

# Drivers Jonas Deloitte.

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**Job title:**

St Edmundsbury Retail & Leisure Study 2011  
*Appendix 9: Expansion Areas Analysis*

**Client:**

St Edmundsbury Borough Council

**Drivers Jonas Deloitte ref file:**

21665187v1

**Date:**

January 2012

# St Edmundsbury Borough Council - Retail Study 2011

## Expansion Areas Analysis

EA Table 1: Study Area Population Projections

| Town                   | Expansion Area            | Number of Homes | Implementation Period | Estimated Household Density | Estimated Population |
|------------------------|---------------------------|-----------------|-----------------------|-----------------------------|----------------------|
| <b>Bury St Edmunds</b> | North West                | 900             | 2016                  | 2.27                        | 2,043                |
|                        | Moreton Hall              | 500             | 2016                  | 2.27                        | 1,135                |
|                        | Western Expansion Area    | 450             | 2021                  | 2.22                        | 999                  |
|                        | North East                | 1,250           | 2026                  | 2.20                        | 2,750                |
|                        | South East                | 1,250           | 2026                  | 2.20                        | 2,750                |
| <b>Haverhill</b>       | North West Expansion Area | 1,150           | 2016                  | 2.27                        | 2,611                |
|                        | North East Expansion Area | 2,500           | 2026                  | 2.20                        | 5,500                |
| <b>Total</b>           | <b>Total</b>              | <b>8,000</b>    | <b>14,147</b>         |                             | <b>17,788</b>        |

### Notes

- (1) Expansion Area details derived from St Edmundsbury Core Strategy (2010)
- (2) Population estimated by multiplying number of homes by estimated household density
- (3) Household density size based on ONS data available at <http://www.communities.gov.uk/documents/housing/xls/table401.xls>

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## Expansion Areas Analysis

EA Table 2a: Total Convenience Expenditure Per Head with NSRT

|        | 2016   | 2017   | 2018   | 2019   | 2020   | 2021   | 2022   | 2023   | 2024   | 2025   | 2026   | 2027   | 2028   | 2029   | 2030   | 2031   |
|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Zone 2 | £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 8 | £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 |

EA Table 2b: Total Comparison Expenditure Per Head with NSRT

|        | 2016   | 2017   | 2018   | 2019   | 2020   | 2021   | 2022   | 2023   | 2024   | 2025   | 2026   | 2027   | 2028   | 2029   | 2030   | 2031   |
|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Zone 2 | £3,066 | £3,066 | £3,066 | £3,066 | £3,066 | £3,066 | £3,066 | £3,066 | £3,066 | £3,066 | £3,066 | £3,066 | £3,066 | £3,066 | £3,066 | £3,066 |
| Zone 8 | £2,747 | £2,747 | £2,747 | £2,747 | £2,747 | £2,747 | £2,747 | £2,747 | £2,747 | £2,747 | £2,747 | £2,747 | £2,747 | £2,747 | £2,747 | £2,747 |

**Notes**

(1) Data taken from Table 2b of Convenience and Comparison Analysis Tables

## St Edmundsbury Borough Council - Retail Study 2011

### Expansion Areas Analysis

EA Table 3: Convenience/Comparison Goods Available Expenditure

| Town            | Expansion Area            | Implementation Period | Estimated Population | Convenience Goods Expenditure at Implementation (Convenience) £m | Comparison Goods Expenditure at Implementation (Convenience) £m |
|-----------------|---------------------------|-----------------------|----------------------|--|---|
| Bury St Edmunds | North West                | 2016                  | 2,043                | £1.39  | £0.63   |
|                 | Moreton Hall              | 2016                  | 1,135                | £0.77  | £0.56   |
|                 | Western Expansion Area    | 2021                  | 999                  | £0.70  | £0.31   |
|                 | North East                | 2031                  | 2,750                | £2.02  | £0.84   |
|                 | South East                | 2031                  | 2,750                | £2.02  | £0.84   |
| Haverhill       | North West Expansion Area | 2016                  | 2,611                | £1.65  | £0.72   |
|                 | North East Expansion Area | 2031                  | 5,500                | £3.76  | £1.51   |
| <b>Total</b>    |                           | <b>14,162</b>         | <b>17,788</b>        | <b>£12.31</b>  | <b>£5.41</b>  |

#### Notes

- (1) Convenience Goods Expenditure is 35% of Total Available Convenience Goods Expenditure (population multiplied by Table EA2a)  
 (2) Comparison Goods Expenditure is 10% of Total Available Convenience Goods Expenditure (population multiplied by Table EA2b)

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Expansion Areas Analysis

EA Table 4: Floorspace Requirements

Bury St Edmunds

| North West Expansion Area             | Convenience | Comparison |
|---------------------------------------|-------------|------------|
| Number of Homes:                      |             |            |
| 900                                   |             |            |
| Total Available Expenditure           | £1.39       | £0.63      |
| Benchmark Turnover                    | £4,994      | £4,347     |
| Net Floorspace Requirement            | 278         | 144        |
| Gross Floorspace Needed (70:30 ratio) | 397         | 206        |

| Moreton Hall                          | Convenience | Comparison |
|---------------------------------------|-------------|------------|
| Number of Homes:                      |             |            |
| 500                                   |             |            |
| Total Available Expenditure           | £0.77       | £0.56      |
| Benchmark Turnover                    | £4,994      | £4,347     |
| Net Floorspace Requirement            | 155         | 129        |
| Gross Floorspace Needed (70:30 ratio) | 221         | 184        |

| Western Expansion Area                | Convenience | Comparison |
|---------------------------------------|-------------|------------|
| Number of Homes:                      |             |            |
| 450                                   |             |            |
| Total Available Expenditure           | £0.70       | £0.31      |
| Benchmark Turnover                    | £5,064      | £4,730     |
| Net Floorspace Requirement            | 137         | 65         |
| Gross Floorspace Needed (70:30 ratio) | 196         | 93         |

| North East                            | Convenience | Comparison |
|---------------------------------------|-------------|------------|
| Number of Homes:                      |             |            |
| 1,250                                 |             |            |
| Total Available Expenditure           | £2.02       | £0.84      |
| Benchmark Turnover                    | £5,167      | £5,598     |
| Net Floorspace Requirement            | 390         | 151        |
| Gross Floorspace Needed (70:30 ratio) | 558         | 215        |

| South East                                   | Convenience | Comparison |
|--|-------------|------------|
| <b>Number of Homes:</b>                      |             |            |
| <b>1,250</b>                                 |             |            |
| Total Available Expenditure                  | £2.02       | £0.84      |
| Benchmark Turnover                           | £5,167      | £5,598     |
| <b>Net Floorspace Requirement</b>            | <b>390</b>  | <b>151</b> |
| <b>Gross Floorspace Needed (70:30 ratio)</b> | <b>558</b>  | <b>215</b> |

#### HAVERHILL

| North West Expansion Area                    | Convenience | Comparison |
|--|-------------|------------|
| <b>Number of Homes:</b>                      |             |            |
| <b>1,150</b>                                 |             |            |
| Total Available Expenditure                  | £1.65       | £0.72      |
| Benchmark Turnover                           | £4,994      | £4,347     |
| <b>Net Floorspace Requirement</b>            | <b>331</b>  | <b>165</b> |
| <b>Gross Floorspace Needed (70:30 ratio)</b> | <b>473</b>  | <b>236</b> |

| North East Expansion Area                    | Convenience | Comparison |
|--|-------------|------------|
| <b>Number of Homes:</b>                      |             |            |
| <b>2,500</b>                                 |             |            |
| Total Available Expenditure                  | £3.76       | £1.51      |
| Benchmark Turnover                           | £5,167      | £5,598     |
| <b>Net Floorspace Requirement</b>            | <b>728</b>  | <b>270</b> |
| <b>Gross Floorspace Needed (70:30 ratio)</b> | <b>1040</b> | <b>386</b> |

#### Notes

(1) TAE calculated by multiplying population by Expenditure per Head (Table EA2a or 2b)

(2) Benchmark Turnovers are Drivers Jonas Deloitte estimates of £5,000 for convenience goods and £4,000 for comparison goods in 2011, grown forward using sales density rates shown in Tables C1 & CM1 of the Convenience/Comparison goods quantitative analysis.

(3) Net floorspace calculated by dividing TAE by Benchmark Turnover. Gross floorspace is calculated by adding 30% to net floorspace