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Job title:

St Edmundsbury Retail & Leisure Study 2011
Appendix 7: Convenience Analysis

Client:

St Edmundsbury Borough Council

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St Edmundsbury Borough Council - Retail Study 2011

Table C1 - Growth Rate & SFT Assumptions

Experian 9 Growth Rates

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031
Convenience	0.8%	-0.3%	-0.4%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.6%	0.6%	0.6%	0.6%	0.6%	0.6%	0.6%	0.6%	0.6%	0.6%	0.6%	0.6%	0.6%
	1.008	0.997	0.996	1.005	1.005	1.005	1.005	1.005	1.005	1.006	1.006	1.006	1.006	1.006	1.006	1.006	1.006	1.006	1.006	1.006	1.006	1.006
Comparison	0.1%	0.5%	1.6%	2.1%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%
	1.001	1.005	1.016	1.021	1.03	1.03	1.03	1.03	1.03	1.03	1.03	1.03	1.03	1.03	1.03	1.03	1.03	1.03	1.03	1.03	1.03	1.03

Special Forms of Trading

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031
Convenience	3.7%	4.2%	4.6%	5.0%	5.4%	5.6%	5.9%	6.0%	6.0%	6.1%	6.2%	6.3%	6.3%	6.4%	6.5%	6.6%	6.8%	6.9%	7.0%	7.0%	7.0%	7.0%
	0.963	0.958	0.954	0.950	0.946	0.944	0.941	0.940	0.940	0.939	0.938	0.937	0.937	0.936	0.935	0.934	0.932	0.931	0.930	0.930	0.930	0.930
Comparison	8.8%	10.0%	10.9%	11.7%	12.3%	12.6%	12.7%	12.8%	12.7%	12.6%	12.5%	12.4%	12.3%	12.3%	12.2%	12.1%	12.1%	12.0%	12.0%	12.0%	12.0%	12.0%
	0.912	0.900	0.891	0.883	0.877	0.874	0.873	0.872	0.873	0.874	0.875	0.876	0.877	0.877	0.878	0.879	0.879	0.880	0.880	0.880	0.880	0.880

Retail Sales Density

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031
Convenience	-0.8%	-1.0%	-1.7%	0.4%	0.4%	0.4%	0.4%	0.4%	0.4%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%
	0.992	0.990	0.983	1.004	1.004	1.004	1.004	1.004	1.004	1.002	1.002	1.002	1.002	1.002	1.002	1.002	1.002	1.002	1.002	1.002	1.002	1.002
Comparison	-0.3%	0.7%	1.8%	1.5%	1.7%	1.7%	1.7%	1.7%	1.7%	1.7%	1.7%	1.7%	1.7%	1.7%	1.7%	1.7%	1.7%	1.7%	1.7%	1.7%	1.7%	1.7%
	0.997	1.007	1.018	1.015	1.017	1.017	1.017	1.017	1.017	1.017	1.017	1.017	1.017	1.017	1.017	1.017	1.017	1.017	1.017	1.017	1.017	1.017

Notes

- 1) Expenditure growth rates taken from Experian Retail Planner Briefing Note 9 (September 2011) - Figure 1a, p8
- 2) Special forms of trading deduction rates taken from Experian Retail Planner Briefing Note 9 (September 2011) - Appendix 3, p17
- 3) Retail sales density figures taken from Experian Retail Planner Briefing Note 9 (September 2011) - Figure 4a & 4b, p12
- 4) Rates from 2029-2031 as per 2028 rate in relevant category
- 5) 2010 prices

St Edmundsbury Borough Council - Retail Study 2011

Convenience Goods Analysis

Convenience Table 1: Study Area Population Projections

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031
Zone 1 (Bury St Edmunds)	40,026	40,335	40,579	40,935	41,189	41,477	41,855	42,216	42,577	42,958	43,357	43,711	44,074	44,439	44,788	45,132	45,482	45,826	46,184	46,512	46,845	47,178
Zone 2	47,586	47,889	48,283	48,632	48,971	49,294	49,727	50,071	50,402	50,755	51,173	51,522	51,923	52,226	52,637	52,956	53,275	53,632	53,924	54,243	54,572	54,901
Zone 3	41,161	41,738	42,224	42,820	43,441	43,930	44,475	45,093	45,746	46,337	47,019	47,629	48,252	48,859	49,455	50,018	50,610	51,158	51,751	52,253	52,745	53,237
Zone 4	40,070	40,408	40,781	41,138	41,478	41,898	42,336	42,686	43,114	43,572	43,968	44,317	44,791	45,201	45,603	46,005	46,320	46,696	47,102	47,448	47,760	48,072
Zone 5	50,038	50,717	51,433	52,212	52,952	53,665	54,373	55,101	55,865	56,575	57,297	58,023	58,732	59,394	60,092	60,818	61,533	62,162	62,825	63,486	64,140	64,794
Zone 6	80,236	81,229	82,418	83,446	84,523	85,611	86,669	87,709	88,838	89,841	90,853	91,864	92,831	93,780	94,652	95,578	96,456	97,312	98,168	99,007	99,814	100,621
Zone 7	25,231	25,509	25,768	25,970	26,245	26,491	26,737	26,978	27,204	27,458	27,712	27,978	28,222	28,487	28,738	28,936	29,171	29,377	29,603	29,822	30,063	30,304
Zone 8 (Haverhill)	30,072	30,293	30,682	31,035	31,429	31,780	32,106	32,443	32,810	33,196	33,543	33,922	34,273	34,626	34,967	35,329	35,624	35,942	36,298	36,653	36,975	37,297
Zone 9	16,203	16,323	16,404	16,433	16,541	16,592	16,677	16,735	16,819	16,891	16,983	17,081	17,197	17,266	17,316	17,420	17,504	17,570	17,642	17,706	17,785	17,864
Zone 10	43,569	43,823	44,017	44,188	44,396	44,681	44,979	45,275	45,561	45,865	46,267	46,679	47,024	47,375	47,782	48,176	48,520	48,901	49,256	49,599	49,947	50,295
Total	414,192	418,264	422,589	426,809	431,165	435,419	439,934	444,307	448,936	453,448	458,172	462,726	467,319	471,653	476,030	480,368	484,495	488,576	492,753	496,729	500,646	504,563

Notes

(1) Population data taken from Experian Micromarketer (November 2011)

(2) Population estimate for 2031 is based on the same level of growth as seen in 2029/30 as Experian do not project to this year

St Edmundsbury Borough Council - Retail Study 2011

Convenience Goods Analysis

Convenience Table 2a: Total Convenience Expenditure Per Head

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031
Zone 1 (Bury St Edmunds)	£1,869	£1,863	£1,856	£1,865	£1,875	£1,884	£1,893	£1,903	£1,912	£1,924	£1,935	£1,947	£1,959	£1,970	£1,982	£1,994	£2,006	£2,018	£2,030	£2,042	£2,055	£2,067
Zone 2	£2,038	£2,032	£2,024	£2,034	£2,044	£2,054	£2,065	£2,075	£2,085	£2,098	£2,110	£2,123	£2,136	£2,149	£2,161	£2,174	£2,187	£2,201	£2,214	£2,227	£2,240	£2,254
Zone 3	£1,915	£1,909	£1,902	£1,911	£1,921	£1,930	£1,940	£1,950	£1,959	£1,971	£1,983	£1,995	£2,007	£2,019	£2,031	£2,043	£2,055	£2,068	£2,080	£2,093	£2,105	£2,118
Zone 4	£2,104	£2,098	£2,089	£2,100	£2,110	£2,121	£2,131	£2,142	£2,153	£2,166	£2,179	£2,192	£2,205	£2,218	£2,231	£2,245	£2,258	£2,272	£2,285	£2,299	£2,313	£2,327
Zone 5	£1,733	£1,728	£1,721	£1,729	£1,738	£1,747	£1,756	£1,764	£1,773	£1,784	£1,795	£1,805	£1,816	£1,827	£1,838	£1,849	£1,860	£1,871	£1,882	£1,894	£1,905	£1,917
Zone 6	£1,895	£1,889	£1,882	£1,891	£1,901	£1,910	£1,920	£1,929	£1,939	£1,951	£1,962	£1,974	£1,986	£1,998	£2,010	£2,022	£2,034	£2,046	£2,058	£2,071	£2,083	£2,096
Zone 7	£1,991	£1,985	£1,977	£1,987	£1,997	£2,007	£2,017	£2,027	£2,037	£2,049	£2,062	£2,074	£2,086	£2,099	£2,112	£2,124	£2,137	£2,150	£2,163	£2,176	£2,189	£2,202
Zone 8 (Haverhill)	£1,899	£1,893	£1,886	£1,895	£1,905	£1,914	£1,924	£1,933	£1,943	£1,955	£1,966	£1,978	£1,990	£2,002	£2,014	£2,026	£2,038	£2,050	£2,063	£2,075	£2,088	£2,100
Zone 9	£2,070	£2,064	£2,056	£2,066	£2,076	£2,087	£2,097	£2,107	£2,118	£2,131	£2,143	£2,156	£2,169	£2,182	£2,195	£2,209	£2,222	£2,235	£2,249	£2,262	£2,276	£2,289
Zone 10	£1,915	£1,909	£1,902	£1,911	£1,921	£1,930	£1,940	£1,950	£1,959	£1,971	£1,983	£1,995	£2,007	£2,019	£2,031	£2,043	£2,055	£2,068	£2,080	£2,093	£2,105	£2,118
Average Study Area	£1,943	£1,937	£1,929	£1,939	£1,949	£1,958	£1,968	£1,978	£1,988	£2,000	£2,012	£2,024	£2,036	£2,048	£2,061	£2,073	£2,085	£2,098	£2,110	£2,123	£2,136	£2,149

Convenience Table 2b: Total Convenience Expenditure Per Head With NSRT Adjustment

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031
Zone 1 (Bury St Edmunds)	£1,800	£1,785	£1,771	£1,772	£1,773	£1,778	£1,782	£1,789	£1,798	£1,806	£1,815	£1,824	£1,835	£1,844	£1,853	£1,862	£1,870	£1,879	£1,888	£1,899	£1,911	£1,922
Zone 2	£1,963	£1,947	£1,931	£1,932	£1,934	£1,939	£1,943	£1,950	£1,960	£1,970	£1,979	£1,989	£2,001	£2,011	£2,021	£2,031	£2,039	£2,049	£2,059	£2,071	£2,084	£2,096
Zone 3	£1,844	£1,829	£1,814	£1,816	£1,817	£1,822	£1,825	£1,833	£1,842	£1,851	£1,860	£1,869	£1,880	£1,890	£1,899	£1,908	£1,916	£1,925	£1,935	£1,946	£1,958	£1,970
Zone 4	£2,026	£2,010	£1,993	£1,995	£1,996	£2,002	£2,006	£2,014	£2,024	£2,034	£2,044	£2,054	£2,066	£2,076	£2,086	£2,097	£2,105	£2,115	£2,125	£2,138	£2,151	£2,164
Zone 5	£1,669	£1,655	£1,642	£1,643	£1,644	£1,649	£1,652	£1,658	£1,667	£1,675	£1,683	£1,692	£1,702	£1,710	£1,718	£1,727	£1,734	£1,742	£1,751	£1,761	£1,772	£1,782
Zone 6	£1,825	£1,810	£1,795	£1,797	£1,798	£1,803	£1,806	£1,814	£1,823	£1,832	£1,841	£1,850	£1,861	£1,870	£1,879	£1,888	£1,896	£1,905	£1,914	£1,926	£1,937	£1,949
Zone 7	£1,917	£1,902	£1,886	£1,888	£1,889	£1,895	£1,898	£1,905	£1,915	£1,924	£1,934	£1,943	£1,955	£1,965	£1,974	£1,984	£1,992	£2,001	£2,011	£2,023	£2,036	£2,048
Zone 8 (Haverhill)	£1,829	£1,814	£1,799	£1,800	£1,802	£1,807	£1,810	£1,817	£1,826	£1,835	£1,844	£1,854	£1,865	£1,874	£1,883	£1,892	£1,900	£1,909	£1,918	£1,930	£1,941	£1,953
Zone 9	£1,993	£1,977	£1,961	£1,963	£1,964	£1,970	£1,973	£1,981	£1,991	£2,001	£2,011	£2,020	£2,033	£2,043	£2,053	£2,063	£2,071	£2,081	£2,091	£2,104	£2,116	£2,129
Zone 10	£1,844	£1,829	£1,814	£1,816	£1,817	£1,822	£1,825	£1,833	£1,842	£1,851	£1,860	£1,869	£1,880	£1,890	£1,899	£1,908	£1,916	£1,925	£1,935	£1,946	£1,958	£1,970
Average Study Area	£1,871	£1,856	£1,841	£1,842	£1,843	£1,849	£1,852	£1,859	£1,869	£1,878	£1,887	£1,896	£1,908	£1,917	£1,927	£1,936	£1,944	£1,953	£1,963	£1,975	£1,986	£1,998

Notes

- (1) 2010 Prices
- (2) 2010 Base figure from Experian Micromarketer, November 2011
- (3) Expenditure per Head projected forward utilising Experian's Growth Rates for Convenience Goods (Experian Retail Planner Briefing Note 9, September 2011- Figure 1a, p8)
- (4) Non-Store Retail Trade Adjustment Taken from Experian Retail Planner Briefing Note 9 (September 2011) - Appendix 3, p17

St Edmundsbury Borough Council - Retail Study 2011

Convenience Goods Analysis

Convenience Table 3: Total Available Expenditure (£m)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031
Zone 1 (Bury St Edmunds)	£72.04	£72.00	£71.85	£72.54	£73.04	£73.76	£74.57	£75.51	£76.54	£77.60	£78.71	£79.74	£80.89	£81.96	£83.01	£84.06	£85.04	£86.10	£87.20	£88.35	£89.51	£90.69
Zone 2	£93.39	£93.22	£93.22	£93.97	£94.69	£95.59	£96.61	£97.66	£98.79	£99.98	£101.30	£102.49	£103.91	£105.03	£106.38	£107.55	£108.61	£109.88	£111.02	£112.35	£113.71	£115.08
Zone 3	£75.91	£76.34	£76.60	£77.74	£78.93	£80.05	£81.19	£82.64	£84.26	£85.77	£87.46	£89.03	£90.73	£92.33	£93.91	£95.45	£96.95	£98.48	£100.12	£101.69	£103.27	£104.86
Zone 4	£81.19	£81.20	£81.28	£82.06	£82.80	£83.88	£84.91	£85.95	£87.25	£88.61	£89.85	£91.01	£92.54	£93.84	£95.15	£96.46	£97.49	£98.77	£100.11	£101.46	£102.74	£104.03
Zone 5	£83.51	£83.95	£84.44	£85.79	£87.07	£88.49	£89.82	£91.38	£93.11	£94.76	£96.45	£98.15	£99.94	£101.57	£103.27	£105.03	£106.67	£108.29	£109.99	£111.81	£113.64	£115.49
Zone 6	£146.42	£147.02	£147.96	£149.92	£151.97	£154.37	£156.56	£159.06	£161.91	£164.55	£167.22	£169.92	£172.74	£175.36	£177.86	£180.49	£182.85	£185.38	£187.93	£190.67	£193.38	£196.11
Zone 7	£48.38	£48.51	£48.60	£49.02	£49.58	£50.19	£50.74	£51.40	£52.09	£52.84	£53.59	£54.37	£55.17	£55.97	£56.74	£57.41	£58.10	£58.80	£59.54	£60.34	£61.19	£62.06
Zone 8 (Haverhill)	£54.99	£54.94	£55.20	£55.88	£56.63	£57.43	£58.12	£58.96	£59.93	£60.93	£61.87	£62.88	£63.91	£64.88	£65.85	£66.86	£67.67	£68.61	£69.63	£70.74	£71.79	£72.85
Zone 9	£32.30	£32.27	£32.17	£32.25	£32.49	£32.68	£32.91	£33.15	£33.48	£33.79	£34.15	£34.51	£34.95	£35.27	£35.54	£35.93	£36.25	£36.56	£36.89	£37.25	£37.64	£38.03
Zone 10	£80.35	£80.16	£79.85	£80.23	£80.67	£81.42	£82.11	£82.97	£83.92	£84.89	£86.06	£87.25	£88.42	£89.52	£90.74	£91.94	£92.95	£94.14	£95.29	£96.53	£97.79	£99.06
Total Study Area	£768.47	£769.62	£771.17	£779.38	£787.87	£797.86	£807.54	£818.69	£831.28	£843.72	£856.65	£869.35	£883.21	£895.73	£908.44	£921.17	£932.58	£945.01	£957.72	£971.18	£984.65	£998.25

Notes

- (1) Based on Convenience Table 1 and Table 2b
- (2) 2010 Prices
- (3) Figures not exact due to rounding

St Edmundsbury Borough Council - Retail Study 2011

Convenience Goods Analysis

Convenience Table 4a: Total Available Expenditure - Main Food Shopping (£m)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031
Zone 1 (Bury St Edmunds)	£50.43	£50.40	£50.29	£50.77	£51.13	£51.63	£52.20	£52.86	£53.57	£54.32	£55.10	£55.82	£56.62	£57.37	£58.11	£58.84	£59.52	£60.27	£61.04	£61.84	£62.66	£63.48
Zone 2	£65.37	£65.25	£65.25	£65.78	£66.29	£66.91	£67.62	£68.36	£69.16	£69.98	£70.91	£71.74	£72.74	£73.52	£74.46	£75.28	£76.03	£76.91	£77.71	£78.64	£79.59	£80.55
Zone 3	£53.13	£53.44	£53.62	£54.42	£55.25	£56.03	£56.83	£57.85	£58.98	£60.04	£61.22	£62.32	£63.51	£64.63	£65.74	£66.82	£67.87	£68.94	£70.08	£71.19	£72.29	£73.40
Zone 4	£56.83	£56.84	£56.90	£57.44	£57.96	£58.72	£59.44	£60.16	£61.07	£62.02	£62.90	£63.71	£64.78	£65.69	£66.60	£67.52	£68.24	£69.14	£70.08	£71.02	£71.91	£72.82
Zone 5	£58.46	£58.76	£59.11	£60.05	£60.95	£61.95	£62.88	£63.97	£65.18	£66.33	£67.51	£68.70	£69.96	£71.10	£72.29	£73.52	£74.67	£75.81	£76.99	£78.27	£79.55	£80.84
Zone 6	£102.50	£102.92	£103.57	£104.94	£106.38	£108.06	£109.59	£111.34	£113.34	£115.19	£117.06	£118.94	£120.92	£122.75	£124.51	£126.34	£127.99	£129.76	£131.55	£133.47	£135.37	£137.28
Zone 7	£33.86	£33.96	£34.02	£34.32	£34.71	£35.13	£35.52	£35.98	£36.47	£36.99	£37.51	£38.06	£38.62	£39.18	£39.72	£40.19	£40.67	£41.16	£41.68	£42.24	£42.84	£43.44
Zone 8 (Haverhill)	£38.50	£38.46	£38.64	£39.11	£39.64	£40.20	£40.68	£41.27	£41.95	£42.65	£43.31	£44.01	£44.74	£45.42	£46.09	£46.80	£47.37	£48.03	£48.74	£49.52	£50.25	£50.99
Zone 9	£22.61	£22.59	£22.52	£22.58	£22.74	£22.88	£23.04	£23.21	£23.44	£23.66	£23.90	£24.16	£24.47	£24.69	£24.88	£25.15	£25.37	£25.59	£25.82	£26.07	£26.35	£26.62
Zone 10	£56.24	£56.11	£55.90	£56.16	£56.47	£56.99	£57.48	£58.08	£58.74	£59.42	£60.24	£61.08	£61.90	£62.67	£63.52	£64.35	£65.06	£65.90	£66.70	£67.57	£68.45	£69.34
Total Study Area	£537.93	£538.73	£539.82	£545.57	£551.51	£558.50	£565.28	£573.08	£581.90	£590.60	£599.65	£608.54	£618.25	£627.01	£635.91	£644.82	£652.80	£661.51	£670.41	£679.83	£689.25	£698.77

Notes

- (1) 2010 Prices
- (2) Figures calculated by multiplying Convenience Table 3 by proportion of convenience expenditure spent on main food shopping
- (3) Assumed 70% of residents' expenditure spent on main food shopping
- (4) Figures not exact due to rounding

St Edmundsbury Borough Council - Retail Study 2011

Convenience Goods Analysis

Convenience Table 4b: Total Available Expenditure - Top Up Food Shopping (£m)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031
Zone 1 (Bury St Edmunds)	£21.61	£21.60	£21.55	£21.76	£21.91	£22.13	£22.37	£22.65	£22.96	£23.28	£23.61	£23.92	£24.27	£24.59	£24.90	£25.22	£25.51	£25.83	£26.16	£26.50	£26.85	£27.21
Zone 2	£28.02	£27.97	£27.97	£28.19	£28.41	£28.68	£28.98	£29.30	£29.64	£29.99	£30.39	£30.75	£31.17	£31.51	£31.91	£32.26	£32.58	£32.96	£33.31	£33.70	£34.11	£34.52
Zone 3	£22.77	£22.90	£22.98	£23.32	£23.68	£24.01	£24.36	£24.79	£25.28	£25.73	£26.24	£26.71	£27.22	£27.70	£28.17	£28.64	£29.09	£29.55	£30.03	£30.51	£30.98	£31.46
Zone 4	£24.36	£24.36	£24.39	£24.62	£24.84	£25.16	£25.47	£25.78	£26.17	£26.58	£26.96	£27.30	£27.76	£28.15	£28.54	£28.94	£29.25	£29.63	£30.03	£30.44	£30.82	£31.21
Zone 5	£25.05	£25.18	£25.33	£25.74	£26.12	£26.55	£26.95	£27.42	£27.93	£28.43	£28.93	£29.44	£29.98	£30.47	£30.98	£31.51	£32.00	£32.49	£33.00	£33.54	£34.09	£34.65
Zone 6	£43.93	£44.11	£44.39	£44.98	£45.59	£46.31	£46.97	£47.72	£48.57	£49.37	£50.17	£50.98	£51.82	£52.61	£53.36	£54.15	£54.85	£55.61	£56.38	£57.20	£58.01	£58.83
Zone 7	£14.51	£14.55	£14.58	£14.71	£14.87	£15.06	£15.22	£15.42	£15.63	£15.85	£16.08	£16.31	£16.55	£16.79	£17.02	£17.22	£17.43	£17.64	£17.86	£18.10	£18.36	£18.62
Zone 8 (Haverhill)	£16.50	£16.48	£16.56	£16.76	£16.99	£17.23	£17.44	£17.69	£17.98	£18.28	£18.56	£18.86	£19.17	£19.47	£19.75	£20.06	£20.30	£20.58	£20.89	£21.22	£21.54	£21.85
Zone 9	£9.69	£9.68	£9.65	£9.68	£9.75	£9.80	£9.87	£9.95	£10.05	£10.14	£10.24	£10.35	£10.49	£10.58	£10.66	£10.78	£10.87	£10.97	£11.07	£11.17	£11.29	£11.41
Zone 10	£24.10	£24.05	£23.96	£24.07	£24.20	£24.43	£24.63	£24.89	£25.17	£25.47	£25.82	£26.18	£26.53	£26.86	£27.22	£27.58	£27.88	£28.24	£28.59	£28.96	£29.34	£29.72
Total Study Area	£230.54	£230.89	£231.35	£233.81	£236.36	£239.36	£242.26	£245.61	£249.38	£253.11	£256.99	£260.80	£264.96	£268.72	£272.53	£276.35	£279.77	£283.50	£287.32	£291.35	£295.39	£299.47

Notes

- (1) 2010 Prices
- (2) Figures calculated by multiplying Convenience Table 3 by proportion of convenience expenditure spent on top-up shopping
- (3) Assumed 30% of residents' expenditure spent on top-up food shopping
- (4) Figures not exact due to rounding

St Edmundsbury Borough Council - Retail Study 2011

Convenience Goods Analysis

Convenience Table 6: Expenditure - All Convenience Goods (Bury St Edmunds & Haverhill)

			Zone 1 (Bury St Edmunds)	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8 (Haverhill)	Zone 9	Zone 10	Total	Inflow	Total including Inflow
			(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	%	(£m)
Bury St Edmunds	IN CENTRE	Market, Bury St Edmunds	£0.30	£0.21	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.12	£0.62		£0.62
		Marks & Spencer, Buttermarket, Bury St Edmunds	£6.28	£2.80	£0.68	£0.00	£0.19	£0.72	£0.00	£0.24	£0.30	£0.59	£11.80		£11.80
		Greggs, Abbeygate Street, Bury St Edmunds	£0.35	£0.00	£0.00	£0.00	£0.18	£0.00	£0.00	£0.00	£0.00	£0.00	£0.53		£0.53
		Iceland, Cornhill, Bury St Edmunds	£2.89	£0.93	£0.00	£0.20	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£4.02		£4.02
		Tesco Express, Cornhill, Bury St Edmunds	£0.54	£0.62	£0.63	£0.00	£0.36	£0.22	£0.00	£0.00	£0.00	£0.00	£2.37		£2.37
		Waitrose, Robert Boby Way, Bury St Edmunds	£7.06	£6.45	£0.90	£1.03	£0.36	£2.25	£0.00	£0.00	£0.47	£0.36	£18.88		£18.88
		Local stores, Bury St Edmunds Town Centre	£1.00	£1.02	£0.21	£0.00	£0.00	£0.00	£0.00	£0.00	£0.07	£0.00	£2.30		£2.30
	OUT OF CENTRE	Asda, Western Way, Bury St Edmunds	£15.69	£7.42	£0.45	£0.20	£2.59	£9.04	£0.00	£0.65	£0.32	£0.24	£36.61		£36.61
		Costcutter, Newmarket Road, Bury St Edmunds	£0.12	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.12		£0.12
		Farmfoods, The Bartons Retail Park, Barton Road, Bury St Edmunds	£1.18	£0.78	£0.00	£0.00	£0.31	£0.00	£0.00	£0.14	£0.00	£0.00	£2.41		£2.41
		Local stores, Bury St Edmunds	£1.00	£1.02	£0.21	£0.00	£0.00	£0.00	£0.00	£0.00	£0.07	£0.00	£2.30		£2.30
		One Stop, Cadogan Road, Bury St Edmunds	£0.18	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.18		£0.18
		Premier, Lake Avenue, Bury St Edmunds	£0.18	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.18		£0.18
		Sainsbury's, Bedingfield Way, Moreton Hall, Bury St Edmunds	£13.33	£16.47	£1.32	£0.60	£2.17	£2.79	£0.00	£0.00	£0.63	£0.18	£37.49		£37.49
		Somerfield, Mildenhall Road, Bury St Edmunds	£2.90	£1.56	£0.00	£0.00	£0.55	£0.87	£0.00	£0.00	£0.00	£0.18	£6.06		£6.06
		Spar, St Olaves Precinct, Bury St Edmunds	£0.35	£0.21	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.56		£0.56
		Tesco Express, Lawson Place, Bury St Edmunds	£1.59	£1.34	£0.00	£0.00	£0.13	£0.22	£0.00	£0.00	£0.00	£0.00	£3.28		£3.28
		Tesco, St Saviours Interchange, Bury St Edmunds	£13.20	£16.09	£0.46	£0.61	£1.22	£3.05	£0.00	£0.39	£0.00	£0.72	£35.75		£35.75
		Tesco, Stamford Court, Bury St Edmunds	£0.47	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.47		£0.47
		Total Bury St Edmunds	£68.61	£56.92	£4.86	£2.64	£8.05	£19.17	£0.00	£1.43	£1.86	£2.40	£165.94		£165.94
Haverhill	IN CENTRE	Iceland, High Street, Haverhill	£0.00	£0.00	£0.00	£0.00	£0.00	£0.20	£1.69	£0.16	£0.00	£2.05	2%	£2.09	
		Co-op, Jubilee Walk, Haverhill	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£2.38	£0.31	£0.41	£3.10	2%	£3.16	
		Local Stores, Haverhill Town Centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.14	£0.14	£0.00	£1.27	2%	£1.30	
		Aldi, Lordscroft Lane, Haverhill	£0.00	£0.00	£0.00	£0.00	£0.62	£0.00	£3.02	£0.94	£0.00	£4.58	2%	£4.67	
	OUT OF CENTRE	Local stores, Haverhill	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.14	£0.14	£0.00	£1.27	2%	£1.30	
		Londis, Gloucester Road, Haverhill	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.11	£0.00	£0.00	£0.11	2%	£0.11	
		Sainsbury's, Haycocks Road, Hanchett End, Haverhill	£0.00	£0.00	£0.00	£0.00	£0.00	£1.99	£3.42	£19.95	£4.48	£0.00	£29.83	15%	£34.31
		Tesco, Cangle Road, Haverhill	£0.00	£0.16	£0.00	£0.00	£0.18	£1.99	£0.00	£19.27	£4.19	£0.00	£25.79	15%	£29.66
Total Haverhill	£0.00	£0.16	£0.00	£0.00	£0.18	£4.60	£3.62	£48.69	£10.35	£0.41	£68.01		£76.60		

Notes

(1) Expenditure derived from Tables 5a-5d

(2) Local Stores, Bury and Local Stores, Haverhill responses split 50% between Town Centre and Out of Centre

(3) Inflow of 2% added to Haverhill 'in centre' facilities based on On-Street Survey data (November 2011). Out of centre inflow based on Drivers Jonas Deloitte estimates

St Edmundsbury Borough Council - Retail Study 2011

Convenience Goods Analysis

Convenience Table 7a: Bury St Edmunds Market Shares in 2011 (from PCA - Zones 1 & 2)

Bury St Edmunds	Expenditure	Market Share
Total Available Expenditure (£m) (Excluding NSRT)	£165.22	
Survey Derived Expenditure within Town Centre (£m)	£30.44	18.4%
Survey Derived Expenditure within Town as a Whole (£m)	£125.53	76.0%

Convenience Table 7b: Haverhill Market Shares in 2011 (from PCA - Zones 8 & 9)

Haverhill	Expenditure	Market Share
Total Available Expenditure (£m) (Excluding NSRT)	£87.22	
Survey Derived Expenditure within Town Centre (£m)	£5.81	6.7%
Survey Derived Expenditure within Town as a Whole (£m)	£59.04	67.7%

Notes

(1) 2010 Prices

(2) Total available expenditure taken from Table 3

(3) Survey derived expenditure derived from Table 6

St Edmundsbury Borough Council - Retail Study 2011

Convenience Goods Analysis

Convenience Table 8: Expenditure - All Convenience Goods (Bury St Edmunds & Haverhill)

			Gross Floorspace (sq m)	Net Floorspace (sq m)	% Convenience Goods Floorspace	Net Convenience Floorspace (sq m)	Benchmark Convenience Turnover (£/ sq m) 2010	Benchmark Convenience Turnover (£m) 2010	Benchmark Convenience Turnover (£m) 2011
Bury St Edmunds	IN CENTRE	Market, Bury St Edmunds							£0.62
		Marks & Spencer, Buttermarket, Bury St Edmunds	5203	938	94.4%	886	£11,692	£10.36	£10.26
		Greggs, Abbeygate Street, Bury St Edmunds	260	78	100.0%	78	£3,000	£0.23	£0.23
		Iceland, Cornhill, Bury St Edmunds		544	97.0%	528	£7,023	£3.71	£3.67
		Tesco Express, Cornhill, Bury St Edmunds	695	487	90.0%	438	£9,000	£3.94	£3.90
		Waitrose, Robert Boby Way, Bury St Edmunds		1952	85.1%	1662	£12,936	£21.50	£21.29
	Local stores, Bury St Edmunds Town Centre	1090	763	100.0%	763	£3,000	£2.29	£2.27	
	OUT OF CENTRE	Asda, Western Way, Bury St Edmunds	6456	3376	75.0%	2532	£15,795	£40.00	£39.60
		Costcutter, Newmarket Road, Bury St Edmunds	125	100	90.0%	90	£6,226	£0.56	£0.55
		Farmfoods, Barton Road, Bury St Edmunds		416	90.0%	375	£6,226	£2.33	£2.31
		Local stores, Bury St Edmunds							£2.30
		One Stop, Cadogan Road, Bury St Edmunds	183	134	81.4%	109	£7,375	£0.80	£0.80
		Premier, Lake Avenue, Bury St Edmunds	94	66	95.0%	63	£7,375	£0.46	£0.46
		Sainsbury's, Bedingfield Way, Moreton Hall, Bury St Edmunds	6274	4558	75.0%	3419	£13,837	£47.30	£46.83
		Co-op Mildenhall Road, Bury St Edmunds	1937	1301	85.0%	1106	£8,460	£9.35	£9.26
		Spar, St Olaves Precinct, Bury St Edmunds	318	223	81.4%	181	£7,500	£1.36	£1.35
		Tesco Express, Lawson Place, Bury St Edmunds	524	179	90.0%	161	£7,500	£1.21	£1.20
Tesco, St Saviours Interchange, Bury St Edmunds		6380	3301	75.0%	2475	£14,024	£34.72	£34.37	
Tesco Express, Stamford Court, Bury St Edmunds	277	153	90.0%	137	£7,500	£1.03	£1.02		
Haverhill	IN CENTRE	Iceland, High Street, Haverhill		418	97.0%	405	£7,691	£3.12	£3.09
		Co-op, Jubilee Walk, Haverhill	2369	1328	85.0%	1129	£8,460	£9.55	£9.45
		Local stores, Haverhill Town Centre	1400	980	100.0%	980	£3,000	£2.94	£2.91
	OUT OF CENTRE	Aldi, Lordscroft Lane, Haverhill	1022	697	73.6%	513	£7,908	£4.05	£4.01
		Londis, Gloucester Road, Haverhill	220	154	81.4%	125	£7,375	£0.92	£0.92
		Sainsbury's, Haycocks Road, Hanchett End, Haverhill	5961	4621	75.0%	3466	£13,837	£47.96	£47.48
		Tesco, Cangle Road, Haverhill	6083	3227	75.0%	2420	£14,024	£33.94	£33.60
Local stores, Haverhill							£1.30		

Notes

- (1) Percentage market shares based on survey results of Household Telephone Survey undertaken by Research & Marketing, November 2011
- (2) Benchmark turnover for named foodstores based on Verdict (2011) figures
- (3) Convenience floorspace ratio based on company averages as derived from Verdict UK Food & Grocery Retailers 2011 or based on Drivers Jonas Deloitte assumptions from site visits.
- (4) Benchmark 2011 turnovers reflects 1% decrease in sales density as set out in Experian 9 (see Table C1)
- (5) Sales densities for Farmfoods/Costcutter based on 'average discounter'
- (6) Net floorspaces for named foodstores derived from IGD Foodstore Database (2010), except for Premier and Spar which are 70% of gross floorspace measured on Promap and Farmfoods which is taken from its planning application submission
- (7) Floorspace for local stores Bury St Edmunds & Haverhill Town Centres derived from GOAD (minus named foodstores already in table)
- (8) Benchmark turnover for Market, local stores Haverhill Town and Bury St Edmunds Town use survey derived turnover as floorspaces cannot be determined
- (9) Premier/One Stop turnover uses average Londis turnover
- (10) Tesco Express & Spar sales density at £7,500 based on DJD estimates following site visits

St Edmundsbury Borough Council - Retail Study 2011

Convenience Goods Analysis

Convenience Table 9: Expenditure - All Convenience Goods (Bury St Edmunds & Haverhill)

			Benchmark Convenience Turnover (£m) 2011	Survey Derived Convenience Turnover (£m) 2011	Difference (£m)
Bury St Edmunds	IN CENTRE	Market, Bury St Edmunds	£0.62	£0.62	£0.00
		Marks & Spencer, Buttermarket, Bury St Edmunds	£10.26	£11.80	£1.55
		Greggs, Abbeygate Street, Bury St Edmunds	£0.23	£0.53	£0.30
		Iceland, Cornhill, Bury St Edmunds	£3.67	£4.02	£0.35
		Tesco Express, Cornhill, Bury St Edmunds	£3.90	£2.37	-£1.53
		Waitrose, Robert Boby Way, Bury St Edmunds	£21.29	£18.88	-£2.40
		Local stores, Bury St Edmunds Town Centre	£2.27	£2.30	£0.04
	OUT OF CENTRE	Asda, Western Way, Bury St Edmunds	£39.60	£36.61	-£2.99
		Costcutter, Newmarket Road, Bury St Edmunds	£0.55	£0.12	-£0.43
		Farmfoods, Barton Road, Bury St Edmunds	£2.31	£2.41	£0.10
		Local stores, Bury St Edmunds	£2.30	£2.30	£0.00
		One Stop, Cadogan Road, Bury St Edmunds	£0.80	£0.18	-£0.62
		Premier, Lake Avenue, Bury St Edmunds	£0.46	£0.18	-£0.28
		Sainsbury's, Bedingfeld Way, Moreton Hall, Bury St Edmunds	£46.83	£37.49	-£9.34
		Co-op Mildenhall Road, Bury St Edmunds	£9.26	£6.06	-£3.20
		Spar, St Olaves Precinct, Bury St Edmunds	£1.35	£0.56	-£0.79
		Tesco Express, Lawson Place, Bury St Edmunds	£1.20	£3.28	£2.09
Tesco, St Saviours Interchange, Bury St Edmunds	£34.37	£35.75	£1.38		
Tesco Express, Stamford Court, Bury St Edmunds	£1.02	£0.47	-£0.55		
Haverhill	IN CENTRE	Iceland, High Street, Haverhill	£3.09	£2.09	-£1.00
		Co-op, Jubilee Walk, Haverhill	£9.45	£3.16	-£6.29
		Local stores, Haverhill Town Centre	£2.91	£1.30	-£1.61
	OUT OF CENTRE	Aldi, Lordscroft Lane, Haverhill	£4.01	£4.67	£0.66
		Londis, Gloucester Road, Haverhill	£0.92	£0.11	-£0.80
		Sainsbury's, Haycocks Road, Hanchett End, Haverhill	£47.48	£34.31	-£13.17
		Tesco, Cangle Road, Haverhill	£33.60	£29.66	-£3.94
Local stores, Haverhill	£1.30	£1.30	£0.00		

Notes

(1) 2010 prices

(2) Benchmark turnover taken from Table 8

(3) Survey Derived Turnover taken from Table 6

(4) Negative figures indicate possible under-trading / positive figures indicate possible over-trading

St Edmundsbury Borough Council - Retail Study 2011

Convenience Goods Analysis

Convenience Table 10: Commitments & Allocations

	Location	Description	Gross Floorspace (sq.m)	Class A1 Floorspace (sq.m)	Net Convenience Floorspace (sq.m)	Convenience Turnover per sq.m 2011	Total Convenience Turnover (£m) 2011	Total Convenience Turnover (£m) 2012	Total Convenience Turnover (£m) 2013
Bury St Edmunds	Tayfen Road	Retail Warehousing	3,000	2,400	-	-	-	-	-
		Discount Foodstore	1,548	1,084	892	£6,226	£5.56	£5.46	£5.48
TOTAL					892		£5.56	£5.46	£5.58
Haverhill	Former Project Office Furniture, Hamlet Green	Wickes	2,522	2,193	-	-	-	-	-
		Unit 1: Floor & Furniture Coverings	762	648	-	-	-	-	-
		Unit 2: Electricals	512	435	-	-	-	-	-
		Unit 3: Pets	762	648	-	-	-	-	-
TOTAL					1,785		£0.00	£0.00	£0.00

Notes

- 1) Data from St Edmundsbury Borough Council, December 2011
- 2) Convenience / comparison floorspace split and sales densities per outlet derived from Verdict UK Food & Grocery Retailers 2011 and Mintel Retail Rankings (2011) with averages applied where operators are not known
- 3) Turnover of Haverill Retail Park scheme taken from planning application submission (ref: SE/111/0424)
- 4) Tayfen Road Foodstore sales densities based on Average 'Top 5' Foodstore turnovers derived from Verdict UK Food & Grocery Retailers 2011
- 5) Turnover of commitments grown forward using retail sales density figures taken from Experian Retail Planner Briefing Note 9 (September 2011) - Figure 4a, p12

St Edmundsbury Borough Council - Retail Study 2011
Convenience Goods Analysis

Convenience Table 11a: Bury St Edmunds Convenience Goods Capacity (Current Market Share - 76%)

Bury St Edmunds Town	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031
Total Available Expenditure (Em)	£165.22	£165.07	£166.50	£167.73	£169.36	£171.18	£173.17	£175.33	£177.58	£180.00	£182.23	£184.79	£186.99	£189.38	£191.61	£193.65	£195.98	£198.22	£200.69	£203.22	£205.77
Town Market Share	76.0%	76.0%	76.0%	76.0%	76.0%	76.0%	76.0%	76.0%	76.0%	76.0%	76.0%	76.0%	76.0%	76.0%	76.0%	76.0%	76.0%	76.0%	76.0%	76.0%	76.0%
PCA Survey Derived Turnover (Em)	£125.53	£125.41	£126.50	£127.44	£128.67	£130.05	£131.56	£133.21	£134.91	£136.76	£138.45	£140.40	£142.06	£143.88	£145.57	£147.12	£148.89	£150.60	£152.48	£154.39	£156.33
Inflow from other Study Area Zones	£40.41	£40.25	£40.45	£40.65	£40.86	£41.06	£41.27	£41.47	£41.72	£41.97	£42.22	£42.48	£42.73	£42.99	£43.25	£43.51	£43.77	£44.03	£44.29	£44.56	£44.83
Inflow from Beyond Study Area	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Survey Derived Turnover (Em)	£165.94	£165.66	£166.95	£168.09	£169.52	£171.11	£172.83	£174.68	£176.64	£178.73	£180.67	£182.87	£184.79	£186.87	£188.82	£190.63	£192.66	£194.63	£196.77	£198.95	£201.16
Benchmark Turnover of Existing Floorspace (Em)	£182.27	£179.17	£179.89	£180.61	£181.33	£182.06	£182.79	£183.52	£183.89	£184.25	£184.62	£184.99	£185.36	£185.73	£186.10	£186.48	£186.85	£187.22	£187.60	£187.97	£188.35
Benchmark Turnover of Commitments (Em)	£0.00	£0.00	£5.48	£5.51	£5.53	£5.55	£5.57	£5.59	£5.61	£5.62	£5.63	£5.64	£5.65	£5.66	£5.67	£5.68	£5.70	£5.71	£5.72	£5.73	£5.74
Total Benchmark Turnover (Em)	£182.27	£179.17	£185.38	£186.12	£186.86	£187.61	£188.36	£189.11	£189.49	£189.87	£190.25	£190.63	£191.01	£191.39	£191.78	£192.16	£192.54	£192.93	£193.32	£193.70	£194.09
Latent Surplus Expenditure (Em)	£-16.34	£-13.52	£-16.43	£-18.03	£-17.34	£-16.50	£-15.53	£-14.43	£-12.86	£-11.14	£-9.58	£-7.76	£-6.22	£-4.52	£-2.96	£-1.53	£0.12	£1.70	£3.45	£5.25	£7.07
Surplus Expenditure Growth (Em)	£0.00	£2.82	£-2.09	£-1.69	£-1.00	£-0.16	£0.80	£1.90	£3.48	£5.20	£6.76	£8.58	£10.12	£11.81	£13.38	£14.80	£16.45	£18.03	£19.79	£21.59	£23.40

Convenience Table 11b: Haverhill Convenience Goods Capacity (Current Market Share - 67.7%)

Haverhill Town	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031
Total Available Expenditure (Em)	£87.22	£87.36	£88.13	£89.12	£90.11	£91.03	£92.11	£93.41	£94.72	£96.02	£97.39	£98.86	£100.15	£101.39	£102.79	£103.92	£105.18	£106.53	£107.98	£109.43	£110.88
Town Market Share	67.7%	67.7%	67.7%	67.7%	67.7%	67.7%	67.7%	67.7%	67.7%	67.7%	67.7%	67.7%	67.7%	67.7%	67.7%	67.7%	67.7%	67.7%	67.7%	67.7%	67.7%
PCA Survey Derived Turnover (Em)	£59.04	£59.14	£59.65	£60.32	£60.99	£61.62	£62.35	£63.23	£64.12	£64.99	£65.92	£66.92	£67.79	£68.63	£69.58	£70.34	£71.19	£72.11	£73.10	£74.07	£75.05
Inflow from other Study Area Zones	£8.97	£8.94	£8.98	£9.03	£9.07	£9.12	£9.16	£9.21	£9.26	£9.37	£9.43	£9.49	£9.54	£9.60	£9.66	£9.72	£9.77	£9.83	£9.89	£9.95	£9.95
Inflow from Beyond Study Area	£8.59	£8.56	£8.60	£8.64	£8.69	£8.73	£8.77	£8.82	£8.87	£8.92	£8.98	£9.03	£9.08	£9.14	£9.19	£9.25	£9.30	£9.36	£9.42	£9.47	£9.53
Survey Derived Turnover (Em)	£76.60	£76.63	£77.23	£77.99	£78.75	£79.46	£80.29	£81.25	£82.25	£83.23	£84.27	£85.38	£86.37	£87.31	£88.37	£89.25	£90.21	£91.24	£92.35	£93.44	£94.54
Benchmark Turnover of Existing Floorspace (Em)	£102.76	£101.01	£101.41	£101.82	£102.23	£102.63	£103.05	£103.46	£103.66	£103.87	£104.08	£104.29	£104.50	£104.71	£104.91	£105.12	£105.33	£105.55	£105.76	£105.97	£106.18
Benchmark Turnover of Commitments (Em)	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Floorspace Lost (Closure of Co-op, Haverhill)	£0.00	£-9.45	£-9.45	£-9.45	£-9.45	£-9.45	£-9.45	£-9.45	£-9.45	£-9.45	£-9.45	£-9.45	£-9.45	£-9.45	£-9.45	£-9.45	£-9.45	£-9.45	£-9.45	£-9.45	£-9.45
Total Benchmark Turnover (Em)	£102.76	£91.56	£91.96	£92.37	£92.77	£93.18	£93.59	£94.01	£94.21	£94.42	£94.63	£94.84	£95.04	£95.25	£95.46	£95.67	£95.88	£96.09	£96.30	£96.52	£96.73
Latent Surplus Expenditure (Em)	£-26.16	£-14.93	£-14.73	£-14.38	£-14.02	£-13.72	£-13.31	£-12.75	£-11.96	£-11.19	£-10.35	£-9.45	£-8.68	£-7.94	£-7.09	£-6.42	£-5.67	£-4.85	£-3.96	£-3.08	£-2.19
Surplus Expenditure Growth (Em)	£0.00	£0.00	£0.20	£0.55	£0.90	£1.21	£1.62	£2.18	£2.97	£3.74	£4.57	£5.47	£6.25	£6.99	£7.84	£8.51	£9.26	£10.08	£10.97	£11.85	£12.73

Notes

- (1) 2010 prices
- (2) Total available expenditure from Convenience Table 3
- (3) Catchment Area Market Share from Convenience Table 7a & 7b and assumes no change in market share over time
- (4) Floorspace data from Convenience Tables 9 & 11
- (5) Floorspace efficiency taken from latest Experian projections (Experian Retail Planner Briefing Note 9 - September 2011 - Figure 4a, p12)
- (6) Assumes no inflow for Bury St Edmunds
- (7) Surplus expenditure is calculated by adding 'market share expenditure' to inflow expenditure, then deducting the existing turnover of facilities
- (8) Figures not exact due to rounding
- (9) Commitment turnover taken from Table 10 with assumed implementation in 2013
- (10) Includes 2% inflow for main facilities within Haverhill for main food first choice shopping (see Table 6)
- (11) Inflow from other Zones/beyond Study area grown forward using Experian Growth Rates (Experian Retail Planner Briefing Note 9 - September 2011 - Figure 1a, p8)
- (12) Benchmark turnover for Co-op removed from Total Benchmark Turnover following closure of store. Assumes survey derived turnover is maintained at other facilities in Haverhill.

St Edmundsbury Borough Council - Retail Study 2011
Convenience Goods Analysis

Convenience Table 12a: Capacity for New Convenience Floorspace in Bury St Edmunds

Bury St Edmunds	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031
Theoretical Surplus Expenditure (£m)	-£16.34	-£13.52	-£18.43	-£18.03	-£17.34	-£16.50	-£15.53	-£14.43	-£12.86	-£11.14	-£9.58	-£7.76	-£6.22	-£4.52	-£2.96	-£1.53	£0.12	£1.70	£3.45	£5.25	£7.07
Average 'Top Five' Grocers Turnover per sq m	£14.044	£13.805	£13.860	£13.916	£13.972	£14.027	£14.084	£14.140	£14.168	£14.197	£14.225	£14.253	£14.282	£14.310	£14.339	£14.368	£14.396	£14.425	£14.454	£14.483	£14.512
Top Five Grocers Foodstore Illustration Net Floorspace equivalent (sq m)	-1,163	-979	-1,329	-1,295	-1,241	-1,176	-1,103	-1,021	-907	-785	-673	-544	-435	-316	-206	-107	8	118	239	363	487
Top Five Grocers Gross Floorspace equivalent (sq m) 70% net: gross ratio	-1,662	-1,399	-1,899	-1,851	-1,773	-1,680	-1,575	-1,458	-1,296	-1,121	-962	-777	-622	-451	-295	-152	12	168	341	518	696
Local Convenience Goods Turnover per sq m	£5,000	£4,915	£4,935	£4,954	£4,974	£4,994	£5,014	£5,034	£5,044	£5,054	£5,064	£5,075	£5,085	£5,095	£5,105	£5,115	£5,125	£5,136	£5,146	£5,156	£5,167
Local Convenience Goods Illustration Net Floorspace equivalent (sq m)	-3,267	-2,750	-3,734	-3,639	-3,485	-3,303	-3,097	-2,867	-2,549	-2,204	-1,891	-1,529	-1,223	-887	-579	-299	23	330	671	1,019	1,368
Local Convenience Goods Illustration Gross Floorspace equivalent (sq m) 80% net: gross ratio	-4,084	-3,438	-4,667	-4,548	-4,357	-4,129	-3,872	-3,584	-3,186	-2,755	-2,364	-1,911	-1,528	-1,109	-724	-374	28	413	839	1,273	1,710

Convenience Table 12b: Capacity for New Convenience Floorspace in Bury St Edmunds (Surplus Exp. Growth)

Bury St Edmunds	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031
Surplus Expenditure Growth (£m)	£0.00	£2.82	-£2.09	-£1.69	-£1.00	-£0.16	£0.80	£1.90	£3.48	£5.20	£6.76	£8.58	£10.12	£11.81	£13.38	£14.80	£16.45	£18.03	£19.79	£21.59	£23.40
Average 'Top Five' Grocers Turnover per sq m	£14.044	£13.805	£13.860	£13.916	£13.972	£14.027	£14.084	£14.140	£14.168	£14.197	£14.225	£14.253	£14.282	£14.310	£14.339	£14.368	£14.396	£14.425	£14.454	£14.483	£14.512
Top Five Grocers Foodstore Illustration Net Floorspace equivalent (sq m)	0	204	-151	-122	-72	-12	57	134	246	366	475	602	708	826	933	1,030	1,143	1,250	1,369	1,491	1,613
Top Five Grocers Gross Floorspace equivalent (sq m) 70% net: gross ratio	0	282	-215	-174	-102	-16	82	192	351	523	679	860	1,012	1,179	1,333	1,472	1,633	1,786	1,956	2,129	2,304
Local Convenience Goods Turnover per sq m	£5,000	£4,915	£4,935	£4,954	£4,974	£4,994	£5,014	£5,034	£5,044	£5,054	£5,064	£5,075	£5,085	£5,095	£5,105	£5,115	£5,125	£5,136	£5,146	£5,156	£5,167
Local Convenience Goods Illustration Net Floorspace equivalent (sq m)	0	574	-424	-341	-201	-32	161	378	690	1,028	1,335	1,691	1,990	2,319	2,620	2,894	3,210	3,511	3,846	4,187	4,530
Local Convenience Goods Illustration Gross Floorspace equivalent (sq m) 80% net: gross ratio	0	717	-529	-427	-252	-40	201	472	862	1,285	1,668	2,113	2,487	2,899	3,276	3,618	4,012	4,389	4,807	5,233	5,662

Convenience Table 12c: Capacity for New Convenience Floorspace in Haverhill

Haverhill	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031
Theoretical Surplus Expenditure (£m)	-£26.16	-£14.93	-£14.73	-£14.38	-£14.02	-£13.72	-£13.31	-£12.75	-£11.96	-£11.19	-£10.35	-£9.45	-£8.68	-£7.94	-£7.09	-£6.42	-£5.67	-£4.85	-£3.96	-£3.08	-£2.19
Average 'Top Five' Grocers Turnover per sq m	£14,044	£13,805	£13,860	£13,916	£13,972	£14,027	£14,084	£14,140	£14,168	£14,197	£14,225	£14,253	£14,282	£14,310	£14,339	£14,368	£14,396	£14,425	£14,454	£14,483	£14,512
Top Five Grocers Foodstore Illustration Net Floorspace equivalent (sq m)	-1,862	-1,081	-1,063	-1,033	-1,004	-978	-945	-902	-844	-788	-728	-663	-608	-555	-494	-447	-394	-336	-274	-213	-151
Top Five Grocers Gross Floorspace equivalent (sq m) 70% net:gross ratio	-2,661	-1,545	-1,518	-1,476	-1,434	-1,397	-1,350	-1,288	-1,206	-1,126	-1,040	-948	-868	-793	-706	-639	-562	-480	-391	-304	-216
Local Convenience Goods Turnover per sq m	£5,000	£4,915	£4,935	£4,954	£4,974	£4,994	£5,014	£5,034	£5,044	£5,054	£5,064	£5,075	£5,085	£5,095	£5,105	£5,115	£5,125	£5,136	£5,146	£5,156	£5,167
Local Convenience Goods Illustration Net Floorspace equivalent (sq m)	-5,231	-3,037	-2,985	-2,902	-2,819	-2,748	-2,654	-2,533	-2,371	-2,213	-2,045	-1,863	-1,707	-1,558	-1,389	-1,255	-1,106	-944	-769	-597	-424
Local Convenience Goods Illustration Gross Floorspace equivalent (sq m) 80% net:gross ratio	-6,539	-3,796	-3,731	-3,627	-3,524	-3,434	-3,318	-3,166	-2,964	-2,766	-2,556	-2,329	-2,134	-1,948	-1,736	-1,569	-1,382	-1,181	-962	-747	-530

Convenience Table 12d: Capacity for New Convenience Floorspace in Haverhill (Surplus Exp. Growth)

Haverhill	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031
Surplus Expenditure Growth (£m)	£0.00	£0.00	£0.20	£0.55	£0.90	£1.21	£1.62	£2.18	£2.97	£3.74	£4.57	£5.47	£6.25	£6.99	£7.84	£8.51	£9.26	£10.08	£10.97	£11.85	£12.73
Average 'Top Five' Grocers Turnover per sq m	£14,044	£13,805	£13,860	£13,916	£13,972	£14,027	£14,084	£14,140	£14,168	£14,197	£14,225	£14,253	£14,282	£14,310	£14,339	£14,368	£14,396	£14,425	£14,454	£14,483	£14,512
Top Five Grocers Foodstore Illustration Net Floorspace equivalent (sq m)	0	0	14	40	65	86	115	154	209	264	321	384	437	488	547	592	643	699	759	818	878
Top Five Grocers Gross Floorspace equivalent (sq m) 70% net:gross ratio	0	0	20	57	92	123	164	220	299	376	459	549	625	698	781	846	919	998	1,084	1,169	1,254
Local Convenience Goods Turnover per sq m	£5,000	£4,915	£4,935	£4,954	£4,974	£4,994	£5,014	£5,034	£5,044	£5,054	£5,064	£5,075	£5,085	£5,095	£5,105	£5,115	£5,125	£5,136	£5,146	£5,156	£5,167
Local Convenience Goods Illustration Net Floorspace equivalent (sq m)	0	0	40	111	181	241	323	432	588	740	903	1,078	1,229	1,372	1,535	1,663	1,806	1,962	2,131	2,298	2,465
Local Convenience Goods Illustration Gross Floorspace equivalent (sq m) 80% net:gross ratio	0	0	50	139	227	302	404	540	735	925	1,129	1,348	1,536	1,715	1,919	2,078	2,258	2,453	2,664	2,872	3,081

Notes

- (1) Turnover for 'Average Top Five' retailers (Tesco, Sainsburys, ASDA, Morrisons & Waitrose) derived from Verdict UK Food & Grocery Retailers 2011
- (2) Turnover for local convenience goods average based on Drivers Jonas Deloitte estimate
- (3) Figures from Convenience Tables 11a-f
- (4) Values expressed in £m
- (5) 2010 prices
- (6) Floorspace efficiency forecast as per Experian Retail Planner Briefing Note 9 (see Table C1)