	2026	Change 2007-11	Change 2011-16	Change 2016-21	Change 2021-26	Change 2007-26
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m
Scenario C - 'RSS Option 4' Population Growth	413.6	490.4	640.3	837.7	1093.3	76.8	149.9	197.4	255.6	679.7

Allowances for Claims on Comparison Expenditure Growth

- 2.5 Table 2.3 summarises the main deductions for the claims on the initial surplus of comparison expenditure - i.e. the allowances for existing retail planning commitments and for increased floorspace efficiency - for population growth Scenario C. The five comparison retail commitments in the OCA together comprise some 13,490 sq.m

(145,205 sq.ft) of new comparison floorspace (net sales area). We estimate that this new floorspace and allowances for increased floorspace efficiency will together account for some £105.2m of the initial surplus of comparison expenditure at 2011 under Scenario C.

Table 2.3 Initial Comparison Retail Expenditure Residual

Scenario C - 'RSS Option 4' Population Growth	Change 2007-11	Change 2011-16	Change 2016-21	Change 2021-26	Change 2007-26
Goods Base	£m	£m	£m	£m	£m
Initial Surplus	76.8	149.9	197.4	255.6	679.7
Claims on Capacity	105.2	61.1	68.2	76.3	301.0
Residual	-28.4	88.9	129.1	179.3	378.7

- 2.6 Table 2.3 shows of the comparison goods residual under Scenario C at 2026 of £378.7m, around half (£179.3m) can be attributed to the final 2021-2026 reporting period; the total residual apparent at 2021 is £189.6m. It should also be noted that, as with Scenarios A and B, there is a negative residual at 2011 under Scenario C, due to the relatively large amount of comparison floorspace within the OCA that is currently committed in the planning pipeline.

Converting Residual Comparison Expenditure to Net Sales Floorspace Requirements²

- 2.7 Table 2.4 converts the residual expenditure total for population growth Scenario C into theoretical net sales³ floorspace requirements. For the OCA as a whole, the quantitative need up to 2026 under Scenario C is 50,739 sq.m (546,154 sq.ft) net. Again, it should be emphasised that around half of this requirement (23,287 sqm) arises between 2021 and 2026; in the period 2007-2021, the quantitative need equates to 27,452 sq.m (295,493 sq.ft) net under Scenario C.

Table 2.4 Conversion of Expenditure Surplus to Comparison Floorspace Requirements

Scenario C - 'RSS Option 4' Population Growth					
COMPARISON	2007-11	2011-16	2016-21	2021-26	2007-26
Goods Base Residual (£m)	-28.4	88.9	129.1	179.3	378.7
Assumed Floorspace Efficiency, £ per sq.m sales area	5,516	6,165	7,098	7,701	
Floorspace Requirement, sq.m sales area	-5,158	14,418	18,192	23,287	50,739

Summary of Quantitative Need in the Comparison Sector (Scenario C)

- 2.8 In the period to 2021, the quantitative need for additional comparison retail floorspace in the East Staffordshire OCA under Scenario C is around 27,500 sq.m (295,500 sq.ft). In the 2007-26 period, the overall comparison retail floorspace requirement under Scenario C increases to around 50,800 sq.m (546,000 sq.ft) net. As previously discussed, the identified floorspace requirements are based on a static retention rate, which we consider to be the most realistic scenario to plan for given the healthy current retention rate of 67 per cent.

² Our floorspace forecasts for both the comparison and convenience sectors should be treated as indicative only. Long-term forecasts to 2021 and 2026, whilst valuable for strategic planning purposes, should be regarded as subject to increasing uncertainty in the later parts of the study period and should be kept under regular review.

³ Typical net to gross ratios are 70 per cent for 'high street' comparison retail and 80 to 90 per cent for comparison retail warehouses.

3 QUANTITATIVE RETAIL CAPACITY ANALYSIS - CONVENIENCE SECTOR (RSS 'OPTION 4')

Introduction

- 3.1 As with our Scenario C comparison sector forecasts, the only data input that is different in the Scenario C convenience forecast is population. All of the other data inputs - expenditure growth rates, future retention rates, allowances for claims on expenditure, commitments, turnover efficiency ratios, and so on - are the same as the inputs that we used for the Scenario A and B forecasts.
- 3.2 For consistency with the convenience retail forecasts that we produced for the Main Report, we refer in this Paper to the additional retail capacity forecasts as 'Scenario C'.

Forecast Growth in Convenience Expenditure of OCA Residents

- 3.3 Spreadsheets 2 and Spreadsheets 12 to 19 of Appendix 2 provide the projections for population, per capita spending and the overall convenience goods spend for residents of each of the nine OCA zones. Table 2.5 below summarises the projected growth in convenience spending for residents in the whole of the OCA area, derived by applying the MapInfo/OEF forecast comparison expenditure growth rate of 0.9 per cent, per capita, per annum. The total increase in convenience goods expenditure that arises over the 2006-26 study period under Scenario C (£142.3m) equates to a growth of 42.2 per cent.

Table 2.5 Projected Growth in the Convenience Expenditure of Residents of the East Staffordshire Overall Catchment Area, £m (2004 Prices)

	2007	2011	2016	2021	2026	Change 2007-11	Change 2011-16	Change 2016-21	Change 2021-26	Change 2006-16
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m
Scenario C - 'RSS Option 4'										
Population										
Growth	336.7	358.5	395.6	435.9	479.0	21.7	37.1	40.3	43.1	142.3

- 3.4 Table 2.6 below sets out the amount of convenience expenditure which is retained by all foodstores located within the catchment area and the resulting growth in retained expenditure, under Scenario C. The overall growth in retained expenditure in the OCA up to 2026 amounts to £125.0m.

Table 2.6 Convenience Expenditure Retained by Centres/Stores Located in the East Staffordshire Overall Catchment Area, £m (2004 Prices)

	2007	2011	2016	2021	2026	Change 2007-11	Change 2011-16	Change 2016-21	Change 2021-26	Change 2006-16
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m
Scenario C - 'RSS Option 4'										
Population										
Growth	294.5	313.4	345.9	381.4	419.5	18.8	32.5	35.5	38.1	125.0

Allowances for Claims on Convenience Expenditure Growth

- 3.5 As is made clear in the main report, there are four significant foodstore commitments in the East Staffordshire catchment, the most notable of which is the proposal for an extension to the Tesco foodstore at Town Meadows Way, Uttoxeter.

- 3.6 A further deduction is necessary in order to allow for the likely growth in productivity amongst existing retailers within the OCA of 0.2 per cent, per annum, as detailed in paragraph 7.1 of the main report.

Residual Expenditure - Convenience Sector

- 3.7 Table 2.7 summarises the main deductions for the claims on the initial surplus of convenience expenditure, under population growth Scenario C. The table shows a significant overall positive residual at 2026.
- 3.8 Under Scenario C, the convenience goods residual at 2026 is £88.2m. As in the comparison retail sector, a significant proportion of the overall residual (£34.8m) can be attributed to the final 2021-2026 reporting period; the total residual apparent at 2021 is £53.1m. There is a negative residual at 2011, due to the relatively large amount of convenience floorspace within the OCA that is currently committed by way of extant planning permissions.

Table 2.7 Initial Convenience Retail Expenditure Residual

Scenario C - 'RSS Option 4' Population Growth	Change 2007-11	Change 2011-16	Change 2016-21	Change 2021-26	Change 2007-26
Goods Base	£m	£m	£m	£m	£m
Initial Surplus	18.8	32.5	35.5	38.1	125.0
Claims on Capacity	27.2	3.2	3.3	3.3	36.8
Residual	-8.4	29.3	32.2	34.8	88.2

Converting Residual Expenditure to Net Convenience Retail Floorspace Requirements

- 3.9 Table 2.9 converts the outputs from convenience expenditure Scenario C - the residual expenditure total - into theoretical net sales⁴ floorspace requirements. Although there is a negative floorspace requirement in the 2007-11 period, positive floorspace requirements arise in the 2011-16, 2016-21 and 2021-26 periods, which more than offset the initial negative residual.
- 3.10 For the OCA as a whole, the quantitative need up to 2026 under Scenario C is 10,656 sq.m (115,777 sq.ft) net. Around 40 per cent of this requirement (4,188 sqm) arises between 2021 and 2026; in the period 2007-2021, the quantitative need equates to 6,468 sq.m (69,621 sq.ft) net under Scenario C.

Table 2.8 Conversion of Expenditure Surplus to Convenience Floorspace Requirements

Scenario C - 'RSS Option 4' Population Growth					
COMPARISON	2007-11	2011-16	2016-21	2021-26	2007-26
Goods Base Residual (£m)	-8.4	29.3	32.2	34.8	88.2
Assumed Floorspace Efficiency, £ per sq.m sales area	8,080	8,161	8,227	8,310	
Floorspace Requirement, sq.m sales area	-1,040	3,591	3,917	4,188	10,656

Summary of Quantitative Need in the Convenience Sector

- 3.11 Under population growth Scenario C, there is scope for around 10,700 sq.m (115,800 sq.ft) of additional convenience floorspace (net sales area) in the period to 2026, based on the floorspace efficiency of typical supermarket operators. The convenience floorspace requirement arising in the shorter period to 2021 is around 6,500 sq.m (70,200 sq.ft) net.

⁴ The typical gross to net ratio for convenience retail stores is 60 per cent.

4 SUMMARY

Comparison Retail Sector

- 4.1 In the period to 2021, our quantitative capacity work shows that there is a goods based capacity for an additional 27,500 sq.m (295,500 sq.ft) of comparison sector sales floorspace when assessed on the basis of SCC's latest RSS population growth projections (Scenario C) and assuming a static retention rate. The corresponding net sales area requirements under Scenarios A and B are 16,900 sq.m (181,800 sq.ft) and 22,750 sq.m (244,800 sq.ft), respectively.
- 4.2 In the longer 2007-26 period, the overall comparison retail floorspace requirement range increases to around 50,800 sq.m (546,000 sq.ft) net under Scenario C. This compares to the corresponding requirements of 33,700 sq.m (362,000 sq.ft) net arising under Scenario A, and around 42,800 sq.m (460,200 sq.ft) under Scenario B.
- 4.3 It is important to emphasise that around half of the comparison retail floorspace requirements identified for the overall study period 2007-26 arise in the post-2021 period, under each of the three population Scenarios A, B and C. Furthermore, primarily as a consequence of existing retail commitments already in the planning pipeline, no floorspace capacity arises until the post-2011 period. Table 4.1 summarises the position for the three population scenarios that we have assessed.

Table 4.1 Summary of Goods Based Comparison Retail Floorspace Requirements Arising in the Periods to 2021 and 2026

Floorspace Requirement, sq.m sales area	2007-11	2011-16	2016-21	2007-21	2021-26	2007-26
'Low' Population Growth (Scenario A)	-7,075	10,742	13,219	16,886	16,767	33,653
'Higher' Population Growth (Scenario B)	-5,793	12,791	15,743	22,741	20,012	42,753
'Highest' Population Growth (Scenario C)	-5,158	14,418	18,192	27,452	23,287	50,739

- 4.4 As we have made clear in the main report, the comparison retail floorspace requirements set out in Table 4.1 (as with the convenience sector requirements summarised in Table 4.2) are indicative only, and should be treated as guidelines. Long-term forecasts, whilst valuable for strategic planning purposes, should be regarded as subject to increasing uncertainty in the later parts of the study period and should be kept under regular review.

Convenience Retail Sector

- 4.5 The convenience floorspace requirement arising by 2021 under population growth Scenario C is around 6,500 sq.m (70,200 sq.ft) net based on the floorspace efficiency of typical supermarket operators and a static retention rate (87 per cent). The corresponding net sales area requirements under Scenarios A and B are 2,800 sq.m (30,300 sq.ft) and 4,800 sq.m (51,700 sq.ft), respectively.
- 4.6 In the longer-term period 2007-26, there is scope for around 10,700 sq.m (115,800 sq.ft) of additional convenience floorspace (net sales area). This compares to the corresponding requirements of 5,300 sq.m (57,600 sq.ft) under population growth Scenario A, and around 8,100 sq.m (87,300 sq.ft) under population growth Scenario B. Thus, as in the comparison sector, a significant proportion of the convenience retail floorspace requirements identified for the overall study period 2007-26 arise in the post-2021 period, under all three of the population scenarios. The position is summarised in Table 4.2 which shows that, as in the comparison sector, no convenience floorspace capacity arises in the initial 2007-11 forecasting period under any of the three population scenarios.

Table 4.2 Conversion of Expenditure Surplus to Convenience Floorspace Requirements

Floorspace Requirement, sq.m sales area	2007-11	2011-16	2016-21	2007-21	2021-26	2007-26
'Low' Population Growth (Scenario A)	-1,755	2,198	2,376	2,819	2,529	5,348
'Higher' Population Growth (Scenario B)	-1,221	2,901	3,119	4,799	3,314	8,113
'Highest' Population Growth (Scenario C)	-1,040	3,591	3,917	6,468	4,188	10,656

APPENDIX 1

Comparison Retail Spreadsheets, Population Growth Scenario C ('RSS Option 4')

Spreadsheet 1 - Zone Data

Zone	Ward	Local Authority	Zone	Ward	Local Authority
Zone 1	Heath	East Staffordshire	Zone 6 (continued)	Ashby Ivanhoe	North West Leicestershire
	Town	East Staffordshire		Appleby	North West Leicestershire
Zone 2	Abbey	East Staffordshire		Measham	North West Leicestershire
	Churnet	East Staffordshire		Moira	North West Leicestershire
	Doveridge and Sudbury	Derbyshire Dales	Oakthorpe and Donisthorpe	North West Leicestershire	
Zone 3	Hatton	South Derbyshire	Zone 7	Anglesey	East Staffordshire
	Norbury	Derbyshire Dales		Branston	East Staffordshire
	North West	South Derbyshire		Brizlincote	East Staffordshire
Zone 4	Etwall	South Derbyshire		Burton	East Staffordshire
	Hilton	South Derbyshire		Eton Park	East Staffordshire
	Willington and Findern	South Derbyshire		Horninglow	East Staffordshire
Zone 5	Church Gresley	South Derbyshire		Shobnall	East Staffordshire
	Hartshorne and Ticknall	South Derbyshire		Stapenhill	East Staffordshire
	Linton	South Derbyshire		Stretton	East Staffordshire
	Midway	South Derbyshire	Winshill	East Staffordshire	
	Newhall and Stanton	South Derbyshire	Zone 8	Crown	East Staffordshire
	Repton	South Derbyshire		Needwood	East Staffordshire
	Seales	South Derbyshire		Rolleston on Dove	East Staffordshire
	Swadlincote	South Derbyshire	Tutbury and Outwoods	East Staffordshire	
	Woodville	South Derbyshire	Zone 9	Bagots	East Staffordshire
Zone 6	Ashby Castle	North West Leicestershire		Yoxall	East Staffordshire
	Ashby Holywell	North West Leicestershire			

Spreadsheet 2 - Population Projections

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	All zones total
Population 2007	12,631	8,098	6,773	15,088	54,523	27,139	65,348	17,190	5,275	212,065
Population 2011	12,996	8,276	7,044	15,860	57,315	28,089	67,237	17,686	5,427	219,931
Population 2016	13,803	8,659	7,368	16,771	60,607	29,283	71,412	18,785	5,764	232,452
Population 2021	14,677	9,080	7,661	17,575	63,513	30,419	75,934	19,974	6,129	244,964
Population 2026	15,643	9,542	7,912	18,250	65,950	31,382	80,931	21,289	6,533	257,430
Change in population 2007 - 2011										
Numeric change	365	177	271	773	2,792	949	1,889	497	152	7,866
Percentage change	2.9%	2.2%	4.0%	5.1%	5.1%	3.5%	2.9%	2.9%	2.9%	3.7%
Change in population 2011 - 2016										
Numeric change	807	383	324	911	3,292	1,194	4,175	1,098	337	12,521
Percentage change	6.2%	4.6%	4.6%	5.7%	5.7%	4.3%	6.2%	6.2%	6.2%	5.7%
Change in population 2016 - 2021										
Numeric change	874	421	294	804	2,906	1,136	4,522	1,190	365	12,512
Percentage change	6.3%	4.9%	4.0%	4.8%	4.8%	3.9%	6.3%	6.3%	6.3%	5.4%
Change in population 2021 - 2026										
Numeric change	966	462	250	674	2,436	963	4,997	1,314	403	12,467
Percentage change	6.6%	5.1%	3.3%	3.8%	3.8%	3.2%	6.6%	6.6%	6.6%	5.1%
Change in population 2007 - 2026										
Numeric change	3,012	1,444	1,139	3,162	11,426	4,243	15,583	4,099	1,258	45,366
Percentage change	23.8%	17.8%	16.8%	21.0%	21.0%	15.6%	23.8%	23.8%	23.8%	21.4%

NOTES:

(1) For non-East Staffs areas, population multipliers derived from Staffordshire County Council's RSS growth estimates (December 2006) and ONS 2004 Population Projections. For East Staffs, population multipliers derived from Staffordshire County Council's RSS 'high growth' estimates (June 2007)

Spreadsheet 3 - Comparison Goods Expenditure (Per Capita)

Year	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
	£	£	£	£	£	£	£	£	£
2007	3,274	3,474	3,552	3,497	3,040	3,136	3,001	3,418	3,671
2011	3,889	4,127	4,220	4,154	3,611	3,725	3,565	4,060	4,361
2012	4,823	5,118	5,233	5,152	4,479	4,620	4,421	5,036	5,409
2021	5,982	6,347	6,491	6,389	5,555	5,730	5,483	6,246	6,708
2026	7,419	7,872	8,050	7,924	6,889	7,106	6,800	7,746	8,319

NOTES:

(1) All data derived from MapInfo 2004 per capita annual comparison goods expenditure estimates, which we have obtained through our in-house GIS system using the MapInfo data.

(2) This 2004 MapInfo expenditure data has been projected forward to the base year and forecast years using the MapInfo forecast growth rate of 4.4% per annum (please note that the MapInfo forecast ends at 2016, but we continue this 4.4% per annum forecast to 2026). The source for the growth rates is MapInfo/OEF Information Brief 06/2 (Table 2).

All monetary values are held constant at 2004 prices.

Spreadsheet 4 - Total Comparison Goods Expenditure and Expenditure Growth

Year	Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Zone 6 £m	Zone 7 £m	Zone 8 £m	Zone 9 £m	All zones total £m
Sub total 2007	41.35	28.13	24.06	52.75	165.74	85.10	196.08	58.75	19.36	671.34
Deduction for SFT at 8.6%	3.56	2.42	2.07	4.54	14.25	7.32	16.86	5.05	1.67	57.73
Total 2007	37.79	25.71	21.99	48.22	151.49	77.78	179.22	53.70	17.70	613.60
Sub total 2011	50.54	34.15	29.72	65.88	206.98	104.63	239.67	71.82	23.67	827.06
Deduction for SFT at 12.0%	6.07	4.10	3.57	7.91	24.84	12.56	28.76	8.62	2.84	99.25
Total 2011	44.48	30.05	26.16	57.97	182.14	92.08	210.91	63.20	20.83	727.82
Sub total 2016	66.58	44.32	38.56	86.40	271.44	135.29	315.70	94.60	31.18	1084.06
Deduction for SFT at 12.4%	8.26	5.50	4.78	10.71	33.66	16.78	39.15	11.73	3.87	134.42
Total 2016	58.32	38.82	33.78	75.69	237.78	118.51	276.56	82.87	27.31	949.64
Sub total 2021	87.80	57.63	49.73	112.29	352.79	174.30	416.34	124.75	41.11	1416.75
Deduction for SFT at 12.4%	10.89	7.15	6.17	13.92	43.75	21.61	51.63	15.47	5.10	175.68
Total 2021	76.91	50.49	43.56	98.37	309.05	152.69	364.72	109.28	36.02	1241.08
Sub total 2026	116.06	75.12	63.69	144.61	454.33	223.01	550.34	164.91	54.35	1846.41
Deduction for SFT at 12.4%	14.39	9.31	7.90	17.93	56.34	27.65	68.24	20.45	6.74	228.95
Total 2026	101.67	65.80	55.79	126.68	397.99	195.36	482.10	144.46	47.61	1617.45
Growth in total expenditure 2006 - 2011	6.68	4.34	4.17	9.76	30.65	14.29	31.69	9.50	3.13	114.21
Growth in total expenditure 2011 - 2016	13.84	8.77	7.62	17.71	55.64	26.44	65.65	19.67	6.48	221.82
Growth in total expenditure 2016 - 2021	18.59	11.67	9.78	22.68	71.26	34.17	88.16	26.42	8.71	291.44
Growth in total expenditure 2021 - 2026	28.26	17.48	13.96	32.32	101.54	48.72	134.00	40.15	13.23	429.65
Growth - 2007 - 2026	63.87	40.09	33.80	78.46	246.50	117.58	302.88	90.76	29.91	1003.85

NOTES:

(1) The figures in the above table are the sums of the data presented in Tables 2 (population) and 3 (per capita comparison goods expenditure) and are in millions of pounds (£m).

(2) We have deducted a percentage of expenditure for Special Forms of Trading (SFT) (i.e. mail order, TV and internet shopping) from the total expenditure using the forecast provided by Experian Retail Planner Briefing Note 2.3D (Table 6.2). Therefore we allow a deduction for SFT of 8.6% at 2007, which increases to 12.3% in 2012, to 12.4% in 2017 and remains at 12.4% in 2021 and 2026.

All monetary values are held constant at 2004 prices.

Spreadsheet 5 - Comparison Goods Spending Patterns in 2007 as a Percentage Across the Study Area Zones

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
	%	%	%	%	%	%	%	%	%
Inside study area									
Zone 1									
Uttoxeter town centre	41.0	28.6	5.8	0.0	0.0	0.0	0.3	2.4	8.0
Other, Zone 1	5.9	2.3	1.4	0.2	0.0	0.0	0.1	0.0	1.2
Zone 2									
Zone 2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Zone 3									
Zone 3	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.1	0.0
Zone 4									
Zone 4	0.0	0.0	0.0	2.9	0.0	0.0	0.0	0.0	0.0
Zone 5									
Swadlincote town centre	0.2	0.0	0.0	0.3	16.8	4.0	0.8	0.6	0.0
Other, Zone 5	0.0	0.0	0.0	1.8	4.2	0.5	0.5	0.5	0.0
Zone 6									
Ashby de la Zouch town centre	0.0	0.0	0.0	0.2	0.9	24.6	0.2	0.0	0.0
Other, Zone 6	0.0	0.0	0.0	0.0	0.5	2.2	0.1	0.1	0.0
Zone 7									
Burton-upon-Trent town centre	15.6	15.7	34.2	22.6	51.3	25.0	71.7	58.4	51.5
Other, Zone 7	0.0	0.5	0.2	0.7	2.4	0.6	5.2	4.4	3.0
Zone 8									
Zone 8	0.0	0.0	5.4	0.2	0.4	0.0	0.8	4.2	0.0
Zone 9									
Zone 9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.3	0.3
Sub TOTAL inside	62.7	47.1	47.1	29.1	76.6	57.0	79.6	73.0	63.9

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Spreadsheet 6 - Comparison Goods Spending Patterns in 2007 Across the Study Area Zones

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	All zones total ⁽¹⁾	All zones market share ⁽²⁾
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	%
Inside study area											
Zone 1											
Uttoxeter town centre	15.49	7.34	1.28	0.00	0.00	0.00	0.59	1.27	1.42	27.39	4.5%
Other, Zone 1	2.23	0.59	0.32	0.08	0.00	0.00	0.16	0.00	0.21	3.60	0.6%
Zone 2											
Zone 2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Zone 3											
Zone 3	0.00	0.00	0.00	0.11	0.00	0.00	0.00	0.07	0.00	0.18	0.0%
Zone 4											
Zone 4	0.00	0.00	0.00	1.41	0.00	0.00	0.00	0.00	0.00	1.41	0.2%
Zone 5											
Swadlincote town centre	0.07	0.00	0.00	0.15	25.48	3.14	1.38	0.31	0.00	30.54	5.0%
Other, Zone 5	0.00	0.00	0.00	0.88	6.43	0.40	0.82	0.25	0.00	8.79	1.4%
Zone 6											
Ashby de la Zouch town centre	0.00	0.00	0.00	0.09	1.36	19.16	0.29	0.00	0.00	20.90	3.4%
Other, Zone 6	0.00	0.00	0.00	0.00	0.76	1.68	0.12	0.06	0.00	2.62	0.4%
Zone 7											
Burton-upon-Trent town centre	5.89	4.04	7.53	10.90	77.74	19.46	128.54	31.39	9.11	294.59	48.0%
Other, Zone 7	0.00	0.13	0.05	0.34	3.61	0.47	9.24	2.35	0.52	16.71	2.7%
Zone 8											
Zone 8	0.00	0.00	1.19	0.09	0.58	0.00	1.45	2.23	0.00	5.54	0.9%
Zone 9											
Zone 9	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.26	0.05	1.31	0.2%
Sub TOTAL inside	23.69	12.10	10.37	14.05	115.97	44.30	142.60	39.19	11.31	413.57	67.4%

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Spreadsheet 6 continued...

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	All zones total ⁽¹⁾	All zones market share ⁽²⁾
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	%
Outside study area											
Birmingham city centre	0.24	0.08	0.00	0.53	1.77	2.05	3.69	1.28	0.85	10.50	1.7%
Derby city centre	2.12	3.03	5.76	17.70	10.31	1.13	11.23	5.61	0.55	57.44	9.4%
Nottingham city centre	0.33	0.64	0.26	1.92	1.97	3.03	0.74	0.68	0.00	9.58	1.6%
Tamworth town centre	0.00	0.29	0.00	0.00	4.92	5.22	1.53	0.57	0.00	12.52	2.0%
Kingsway Retail Park, Kingsway, Derby	0.18	0.41	1.40	4.60	1.37	0.15	2.46	0.36	0.00	10.94	1.8%
Other, Outside Catchment	11.23	9.16	4.21	9.42	15.19	21.90	16.97	6.00	4.98	99.05	16.1%
Sub TOTAL outside	14.11	13.61	11.62	34.17	35.52	33.48	36.62	14.52	6.39	200.03	32.6%
TOTAL	37.79	25.71	21.99	48.22	151.49	77.78	179.22	53.70	17.70	613.60	100.0%

NOTES:

(1) The spending patterns are calculated by multiplying the total comparison goods expenditure (Table 4) by the market share (Table 5), the all zones total is the sum of the expenditure attracted to each centre from each zone.

(2) The 'All zones market share' is calculated through dividing the total expenditure attracted by each centre by the total expenditure in the study area.

All monetary values are held constant at 2004 prices.

Spreadsheet 7 - Comparison Goods Spending Patterns in 2011 Across the Study Area Zones

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	All zones total ⁽¹⁾	All zones market share ⁽²⁾
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	%
Inside study area											
Zone 1											
Uttoxeter town centre	18.23	8.58	1.52	0.00	0.00	0.00	0.69	1.50	1.67	32.19	4.4%
Other, Zone 1	2.63	0.69	0.38	0.10	0.00	0.00	0.19	0.00	0.25	4.24	0.6%
Zone 2											
Zone 2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Zone 3											
Zone 3	0.00	0.00	0.00	0.13	0.00	0.00	0.00	0.08	0.00	0.21	0.0%
Zone 4											
Zone 4	0.00	0.00	0.00	1.69	0.00	0.00	0.00	0.00	0.00	1.69	0.2%
Zone 5											
Swadlincote town centre	0.09	0.00	0.00	0.18	30.63	3.72	1.63	0.36	0.00	36.61	5.0%
Other, Zone 5	0.00	0.00	0.00	1.05	7.74	0.48	0.97	0.30	0.00	10.53	1.4%
Zone 6											
Ashby de la Zouch town centre	0.00	0.00	0.00	0.11	1.63	22.68	0.34	0.00	0.00	24.76	3.4%
Other, Zone 6	0.00	0.00	0.00	0.00	0.91	1.99	0.14	0.07	0.00	3.11	0.4%
Zone 7											
Burton-upon-Trent town centre	6.93	4.72	8.96	13.11	93.48	23.03	151.27	36.94	10.72	349.15	48.0%
Other, Zone 7	0.00	0.15	0.06	0.40	4.35	0.55	10.88	2.76	0.62	19.77	2.7%
Zone 8											
Zone 8	0.00	0.00	1.41	0.11	0.70	0.00	1.70	2.63	0.00	6.55	0.9%
Zone 9											
Zone 9	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.48	0.06	1.54	0.2%
Sub TOTAL inside	27.87	14.15	12.33	16.89	139.43	52.44	167.81	46.12	13.31	490.36	67.4%

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Spreadsheet 7 continued...

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	All zones total ⁽¹⁾	All zones market share ⁽²⁾
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	%
Outside study area											
Birmingham city centre	0.28	0.09	0.00	0.64	2.12	2.43	4.34	1.51	1.01	12.43	1.7%
Derby city centre	2.50	3.54	6.85	21.28	12.39	1.34	13.22	6.60	0.65	68.36	9.4%
Nottingham city centre	0.39	0.75	0.31	2.31	2.37	3.59	0.87	0.80	0.00	11.39	1.6%
Tamworth town centre	0.00	0.34	0.00	0.00	5.92	6.18	1.80	0.67	0.00	14.90	2.0%
Kingsway Retail Park, Kingsway, Derby	0.22	0.48	1.67	5.54	1.64	0.18	2.89	0.43	0.00	13.04	1.8%
Other, Outside Catchment	13.21	10.71	5.00	11.33	18.26	25.92	19.97	7.06	5.86	117.33	16.1%
Sub TOTAL outside	16.6	15.9	13.8	41.1	42.7	39.6	43.1	17.1	7.5	237.5	32.6%
TOTAL	44.5	30.1	26.2	58.0	182.1	92.1	210.9	63.2	20.8	727.8	100.00%

NOTES:

(1) The spending patterns are calculated by multiplying the total comparison goods expenditure (Table 4) by the market share (Table 5), the all zones total is the sum of the expenditure attracted to each centre from each zone.

(2) The 'All zones market share' is calculated through dividing the total expenditure attracted by each centre by the total expenditure in the study area.

All monetary values are held constant at 2004 prices.

Spreadsheet 8 - Comparison Good Spending Patterns in 2016 across the Study Area Zones

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	All zones total ⁽¹⁾	All zones market share ⁽²⁾
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	%
Inside study area											
Zone 1											
Uttoxeter town centre	23.91	11.09	1.97	0.00	0.00	0.00	0.91	1.96	2.19	42.02	4.4%
Other, Zone 1	3.45	0.89	0.49	0.13	0.00	0.00	0.25	0.00	0.32	5.53	0.6%
Zone 2											
Zone 2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Zone 3											
Zone 3	0.00	0.00	0.00	0.17	0.00	0.00	0.00	0.11	0.00	0.28	0.0%
Zone 4											
Zone 4	0.00	0.00	0.00	2.21	0.00	0.00	0.00	0.00	0.00	2.21	0.2%
Zone 5											
Swadlincote town centre	0.11	0.00	0.00	0.24	39.99	4.79	2.14	0.48	0.00	47.74	5.0%
Other, Zone 5	0.00	0.00	0.00	1.38	10.10	0.62	1.27	0.39	0.00	13.75	1.4%
Zone 6											
Ashby de la Zouch town centre	0.00	0.00	0.00	0.15	2.13	29.19	0.45	0.00	0.00	31.91	3.4%
Other, Zone 6	0.00	0.00	0.00	0.00	1.19	2.56	0.19	0.09	0.00	4.02	0.4%
Zone 7											
Burton-upon-Trent town centre	9.09	6.10	11.57	17.11	122.03	29.64	198.36	48.43	14.06	456.38	48.1%
Other, Zone 7	0.00	0.20	0.08	0.53	5.67	0.71	14.26	3.62	0.81	25.88	2.7%
Zone 8											
Zone 8	0.00	0.00	1.82	0.15	0.92	0.00	2.23	3.44	0.00	8.56	0.9%
Zone 9											
Zone 9	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.94	0.08	2.02	0.2%
Sub TOTAL inside	36.55	18.27	15.92	22.05	182.03	67.50	220.05	60.47	17.46	640.30	67.4%

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Spreadsheet 8 continued...

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	All zones total ⁽¹⁾	All zones market share ⁽²⁾
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	%
Outside study area											
Birmingham city centre	0.37	0.12	0.00	0.83	2.77	3.13	5.70	1.98	1.32	16.22	1.7%
Derby city centre	3.28	4.57	8.84	27.78	16.18	1.72	17.33	8.66	0.85	89.21	9.4%
Nottingham city centre	0.52	0.97	0.40	3.01	3.09	4.62	1.14	1.06	0.00	14.80	1.6%
Tamworth town centre	0.00	0.44	0.00	0.00	7.72	7.95	2.36	0.88	0.00	19.34	2.0%
Kingsway Retail Park, Kingsway, Derby	0.28	0.62	2.15	7.23	2.15	0.23	3.80	0.56	0.00	17.01	1.8%
Other, Outside Catchment	17.32	13.83	6.46	14.79	23.84	33.37	26.19	9.26	7.69	152.75	16.1%
Sub TOTAL outside	21.8	20.5	17.9	53.6	55.8	51.0	56.5	22.4	9.9	309.3	32.6%
TOTAL	58.3	38.8	33.8	75.7	237.8	118.5	276.6	82.9	27.3	949.6	100.0%

NOTES:

(1) The spending patterns are calculated by multiplying the total comparison goods expenditure (Table 4) by the market share (Table 5), the all zones total is the sum of the expenditure attracted to each centre from each zone.

(2) The 'All zones market share' is calculated through dividing the total expenditure attracted by each centre by the total expenditure in the study area.

All monetary values are held constant at 2004 prices.

Spreadsheet 9 - Comparison Goods Spending Patterns in 2021 Across the Study Area Zones

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	All zones total ⁽¹⁾	All zones market share ⁽²⁾
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	%
Inside study area											
Zone 1											
Uttoxeter town centre	31.53	14.42	2.54	0.00	0.00	0.00	1.19	2.59	2.88	55.15	4.4%
Other, Zone 1	4.54	1.16	0.63	0.17	0.00	0.00	0.34	0.00	0.43	7.26	0.6%
Zone 2											
Zone 2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Zone 3											
Zone 3	0.00	0.00	0.00	0.22	0.00	0.00	0.00	0.14	0.00	0.36	0.0%
Zone 4											
Zone 4	0.00	0.00	0.00	2.87	0.00	0.00	0.00	0.00	0.00	2.87	0.2%
Zone 5											
Swadlincote town centre	0.15	0.00	0.00	0.31	51.98	6.17	2.82	0.63	0.00	62.05	5.0%
Other, Zone 5	0.00	0.00	0.00	1.79	13.13	0.79	1.67	0.52	0.00	17.90	1.4%
Zone 6											
Ashby de la Zouch town centre	0.00	0.00	0.00	0.19	2.77	37.60	0.59	0.00	0.00	41.15	3.3%
Other, Zone 6	0.00	0.00	0.00	0.00	1.54	3.30	0.25	0.12	0.00	5.21	0.4%
Zone 7											
Burton-upon-Trent town centre	11.98	7.93	14.92	22.24	158.60	38.19	261.59	63.87	18.54	597.86	48.2%
Other, Zone 7	0.00	0.25	0.11	0.68	7.37	0.92	18.81	4.78	1.07	33.99	2.7%
Zone 8											
Zone 8	0.00	0.00	2.35	0.19	1.19	0.00	2.94	4.54	0.00	11.21	0.9%
Zone 9											
Zone 9	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.56	0.10	2.66	0.2%
Sub TOTAL inside	48.20	23.76	20.54	28.66	236.58	86.96	290.19	79.75	23.02	837.67	67.5%

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Spreadsheet 9 continued...

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	All zones total ⁽¹⁾	All zones market share ⁽²⁾
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	%
Outside study area											
Birmingham city centre	0.49	0.16	0.00	1.08	3.60	4.03	7.51	2.61	1.74	21.22	1.7%
Derby city centre	4.32	5.95	11.40	36.10	21.03	2.22	22.86	11.42	1.12	116.42	9.4%
Nottingham city centre	0.68	1.26	0.52	3.91	4.02	5.95	1.51	1.39	0.00	19.23	1.5%
Tamworth town centre	0.00	0.57	0.00	0.00	10.04	10.24	3.11	1.16	0.00	25.11	2.0%
Kingsway Retail Park, Kingsway, Derby	0.38	0.81	2.77	9.39	2.79	0.29	5.01	0.74	0.00	22.17	1.8%
Other, Outside Catchment	22.85	17.99	8.33	19.22	30.98	42.99	34.53	12.22	10.14	199.24	16.1%
Sub TOTAL outside	28.7	26.7	23.0	69.7	72.5	65.7	74.5	29.5	13.0	403.4	32.5%
TOTAL	76.9	50.5	43.6	98.4	309.0	152.7	364.7	109.3	36.0	1,241.1	100.0%

NOTES:

(1) The spending patterns are calculated by multiplying the total comparison goods expenditure (Table 4) by the market share (Table 5), the all zones total is the sum of the expenditure attracted to each centre from each zone.

(2) The 'All zones market share' is calculated through dividing the total expenditure attracted by each centre by the total expenditure in the study area.

All monetary values are held constant at 2004 prices.

Spreadsheet 10 - Comparison Goods Spending Patterns in 2026 Across the Study Area Zones

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	All zones total ⁽¹⁾	All zones market share ⁽²⁾
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	%
Inside study area											
Zone 1											
Uttoxeter town centre	41.67	18.80	3.25	0.00	0.00	0.00	1.58	3.42	3.81	72.53	4.5%
Other, Zone 1	6.01	1.51	0.81	0.22	0.00	0.00	0.44	0.00	0.57	9.55	0.6%
Zone 2											
Zone 2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Zone 3											
Zone 3	0.00	0.00	0.00	0.29	0.00	0.00	0.00	0.18	0.00	0.47	0.0%
Zone 4											
Zone 4	0.00	0.00	0.00	3.70	0.00	0.00	0.00	0.00	0.00	3.70	0.2%
Zone 5											
Swadlincote town centre	0.20	0.00	0.00	0.40	66.94	7.89	3.72	0.83	0.00	79.97	4.9%
Other, Zone 5	0.00	0.00	0.00	2.30	16.91	1.02	2.21	0.68	0.00	23.12	1.4%
Zone 6											
Ashby de la Zouch town centre	0.00	0.00	0.00	0.24	3.57	48.11	0.78	0.00	0.00	52.70	3.3%
Other, Zone 6	0.00	0.00	0.00	0.00	1.98	4.22	0.33	0.16	0.00	6.69	0.4%
Zone 7											
Burton-upon-Trent town centre	15.84	10.34	19.10	28.64	204.25	48.87	345.78	84.43	24.50	781.74	48.3%
Other, Zone 7	0.00	0.33	0.14	0.88	9.49	1.17	24.86	6.32	1.41	44.61	2.8%
Zone 8											
Zone 8	0.00	0.00	3.01	0.24	1.54	0.00	3.89	6.00	0.00	14.68	0.9%
Zone 9											
Zone 9	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.38	0.13	3.52	0.2%
Sub TOTAL inside	63.71	30.97	26.30	36.91	304.68	111.27	383.59	105.41	30.43	1093.27	67.6%

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Spreadsheet 10 continued...

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	All zones total ⁽¹⁾	All zones market share ⁽²⁾
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	%
Outside study area											
Birmingham city centre	0.65	0.20	0.00	1.39	4.64	5.16	9.93	3.45	2.30	27.72	1.7%
Derby city centre	5.71	7.75	14.60	46.49	27.08	2.84	30.21	15.10	1.48	151.27	9.4%
Nottingham city centre	0.90	1.64	0.66	5.04	5.17	7.61	2.00	1.84	0.00	24.86	1.5%
Tamworth town centre	0.00	0.74	0.00	0.00	12.93	13.10	4.11	1.53	0.00	32.41	2.0%
Kingsway Retail Park, Kingsway, Derby	0.50	1.05	3.55	12.10	3.59	0.37	6.62	0.98	0.00	28.75	1.8%
Other, Outside Catchment	30.20	23.44	10.67	24.75	39.90	55.00	45.65	16.15	13.40	259.17	16.0%
Sub TOTAL outside	38.0	34.8	29.5	89.8	93.3	84.1	98.5	39.0	17.2	524.2	32.4%
TOTAL	101.7	65.8	55.8	126.7	398.0	195.4	482.1	144.5	47.6	1,617.5	100.0%

Spreadsheet 11 - Summary of Capacity for Comparison Goods Base Scenario 1

Static Retention Rate [67%] with moderate turnover efficiency [2.25%]

	2007	2011	2016	2021	2026	Change 2007-11	Change 2011-16	Change 2016-21	Change 2021-26	Change 2007-26
Total Population	212,065	219,931	232,452	244,964	257,430	7,866	12,521	12,512	12,467	45,366
Total Expenditure £m	613.6	727.8	949.6	1,241.1	1,617.5	114.2	221.8	291.4	376.4	1,003.9
Retained Expenditure £m	413.6	490.4	640.3	837.7	1093.3	76.8	149.9	197.4	255.6	679.7
Retained Expenditure %	67	67	67	67	67					
Leakage £m	200.0	237.5	309.3	403.4	524.2	37.4	71.9	94.1	120.8	324.1
Total Turnover of Comparison Stores in OCA £m	413.6	490.4	640.3	837.7	1093.3	76.8	149.9	197.4	255.6	679.7
Initial Surplus £m/annum (Growth in Retained Expenditure)						76.8	149.9	197.4	255.6	679.7
Claims on Expenditure										
Existing Traders £m	0	38.5	91.7	151.2	217.6	38.5	53.2	59.5	66.5	217.6
Commitments	0	66.7	74.6	83.4	93.2	66.7	7.9	8.8	9.8	83
Impact on capacity £m	0	105.2	166.3	234.5	310.8	105.2	61.1	68.2	76.3	301.0
SUMMARY						2007-11	2011-16	2016-21	2021-2026	2007-26
Initial surplus £m						76.8	149.9	197.4	255.6	679.7
Claims on capacity £m						105.2	61.1	68.2	76.3	301.0
RESIDUAL £m						-28.4	88.9	129.1	179.3	378.7
Turnover per sq m						5,516	6,165	7,098	7,701	
Floorspace Requirement sq m (gross)						-7,368	20,597	25,988	33,267	72,484
Floorspace Requirement sq m (net)						-5,158	14,418	18,192	23,287	50,739

APPENDIX 2

Convenience Retail Spreadsheets, Population Growth Scenario C ('RSS Option 4')

Spreadsheet 12 - Convenience Goods Expenditure (per capita)

Year	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
	£	£	£	£	£	£	£	£	£
2007	1,598	1,764	1,803	1,742	1,604	1,598	1,552	1,712	1,797
2011	1,657	1,828	1,869	1,806	1,662	1,657	1,609	1,775	1,862
2016	1,733	1,912	1,954	1,889	1,738	1,733	1,683	1,856	1,948
2021	1,812	1,999	2,044	1,975	1,818	1,812	1,760	1,941	2,037
2026	1,895	2,091	2,137	2,066	1,901	1,895	1,840	2,030	2,130

NOTES:

(1) All data derived from MapInfo 2004 per capita annual convenience goods expenditure estimates, which we have obtained through our in-house GIS system using the MapInfo data.

(2) This 2004 MapInfo expenditure data has been projected forward to the base year and forecast years using the MapInfo forecast growth rate of 0.9% per annum (please note that the MapInfo forecast ends at 2016, but we continue this 0.9% per annum forecast to 2026). The source for the growth rates is MapInfo/OEF Information Brief 06/02 (Table 2).

All monetary values are held constant at 2004 prices.

Spreadsheet 13 - Total Convenience Goods Expenditure and Expenditure Growth

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	All zones total
Year	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m
Sub total 2007	20.2	14.3	12.2	26.3	87.4	43.4	101.4	29.4	9.5	344.1
Deduction for SFT at 2.15%	0.4	0.3	0.3	0.6	1.9	0.9	2.2	0.6	0.2	7.4
Total 2007	19.8	14.0	11.9	25.7	85.6	42.4	99.2	28.8	9.3	336.7
Sub total 2011	21.5	15.1	13.2	28.6	95.3	46.5	108.2	31.4	10.1	369.9
Deduction for SFT at 3.1%	0.7	0.5	0.4	0.9	3.0	1.4	3.4	1.0	0.3	11.5
Total 2011	20.9	14.7	12.8	27.8	92.3	45.1	104.8	30.4	9.8	358.5
Sub total 2016	23.9	16.6	14.4	31.7	105.3	50.7	120.2	34.9	11.2	408.9
Deduction for SFT at 3.25%	0.8	0.5	0.5	1.0	3.4	1.6	3.9	1.1	0.4	13.3
Total 2016	23.1	16.0	13.9	30.6	101.9	49.1	116.2	33.7	10.9	395.6
Sub total 2021	26.6	18.2	15.7	34.7	115.5	55.1	133.6	38.8	12.5	450.6
Deduction for SFT at 3.25%	0.9	0.6	0.5	1.1	3.8	1.8	4.3	1.3	0.4	14.6
Total 2021	25.7	17.6	15.1	33.6	111.7	53.3	129.3	37.5	12.1	435.9
Sub total 2026	29.6	20.0	16.9	37.7	125.4	59.5	148.9	43.2	13.9	495.1
Deduction for SFT at 3.25%	1.0	0.6	0.5	1.2	4.1	1.9	4.8	1.4	0.5	16.1
Total 2026	28.7	19.3	16.4	36.5	121.3	57.5	144.1	41.8	13.5	479.0
Growth in total expenditure 2007 - 2011	1.1	0.7	0.8	2.0	6.8	2.6	5.6	1.6	0.5	21.7
Growth in total expenditure 2011 - 2016	2.3	1.4	1.2	2.9	9.6	4.0	11.4	3.3	1.1	37.1
Growth in total expenditure 2016 - 2021	2.6	1.5	1.2	2.9	9.8	4.2	13.0	3.8	1.2	40.3
Growth in total expenditure 2021 - 2026	2.9	1.7	1.2	2.9	9.6	4.2	14.8	4.3	1.4	43.1
Growth - 2007 - 2026	6.0	3.6	3.2	7.9	26.2	10.9	30.0	8.7	2.8	142.3

NOTES:

(1) The figures in the above table are the sums of the data presented in Tables 2 (population) and 9 (per capita convenience goods expenditure) and are in millions of pounds (£m).

(2) We have deducted a percentage of expenditure for Special Forms of Trading (SFT) (i.e. outdoor markets and Internet shopping) from the expenditure, and we anticipate that this percentage will increase year on year. Therefore we allow a deduction for SFT of 2.2% at 2006, which increases to 3.15% in 2012, to 3.25% in 2017 and remains at 3.25% in 2021.

All monetary values are held constant at 2004 prices.

Spreadsheet 14 - Convenience Goods Spending Percentage in 2007 Across the Study Area Zones

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
	%	%	%	%	%	%	%	%	%
Inside study area									
Zone 1									
Tesco, Brookside Road, Uttoxeter	61.0	60.5	8.3	0.7	0.0	0.0	0.0	5.6	13.1
Other stores, Uttoxeter	29.6	18.4	5.5	0.0	0.0	0.0	0.0	1.0	3.1
Zone 2									
Other stores, Zone 2	0.0	5.2	0.6	0.0	0.0	0.0	0.0	0.0	0.0
Zone 3									
Other stores, Zone 3	0.0	0.0	17.2	10.1	0.0	0.0	0.0	2.8	0.0
Zone 4									
Other stores, Zone 4	0.0	0.0	0.6	10.1	0.0	0.0	0.0	0.0	0.0
Zone 5									
Sainsbury's, Civic Way, Swadlincote	0.0	0.0	0.0	0.0	23.4	2.7	0.0	0.7	0.0
Somerfield, 43 High Street, Swadlincote	0.0	0.0	0.0	0.0	11.4	0.5	0.0	0.0	0.0
Morrisons, Coppice Side, Swadlincote	0.0	0.0	0.0	0.0	27.0	1.9	0.5	0.0	0.0
Other stores, Swadlincote	0.0	0.0	0.0	0.0	14.1	1.2	0.3	0.4	0.0
Other stores, Zone 5	0.0	0.0	0.0	0.4	2.1	0.0	0.0	0.0	0.0
Zone 6									
Somerfield, 9 Derby Road, Ashby de la Zouch	0.0	0.0	0.0	0.0	0.0	13.5	0.0	0.0	0.0
Tesco, 4 Resolution Road, Ashby de la Zouch	0.0	0.0	0.0	0.0	3.8	53.3	0.0	0.0	0.0
Other stores, Zone 6	0.0	0.0	0.0	0.0	0.0	9.4	0.0	0.0	0.0
Zone 7									
Asda, Orchard Street, Burton upon Trent	0.8	0.0	2.5	0.7	1.2	1.9	7.9	2.6	3.3
Co-op Food Shop, James Brindley Way, Stretton, Burton upon Trent	0.0	0.0	0.0	0.0	0.0	0.0	5.7	4.7	0.0
Marks & Spencer, 2-6 St Modwens Walk, Burton upon Trent	0.0	0.0	0.0	0.4	1.4	0.0	3.5	1.0	1.8
Morrisons, Wellington Road, Burton upon Trent	2.4	1.9	7.7	5.6	2.9	0.5	15.0	28.9	10.1
Sainsbury's, Union Street, Burton upon Trent	1.3	1.0	8.0	1.9	2.7	1.4	21.7	17.0	11.0
Tesco, Bond End Wharf, St Peters Bridge, Burton upon Trent	0.0	1.0	2.9	1.5	5.3	1.4	23.4	9.8	9.5
Other Stores, Burton upon Trent	0.0	0.0	3.9	0.4	0.9	0.7	18.4	6.9	1.5

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Spreadsheet 15 - Convenience Goods Spending Patterns in 2007 Across the Study Area Zones

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total market share ⁽¹⁾	All zones market share ⁽²⁾
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	%
Inside study area											
Zone 1											
Tesco, Brookside Road, Uttoxeter	12.06	8.46	0.99	0.19	0.00	0.00	0.00	1.61	1.21	24.53	7.3%
Other stores, Uttoxeter	5.85	2.57	0.65	0.00	0.00	0.00	0.00	0.30	0.28	9.66	2.9%
Zone 2											
Other stores, Zone 2	0.00	0.72	0.07	0.00	0.00	0.00	0.00	0.00	0.00	0.79	0.2%
Zone 3											
Other stores, Zone 3	0.00	0.00	2.06	2.59	0.00	0.00	0.00	0.80	0.00	5.45	1.6%
Zone 4											
Other stores, Zone 4	0.00	0.00	0.07	2.61	0.00	0.00	0.00	0.00	0.00	2.68	0.8%
Zone 5											
Sainsbury's, Civic Way, Swadlincote	0.00	0.00	0.00	0.00	20.05	1.16	0.00	0.19	0.00	21.40	6.4%
Somerfield, 43 High Street, Swadlincote	0.00	0.00	0.00	0.00	9.78	0.22	0.00	0.00	0.00	10.00	3.0%
Morrisons, Coppice Side, Swadlincote	0.00	0.00	0.00	0.00	23.07	0.81	0.47	0.00	0.00	24.35	7.2%
Other stores, Swadlincote	0.00	0.00	0.00	0.00	12.07	0.52	0.26	0.10	0.00	12.95	3.8%
Other stores, Zone 5	0.00	0.00	0.00	0.10	1.80	0.00	0.00	0.00	0.00	1.91	0.6%
Zone 6											
Somerfield, 9 Derby Road, Ashby de la Zouch	0.00	0.00	0.00	0.00	0.00	5.74	0.00	0.00	0.00	5.74	1.7%
Tesco, 4 Resolution Road, Ashby de la Zouch	0.00	0.00	0.00	0.00	3.28	22.61	0.00	0.00	0.00	25.89	7.7%
Other stores, Zone 6	0.00	0.00	0.00	0.00	0.00	3.97	0.00	0.00	0.00	3.97	1.2%
Zone 7											
Asda, Orchard Street, Burton upon Trent	0.16	0.00	0.30	0.19	1.01	0.81	7.85	0.75	0.31	11.38	3.4%
Co-op Food Shop, James Brindley Way, Stretton, Burton upon Trent	0.00	0.00	0.00	0.00	0.00	0.00	5.66	1.36	0.00	7.03	2.1%
Marks & Spencer, 2-6 St Modwens Walk, Burton upon Trent	0.00	0.00	0.00	0.10	1.17	0.00	3.47	0.30	0.16	5.20	1.5%
Morrisons, Wellington Road, Burton upon Trent	0.47	0.27	0.93	1.44	2.52	0.22	14.91	8.32	0.94	30.01	8.9%
Sainsbury's, Union Street, Burton upon Trent	0.25	0.14	0.95	0.48	2.30	0.59	21.54	4.89	1.02	32.18	9.6%
Tesco, Bond End Wharf, St Peters Bridge, Burton upon Trent	0.00	0.14	0.35	0.38	4.57	0.59	23.21	2.83	0.88	32.95	9.8%
Other Stores, Burton upon Trent	0.00	0.00	0.47	0.10	0.79	0.30	18.28	1.99	0.14	22.07	6.6%

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Spreadsheet 15 continued...

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	All zones total ⁽¹⁾	All zones market share ⁽²⁾
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	%
Zone 8											
Other stores, Zone 8	0.00	0.00	0.00	0.00	0.25	0.00	0.00	3.00	0.06	3.31	1.0%
Zone 9											
Other stores, Zone 9	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.20	0.93	1.12	0.3%
Sub TOTAL Inside	18.79	12.30	6.84	8.19	82.65	37.54	95.67	26.64	5.94	294.54	87.5%
Outside study area											
Asda, Sinfin District Centre, Derby	0.00	0.00	0.12	3.42	0.76	0.00	0.26	0.19	0.00	4.75	1.4%
Sainsbury's, Kingsway Retail Park, Derby	0.00	0.00	0.30	3.91	0.76	0.00	0.93	0.19	0.00	6.09	1.8%
Other stores, Lichfield	0.00	0.00	0.00	0.29	0.25	0.00	0.47	0.79	1.78	3.58	1.1%
Other stores, Derby	0.09	0.00	2.19	9.80	0.00	0.00	0.73	0.50	0.09	13.40	4.0%
Other stores, Tamworth	0.00	0.00	0.00	0.00	0.76	1.33	0.93	0.19	0.09	3.30	1.0%
Other stores, outside catchment	0.87	1.68	2.50	0.10	0.38	3.58	0.26	0.30	1.38	11.05	3.3%
Sub TOTAL outside	0.97	1.68	5.11	17.53	2.90	4.91	3.58	2.16	3.33	42.18	12.5%
TOTAL	19.76	13.98	11.95	25.72	85.55	42.45	99.25	28.80	9.27	336.72	100.0%

NOTES:

(1) The spending patterns are calculated by multiplying the total convenience goods expenditure (Table 12) by the market share (Table 13), the all zones total is the sum of the expenditure attracted to each centre from each zone.

(2) The 'All zones market share' is calculated through dividing the total expenditure attracted by each centre by the total expenditure in the study area.

All monetary values are held constant at 2004 prices.

Spreadsheet 16 - Convenience Goods Spending Patterns in 2011 Across the Study Area Zones

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total market share ⁽¹⁾	All zones market share ⁽²⁾
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	%
Inside study area											
Zone 1											
Tesco, Brookside Road, Uttoxeter	12.74	8.87	1.06	0.21	0.00	0.00	0.00	1.70	1.28	25.86	7.2%
Other stores, Uttoxeter	6.18	2.70	0.70	0.00	0.00	0.00	0.00	0.31	0.30	10.19	2.8%
Zone 2											
Other stores, Zone 2	0.00	0.76	0.07	0.00	0.00	0.00	0.00	0.00	0.00	0.83	0.2%
Zone 3											
Other stores, Zone 3	0.00	0.00	2.20	2.79	0.00	0.00	0.00	0.84	0.00	5.84	1.6%
Zone 4											
Other stores, Zone 4	0.00	0.00	0.07	2.81	0.00	0.00	0.00	0.00	0.00	2.89	0.8%
Zone 5											
Sainsbury's, Civic Way, Swadlincote	0.00	0.00	0.00	0.00	21.63	1.23	0.00	0.20	0.00	23.06	6.4%
Somerfield, 43 High Street, Swadlincote	0.00	0.00	0.00	0.00	10.55	0.23	0.00	0.00	0.00	10.78	3.0%
Morrisons, Coppice Side, Swadlincote	0.00	0.00	0.00	0.00	24.89	0.86	0.49	0.00	0.00	26.24	7.3%
Other stores, Swadlincote	0.00	0.00	0.00	0.00	13.02	0.55	0.28	0.11	0.00	13.96	3.9%
Other stores, Zone 5	0.00	0.00	0.00	0.11	1.94	0.00	0.00	0.00	0.00	2.06	0.6%
Zone 6											
Somerfield, 9 Derby Road, Ashby de la Zouch	0.00	0.00	0.00	0.00	0.00	6.09	0.00	0.00	0.00	6.09	1.7%
Tesco, 4 Resolution Road, Ashby de la Zouch	0.00	0.00	0.00	0.00	3.54	24.02	0.00	0.00	0.00	27.56	7.7%
Other stores, Zone 6	0.00	0.00	0.00	0.00	0.00	4.22	0.00	0.00	0.00	4.22	1.2%
Zone 7											
Asda, Orchard Street, Burton upon Trent	0.16	0.00	0.32	0.21	1.09	0.86	8.29	0.79	0.33	12.05	3.4%
Co-op Food Shop, James Brindley Way, Stretton, Burton upon Trent	0.00	0.00	0.00	0.00	0.00	0.00	5.98	1.44	0.00	7.42	2.1%
Marks & Spencer, 2-6 St Modwens Walk, Burton upon Trent	0.00	0.00	0.00	0.11	1.26	0.00	3.67	0.31	0.17	5.53	1.5%
Morrisons, Wellington Road, Burton upon Trent	0.49	0.29	0.99	1.55	2.72	0.23	15.75	8.79	0.99	31.80	8.9%
Sainsbury's, Union Street, Burton upon Trent	0.26	0.14	1.02	0.52	2.48	0.63	22.75	5.17	1.08	34.06	9.5%
Tesco, Bond End Wharf, St Peters Bridge, Burton upon Trent	0.00	0.14	0.37	0.41	4.93	0.63	24.52	2.99	0.93	34.92	9.7%
Other Stores, Burton upon Trent	0.00	0.00	0.50	0.11	0.85	0.32	19.31	2.10	0.15	23.33	6.5%

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Spreadsheet 16 continued...

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	All zones total ⁽¹⁾	All zones market share ⁽²⁾
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	%
Zone 8											
Other stores, Zone 8	0.00	0.00	0.00	0.00	0.27	0.00	0.00	3.17	0.06	3.50	1.0%
Zone 9											
Other stores, Zone 9	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.21	0.98	1.19	0.3%
Sub TOTAL Inside	19.84	12.90	7.30	8.83	89.18	39.88	101.03	28.13	6.27	313.37	87.4%
Outside study area											
Asda, Sinfin District Centre, Derby	0.00	0.00	0.13	3.69	0.82	0.00	0.28	0.20	0.00	5.12	1.4%
Sainsbury's, Kingsway Retail Park, Derby	0.00	0.00	0.32	4.22	0.82	0.00	0.98	0.20	0.00	6.54	1.8%
Other stores, Lichfield	0.00	0.00	0.00	0.32	0.27	0.00	0.49	0.83	1.88	3.79	1.1%
Other stores, Derby	0.10	0.00	2.33	10.58	0.00	0.00	0.77	0.53	0.09	14.41	4.0%
Other stores, Tamworth	0.00	0.00	0.00	0.00	0.82	1.41	0.98	0.20	0.09	3.51	1.0%
Other stores, outside catchment	0.92	1.76	2.67	0.11	0.41	3.80	0.28	0.31	1.46	11.72	3.3%
Sub TOTAL outside	1.02	1.76	5.45	18.92	3.13	5.21	3.79	2.29	3.52	45.09	12.6%
TOTAL	20.86	14.66	12.75	27.75	92.31	45.09	104.82	30.42	9.79	358.46	100.0%

NOTES:
(1) The spending patterns are calculated by multiplying the total convenience goods expenditure (Table 12) by the market share (Table 13), the all zones total is the sum of the expenditure attracted to each centre from each zone.
(2) The 'All zones market share' is calculated through dividing the total expenditure attracted by each centre by the total expenditure in the study area.
All monetary values are held constant at 2004 prices.

Spreadsheet 17 - Convenience Goods Spending Patterns in 2017 Across the Study Area Zones

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total market share ⁽¹⁾	All zones market share ⁽²⁾
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	%
Inside study area											
Zone 1											
Tesco, Brookside Road, Uttoxeter	14.12	9.70	1.16	0.23	0.00	0.00	0.00	1.89	1.42	28.51	7.2%
Other stores, Uttoxeter	6.86	2.95	0.76	0.00	0.00	0.00	0.00	0.35	0.33	11.25	2.8%
Zone 2											
Other stores, Zone 2	0.00	0.83	0.08	0.00	0.00	0.00	0.00	0.00	0.00	0.91	0.2%
Zone 3											
Other stores, Zone 3	0.00	0.00	2.40	3.08	0.00	0.00	0.00	0.94	0.00	6.42	1.6%
Zone 4											
Other stores, Zone 4	0.00	0.00	0.08	3.11	0.00	0.00	0.00	0.00	0.00	3.19	0.8%
Zone 5											
Sainsbury's, Civic Way, Swadlincote	0.00	0.00	0.00	0.00	23.88	1.34	0.00	0.23	0.00	25.45	6.4%
Somerfield, 43 High Street, Swadlincote	0.00	0.00	0.00	0.00	11.65	0.25	0.00	0.00	0.00	11.90	3.0%
Morrisons, Coppice Side, Swadlincote	0.00	0.00	0.00	0.00	27.48	0.94	0.55	0.00	0.00	28.97	7.3%
Other stores, Swadlincote	0.00	0.00	0.00	0.00	14.38	0.60	0.31	0.12	0.00	15.40	3.9%
Other stores, Zone 5	0.00	0.00	0.00	0.12	2.15	0.00	0.00	0.00	0.00	2.27	0.6%
Zone 6											
Somerfield, 9 Derby Road, Ashby de la Zouch	0.00	0.00	0.00	0.00	0.00	6.63	0.00	0.00	0.00	6.63	1.7%
Tesco, 4 Resolution Road, Ashby de la Zouch	0.00	0.00	0.00	0.00	3.91	26.15	0.00	0.00	0.00	30.05	7.6%
Other stores, Zone 6	0.00	0.00	0.00	0.00	0.00	4.60	0.00	0.00	0.00	4.60	1.2%
Zone 7											
Asda, Orchard Street, Burton upon Trent	0.18	0.00	0.35	0.23	1.20	0.94	9.20	0.88	0.36	13.34	3.4%
Co-op Food Shop, James Brindley Way, Stretton, Burton upon Trent	0.00	0.00	0.00	0.00	0.00	0.00	6.64	1.60	0.00	8.23	2.1%
Marks & Spencer, 2-6 St Modwens Walk, Burton upon Trent	0.00	0.00	0.00	0.12	1.39	0.00	4.07	0.35	0.19	6.12	1.5%
Morrisons, Wellington Road, Burton upon Trent	0.55	0.31	1.08	1.71	3.00	0.25	17.47	9.75	1.10	35.22	8.9%
Sainsbury's, Union Street, Burton upon Trent	0.29	0.16	1.11	0.58	2.74	0.69	25.23	5.73	1.20	37.72	9.5%
Tesco, Bond End Wharf, St Peters Bridge, Burton upon Trent	0.00	0.16	0.41	0.45	5.44	0.69	27.19	3.31	1.04	38.68	9.8%
Other Stores, Burton upon Trent	0.00	0.00	0.54	0.12	0.94	0.34	21.41	2.33	0.17	25.86	6.5%

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Spreadsheet 17 continued...

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	All zones total (1)	All zones market share (2)
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	%
Zone 8											
Other stores, Zone 8	0.00	0.00	0.00	0.00	0.30	0.00	0.00	3.51	0.07	3.88	1.0%
Zone 9											
Other stores, Zone 9	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.23	1.09	1.32	0.3%
Sub TOTAL Inside	22.00	14.09	7.97	9.75	98.47	43.41	112.05	31.20	6.96	345.91	87.4%
Outside study area											
Asda, Sinfin District Centre, Derby	0.00	0.00	0.14	4.08	0.90	0.00	0.31	0.23	0.00	5.65	1.4%
Sainsbury's, Kingsway Retail Park, Derby	0.00	0.00	0.35	4.66	0.90	0.00	1.09	0.23	0.00	7.22	1.8%
Other stores, Lichfield	0.00	0.00	0.00	0.35	0.30	0.00	0.55	0.92	2.09	4.21	1.1%
Other stores, Derby	0.11	0.00	2.55	11.68	0.00	0.00	0.85	0.59	0.10	15.89	4.0%
Other stores, Tamworth	0.00	0.00	0.00	0.00	0.90	1.54	1.09	0.23	0.10	3.86	1.0%
Other stores, outside catchment	1.02	1.92	2.92	0.12	0.45	4.14	0.31	0.35	1.62	12.85	3.2%
Sub TOTAL outside	1.14	1.92	5.96	20.89	3.45	5.67	4.20	2.54	3.90	49.67	12.6%
TOTAL	23.14	16.02	13.93	30.64	101.92	49.09	116.25	33.74	10.86	395.58	100.0%

NOTES:
(1) The spending patterns are calculated by multiplying the total convenience goods expenditure (Table 12) by the market share (Table 13), the all zones total is the sum of the expenditure attracted to each centre from each zone.
(2) The 'All zones market share' is calculated through dividing the total expenditure attracted by each centre by the total expenditure in the study area.
All monetary values are held constant at 2004 prices.

Spreadsheet 18 - Convenience Goods Spending Patterns in 2021 Across the Study Area Zones

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total market share ⁽¹⁾	All zones market share ⁽²⁾
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	%
Inside study area											
Zone 1											
Tesco, Brookside Road, Uttoxeter	15.71	10.63	1.26	0.25	0.00	0.00	0.00	2.10	1.58	31.52	7.2%
Other stores, Uttoxeter	7.62	3.24	0.83	0.00	0.00	0.00	0.00	0.39	0.37	12.44	2.9%
Zone 2											
Other stores, Zone 2	0.00	0.90	0.09	0.00	0.00	0.00	0.00	0.00	0.00	0.99	0.2%
Zone 3											
Other stores, Zone 3	0.00	0.00	2.61	3.38	0.00	0.00	0.00	1.04	0.00	7.03	1.6%
Zone 4											
Other stores, Zone 4	0.00	0.00	0.09	3.40	0.00	0.00	0.00	0.00	0.00	3.49	0.8%
Zone 5											
Sainsbury's, Civic Way, Swadlincote	0.00	0.00	0.00	0.00	26.18	1.45	0.00	0.25	0.00	27.88	6.4%
Somerfield, 43 High Street, Swadlincote	0.00	0.00	0.00	0.00	12.77	0.27	0.00	0.00	0.00	13.04	3.0%
Morrisons, Coppice Side, Swadlincote	0.00	0.00	0.00	0.00	30.12	1.02	0.61	0.00	0.00	31.75	7.3%
Other stores, Swadlincote	0.00	0.00	0.00	0.00	15.76	0.65	0.34	0.13	0.00	16.88	3.9%
Other stores, Zone 5	0.00	0.00	0.00	0.14	2.35	0.00	0.00	0.00	0.00	2.49	0.6%
Zone 6											
Somerfield, 9 Derby Road, Ashby de la Zouch	0.00	0.00	0.00	0.00	0.00	7.21	0.00	0.00	0.00	7.21	1.7%
Tesco, 4 Resolution Road, Ashby de la Zouch	0.00	0.00	0.00	0.00	4.28	28.41	0.00	0.00	0.00	32.69	7.5%
Other stores, Zone 6	0.00	0.00	0.00	0.00	0.00	4.99	0.00	0.00	0.00	4.99	1.1%
Zone 7											
Asda, Orchard Street, Burton upon Trent	0.20	0.00	0.38	0.25	1.32	1.02	10.23	0.98	0.40	14.78	3.4%
Co-op Food Shop, James Brindley Way, Stretton, Burton upon Trent	0.00	0.00	0.00	0.00	0.00	0.00	7.38	1.77	0.00	9.15	2.1%
Marks & Spencer, 2-6 St Modwens Walk, Burton upon Trent	0.00	0.00	0.00	0.14	1.52	0.00	4.52	0.39	0.21	6.78	1.6%
Morrisons, Wellington Road, Burton upon Trent	0.61	0.34	1.17	1.87	3.29	0.27	19.42	10.84	1.22	39.05	9.0%
Sainsbury's, Union Street, Burton upon Trent	0.33	0.17	1.21	0.63	3.00	0.75	28.05	6.37	1.33	41.85	9.6%
Tesco, Bond End Wharf, St Peters Bridge, Burton upon Trent	0.00	0.17	0.44	0.50	5.97	0.75	30.23	3.68	1.15	42.89	9.8%
Other Stores, Burton upon Trent	0.00	0.00	0.59	0.14	1.03	0.37	23.81	2.59	0.19	28.71	6.6%

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Spreadsheet 18 continued...

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	All zones total ⁽¹⁾	All zones market share ⁽²⁾
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	%
Zone 8											
Other stores, Zone 8	0.00	0.00	0.00	0.00	0.33	0.00	0.00	3.90	0.07	4.31	1.0%
Zone 9											
Other stores, Zone 9	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.26	1.21	1.46	0.3%
Sub TOTAL Inside	24.47	15.46	8.67	10.69	107.92	47.16	124.60	34.70	7.74	381.40	87.5%
Outside study area											
Asda, Sinfin District Centre, Derby	0.00	0.00	0.15	4.47	0.99	0.00	0.34	0.25	0.00	6.20	1.4%
Sainsbury's, Kingsway Retail Park, Derby	0.00	0.00	0.38	5.10	0.99	0.00	1.21	0.25	0.00	7.93	1.8%
Other stores, Lichfield	0.00	0.00	0.00	0.38	0.33	0.00	0.61	1.02	2.32	4.67	1.1%
Other stores, Derby	0.12	0.00	2.77	12.80	0.00	0.00	0.95	0.65	0.11	17.41	4.0%
Other stores, Tamworth	0.00	0.00	0.00	0.00	0.99	1.67	1.21	0.25	0.11	4.23	1.0%
Other stores, outside catchment	1.14	2.11	3.17	0.14	0.49	4.50	0.34	0.39	1.80	14.07	3.2%
Sub TOTAL outside	1.26	2.11	6.48	22.90	3.79	6.16	4.67	2.82	4.34	54.52	12.5%
TOTAL	25.73	17.56	15.15	33.58	111.70	53.33	129.27	37.52	12.08	435.93	100.0%

NOTES:

(1) The spending patterns are calculated by multiplying the total convenience goods expenditure (Table 12) by the market share (Table 13), the all zones total is the sum of the expenditure attracted to each centre from each zone.

(2) The 'All zones market share' is calculated through dividing the total expenditure attracted by each centre by the total expenditure in the study area.

All monetary values are held constant at 2004 prices.

Spreadsheet 19 - Convenience Goods Spending Patterns in 2026 Across the Study Area Zones

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Total market share ⁽¹⁾	All zones market share ⁽²⁾
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	%
Inside study area											
Zone 1											
Tesco, Brookside Road, Uttoxeter	17.51	11.69	1.36	0.27	0.00	0.00	0.00	2.34	1.76	34.92	7.3%
Other stores, Uttoxeter	8.50	3.56	0.90	0.00	0.00	0.00	0.00	0.43	0.41	13.79	2.9%
Zone 2											
Other stores, Zone 2	0.00	0.99	0.10	0.00	0.00	0.00	0.00	0.00	0.00	1.09	0.2%
Zone 3											
Other stores, Zone 3	0.00	0.00	2.82	3.67	0.00	0.00	0.00	1.16	0.00	7.65	1.6%
Zone 4											
Other stores, Zone 4	0.00	0.00	0.10	3.70	0.00	0.00	0.00	0.00	0.00	3.79	0.8%
Zone 5											
Sainsbury's, Civic Way, Swadlincote	0.00	0.00	0.00	0.00	28.43	1.57	0.00	0.28	0.00	30.27	6.3%
Somerfield, 43 High Street, Swadlincote	0.00	0.00	0.00	0.00	13.86	0.30	0.00	0.00	0.00	14.16	3.0%
Morrisons, Coppice Side, Swadlincote	0.00	0.00	0.00	0.00	32.71	1.10	0.68	0.00	0.00	34.49	7.2%
Other stores, Swadlincote	0.00	0.00	0.00	0.00	17.11	0.70	0.38	0.15	0.00	18.34	3.8%
Other stores, Zone 5	0.00	0.00	0.00	0.15	2.56	0.00	0.00	0.00	0.00	2.70	0.6%
Zone 6											
Somerfield, 9 Derby Road, Ashby de la Zouch	0.00	0.00	0.00	0.00	0.00	7.78	0.00	0.00	0.00	7.78	1.6%
Tesco, 4 Resolution Road, Ashby de la Zouch	0.00	0.00	0.00	0.00	4.65	30.65	0.00	0.00	0.00	35.30	7.4%
Other stores, Zone 6	0.00	0.00	0.00	0.00	0.00	5.39	0.00	0.00	0.00	5.39	1.1%
Zone 7											
Asda, Orchard Street, Burton upon Trent	0.23	0.00	0.41	0.27	1.43	1.10	11.40	1.09	0.45	16.38	3.4%
Co-op Food Shop, James Brindley Way, Stretton, Burton upon Trent	0.00	0.00	0.00	0.00	0.00	0.00	8.22	1.98	0.00	10.20	2.1%
Marks & Spencer, 2-6 St Modwens Walk, Burton upon Trent	0.00	0.00	0.00	0.15	1.65	0.00	5.04	0.43	0.24	7.51	1.6%
Morrisons, Wellington Road, Burton upon Trent	0.68	0.38	1.27	2.04	3.58	0.30	21.65	12.08	1.36	43.32	9.0%
Sainsbury's, Union Street, Burton upon Trent	0.36	0.19	1.31	0.69	3.26	0.81	31.27	7.10	1.49	46.47	9.7%
Tesco, Bond End Wharf, St Peters Bridge, Burton upon Trent	0.00	0.19	0.48	0.54	6.48	0.81	33.70	4.11	1.28	47.58	9.9%
Other Stores, Burton upon Trent	0.00	0.00	0.64	0.15	1.12	0.40	26.54	2.88	0.21	31.94	6.7%

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Spreadsheet 19 continued..

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	All zones total ⁽¹⁾	All zones market share ⁽²⁾
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	%
Zone 8											
Other stores, Zone 8	0.00	0.00	0.00	0.00	0.36	0.00	0.00	4.35	0.08	4.79	1.0%
Zone 9											
Other stores, Zone 9	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.29	1.35	1.63	0.3%
Sub TOTAL Inside	27.27	16.99	9.37	11.61	117.19	50.89	138.89	38.67	8.62	419.49	87.6%
Outside study area											
Asda, Sinfin District Centre, Derby	0.00	0.00	0.16	4.86	1.07	0.00	0.38	0.28	0.00	6.75	1.4%
Sainsbury's, Kingsway Retail Park, Derby	0.00	0.00	0.41	5.54	1.07	0.00	1.35	0.28	0.00	8.66	1.8%
Other stores, Lichfield	0.00	0.00	0.00	0.42	0.36	0.00	0.68	1.14	2.59	5.18	1.1%
Other stores, Derby	0.14	0.00	2.99	13.90	0.00	0.00	1.06	0.73	0.13	18.95	4.0%
Other stores, Tamworth	0.00	0.00	0.00	0.00	1.07	1.80	1.35	0.28	0.13	4.63	1.0%
Other stores, outside catchment	1.27	2.32	3.43	0.15	0.54	4.85	0.38	0.43	2.00	15.36	3.2%
Sub TOTAL outside	1.41	2.32	6.99	24.86	4.11	6.65	5.20	3.14	4.84	59.53	12.4%
TOTAL	28.68	19.30	16.36	36.47	121.30	57.54	144.09	41.82	13.46	479.03	100.0%

NOTES:
(1) The spending patterns are calculated by multiplying the total convenience goods expenditure (Table 12) by the market share (Table 13), the all zones total is the sum of the expenditure attracted to each centre from each zone.
(2) The 'All zones market share' is calculated through dividing the total expenditure attracted by each centre by the total expenditure in the study area.

All monetary values are held constant at 2004 prices.

Spreadsheet 20 - Summary of Capacity for Convenience Goods Base Scenario 1

Static Retention Rate [87%] with moderate turnover efficiency [0.2%]

	2007	2011	2016	2021	2026	Change 2007-11	Change 2011-16	Change 2016-21	Change 2021-26	Change 2007-21
Total Population	212,065	219,931	232,452	244,964	257,430	7,866	12,521	12,512	12,467	45,366
Total Expenditure £m	336.7	358.5	395.6	435.9	479.0	21.7	37.1	40.3	43.1	142.3
Retained Expenditure £m	294.5	313.4	345.9	381.4	419.5	18.8	32.5	35.5	38.1	125.0
Retained Expenditure %	87	87	87	87	88					
Leakage £m	42.2	45.1	49.7	54.5	59.5	2.9	4.6	4.9	5.0	17.4
Total Turnover of Convenience Stores in OCA £m	294.5	313.4	345.9	381.4	419.5	18.8	32.5	35.5	38.1	125.0
Initial Surplus £m/annum (Growth in Retained Expenditure)						18.8	32.5	35.5	38.1	125.0
Claims on Expenditure										
Existing Traders £m	0	2.4	5.3	8.4	11.4	2.4	3.0	3.0	3.0	11.4
Commitments	0	24.9	25.1	25.4	25.6	25	0	0	0	25
Impact on capacity £m	0	27.2	30.5	33.7	37.0	27.2	3.2	3.3	3.3	36.8
SUMMARY						2006-11	2011-16	2016-21	2021-26	2007-21
Initial surplus £m						18.8	32.5	35.5	38.1	125.0
Claims on capacity £m						27.2	3.2	3.3	3.3	36.8
RESIDUAL £m						-8.4	29.3	32.2	34.8	88.2
Turnover per sq m						8,080	8,161	8,227	8,310	
Floorspace Requirement sq m (gross)						-1,733	5,985	6,529	6,979	17,760
Floorspace Requirement sq m (net)						-1,040	3,591	3,917	4,188	10,656

