APPENDIX 1

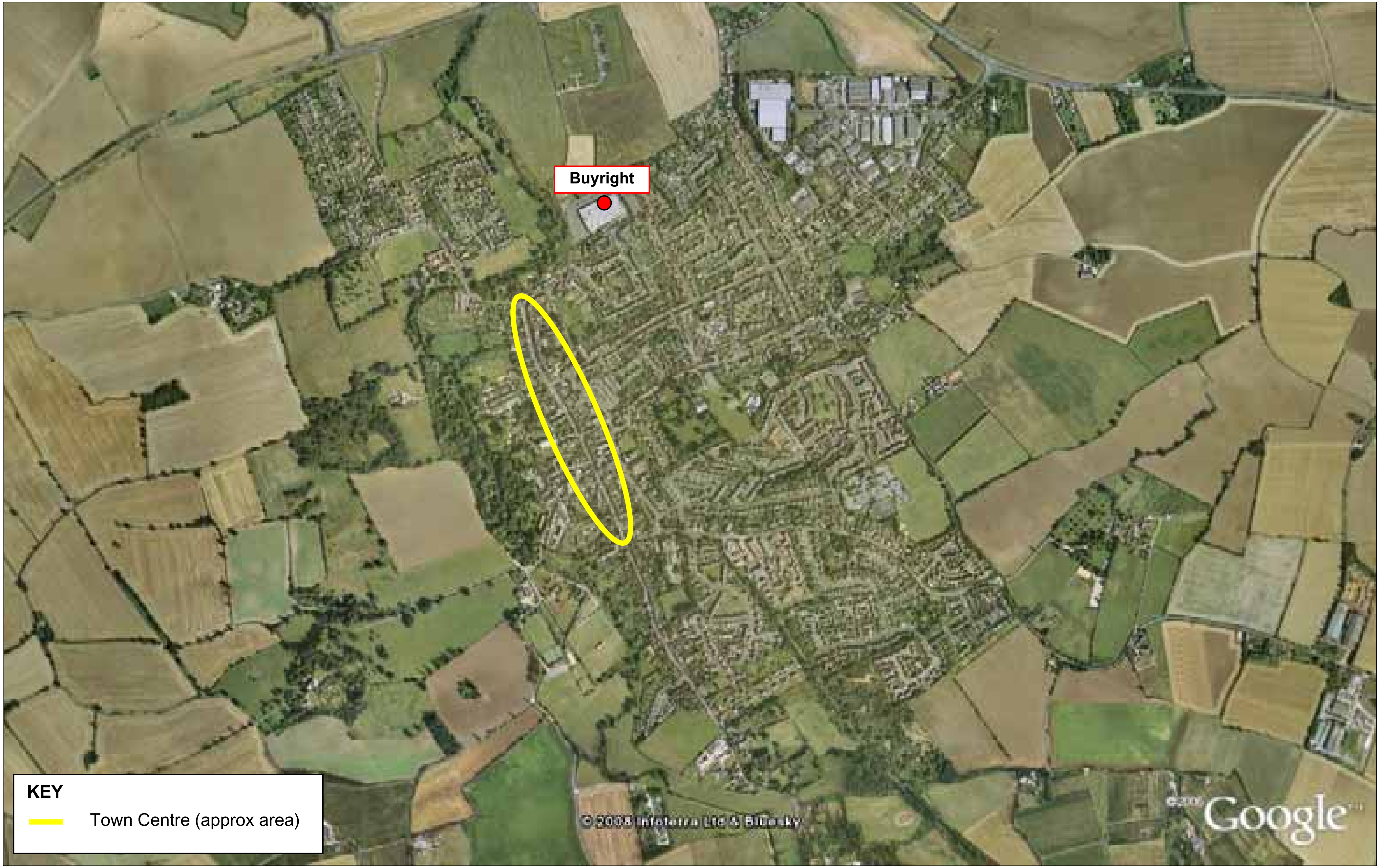
Town Centre Health Checks – Sudbury and Hadleigh

APPENDIX 1A

Aerial Photos of Sudbury and Hadleigh

Sudbury: Aerial Photo Showing Urban Area and Location of Out of Town Retail Provision

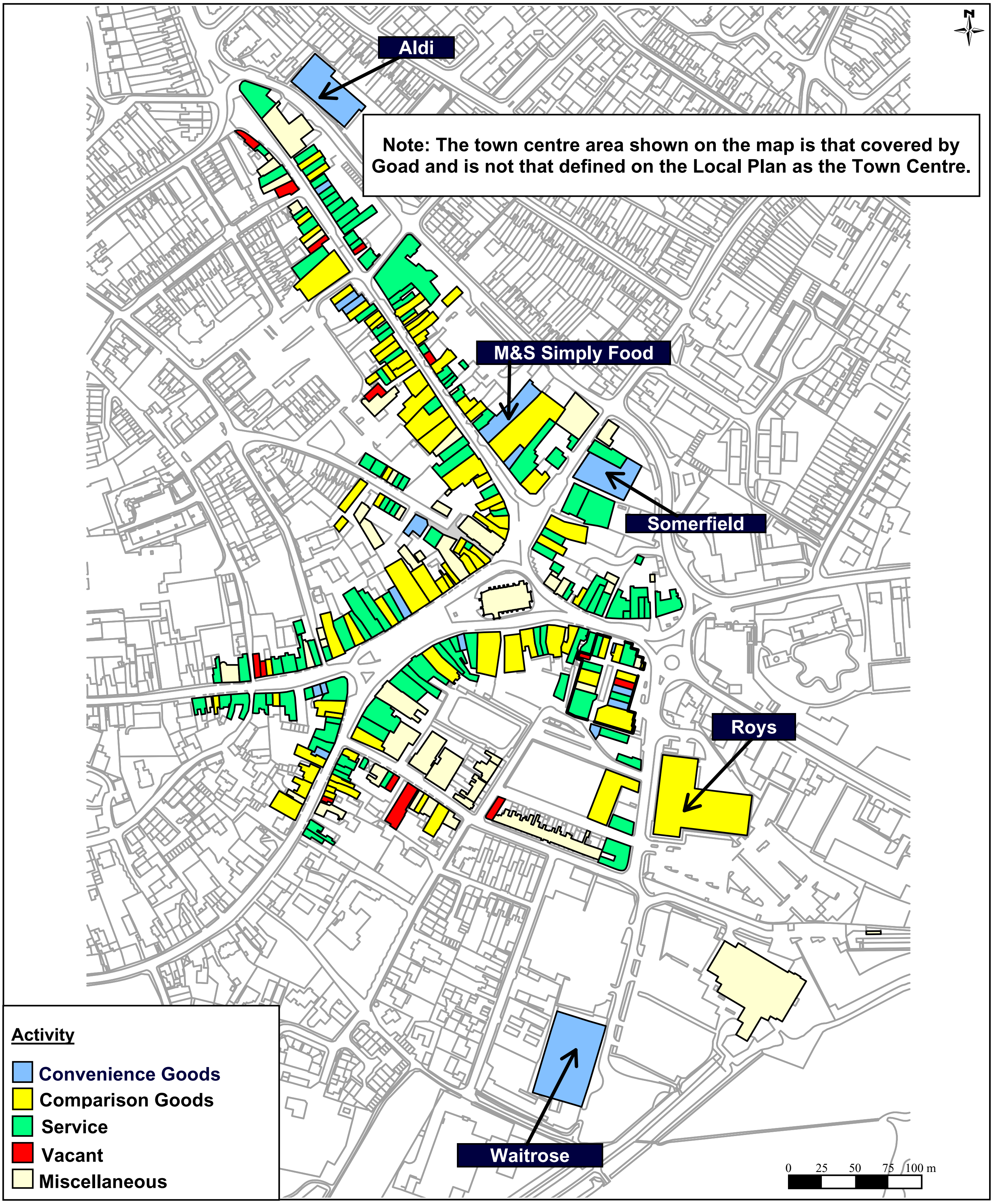
Hadleigh: Aerial Photo Showing Urban Area and Location of Out of Town Buyright Superstore



APPENDIX 1B

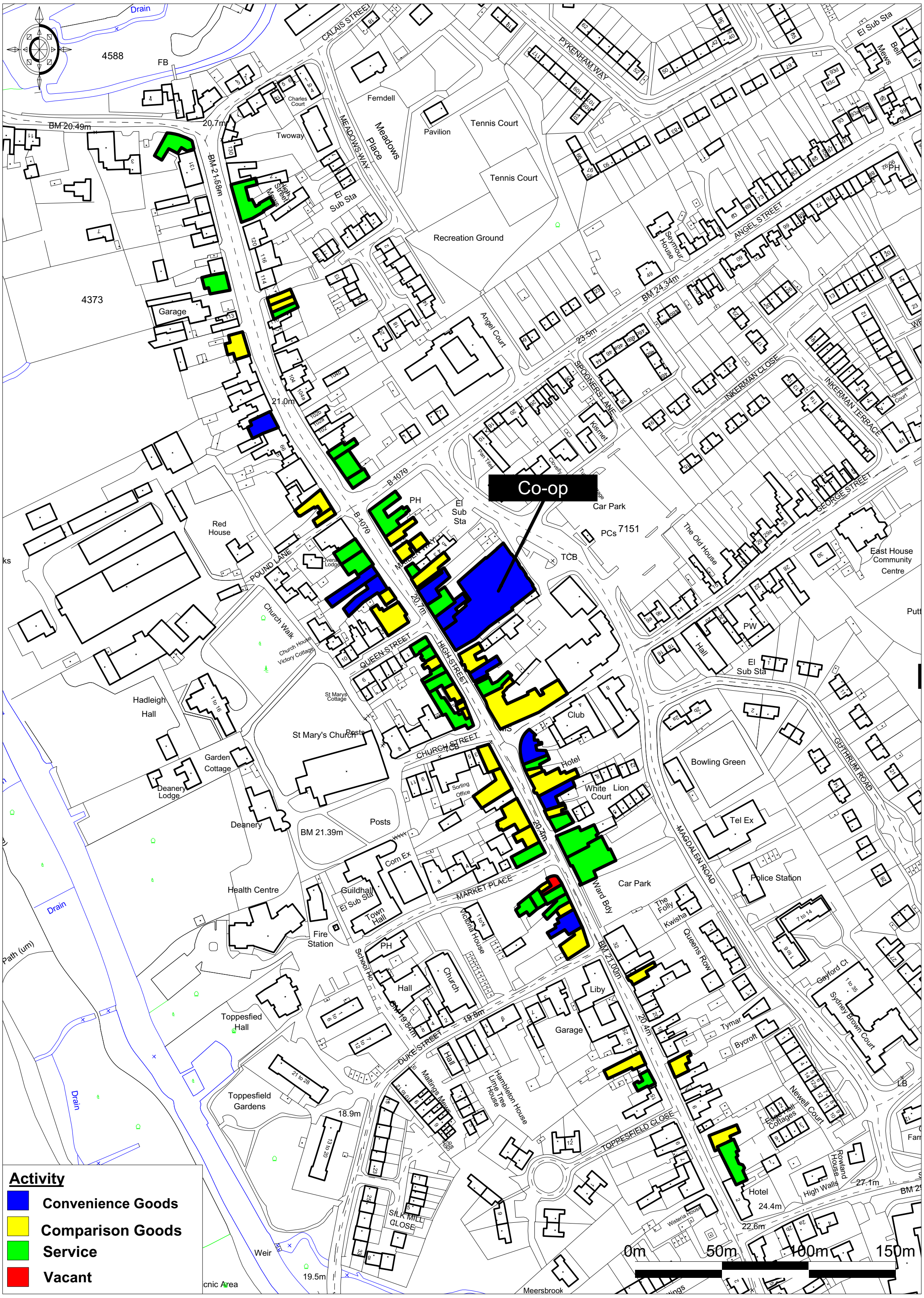
Town Centre Retail Activity Maps of Sudbury and Hadleigh

Sudbury: Town Centre Activity Map (as of June 2008)



For more information on our products and services
www.goadplans.co.uk
0845 6016011
goad.sales@uk.experian.com

Hadleigh: Town Centre Activity Map (as of June 2008)



Note: The town centre area shown above is not as defined on the Local Plan as the Town Centre.

COLLIERS CRE

APPENDIX 1C

Statistical Data by Town

Retail Market Overview – Sudbury

Local Economy

- Over the past decade, total employment in Sudbury increased at a faster rate than the Retail PROMIS average; growth in total employment to 2012 is forecast to be significantly below average.
- In 2006, the service sector accounted for 65% of total employment in Sudbury, slightly below the Retail PROMIS average. Within this sector, 'financial & business services' accounts for 16% of total employment, slightly below the Retail PROMIS average.
- The manufacturing sector accounts for 15% of total employment – slightly above the Retail PROMIS average.
- In March 2008, 1.4% of the workforce was unemployed, compared to the national unemployment rate at March 2008 of 2.2%.

In-Town Retail Market

- Sudbury's VenueScore has increased since 2004, although after a peak in 2006 it has since fallen marginally.
- The town's ranking has followed a similar pattern, although the marginal drop in VenueScore in 2007 has translated to a fall in ranking of 13 places.

Figure 1 – VenueScore and Ranking:

	2004	2005	2006	2007
VENUESCORE	56	63	74	73
UK Rank	351	352	307	320

Source: VENUESCORE, Javelin Group; UK Shopping Centre Index. Locations are rated using a weighted scoring system which takes account of each location's provision of multiple retailers and anchor store strength.

- Based on its VenueScore, Sudbury is classified as a Major District Centre.

Figure 2 – Classification of Retail Location:

Location Grade	Major City	Major Regional	Regional	Sub-Regional	Major District	District	Minor District	Local
VenueScore Range	280+	200-279	133-199	95-129	65-94	40-64	25-39	10-24
Number of Locations	12	33	103	90	144	245	362	1,259

Source: VENUESCORE, Javelin Group

- In 2007, Sudbury had a shopper population of 42,046.
- Sudbury is classified by CACI as a Value Regional Town.
- Consumer expenditure on comparison goods shopping in Sudbury town centre in 2007 was an estimated £117.3 million, which makes it the 253rd highest turnover centre in GB.
- In 2012, consumer expenditure on comparison goods shopping in Sudbury town centre is anticipated to fall by £15.2 million to £102.1 million (274th place).
- Sudbury retains 8.52% of expenditure within its total catchment area.

Figure 3 - Top 20 Retailers Present in the Town Centre:

Rank	Retailer
1	BOOTS
3	ARGOS
4	WOOLWORTHS
7	WH SMITH
11	SUPERDRUG
12	LLOYDS PHARMACY
16	NEW LOOK
18	DOROTHY PERKINS

Source: Focus

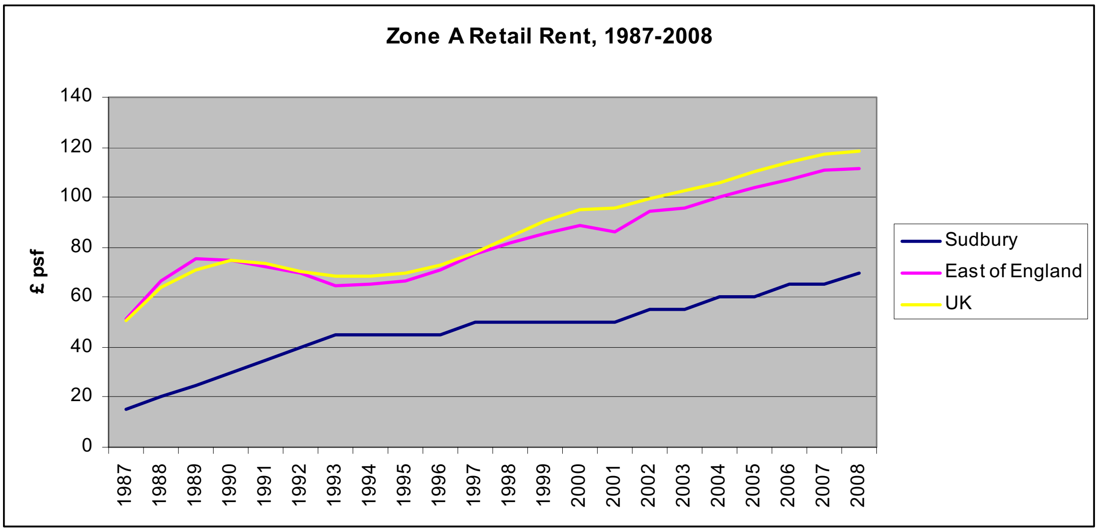
Figure 4 - Top 20 Retailers Not Present in the Town Centre:

Rank	Retailer
2	MARKS AND SPENCERS
5	DEBENHAMS
6	JOHN LEWIS
8	BHS
9	NEXT
10	DIXONS
13	WILKINSON
14	CO OP DEPARTMENT STORES
15	PRIMARK
17	HMV
19	ROSEBYS
20	WATERSTONES

Source: Focus

- 40% of the top 20 retailers are present in the town.

Figure 5:



Source: Colliers CRE

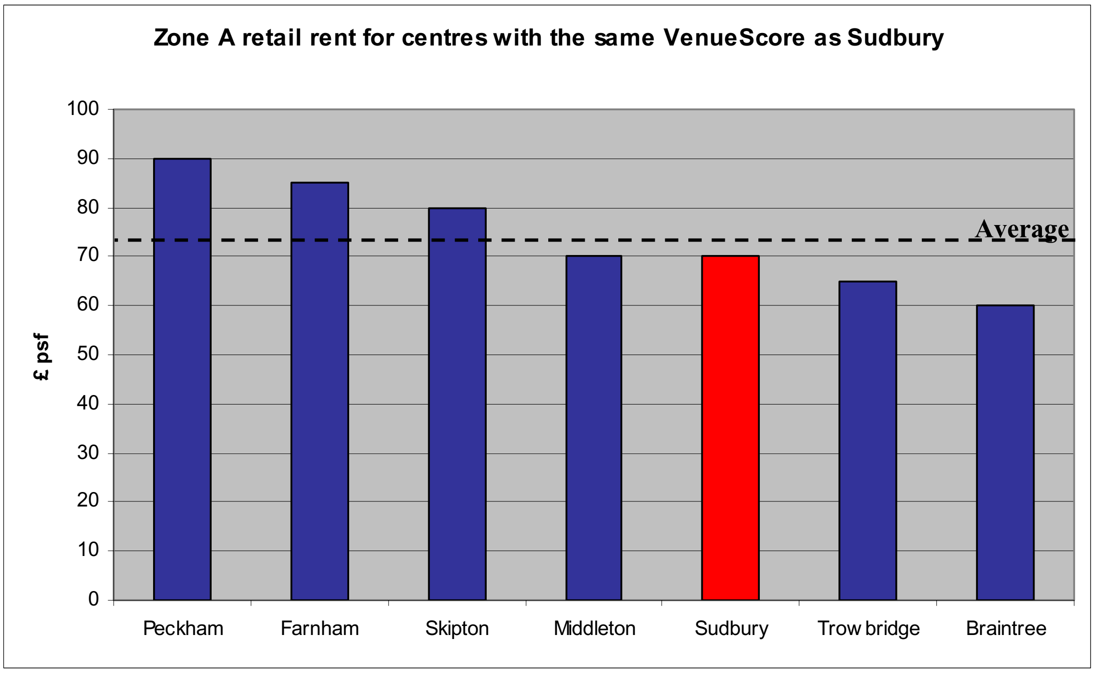
Figure 6 – Growth in Prime Retail Rents:

	One Year	Five Year	Ten Year
Sudbury	7.7%	27.3%	40.0%
East Of England	0.8%	16.7%	37.1%
UK	1.1%	15.7%	40.8%

Source: Colliers CRE

- The prime Zone A retail rent in Sudbury is £70 psf as at May 2008 – significantly lower than the regional and national average.
- However, over the past year the prime rent in Sudbury has grown by 7.7% - greater than both the regional and national average of 0.8% and 1.1% respectively.
- Sudbury's rental growth has also outperformed the East of England over a five and ten year period, as well as the UK over a five year period. Rental growth is in line with the national average over a ten year period.

Figure 7:



Source: VENUESCORE, Javelin Group; UK Shopping Centre Index, Colliers CRE

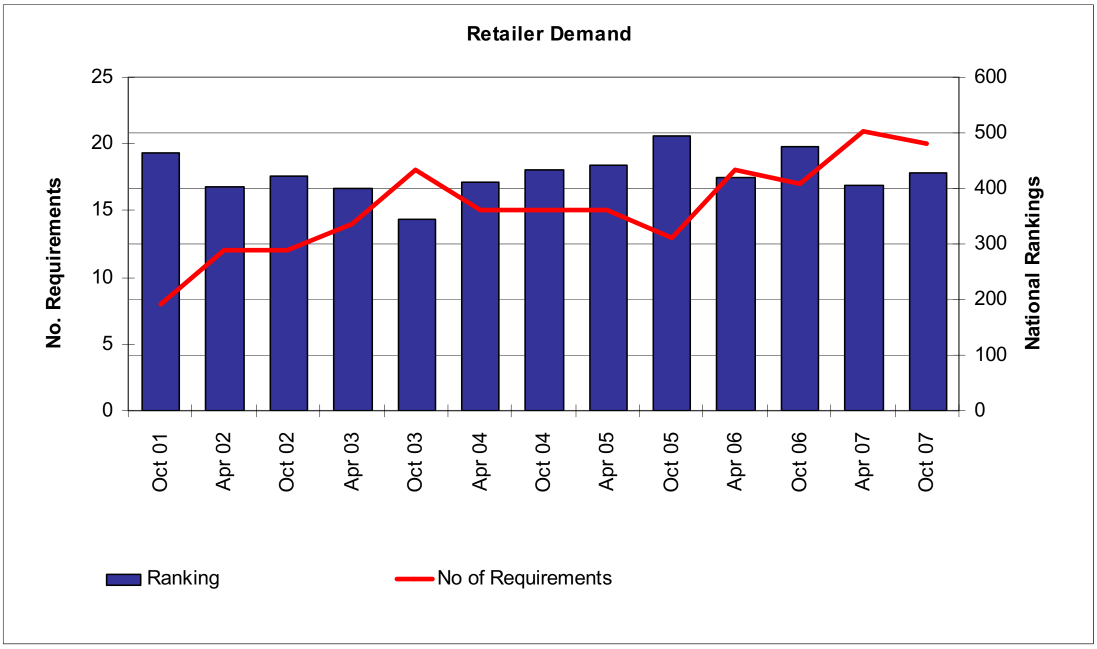
- **Figure 7** shows that of the seven retail centres in the UK that have a VenueScore of 73, Sudbury is ranked fifth highest in terms of Zone A rents in 2008. The average rent for all seven centres is £74 psf, meaning Sudbury is currently underperforming but that there is potential for further rental growth in the future.

Figure 8 – Street Ranking[1] Top Three:

Town	Street	Postcode
Sudbury	North Street	CO10 1RF
Sudbury	Market Hill	CO10 2EA
Sudbury	East Street	CO10 2TP

Source: Focus

Figure 9 – Retail Requirements for Sudbury:



Source: Focus

- As at October 2007, there were 20 retail requirements for Sudbury – up from 17 in October 2006 but down on 21 in April 2007.
- Sudbury is ranked 427th in terms of retailer demand.

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1 Street RankingsTM identifies multiples (stores with five or more locations) located on the main shopping streets of 760 major retail towns in Great Britain. Multiples are then allocated an attraction value based on sales density and average selling area. Using these attraction values, Street RankingsTM ranks each street, within a town centre, by the combined attractiveness of its stores

Figure 10 – Retail Floorspace and Outlet Count for Sudbury:

	Floorspace (sq ft)	Area %	Base %	Index	No of Outlets	Area %	Base %	Index
Convenience								
Bakers	3,900	0.95	1.01	94	4	1.79	1.95	92
Butchers	2,100	0.51	0.44	116	2	0.90	0.81	110
Greengrocers & Fishmongers	600	0.15	1.39	10	1	0.45	0.67	67
Groceries & Frozen Foods	54,500	13.26	12.15	109	6	2.69	2.92	92
Off Licences & Home Brew	2,700	0.66	0.48	137	2	0.90	0.74	122
CTN & Convenience	11,500	2.80	1.63	172	6	2.69	2.31	116
Total	75,300	18.33	17.11	107	21	9.42	9.40	100
Comparison								
Footwear & Repairs	5,500	1.34	1.59	84	6	2.69	2.20	122
Mens & Boys Wear	9,500	2.31	0.94	246	4	1.79	1.12	160
Womens, Girls & Childrens	17,400	4.23	4.54	93	7	3.14	5.24	60
Mixed & General Clothing	14,300	3.48	5.61	62	7	3.14	3.47	90
Furniture, Carpets & Textiles	16,700	4.06	4.68	87	7	3.14	4.05	78
Books, Arts, Crafts, Stationers & Copying	18,200	4.43	3.34	133	11	4.93	4.21	117
Electrical, Home Ent, Telephones & Video	9,700	2.36	3.51	67	11	4.93	4.44	111
DIY, Hardware & Household Goods	14,500	3.53	5.09	69	8	3.59	2.90	124
Gifts, China, Glass & Leather Goods	3,800	0.92	0.90	103	4	1.79	1.70	106
Cars, Motor Cycles & Accessories	9,500	2.31	2.17	106	4	1.79	1.39	129
Chemists, Toiletries & Opticians	18,000	4.38	4.02	109	8	3.59	3.93	91
Variety, Department & Catalogue Showrooms	56,900	13.85	7.93	175	5	2.24	0.85	262
Florists & Gardens	2,000	0.49	0.47	103	3	1.35	1.07	126
Sports, Toys, Cycles & Hobbies	5,700	1.39	2.46	56	5	2.24	2.32	97
Jewellers, Clocks & Repairs	3,000	0.73	0.99	74	3	1.35	2.19	61
Charity, Pets & Other Comparison	10,900	2.65	2.46	108	9	4.04	3.68	110
Total	215,600	52.47	50.71	103	102	45.74	44.76	102
Service								
Restaurants, Cafes, Fast Food & Take Away	34,100	8.30	9.38	88	32	14.35	14.67	98
Hairdressing, Beauty & Health	16,200	3.94	3.61	109	18	8.07	7.49	108
Launderettes & Dry Cleaners	3,900	0.95	0.48	197	3	1.35	1.02	132
Travel Agents	2,100	0.51	0.90	56	3	1.35	1.51	89
Banks & Financial Services	21,200	5.16	4.71	109	11	4.93	4.30	115
Building Societies	3,800	0.92	0.53	176	2	0.90	0.63	141
Estate Agents & Auctioneers	12,100	2.94	2.22	133	13	5.83	3.96	147
Total	93,400	22.73	21.83	104	82	36.77	33.58	109
Miscellaneous								
Employment, Careers, Pos & Info	5,700	1.39	1.09	127	3	1.35	1.30	103
Vacant	20,900	5.09	9.26	55	15	6.73	10.95	61
Total	26,600	6.47	10.35	63	18	8.07	12.26	66
Centre Total	**410,900**				**223**			

Source: Goad

Out-of-Town Retail Market

- There is an estimated 99,000 sq ft of retail warehouses in Sudbury and overall provision of retail warehousing floorspace per household is below the PROMIS average.
- Fashion/other High Street, Child/Sport and Furniture/shing goods are under-represented in terms of provision per household. However, DIY goods are over-represented.
- Sudbury Retail Park, owned by Resolution Properties, has seven units occupied by the following tenants:

    - Carpetright
    - Currys
    - Farmfoods
    - Halfords
    - KFC
    - Pets at Home
    - Topps Tiles

- There is also a Focus on Springlands Way and a Homebase on Waldingfield Road.

Development Pipeline

- There is no new retail floorspace in the pipeline for Sudbury.

Figure 11 – Schemes in the Development Pipeline near Sudbury:

Scheme	Location	Size (sq ft)	Status	Opening Date
arc	Bury St Edmunds	265,000	Under Construction	2009
Westgate Centre	Ipswich	123,000	Proposed	2011
The Mint Quarter	Ipswich	525,000	Proposed	2011
Vineyard Gate	Colchester	550,000	Proposed	2013

Source: Colliers CRE

CHANGE IN RETAIL POTENTIAL

Methodology

- CACI's Centre Futures model uses the retail development pipeline to re-assess the relative attractiveness of comparison goods retail destinations across Great Britain in 2013.
- Turnover figures for 2013 are calculated by re-allocating the 2007 levels of expenditure flowing into each centre, based on revised market share percentages. Therefore the turnover figures in this section do not take into account any growth in expenditure levels between 2007 and 2013.

Development Pipeline

- There is no new retail floorspace in the pipeline for Sudbury or Hadleigh. Nearby schemes in the Development Pipeline are as follows:

Scheme	Location	Size (sq ft)	Status	Opening Date
Cattle Market	Bury St Edmunds	265,000	Under Construction	2009
Westgate Centre	Ipswich	123,000	Proposed	2011
The Mint Quarter	Ipswich	525,000	Proposed	2011
Gainsborough Retail Park	Ipswich (Out of Town Centre)	300,000	Proposed	2012
Vineyard Gate	Colchester	550,000	Proposed	2013

Source: CACI, 2008

SUDBURY

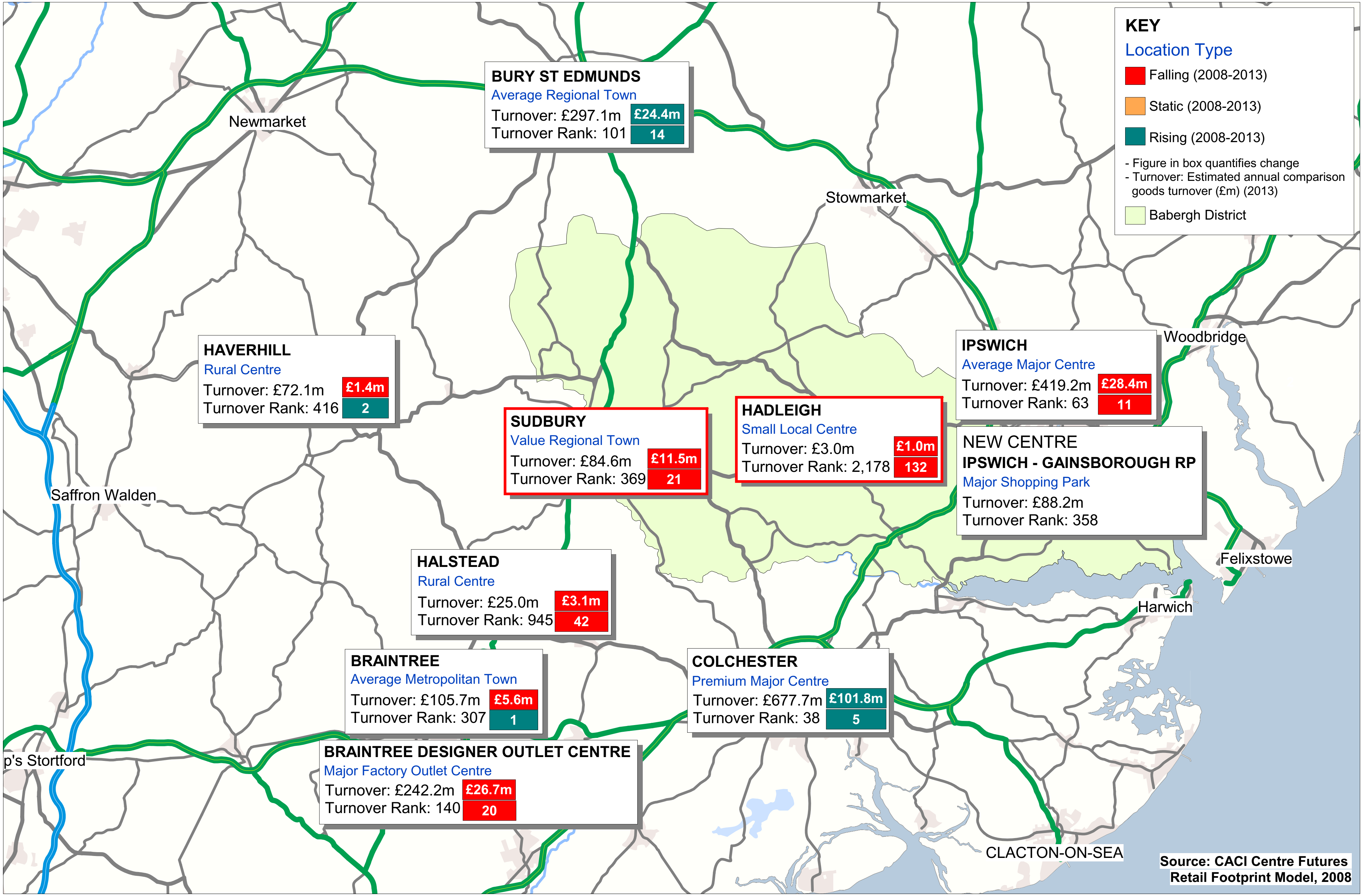
- Sudbury's shopper population is forecast to decrease from 36,366 in 2008 to 32,090 in 2013, a fall of 11.8%.
- The town's estimated comparison goods turnover is predicted to decrease by £11.5 million (12.0%) from £96.1 million in 2008 to £84.6 million in 2013. As a result of this, Sudbury will move down the turnover ranking 21 places.
- These changes are due to Sudbury's competitor centres improving their retail offers and attracting a higher proportion of the available trade.

HADLEIGH

- Hadleigh's shopper population is forecast to decrease from 1,493 in 2008 to 1,109 in 2013, a fall of 25.7%.
- The town's estimated comparison goods turnover is predicted to decrease by £1.0 million (25.0%) from £4.0 million in 2008 to £3.0 million in 2013. As a result of this, Hadleigh will move down the turnover ranking 132 places.
- These changes are due to Hadleigh's competitor centres improving their retail offers and attracting a higher proportion of the available trade.

The map overleaf shows the predicted changes in comparison goods turnover and the resulting changes in ranking for Sudbury, Hadleigh and their competitor centres (2008-2013).

Forecast Change in the Retail Potential of Centres in the Sudbury/Hadleigh Sub-Region, 2008-2013



Source: CACI Centre Futures Retail Footprint Model, 2008

Goad Centre Category Report (Outlet Count)

experian

Centre: Sudbury
Base: All UK Centres
Centre Selection: All Outlets
Survey Date: 02/05/2007

Category	Outlets	Area %	Base %	Index
Distribution of Outlets by Floorspace				
Under 1,000 square feet	124	42.47	40.36	105
Between 1,000 and 2,499 square feet	117	40.07	39.06	103
Between 2,500 and 4,999 square feet	33	11.30	12.26	92
Between 5,000 and 9,999 square feet	11	3.77	4.90	77
Between 10,000 and 14,999 square feet	4	1.37	1.43	96
Between 15,000 and 19,999 square feet	0	0.00	0.66	0
Between 20,000 and 29,999 square feet	2	0.68	0.64	107
30,000 square feet and above	1	0.34	0.71	48

APPENDIX 2

The Household Survey

APPENDIX 2a

Survey Methodology and Sampling

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Fax: 01995 605336
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VAT Reg No: 712347851

BABERGH HOUSEHOLD SHOPPING SURVEY

APRIL 2008

Presented to: Colliers CRE
9a Marylebone Lane
London
W1M 6HL

Presented by: Beacon Research
Suite 3 The Resource Centre
Bridge St
Garstang
Lancs.
PR3 1YB

CONTENTS

BABERGH HOUSEHOLD SURVEY
(APRIL 2008)

BACKGROUND & METHODOLOGY

The client, Colliers CRE, wished to conduct a telephone shopping survey within the Babergh District Council area. This was to establish the following:

- Where respondents go for their general non-food shopping such as clothing, footwear and household goods.
- How frequently they visit their main and secondary centre.
- How their expenditure on such goods is divided between main and secondary centres.
- Why they choose their main centres, how they travel and the length of their journey from home.
- Similar information regarding food & grocery shopping.

A total of 600 interviews were targeted, in eight different zones, each zone defined by Postal Geography. Interviews were conducted over a period of two weeks, between April 7th and April 25th 2008.

In order to provide meaningful and reliable data in each of the zones an equal number of interviews (75) were allocated to each of the 8 zones. The results were then weighted, at the analysis stage to take account of the different populations in each zone and their importance to the overall survey area.

BABERGH SAMPLE BREAKDOWN

ZONE	Popn	%	Achieved Sample	Weighted Sample	Weight
1	16,956	12.1	75	73	0.973
2	30,709	21.9	75	131	1.746
3	19,426	13.8	75	83	1.106
4	20,254	14.4	75	87	1.160
5	7,513	5.4	75	32	0.426
6	12,292	8.7	75	52	0.693
7	21,888	15.5	75	93	1.240
8	11,561	8.2	75	49	1.530
TOTAL	**140599**	**100**	**600**	**600**	**-**

The sample used for making telephone calls was obtained by Beacon Research from Datalinx, who supplied names, addresses and telephone numbers by electoral geography.

Full details of the samples achieved in each zone and the weightings subsequently applied within the analysis, are shown in the preceding table.

The following table summaries the details of calls made and interview outcome.

	Number	%
Initial Sample	1500	100.0
Completed interviews	600	40.0
Refusals	72	4.8
Wrong numbers / Unobtainable / Answer phone	132	8.8
No reply (after 4 calls)	247	16.5
Not used	449	29.9

STATEMENT OF RELIABILITY

Assessment of the standard error:

1. The Babergh Household Shopping Survey has been undertaken by a series of individual sample surveys for a combination of zones.
2. The results are subject to the following sampling error, of which there follows an analysis.
3. The following analysis indicates the methodology used to calculate the standard error, with the standard 95% probability of being correct. The formulae for these calculations are as follows:

$$SE\% = \sqrt{\frac{p\% * q\%}{n}}$$

Where p% = sample value recorded

q% = 100% - p%

n = sample size

And where:

1.96*(SE%) = 95% probability that the correct answer lies in the range calculated.

4. Using the above formulae, we can predict the variation between the sample results and the 'true' values from our knowledge of the size of sample on which the results are based and the number of times that a particular answer is given. The table below illustrates the predicted ranges for the total sample and percentage results at the 95% confidence level.

Approximate sampling tolerances applicable to percentages at or near these levels.

Size of sample on which survey result is based	10% or 90% ±	20% or 80% ±	30% or 70% ±	40% or 60% ±	50% ±
600 interviews	2.40	3.20	3.66	3..92	4.00

For example, with a sample of 600 where 30% give a particular answer, the chances are 19 in 20 that the 'true' value (which would have been obtained if the whole population had been interviewed) will fall within the range of ± 3.66 percentage points from the sample results.

APPENDIX 2B

Copy of Survey Questionnaire

Job No: GW/08/389

AREA

STRICTLY CONFIDENTIAL
BEACON RESEARCH
The Resource Centre, Bridge Street, Garstang, Lancs PR3 1YB
Tel: 01995 606330 Fax: 01995 605336

BABERGH DISTRICT COUNCIL - HOUSEHOLD TELEPHONE SURVEY ON BEHALF OF COLLIERS CRE

Name: ____

Address: ____

____

Postcode: ____

C1 Age:

16-24	1
25-34	2
35-44	3
45-54	4
55-64	5
65 +	6

C2 Sex:

Male	1
Female	2

C3 Do you have the use of a car for shopping?

Yes	1
No	2

C4 What is the occupation of the chief wage earner in your household?

Full/Part time employed	1
Retired	2
Unemployed	3

Occupation ____________________

Rank/Status ____________________

No. of Employees ________________

Qualifications ___________________

Supervisor/Manager/Self Employed
Size of company ___________________
No. of employees __________________

If Retired
Company pension–ask previous occupation
State pension only – code 5 below

If Unemployed
Less than 2 months – ask about previous occupation
Over 2 months – code 6 below

Now Assess Social Grade

AB	1
C1	2
C2	3
D	4
E1 (Retired)	5
E2 (Unemployed)	6
Refused	7

C5 Day / Time of interview

Weekday	1	Morning	1
Weekend	2	Afternoon	2
		Evening	3

Interviewer Name: _________________________ Date:__________________

Interviewer Signature: ____

Job No: GW/08/389

Good morning/afternoon/evening, my name is …………………………………………..……

We are doing some research, on behalf of Babergh District Council, about shopping facilities and shopping behaviour in this area and I'd like to ask you a few questions.
Are you / may I speak to the person responsible for the majority of your household shopping?

Yes	1
No	2 – CLOSE INTERVIEW

As we need to speak to people across a number of areas, could you please tell me your full postcode?

WRITE IN POST CODE HERE ____

Refer to quota and check that respondent is eligible for interview – if not, thank and close.

Job No: GW/08/389

Q1a **Can I ask you first of all, <u>excluding Mail Order and shopping over the Internet</u> at which Town, Centre or Retail Park do you do <u>most</u> of your shopping for non-food goods such as clothing & footwear, books, gifts and jewellery?(SINGLE CODE**

Q1b **And how often do you visit...................... Town, Centre or Retail Park, for this type of non-food shopping?**

Q1c **And <u>excluding Mail Order and shopping over the Internet</u>, what percentage or proportion of your total expenditure on non-food goods such as clothing & footwear, books, gifts and jewellery would you say that you do in ....Town, Centre or Retail Park?**

Q2a **<u>Excluding Mail Order and shopping over the Internet</u> what is your <u>second most important</u> Town, Centre or Retail Park for non-food shopping such as clothing & footwear, Books, gifts and Jewellery? (SINGLE CODE)**

Q2b **And how often do you visit..................... Town, Centre or Retail Park, for this type of non-food shopping?**

Q2c **And <u>excluding Mail Order and shopping over the Internet</u> what percentage or proportion of your total expenditure on non-food goods such as clothing & footwear, books, gifts and jewellery would you say that you do in .... Town, Centre or Retail Park?**

RECORD ANSWERS BELOW & OPPOSITE – CHECK PERCENTAGES ADD TO 100% AT Q1c/Q2c

	CENTRE	**Q1**	**Q2**
A	**CODE FROM LIST 'A'**		
	Local Shops / PO	27	27
	Other (Write In)		
	No Particular Centre / Varies	28	28
	None / Don't shop / Disabled	29	29
	No Second Centre	30	30
	DK / Can't remember	31	31
B	**FREQUENCY OF VISIT**		
	More than once a week	1	1
	Once a week	2	2
	2-3 times a month	3	3
	Once a month	4	4
	Once every 2-3 months	5	5
	Once every 4-6 months	6	6
	Less often	7	7
	DK / Can't remember / Varies	8	8
C	**% In Location (Write in)**	%	%

Q3a You said that ………………….. is your Town / Centre / Retail Park where you do most of your clothing & footwear shopping. What are your reasons for choosing that centre?

Close to home/convenient	1	Good/Cheap Public Transport	7
Close to work	2	Ease of parking	8
Good choice of shops/range of good stores	3	Free/cheap parking	9
Good range of major stores	4	Good quality goods/products	10
Pedestrianised streets/attractive environment	5	Part of joint trip to other facility/centre	11
Good prices/Good value for money	6	Other (Write In)	

Q3b How do you normally travel to / from this Town Centre / Retail Park? (If more than one mode of transport used, code transport used for longest part of journey)

Car (Driver)	1	Park & Ride	5	Taxi	9
Car (Passenger)	2	Walk	6	Other	10
Bus	3	Cycle	7		
Train	4	Motor Cycle	8		

Q3c Where does your journey usually start from?

Home 1
Work 2
Other (write in)____________________

ASK ALL SAYING HOME AT Q3c - OTHERS GO TO Q4

Q3d On average, how long does it take you to travel to this Town Centre / Retail Park from home?

5 minutes or less	1	21 – 25 minutes	5
6 – 10 minutes	2	26 – 30 minutes	6
11 – 15 minutes	3	Over 30 minutes	7
16 – 20 minutes	4		

Q4 At which Town, Centre or Retail Park do you normally undertake most of your Christmas or other special occasion non-food shopping? (Write In)

____

____

Q5a **<u>Excluding Mail Order and shopping over the Internet</u> at which Town, Centre or Retail Park do you do <u>most</u> of your shopping for bulky non-food goods such as DIY, large electrical goods, furniture and carpets (SINGLE CODE)**

Q5b **And how often do you visit ………. Town, Centre / Retail Park, for your <u>main</u> bulky non-food goods shopping?**

Q5c **And <u>excluding Mail Order and shopping over the Internet</u> what percentage or proportion of your total expenditure on bulky non-food goods shopping would you say that you do, in .... Town, Centre / Retail Park?**

Q6a **<u>Excluding Mail Order and shopping over the Internet</u> which is your <u>second most important</u> Town, Centre / Retail Park for bulky non-food goods such as DIY, large electrical goods, furniture and carpets? (SINGLE CODE)**

Q6b **And how often do you visit ………. Town, Centre / Retail Park, for your <u>main</u> bulky non-food goods shopping?**

Q6c **And <u>Excluding Mail Order and shopping over the Internet</u> what percentage or proportion of your total expenditure on bulky non-food goods shopping, would you say that you do in .... Town, Centre / Retail Park?**

RECORD ANSWERS BELOW & OPPOSITE – CHECK PERCENTAGES ADD TO 100% AT Q5c / Q6c

	CENTRE	**Q5**	**Q6**
A	**CODE FROM LIST 'A'**		
	Local Shops / PO	27	27
	Other (Write In)		
	No Particular Centre / Varies	28	28
	None / Don't shop / Disabled	29	29
	No Second Centre	30	30
	DK / Can't remember	31	31
B	**FREQUENCY OF VISIT**		
	More than once a week	1	1
	Once a week	2	2
	2-3 times a month	3	3
	Once a month	4	4
	Once every 2-3 months	5	5
	Once every 4-6 months	6	6
	Less often	7	7
	DK / Can't remember / Varies	8	8
C	**% In Location (Write in)**	%	%

Q7a You said that, ... is the Town, Centre /Retail Park, where you do most of your bulky non-food goods shopping? What is your main reason for choosing that Centre?

Close to home/convenient	1	Good/Cheap Public Transport	7
Close to work	2	Ease of parking	8
Good choice of shops/range of good stores	3	Free/cheap parking	9
Good range of major stores	4	Good quality goods/products	10
Pedestrianised streets/attractive environment	5	Part of joint trip to other facility/centre	11
Good prices/Good value for money	6	Other (Write In)	

Q7b How do you normally travel to / from this Town, Centre / Retail Park? (If more than one mode of transport used, code transport used for longest part of journey)

Car (Driver)	1	Park & Ride	5	Taxi	9
Car (Passenger)	2	Walk	6	Other	10
Bus	3	Cycle	7		
Train	4	Motor Cycle	8		

Q7c Where does your journey usually start from?

Home	1	(Go to Q7d)
Work	2	(Go to Q8a)
Other (write in)______________________		(Go to Q8a)

Q7d On average, how long does it take you to travel to this Town, Centre / Retail Park from home?

10 minutes or less	1	41 – 50 minutes	5
11 – 20 minutes	2	51 – 60 minutes	6
21 – 30 minutes	3	Over 60 minutes	7
31 – 40 minutes	4		

Q8a At which <u>store and centre</u> do you usually do <u>most</u> or all of your main food and grocery shopping? (Store and Centre needed - Single code)

Q8b And when during the week, would you normally shop at your main food store?

Q9 And at which <u>Store and Centre</u> do you usually do your remaining top-up food and grocery shopping? (Store and Centre needed)

RECORD ANSWER BELOW AND OPPOSITE

	STORE / CENTRE	Q8 Main Store/ Centre	Q9 Second Store/ Centre
A	**CODE FROM LIST 'B'**		
	Local shops / PO	80	80
	Other (Write In)		
	None / No particular store / Varies	81	81
	None / Don't shop / Disabled / Someone else shops	82	82
	No second Store	83	83
	DK / Cant remember / No reply	84	84
B	**WHEN SHOP**	Q8b	
	Weekdays (Mon- Fri) Daytime	1	1
	Weekdays (Mon – Fri) Evening	2	2
	Saturday	3	3
	Sunday	4	4
	Varies / No particular time	5	5

Q10a On average, how much in total do you and your household spend on food and groceries <u>each week</u>?

Q10b And how much on average do you spend on food and groceries <u>each week</u> in your <u>main food store</u>?

RECORD BELOW	£	p
(a) Total weekly total expenditure		
(b) ' Main' store weekly total expenditure		
(c) 'Top up' store weekly food expenditure		

[NOTE: (c) is calculated as (a - b)]

Q11a You said that................ is your <u>main</u> store for food/grocery shopping. How often do you visit that store for food and grocery shopping?

Three times a week or more often	1
Twice a week	2
Once a week	3
Once a fortnight	4
Once a month	5
Once every two months	6
Less often	7

Q11b What is the <u>main</u> reason why you and your household choose to shop at the store where you do your main food / grocery shopping? (SINGLE CODE)

Close to home / convenient	1	Wide choice of goods / products	6
Close to work	2	Close to other shops	7
Ease of parking	3	Good prices/value for money	8
Free / cheap parking	4	Good quality goods / products	9
Good / cheap public transport	5		

Other (WRITE IN) ____10

Q11c How do you normally travel to / from this store? (If more than one mode of transport used, code transport used for longest part of journey)

Car (Driver)	1	Walk	6
Car (Passenger)	2	Cycle	7
Bus	3	Motor Cycle	8
Train	4	Taxi	9
Park & Ride	5	Other	10

Q11d Where does your journey usually start from?

Home	1	(Go to Q11e)
Work	2	(Go to Q12a)
Other (write in)______________________		(Go to Q12a)

Q11e On average, how long does it take you to travel to this Store from home?

10 minutes or less	1	41 – 50 minutes	5
11 – 20 minutes	2	51 – 60 minutes	6
21 – 30 minutes	3	Over 60 minutes	7
31 – 40 minutes	4		

Q12a When you do your <u>main</u> food and grocery shopping at……………………….do you or your household usually visit any <u>other</u> shops/service outlets in the <u>same</u> area as part of that trip?

Yes	1	(Ask Q12b – Q12d)
No	2	(Go to Q13)

Q12b-Q12d ONLY ASK IF Q12a=1

Q12b Which town/centre is this? (Write In) ______________________________

Q12c And do you drive to the other shops/service outlets, or walk or use another form of transport?

Drive	1	Taxi	4
Walk	2	Other Form of Transport	5
Bus	3		

Q12d And what other shops/services do you normally visit (MULTI-CODE)

Financial outlets (eg Banks, Building Societies)	1
Professional Services (eg Solicitors, Accountants)	2
Post Office	3
Cafe/Restaurant/Pub/Take-Away	4
Specialist food shops (eg Baker, Greengrocer, Butcher)	5
Chemist	6
Newsagents/Confectioners/Tobacconists	7
Fashion Shops (eg for clothing, footwear etc)	8
Charity Shops	9
Department/Variety Store	10

Other type of shop (WRITE IN) _________________________________

____

Q13a From what you know about <u>Sudbury</u> Town Centre how would you describe the food shopping in the Town Centre, in terms of the balance between large and small shops? (READ OUT)

Too many small shops/not enough large stores	1
Too many large stores/not enough small shops	2
About right	3
Don't know	4

Q13b From what you know about <u>Sudbury</u> Town Centre how would you describe the non food shopping in the Town Centre, in terms of the balance between large and small shops? (READ OUT)

Too many small shops/not enough large stores	1
Too many large stores/not enough small shops	2
About right	3
Don't know	4

Q13c What other major change, if any, would you like to see in Sudbury Town Centre for you and your household to visit it more often for shopping? ***(SINGLE CODE ONLY)***

None / Quite happy	1	Better security / Make the centre safer	13
None / DK / Can't think of any	2	A bigger / better weekly market	14
More car parking	3	Make Centre more attractive (e.g. better shop fronts, planting, paving etc.)	15
More covered shopping opportunities	4	More / better signage	16
Wider variety of stores	5	More / better information displays	17
Better quality stores / Goods	6	Less traffic congestion	18
More / better places to eat or drink	7	More Pedestrianisation	19
More / better toilets	8	More Street entertainment / More things going on	20
More / better parking facilities	9	More shops open on Sunday	21
Better public transport	10	More shops open in the evenings	22
Better cleanliness / Make the centre tidier	11	Other (Write In)	
Cleaner air / Less traffic pollution	12		

Q14a From what you know about Hadleigh Town Centre how would you describe the food shopping in the Town Centre, in terms of the balance between large and small shops? (READ OUT)

Too many small shops/not enough large stores	1
Too many large stores/not enough small shops	2
About right	3
Don't know	4

Q14b And from what you know about Hadleigh Town Centre how would you describe the non food shopping in the Town Centre, in terms of the balance between large and small shops? (READ OUT)

Too many small shops/not enough large stores	1
Too many large stores/not enough small shops	2
About right	3
Don't know	4

Q14c What other major change, if any, would you like to see in <u>Hadleigh</u> Town Centre for you and your household to visit it more often for shopping? ***(SINGLE CODE ONLY)***

None / Quite happy	1	Better security / Make the centre safer	13
None / DK / Can't think of any	2	A bigger / better weekly market	14
More car parking	3	Make Centre more attractive (e.g. better shop fronts, planting, paving etc.)	15
More covered shopping opportunities	4	More / better signage	16
Wider variety of stores	5	More / better information displays	17
Better quality stores / Goods	6	Less traffic congestion	18
More / better places to eat or drink	7	More Pedestrianisation	19
More / better toilets	8	More Street entertainment / More things going on	20
More / better parking facilities	9	More shops open on Sunday	21
Better public transport	10	More shops open in the evenings	22
Better cleanliness / Make the centre tidier	11	Other (Write In)	
Cleaner air / Less traffic pollution	12		

Q15a Do you ever use the Internet, Television or mail order for shopping?

Yes	1	(Go to Q15b)
No	2	Close

Q15b What kinds of goods do you buy from these sources?

Food / Groceries	1
Non food such as clothing and gifts	2
Bulky non food goods	3

COMPLETE CLASSIFICATION - THANK RESPONDENT

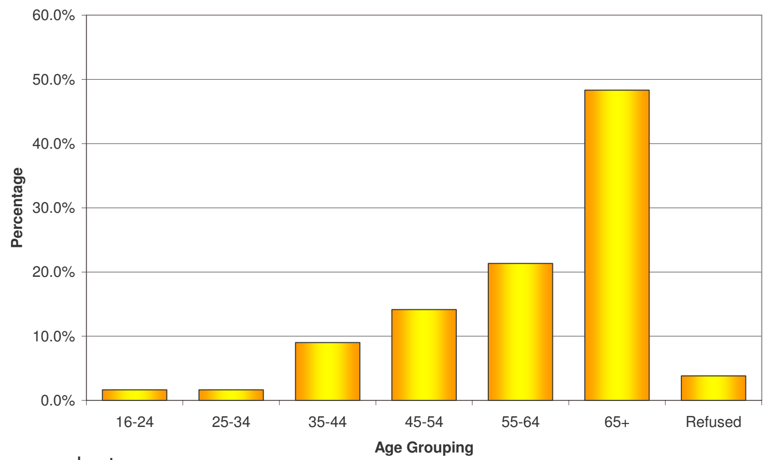
APPENDIX 2C

Key Results

BABERGH DISTRICT RETAIL STUDY
HOUSEHOLD TELEPHONE SURVEY
KEY RESULTS: CONVENIENCE GOODS SHOPPING

- The household telephone survey was carried out during April/May, 2008.
- In total 600 interviews were carried out over 8 zones.
- 33.1% of interviewees were male and 66.9% were female.
- The majority of people were in the 65+ age group (48.3%), the next two highest being 55-64 years (21.3%) and 45-54 years (14.2%).

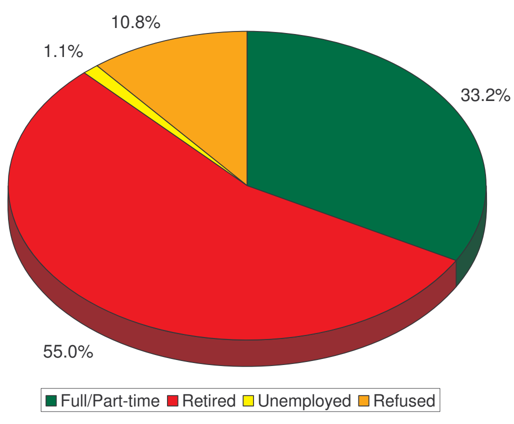
Figure 1 – Age Distribution



Sample size: 600 respondents.

- 56.1% of respondents were retired and unemployed, while 33.2% were workers (**Figure 2**).
- The respondent was the person responsible for the majority of the household shopping.

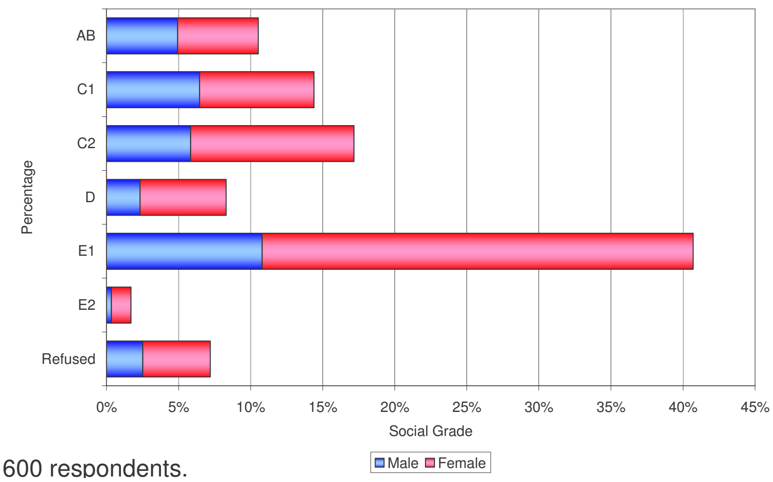
Figure 2 – Employment Status



Sample size: 600 respondents.

- In terms of social grades, it can be seen that the most common grade for respondents was the E1 bracket, retired (40.7% of total) – see **Figure 3** overleaf.

Figure 3 – Social Grades by Gender



Sample size: 600 respondents.

- In all zones, apart from Zones 1 and 2, the survey shows that households tend to do their main food shopping during the day on weekdays, this being most popular in Zone 7 with 83.3%.
- For Zones 1 and 2 most respondents (36.2% and 48.3% respectively) do not shop at a particular time and are more varied.
- **Table 1** shows the results for the more popular stores[1] among respondents. The majority fit the same pattern as the zonal results, with most stores attracting shoppers during weekday daytimes. However, for Tesco Sudbury shoppers tended to be more varied on when they visited.

Table 1 – Filtered Results – When Do You Do Your Main Food Shop by Store

	Weekday Day	Weekday Evening	Saturday	Sunday	Varies
Hadleigh Co-op	66.7%	0%	19%	0%	14.3%
Sudbury Aldi	63.6%	27.3%	0%	0%	18.2%
Sudbury Somerfield	76.9%	7.7%	0%	0%	15.4%
Sudbury Tesco	37.6%	25.8%	19.4%	5.4%	12.9%
Sudbury Waitrose	57.5%	7.5%	15%	2.5%	17.5%

- Linked to the subject of when people shop is how frequently they visit their main food store. Overall most respondents said that they visit their main store once a week (55.6%). This was the same for all zones apart from Zone 1 and 2 where more people shop twice a week (56.3% and 38% respectively).
- The results for popular stores against frequency of shop are broadly similar, with the majority of people visiting once a week, reaching as high as 86.7% for Somerfield in Sudbury.
- **Table 2** overleaf shows the reason for choosing main food store by filtered popular store. It can be seen that convenience is the most important factor for the majority of respondents.

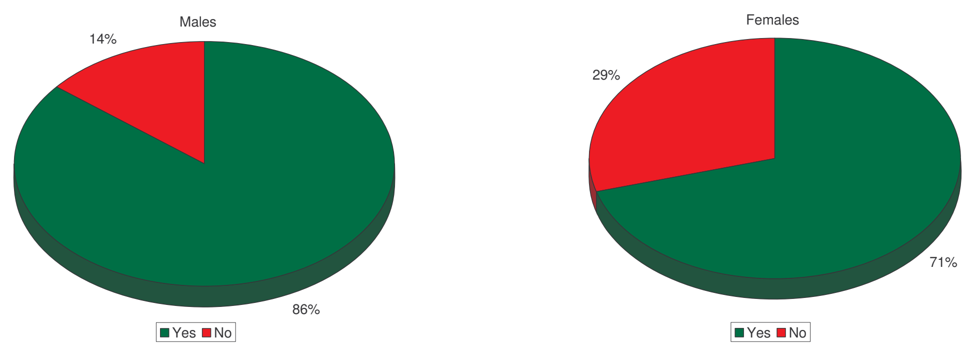
[1] The results have been filtered to include only those stores in Sudbury and Hadleigh with more than 10 responses. This filter has also been applied elsewhere in the report where popular shops are discussed.

Table 2 – Filtered Results – Reason for Choosing Main Food Store by Store

	Hadleigh Co-op	Sudbury Aldi	Sudbury Somerfield	Sudbury Tesco	Sudbury Waitrose
Convenient	35%	92.3%	82.3%	91.1%	72.8%
Close to Work	3.3%	0%	0%	0.4%	7.8%
Easy Parking	3.3%	0%	2.9%	0.9%	0%
Wide Choice of Goods	13.3%	3.9%	0%	2%	4.4%
Close to Other Shops	0%	0%	0%	0%	0%
Good Prices	9.9%	3.9%	0%	2.9%	0%
Quality of Goods	0%	0%	0%	0%	4.8%
Other	31.9%	0%	2.9%	1.6%	10.2%
No Reason	3.3%	0%	11.9%	1.1%	0%

- The vast majority of respondents have the use of a car for shopping (74.3%), while men have greater access to a car than women (see **Figure 4a and 4b**).

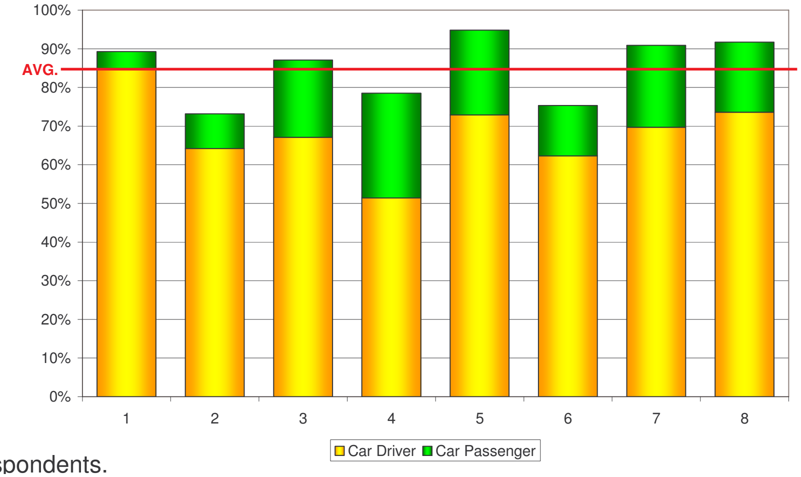
Figure 4a and 4b – Car Use for Main Food Shopping by Gender



Sample size: 600 respondents.

- The high percentage of people who use a car for shopping is reflected by the results for the mode of travel to main food store. Combined car travel accounts for 83% of trips, while 10.9% walk, and 4.5% use the bus.
- When combined car travel is analysed by zone (**Figure 5** overleaf) it can be seen that a number of zones (Zones 2, 4 and 6) have lower than average car usage.
- Respondents in Zone 4 are less likely to travel by car (78%), possibly because they are closer to larger food stores already.
- This notion of closeness to stores is also shown when looking at popular stores and mode of travel. In this instance the smaller stores in the town centres have higher levels of walk in shoppers compared to the out of town Tesco at Sudbury, for example.

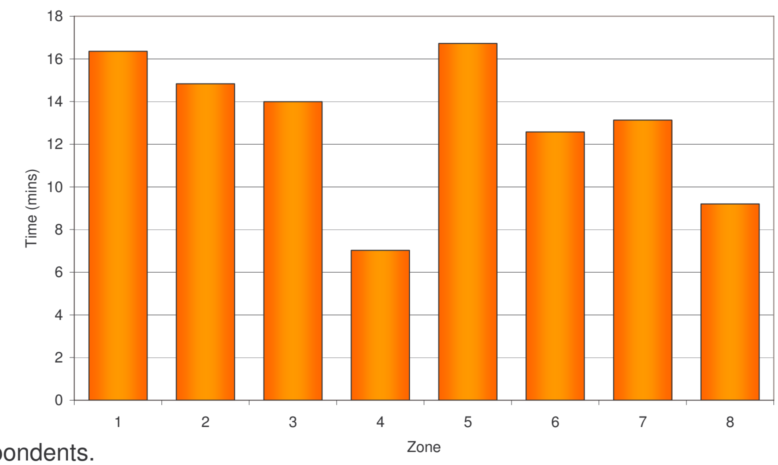
Figure 5 – Car as Mode of Travel to Main Food Store by Zone



Sample size: 548 respondents.

- For all zones and popular stores, the vast majority of respondents trips to their main food store, originated from home (90% and over in all zones).
- The overall mean journey time to main food store was 13 minutes. When broken down by zone, the highest mean was 18 minutes for Zone 5 and the lowest was 7 minutes for Zone 4, which covers Sudbury (**Figure 6**).

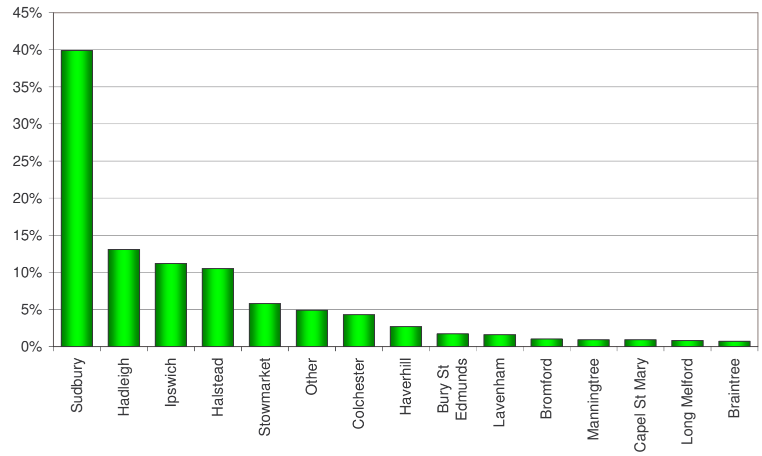
Figure 6 – Mean Journey Time in Minutes to Main Food Store by Zone



Sample size: 521 respondents.

- When asked whether they combined main food shopping with other shops/services, the majority of respondents (70.1%) said that they did not. This was consistent across all zones, however, respondents in Zone 6 were the most likely (47.8%) to combine trips.
- By far the most popular centre to visit on a linked trip was Sudbury (**Figure 7**) reflecting its dominance for main food shopping.

Figure 7 – Towns Respondents Combined Food Shopping With



Sample size: 138 respondents.

- The results for popular stores in **Table 3** indicate that respondents tend to combine trips with the centres they are already visiting for food shopping (i.e. most linked trips are very localised).

Table 3 – Filtered Towns Respondents Combined Food Shopping With by Store

	Hadleigh Co-op	Sudbury Somerfield	Sudbury Tesco	Sudbury Waitrose
Sudbury	7.1%	100%	100%	100%
Hadleigh	92.9%	0%	0%	0%

- The types of other shops or services visited by respondents on a linked main food shopping trip are listed in **Table 4**.
- Services feature quite prominently in the top five, with financial outlets and post office the top two.

Table 4 – Type of Other Shop / Service Outlet Visited

Outlet	Number	%
Financial Outlets	60	18.6%
Post Office	56	17.4%
Specialist Food Shops	48	14.9%
Other Type of Shop	40	12.4%
Department / Variety Store	29	9.0%
Chemist	28	8.7%
Café / Restaurant / Pub / Take-Away	20	6.2%
Charity Shops	13	4.0%
Fashion Shops	12	3.7%
Newsagents / Confectioners / Tobacconists	12	3.7%
Library	4	1.2%
Professional Services	0	0.0%

Sample size: 164 respondents with multiple coding.

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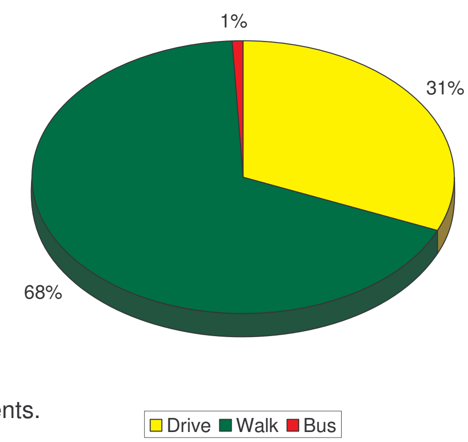
- Perhaps unsurprisingly, the mode of travel to other shops/services on a linked trip (**Figure 8**) shows a far higher proportion of people walking than for mode of transport to their main food store (68%). As these are combination trips, shoppers appear much more likely to drive to just one location and then walk to their other shops/services.

Figure 8 – Mode of Travel to Other Shops / Service Outlets on a Linked Trip



Sample size: 149 respondents.

- **Tables 5 and 6** summarise the perceptions of all respondents (base) vs respondents living in the local zone, when asked about the balance between large and small food shops in town centres.
- **Table 5** shows that the vast majority of Sudbury residents (96%), and the wider base (96%), think that the balance between shops in Sudbury is just right. A small number of residents would like to see more larger shops (4%).
- Residents views in Hadleigh (**Table 6**) differ slightly. Again the majority of residents (75%) think the balance is about right. However, compared to Sudbury, more of the local population are unsure about the balance between large and small food stores. 15% of residents would like to see more bigger stores while 10% would like to see more smaller stores.

Table 5 – Views on Balance Between Small and Large Food Stores in Sudbury

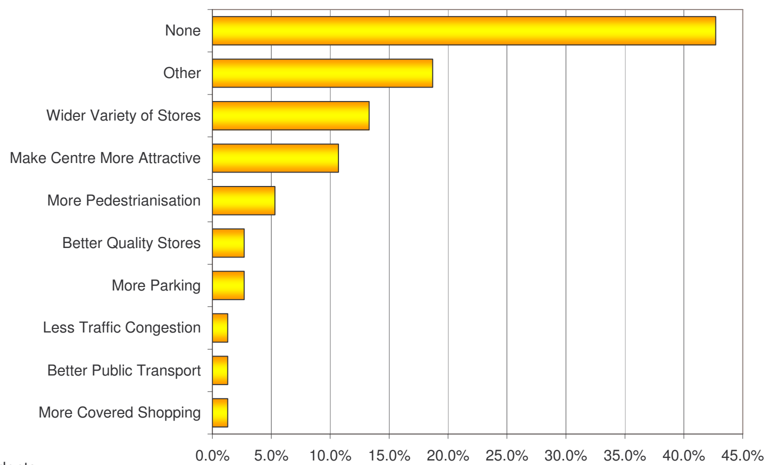
	Base	Sudbury
Too Many Small Shops	2%	4%
Too Many Large Shops	2%	0%
About Right	96%	96%

Table 6 – Views on Balance Between Small and Large Food Stores in Hadleigh

	Base	Hadleigh
Too Many Small Shops	11%	15%
Too Many Large Shops	3%	10%
About Right	86%	75%

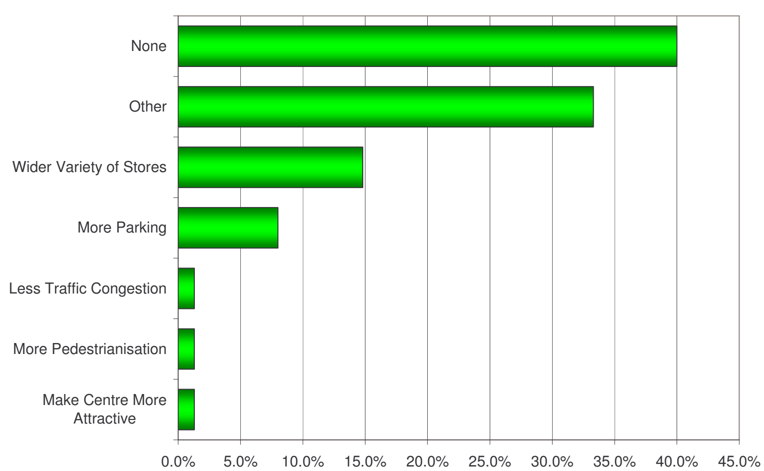
- The majority of Sudbury and Hadleigh residents do not want to see any changes to their town centres (42.7% and 40% respectively) (**Figure 9 and 10**.
- However, of those households that do want to see changes to encourage them to visit their town centres more often, the most popular named change for both Sudbury (13.3%) and Hadleigh (14.8%) was a wider variety of stores.

Figure 9 – What Changes Would Encourage Sudbury Zone Residents To Visit Sudbury Town Centre



Sample size: 86 respondents.

Figure 10 – What Changes Would Encourage Hadleigh Zone Residents To Visit Hadleigh Town Centre

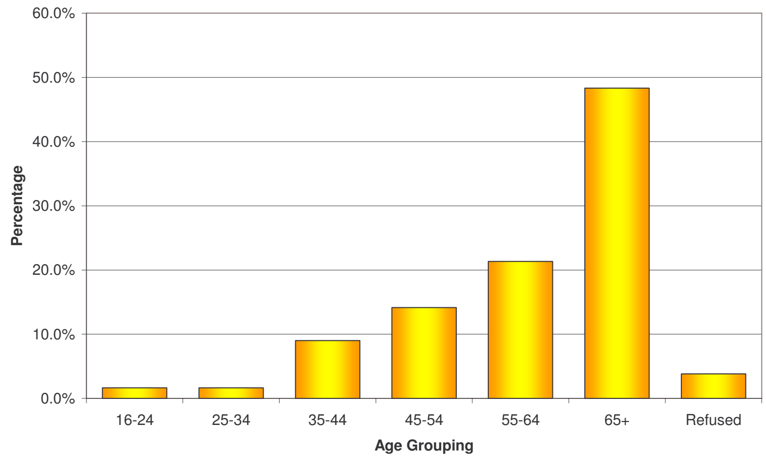


Sample size: 53 respondents.

BABERGH DISTRICT RETAIL STUDY
HOUSEHOLD TELEPHONE SURVEY
KEY RESULTS: NON BULKY AND BULKY GOODS SHOPPING

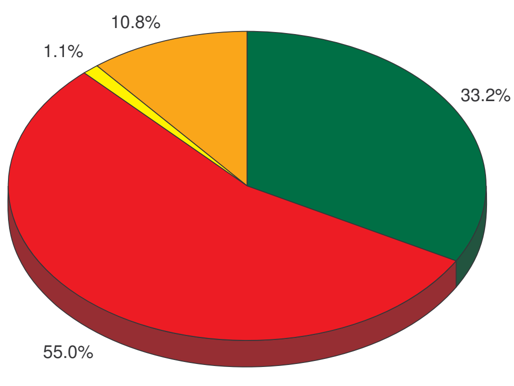
- The household telephone survey was carried out during April/May, 2008.
- In total 600 interviews were carried out over 8 zones.
- 33.1% of interviewees were male and 66.9% were female.
- The majority of people were in the 65+ age group (48.3%), the next two highest being 55-64 years (21.3%) and 45-54 years (14.2%).

Figure 1 – Age Distribution



- 56.1% of respondents were retired and unemployed, while 33.2% were workers (**Figure 2**).
- The respondent was the person responsible for the majority of the household shopping.

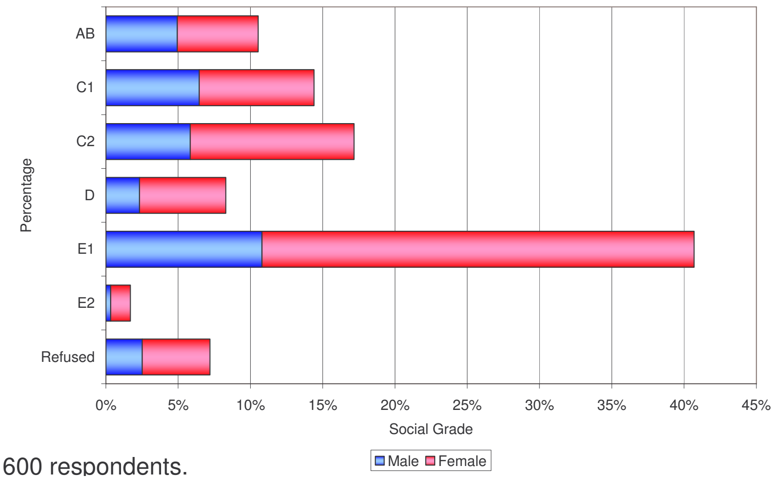
Figure 2 – Employment Status



Sample size: 600 respondents.

- In terms of social grades, it can be seen that the most common grade for respondents was the E1 bracket, retired (40.7% of total) – see **Figure 3** overleaf.

Figure 3 – Social Grades by Gender



Sample size: 600 respondents.

- Once a month was the most popular frequency by which respondents from all zones (apart from Zone 1) visited their main centre for non bulky comparison goods (see **Table 1**).
- Visits to centres for bulky comparison goods were more varied. For the majority of zones the most popular response was once every 2-3 months or less often. The two exceptions were Zone 1 and Zone 2 where the most popular response was once a month (**Table 2** overleaf).

Table 1 – Frequency of Visiting Main Centre For Non Bulky Comparison Goods by Zone

	1	2	3	4	5	6	7	8
More than once a week	0%	4.2%	0%	0%	4.6%	3.6%	0%	0%
Once a week	6.6%	12.5%	0%	1.4%	16.9%	9.1%	6.3%	2.9%
2-3 times a month	37.7%	25%	31.9%	29%	20%	12.7%	11.1%	20.3%
Once a month	31.1%	37.5%	50%	49.3%	29.2%	29.1%	25.4%	34.8%
Once every 2-3 months	18%	16.7%	13.9%	20.3%	9.2%	18.2%	25.4%	14.5%
Once every 4-6 months	6.6%	2.1%	4.2%	0%	16.9%	16.4%	17.5%	13%
Less Often	0%	0%	0%	0%	1.5%	10.9%	14.3%	11.6%
Varies	0%	2%	0%	0%	1.7%	0%	0%	2.9%

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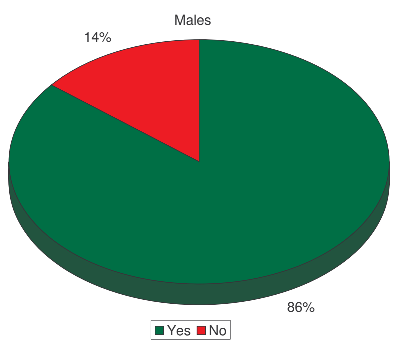
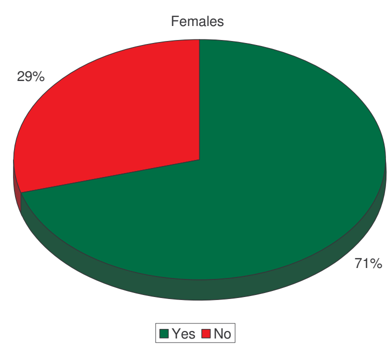
Table 2 – Frequency of Visiting Main Centre For Bulky Comparison Goods by Zone

	1	2	3	4	5	6	7	8
More than once a week	0%	4.2%	1.7%	0%	1.8%	0%	0%	0%
Once a week	0%	10.4%	0%	2%	5.4%	4.8%	2.2%	0%
2-3 times a month	30.9%	18.8%	1.7%	4.1%	10.7%	7.1%	0%	0%
Once a month	40%	39.6%	25.9%	24.5%	7.1%	9.5%	6.7%	8.1%
Once every 2-3 months	25.5%	20.8%	46.6%	38.8%	14.3%	9.5%	4.4%	16.1%
Once every 4-6 months	3.6%	4.2%	20.7%	14.3%	26.8%	42.9%	11.1%	24.2%
Less Often	0%	2%	3.4%	14.3%	30.4%	26.2%	75.6%	48.4%
Varies	0%	0%	0%	2%	3.5%	0%	0%	3.2%

- In terms of choosing a main centre, the most popular reasons were the same for both non bulky and bulky comparison goods. Convenience was by far the biggest factor with 77.2% for non bulky comparison goods shopping and 80.9% for bulky comparison goods shopping.
- Among the lower percentage answers close to work was higher for non bulky comparison goods (1.6%) while ease of parking was higher for bulky comparison goods (1.2%).
- The vast majority of respondents have the use of a car for shopping (74.3%), while men have greater access to a car than women (see **Figures 4a and 4b**).

Figure 4a and 4b – Car Use for Shopping by Gender



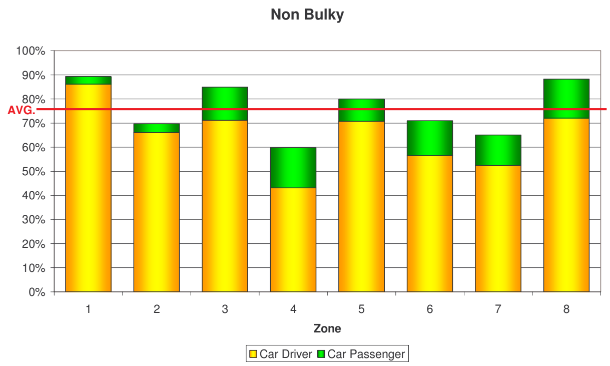


Sample size: 600 respondents.

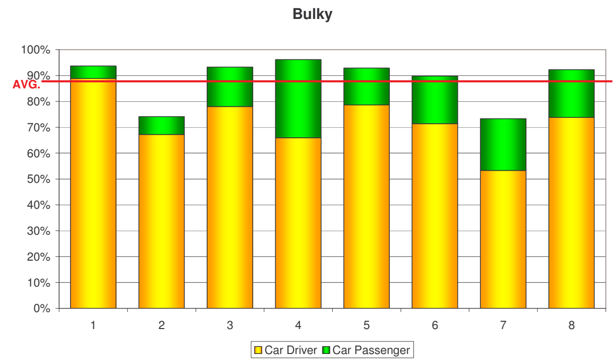
- The high percentage of people who use a car for shopping is reflected by the results for the mode of travel to main centres for non bulky and bulky comparison goods.
- For non bulky goods, car travel accounts for 74.4% of trips, followed by bus travel with 13.8% and walking with 6.4%.
- For bulky goods, car travel accounts for 86.5% of trips, again followed by bus travel with 5.8% and walking with 5.1%. It is unsurprising that car travel is more popular as the main mode of transport for bulky comparison goods shopping.

- When car travel is analysed by zone (**Figures 5a and 5b**) it can be seen that car usage is lower for a number of zones (Zones 2, 4, 6 and 7 for non bulky comparison goods and Zones 2 and 7 for bulky comparison goods).

Figure 5a and 5b – Car as Mode of Travel to Main Non Bulky and Bulky Comparison Goods Centre by Zone



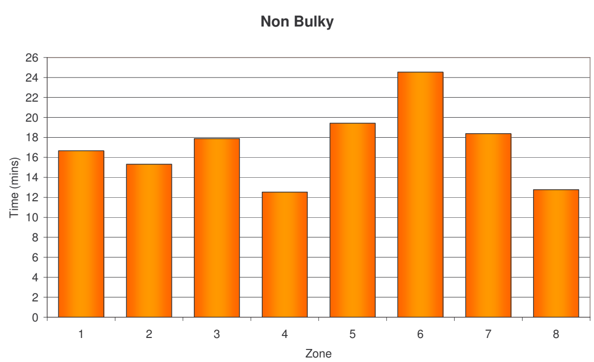
Sample size: 520 respondents.



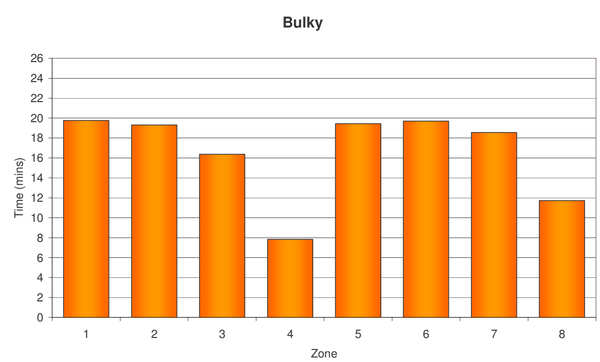
Sample size: 447 respondents.

- For all zones and both types of comparison goods shopping, the vast majority of respondents trips to their main centres originated from home – 97.4% for non bulky comparison goods and 99.4% for bulky goods.
- The overall mean journey time from home to both main non bulky and bulky comparison goods centre was 17 minutes. When broken down by zone, the highest mean for non bulky goods was 25 minutes for Zone 6 and the lowest was 13 minutes for Zone 4. For bulky goods the highest was 20 minutes for Zone 1 and the lowest was 8 minutes for zone 4 (**Figure 6a and 6b**).

Figure 6a and 6b – Mean Journey Time in Minutes to Non Bulky and Bulky Comparison Goods Centre by Zone



Sample size: 506 respondents.



Sample size: 446 respondents.

- Tables **3 and 4** overleaf summarise the perceptions of all respondents (base) vs respondents living in the local zone, when asked about the balance between large and small non food shops in town centres.
- **Table 3** shows that the vast majority of Sudbury households (75%), and the wider base (89.5%), think that the balance between large and small shops in Sudbury is just right. However, a number of households would like to see more larger shops (21%).
- Household views in Hadleigh (**Table 4**) are similar. Again the majority of local households (74%) think the balance is about right although a significant minority of households would like to see more large shops (17%).

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Table 3 – Views on Balance Between Small and Large Non-Food Stores in Sudbury

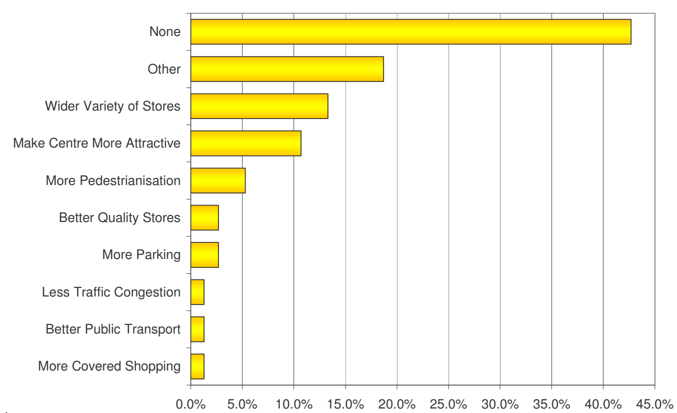
	Base	Sudbury Zone
Too Many Small Shops	9%	21%
Too Many Large Shops	1.5%	4%
About Right	89.5%	75%

Table 4 – Views on Balance Between Small and Large Non-Food Stores in Hadleigh

	Base	Hadleigh Zone
Too Many Small Shops	10%	17%
Too Many Large Shops	3%	9%
About Right	87%	74%

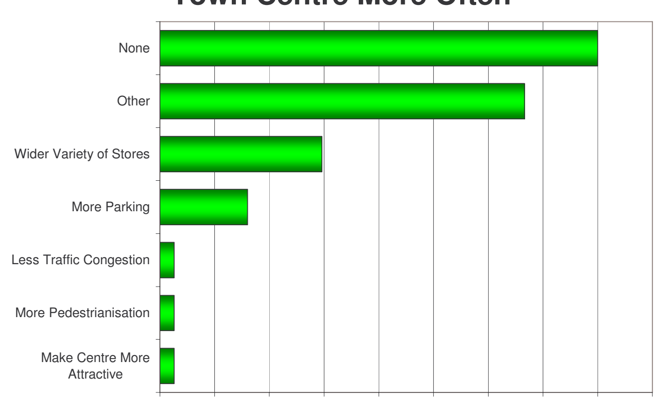
- The majority of Sudbury and Hadleigh households do not want to see any changes made to their town centres (42.7% and 40% respectively) (**Figures 7 and 8**).
- However, of those households that do want to see changes to encourage them to visit their town centres more often, the most popular named change for both Sudbury (13.3%) and Hadleigh (14.8%) was a wider variety of stores.

Figure 7 – What Changes Would Encourage Sudbury Zone Residents To Visit Sudbury Town Centre More Often



Sample size: 86 respondents.

Figure 8 – What Changes Would Encourage Hadleigh Zone Residents To Visit Hadleigh Town Centre More Often



Sample size: 53 respondents.

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APPENDIX 2D

Summary of Market Data by Centre/Zone

NON-BULKY COMPARISON GOODS CENTRE MARKET SHARES BY ZONE (COLUMN PERCENT)								
Centre	**Zone 1**	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**
Hadleigh	0.0%	0.0%	3.9%	0.0%	1.2%	5.8%	0.0%	0.0%
TOTAL HADLEIGH	**0.0%**	**0.0%**	**3.9%**	**0.0%**	**1.2%**	**5.8%**	**0.0%**	**0.0%**
Sudbury	28.5%	23.2%	28.8%	61.0%	37.7%	6.7%	0.0%	0.0%
TOTAL SUDBURY	**28.5%**	**23.2%**	**28.8%**	**61.0%**	**37.7%**	**6.7%**	**0.0%**	**0.0%**
Great Cornard	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
TOTAL GREAT CORNARD	**1.5%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**
Lavenham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
TOTAL LAVERHAM	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**
Long Melford	0.0%	0.0%	2.8%	0.0%	0.0%	0.3%	0.0%	0.0%
TOTAL LONG MELFORD	**0.0%**	**0.0%**	**2.8%**	**0.0%**	**0.0%**	**0.3%**	**0.0%**	**0.0%**
Capel St Mary	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
TOTAL CAPEL ST MARY	**0.0%**	**0.9%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**
Copdock Mill Interchange Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
TOTAL COPDOCK MILL	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**
Local Shops / PO	1.8%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%
TOTAL LOCAL	**1.8%**	**0.0%**	**0.1%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**
Bluewater - Shopping Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Braintree	1.5%	8.9%	0.0%	0.3%	0.4%	0.0%	0.0%	0.0%
Bramford	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.5%
Bury St Edmunds	28.0%	0.0%	35.3%	3.4%	2.7%	2.0%	0.8%	4.0%
Cambridge	8.1%	0.0%	2.0%	0.3%	0.2%	0.0%	0.0%	1.0%
Chelmsford	0.0%	1.8%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%
Clacton-on-Sea	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Colchester	3.1%	32.1%	7.0%	19.6%	42.5%	7.7%	11.9%	0.7%
Colchester - Stanway Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Felixstowe	0.0%	0.0%	0.0%	0.0%	0.0%	3.6%	1.6%	0.0%
Freeport	0.0%	0.0%	0.3%	0.3%	0.6%	0.0%	0.0%	0.0%
Halstead	4.6%	32.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Haverhill	18.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Henley	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%	0.0%
Ipswich	3.1%	0.0%	6.3%	12.5%	7.9%	67.2%	76.8%	58.7%
London (Central / West End)	0.0%	0.0%	2.2%	0.3%	5.9%	3.9%	2.7%	0.0%
Manningtree	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%
Needham Market	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Newmarket	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Norwich	0.0%	0.0%	1.1%	1.1%	0.0%	0.3%	0.0%	1.5%
Other	0.0%	0.0%	0.4%	0.0%	0.0%	1.5%	2.4%	0.0%
Saffron Waldon	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sproughton	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%	0.0%
Stowmaket	0.0%	0.0%	9.8%	0.0%	0.0%	1.0%	0.0%	26.9%
Thetford	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Thurrock / Lakeside - Shopping Centre	0.0%	0.9%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%
Woodbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%
TOTAL OUTSIDE BABERGH DISTRICT	**68.1%**	**75.9%**	**64.5%**	**39.0%**	**61.1%**	**87.2%**	**100.0%**	**100.0%**
TOTAL	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**

BULKY COMPARISON GOODS CENTRE MARKET SHARES BY ZONE (COLUMN PERCENT)								
Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
Hadleigh	0.0%	0.0%	8.3%	0.0%	4.6%	15.6%	0.0%	0.0%
TOTAL HADLEIGH	**0.0%**	**0.0%**	**8.3%**	**0.0%**	**4.6%**	**15.6%**	**0.0%**	**0.0%**
Sudbury	31.8%	14.1%	54.7%	90.0%	35.7%	8.4%	0.0%	0.0%
TOTAL SUDBURY	**31.8%**	**14.1%**	**54.7%**	**90.0%**	**35.7%**	**8.4%**	**0.0%**	**0.0%**
Great Cornard	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
TOTAL GREAT CORNARD	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**
Lavenham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
TOTAL LAVERHAM	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**
Long Melford	0.0%	0.0%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%
TOTAL LONG MELFORD	**0.0%**	**0.0%**	**1.7%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**
Capel St Mary	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
TOTAL CAPEL ST MARY	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**
Copdock Mill Interchange Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	17.1%	41.6%	33.8%
TOTAL COPDOCK MILL	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**17.1%**	**41.6%**	**33.8%**
Local Shops / PO	0.8%	3.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
TOTAL LOCAL	**0.8%**	**3.4%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**
Bluewater - Shopping Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Braintree	1.6%	6.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Bramford	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.1%
Bury St Edmunds	30.6%	1.7%	22.9%	0.4%	0.0%	2.9%	0.0%	3.1%
Cambridge	3.5%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.3%
Chelmsford	0.0%	1.7%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%
Clacton-on-Sea	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Colchester	1.6%	34.1%	0.3%	5.1%	44.9%	9.0%	15.7%	0.0%
Colchester - Stanway Retail Park	0.0%	0.0%	0.0%	0.0%	3.2%	0.0%	0.0%	0.0%
Felixstowe	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Freeport	0.0%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Halstead	6.3%	35.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Haverhill	19.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Henley	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ipswich	1.6%	0.0%	4.0%	4.5%	6.3%	44.8%	39.3%	25.5%
London (Central / West End)	1.6%	0.0%	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%
Manningtree	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Needham Market	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%
Newmarket	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Norwich	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	2.3%	0.8%
Other	0.0%	0.8%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Saffron Waldon	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sproughton	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Stowmaket	0.0%	0.0%	6.2%	0.0%	0.0%	1.4%	0.0%	30.3%
Thetford	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Thurrock / Lakeside - Shopping Centre	0.0%	0.0%	0.0%	0.0%	1.4%	0.8%	0.0%	0.0%
Woodbridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
TOTAL OUTSIDE BABERGH DISTRICT	**67.5%**	**82.4%**	**35.3%**	**10.0%**	**59.7%**	**58.9%**	**58.4%**	**66.2%**
	100.00%	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**

CONVENIENCE GOODS CENTRE MARKET SHARES BY ZONE (COLUMN PERCENT)								
Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
Hadleigh - Coop	0.0%	0.0%	0.2%	0.4%	1.1%	38.1%	2.5%	0.0%
Hadleigh - QD Buyright	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hadleigh - Other	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%
TOTAL HADLEIGH	**0.0%**	**0.0%**	**2.1%**	**0.4%**	**1.1%**	**38.1%**	**2.5%**	**0.0%**
Sudbury - Aldi	0.6%	3.8%	1.2%	5.8%	1.1%	0.0%	0.0%	0.0%
Sudbury - Co-op	0.7%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%
Sudbury - Farm Foods Freezer Centre	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%
Sudbury - M&S Simply Food	0.0%	1.1%	0.0%	2.5%	0.9%	0.0%	0.0%	0.0%
Sudbury - McColls	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sudbury - Roys of Wroxham	0.0%	0.0%	0.0%	0.4%	1.1%	0.0%	0.0%	0.0%
Sudbury - Somerfield	0.0%	1.9%	0.4%	11.1%	1.6%	0.0%	0.0%	0.0%
Sudbury - Tesco, Springlands Way	19.1%	5.6%	30.1%	46.1%	21.9%	4.1%	0.0%	0.0%
Sudbury - Waitrose	4.5%	13.4%	9.6%	17.4%	18.9%	1.1%	0.0%	0.0%
Sudbury - Other	0.0%	7.6%	0.0%	0.0%	2.6%	0.0%	0.0%	0.0%
TOTAL SUDBURY	**25.0%**	**33.4%**	**41.3%**	**84.7%**	**48.1%**	**5.2%**	**0.0%**	**0.0%**
Great Cornard - Co-op	0.0%	0.5%	0.0%	3.4%	0.0%	0.0%	0.0%	0.0%
Great Cornard - Martins	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Great Cornard - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
TOTAL GREAT CORNARD	**2.1%**	**0.5%**	**0.0%**	**3.4%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**
Lavenham - Co-op	0.0%	0.0%	4.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Lavenham - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
TOTAL LAVERHAM	**0.0%**	**0.0%**	**4.2%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**
Long Melford - Co-op	0.0%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Long Melford - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
TOTAL LONG MELFORD	**0.0%**	**0.0%**	**2.2%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**
Capel St Mary - Co-op	1.0%	0.0%	0.0%	0.0%	0.0%	0.9%	3.2%	0.0%
Capel St Mary - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%
TOTAL CAPEL ST MARY	**1.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.9%**	**3.4%**	**0.0%**
Ipswich - Tesco Extra, Copdock Interchange	0.0%	0.0%	2.0%	0.0%	0.0%	14.1%	35.1%	0.0%
TOTAL COPDOCK MILL	**0.0%**	**0.0%**	**2.0%**	**0.0%**	**0.0%**	**14.1%**	**35.1%**	**0.0%**
Local Shops / PO	11.5%	4.8%	16.9%	4.7%	13.0%	13.6%	0.0%	0.3%
TOTAL LOCAL	**11.5%**	**4.8%**	**16.9%**	**4.7%**	**13.0%**	**13.6%**	**0.0%**	**0.3%**
Braintree - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Braintree - Sainsbury	0.8%	3.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Braintree - Somerfield	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Braintree - Tesco	1.6%	5.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Bramford - Coop	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%
Bramford - Morrisons	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%
Bramford - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%
Bramford - Tesco	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%
Brantham - Co-op	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%
Brantham - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Bury St Edmunds - Somerfield	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Bury St Edmunds - Tesco	14.8%	0.0%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%
Bury St Edmunds - Waitrose	2.2%	0.0%	2.1%	0.0%	0.0%	0.0%	3.2%	0.0%
Bury St Edmunds - Other	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Bury St Edmunds - Sainsbury	4.5%	0.0%	12.7%	0.0%	0.0%	0.0%	0.0%	0.0%
Colchester - Aldi	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Colchester - Asda	0.8%	8.4%	0.0%	4.6%	12.5%	0.0%	0.0%	0.0%
Colchester - Other	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Colchester - Sainsbury	0.0%	3.1%	0.0%	0.0%	5.7%	0.0%	0.0%	0.0%
Colchester - Somerfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Colchester - Tesco Express, Bromley Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Colchester - Tesco Express, Crouch Street	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Colchester - Tesco Express, St Johns	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Colchester - Tesco Extra	0.0%	1.4%	0.0%	0.0%	16.5%	0.7%	14.1%	0.0%
Colchester - Tesco, Greenstead Road	0.0%	0.0%	0.0%	2.3%	0.0%	0.0%	0.0%	0.0%
Dedham - Co-op Local	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%
Dedham - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Diss - Morrisons	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Diss - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Diss - Tesco	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Earls Colne (any)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
East Bergholt - Budgens	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.8%	0.0%
East Bergholt - Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Glemsford	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Halstead - Co-op / Solar Supermarket	3.1%	23.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Halstead - Somerfield	1.4%	8.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Halstead- Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Haverhill - Aldi	4.3%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Haverhill - Sainsbury	23.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Haverhill- Other	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Holbrook - Co-op	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.2%	0.0%
Holbrook- Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ipswich - Sainsbury, town centre / Upper Brook Street	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	1.4%
Ipswich - Aldi, Hines Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ipswich - Aldi, Meredith Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ipswich - Asda, Whitehouse / Bury Road	0.0%	0.0%	1.2%	0.0%	1.4%	6.4%	5.5%	14.2%
Ipswich - Co-op, Pinewood	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ipswich - Co-op, town centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%
Ipswich - Iceland, town centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ipswich - Lidl, Ravenswood	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%	0.0%
Ipswich - Lidl, town centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%
Ipswich - M&S, town centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%
Ipswich - Morrisons, Sproughton Road	0.2%	0.0%	0.0%	0.0%	0.0%	6.9%	12.9%	24.0%
Ipswich - Sainsbury, Hadleigh Road	0.0%	0.0%	0.0%	0.0%	1.7%	12.6%	5.3%	6.3%
Ipswich - Sainsbury, Warren Heath	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.9%	0.0%
Ipswich - Tesco Express, Westbourne	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ipswich - Tesco Extra, Martlesham Heath	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ipswich - Tesco Metro, Kesgrave	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.9%
Ipswich- Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%
Maningtree- Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Manningtree - Co-op	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.4%	0.0%
Manningtree - Tesco Express	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Midenhall - Sainsbury	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mildenhall- Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Needham Market - Co-op	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%
Needham Market- Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Newmarket - Tesco	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Newmarket - Waitrose	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Newmarket- Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other	3.0%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Saffron Walden - Tesco	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%
Saffron Walden - Waitrose	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Saffron Waldron- Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sibble Hedingham- Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sible Hedingham - Co-op	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Stowmarket - Aldi	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Stowmarket - Co-op, Combs Lane	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.6%
Stowmarket - Lidl	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Stowmarket - Tesco	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	17.3%
Stowmarket - Waitrose	0.0%	0.0%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%
Stowmarket- Asda	0.0%	0.0%	11.1%	0.0%	0.0%	0.0%	0.0%	11.6%
Stowmarket- Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	10.1%
West Bergholt - Co-op Local	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
West Bergholt- Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
TOTAL OUTSIDE BABERGH DISTRICT	**60.5%**	**61.2%**	**31.2%**	**6.9%**	**37.8%**	**28.1%**	**59.0%**	**99.7%**
TOTAL	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**

APPENDIX 3

Experian Data

APPENDIX 3A

Definition of Convenience and Comparison Goods (Extract)

1. Estimating consumer spending on retail goods

1.1 SOURCES

Estimates of consumer spending on retail items are taken from estimates of household spending contained in the Office for National Statistics' (ONS) publication *Consumer Trends* (latest issue June 2007).[1] This breaks total household spending down according to the internationally recognised COICOPS categories (Classification of Individual Consumption by Purpose). This is consistent with the definitions used in the ONS' *National Accounts (Blue Book also June 2007)* publication.

Note that these estimates are based on surveys of consumers and are not the same as the ONS' estimates of retail sales, which are based on surveys of shops and businesses. The difference between the two estimates is discussed in Section 1.3 below and in more detail in Section 5.

1.2 DEFINITIONS

In Retail Planner, consumer spending on retail goods is available at either a 'fine' or 'coarse' level of detail.[2] Forecasts and market share estimates (see Sections 2 and 4) are only provided at a coarse level. The coarse categories are aggregations of the fine categories and are detailed in Table 1.1. Other special aggregations are also available, such as 'comparison goods', 'convenience goods', 'core DIY goods' and 'core bulky goods' (see Section 1.5 below).

1.3 ALLOWANCE FOR NON-RETAIL SPENDING

In all cases but one, spending estimates refer to retail outlets.[3] The exception is tobacco, where the figures include spending in pubs, clubs and restaurants. We allow for this non-retail spending and for tobacco which is smuggled into the country. Estimates are based on data from the Annual Business Inquiry (ABI).

1.4 ALLOWANCES FOR SPENDING MADE BY FOREIGNERS

The National Accounts definition of household outlays includes spending in the UK by foreigners.[4] This is deducted from the sum of spending by category (which is also net of UK residents' spending abroad) to give the figure for total household spending by UK residents that appears in the *National Accounts* and the ONS' GDP releases.

In 2006, the ONS estimated that foreigners spend £18.6bn pounds in the UK out of total household spending in the UK of £748bn (2.4 per cent of the total). The bulk is used for

[1] The ONS now refers to consumer spending as household spending.
[2] Note that this does not represent the full level of detailed spending estimates available from Experian Business Strategies, but it is the most detailed level for which ONS currently publishes national spending totals (in *Consumer Trends* and the *Blue Book*).
[3] This includes spending in some non-retail outlets such as mail order and sales by wholly internet companies.
[4] European System of Accounts 1995 (or ESA95). Note that this was also the case with previous definitions of consumer spending.

accommodation, catering and travel services, but, on the basis of Input-Output tables and the *International Passenger Survey*, we estimate that some 25 per cent of this is spent on retail goods. Table 1.1 shows this estimate broken down by coarse category and Table 1.2 shows the full, fine category detail.

While this is genuine spending, most of which finds its way into UK retail outlets (rather than into special forms of trading), we have separated it out from the resident totals. This is because most spending by foreigners takes place around tourist centres and cannot be allocated to small areas on the basis of population and socio-economic mix as for residents.[2]

Note that the current version of Retail Planner covers spending by residents in the UK. It does not include any estimates of retail spend by tourists in local areas, although information on this is planned for future versions.

1.5 AGGREGATIONS

Aside from COICOPS, Retail Planner contains a number of special aggregations of retail goods. These are:

1. **Convenience goods** – low cost, everyday items that consumers are unlikely to travel far to purchase. Defined as food and non-alcoholic drinks, tobacco, alcohol, newspapers and 90 per cent of non-durable household goods.[3]
2. **Comparison goods** – all other retail goods
3. **Core DIY goods** – goods that might be sold in a DIY store. These are defined to be
    a. Materials for repair and maintenance of the dwelling
    b. Small tools and miscellaneous accessories
    c. Major tools and equipment
    d. Gardens, plants and flowers
    e. Furniture and floor coverings (10 per cent of total sales)
    f. Non-durable household goods (10 per cent of total sales)

    There is also a category called **core DIY goods excluding gardening**.
4. **Bulky goods** – defined as
    a. DIY goods (as above)
    b. Furniture and floor coverings (remaining 90 per cent of sales)
    c. Major household appliances whether electric or not
    d. Audio-visual equipment

1.6 NHS PRESCRIPTION COSTS

Official estimates of household spending include the cost of prescription charges but not the cost of the subsidy paid by the NHS. This means that household spending on medical goods will understate the potential sales of pharmacists. To allow for this shortcoming we have estimated, based on NHS data, that spending by the NHS on prescriptions was £153 per person in 2006.

[2] In 2004 almost half of all spending in the UK by overseas tourists took place in London (International Passenger Survey)

[3] Non-durable household goods comprise cleaning materials, kitchen disposables, household hardware and appliances, kitchen gloves, cloths etc and pins, needles, tape measures and nails and bolts. We have assumed, based on FES data that 10 per cent of non-durable household goods are DIY-type goods and, therefore, are properly classified as comparison goods while the remaining 90 per cent have the characteristics of convenience goods.

APPENDIX 3B

Convenience Goods Expenditure Per Head

Babergh Household Study Area

Target Area(s):	Zone 1
Base Area(s):	Standard Geography; United Kingdom
Sorted On:	Default (Ascending)
Date:	22/05/2008

Retail Planner 2006

Consumer Retail Expenditure (Coarse)

	Target	Base	Penetration	Index
Small tools and miscellaneous accessories per Household				
Small tools and miscellaneous accessories per Household	199	128	154.927	128
Total Retail per Household	12,797	10,557	121.217	100

	Target	Base	Penetration	Index
Therapeutic appliances and equipment per Household				
Therapeutic appliances and equipment per Household	206	121	171.127	141
Total Retail per Household	12,797	10,557	121.217	100

	Target	Base	Penetration	Index
Tobacco (Retail) per Household				
Tobacco per Household	239	368	65.128	54
Total Retail per Household	12,797	10,557	121.217	100

	Target	Base	Penetration	Index
Prescription costs per Household				
Prescription costs per Household	356	356	100.000	-

Leisure per Household

	Target	Base	Penetration	Index
Total Leisure per Household				
Accommodation services per Household	355	265	133.775	128
Cultural services per Household	595	543	109.624	105
Games of chance per Household	318	379	83.939	80
Hairdressing salons & personal grooming establishments per Household	269	199	134.877	129
Recreational and sporting services per Household	398	274	145.346	139
Restaurants, cafes etc per Household	2,518	2,603	96.738	93
Total Leisure per Household	4,453	4,264	104.447	100

Total Retail per Person

	Target	Base	Penetration	Index
2006 Total Expenditure per Person (in 2006 prices)				
Total Comparison per Person	3,382	2,850	118.646	102
Total Convenience per Person	1,835	1,649	111.276	96
Total Retail per Person	5,217	4,499	115.945	100

	Target	Base	Penetration	Index
Alcohol (off trade) per Person				
Beer (off trade)	42	49	86.781	75
Spirits (off trade)	46	54	86.036	74
Wine, cider and perry (off trade)	141	102	138.468	119
Total Retail per Person	5,217	4,499	115.945	100

	Target	Base	Penetration	Index
Aplliances for personal care per Person				
Electric appliances for personal care per Person	17	17	98.750	85
Other appliances, articles & prods for personal care per Person	249	237	105.208	91
Appliances for personal care per Person	266	254	104.778	90
Total Retail per Person	5,217	4,499	115.945	100

Target	Base	Penetration	Index

Babergh Household Study Area

Target Area(s):	Zone 2
Base Area(s):	Standard Geography; United Kingdom
Sorted On:	Default (Ascending)
Date:	22/05/2008

Retail Planner 2006

Consumer Retail Expenditure (Coarse)

	Target	Base	Penetration	Index
Small tools and miscellaneous accessories per Household				
Small tools and miscellaneous accessories per Household	170	128	132.742	119
Total Retail per Household	11,798	10,557	111.759	100

	Target	Base	Penetration	Index
Therapeutic appliances and equipment per Household				
Therapeutic appliances and equipment per Household	186	121	153.796	138
Total Retail per Household	11,798	10,557	111.759	100

	Target	Base	Penetration	Index
Tobacco (Retail) per Household				
Tobacco per Household	296	368	80.542	72
Total Retail per Household	11,798	10,557	111.759	100

	Target	Base	Penetration	Index
Prescription costs per Household				
Prescription costs per Household	356	356	100.000	-

Leisure per Household

	Target	Base	Penetration	Index
Total Leisure per Household				
Accommodation services per Household	299	265	112.811	112
Cultural services per Household	593	543	109.090	109
Games of chance per Household	342	379	90.087	90
Hairdressing salons & personal grooming establishments per Household	240	199	120.484	120
Recreational and sporting services per Household	337	274	123.091	123
Restaurants, cafes etc per Household	2,467	2,603	94.764	94
Total Leisure per Household	4,277	4,264	100.316	100

Total Retail per Person

	Target	Base	Penetration	Index
2006 Total Expenditure per Person (in 2006 prices)				
Total Comparison per Person	3,295	2,850	115.601	102
Total Convenience per Person	1,800	1,649	109.134	96
Total Retail per Person	5,094	4,499	113.231	100

	Target	Base	Penetration	Index
Alcohol (off trade) per Person				
Beer (off trade)	46	49	94.553	84
Spirits (off trade)	44	54	82.889	73
Wine, cider and perry (off trade)	118	102	116.496	103
Total Retail per Person	5,094	4,499	113.231	100

	Target	Base	Penetration	Index
Aplliances for personal care per Person				
Electric appliances for personal care per Person	18	17	104.146	92
Other appliances, articles & prods for personal care per Person	257	237	108.735	96
Appliances for personal care per Person	275	254	108.429	96
Total Retail per Person	5,094	4,499	113.231	100

	Target	Base	Penetration	Index

Babergh Household Study Area

Target Area(s):	Zone 3
Base Area(s):	Standard Geography; United Kingdom
Sorted On:	Default (Ascending)
Date:	22/05/2008

Retail Planner 2006

Consumer Retail Expenditure (Coarse)

	Target	Base	Penetration	Index
Small tools and miscellaneous accessories per Household				
Small tools and miscellaneous accessories per Household	178	128	138.825	123
Total Retail per Household	11,907	10,557	112.787	100

	Target	Base	Penetration	Index
Therapeutic appliances and equipment per Household				
Therapeutic appliances and equipment per Household	183	121	151.795	135
Total Retail per Household	11,907	10,557	112.787	100

	Target	Base	Penetration	Index
Tobacco (Retail) per Household				
Tobacco per Household	279	368	75.972	67
Total Retail per Household	11,907	10,557	112.787	100

	Target	Base	Penetration	Index
Prescription costs per Household				
Prescription costs per Household	356	356	100.000	-

Leisure per Household

	Target	Base	Penetration	Index
Total Leisure per Household				
Accommodation services per Household	306	265	115.479	116
Cultural services per Household	579	543	106.536	107
Games of chance per Household	344	379	90.604	91
Hairdressing salons & personal grooming establishments per Household	240	199	120.491	121
Recreational and sporting services per Household	343	274	125.156	126
Restaurants, cafes etc per Household	2,430	2,603	93.344	94
Total Leisure per Household	4,241	4,264	99.468	100

Total Retail per Person

	Target	Base	Penetration	Index
2006 Total Expenditure per Person (in 2006 prices)				
Total Comparison per Person	3,345	2,850	117.372	102
Total Convenience per Person	1,854	1,649	112.420	97
Total Retail per Person	5,199	4,499	115.557	100

	Target	Base	Penetration	Index
Alcohol (off trade) per Person				
Beer (off trade)	46	49	93.674	81
Spirits (off trade)	46	54	86.647	75
Wine, cider and perry (off trade)	127	102	125.157	108
Total Retail per Person	5,199	4,499	115.557	100

	Target	Base	Penetration	Index
Aplliances for personal care per Person				
Electric appliances for personal care per Person	18	17	104.910	91
Other appliances, articles & prods for personal care per Person	254	237	107.127	93
Appliances for personal care per Person	271	254	106.979	93
Total Retail per Person	5,199	4,499	115.557	100

	Target	Base	Penetration	Index

Babergh Household Study Area

Target Area(s):	Zone 4
Base Area(s):	Standard Geography; United Kingdom
Sorted On:	Default (Ascending)
Date:	22/05/2008

Retail Planner 2006

Consumer Retail Expenditure (Coarse)

	Target	Base	Penetration	Index
Small tools and miscellaneous accessories per Household				
Small tools and miscellaneous accessories per Household	140	128	109.208	110
Total Retail per Household	10,477	10,557	99.240	100

	Target	Base	Penetration	Index
Therapeutic appliances and equipment per Household				
Therapeutic appliances and equipment per Household	146	121	121.090	122
Total Retail per Household	10,477	10,557	99.240	100

	Target	Base	Penetration	Index
Tobacco (Retail) per Household				
Tobacco per Household	383	368	104.305	105
Total Retail per Household	10,477	10,557	99.240	100

	Target	Base	Penetration	Index
Prescription costs per Household				
Prescription costs per Household	356	356	100.000	-

Leisure per Household

	Target	Base	Penetration	Index
Total Leisure per Household				
Accommodation services per Household	228	265	85.821	93
Cultural services per Household	560	543	103.063	111
Games of chance per Household	400	379	105.592	114
Hairdressing salons & personal grooming establishments per Household	187	199	94.067	102
Recreational and sporting services per Household	250	274	91.159	99
Restaurants, cafes etc per Household	2,321	2,603	89.154	96
Total Leisure per Household	3,946	4,264	92.539	100

Total Retail per Person

	Target	Base	Penetration	Index
2006 Total Expenditure per Person (in 2006 prices)				
Total Comparison per Person	2,896	2,850	101.603	100
Total Convenience per Person	1,674	1,649	101.537	100
Total Retail per Person	4,570	4,499	101.578	100

	Target	Base	Penetration	Index
Alcohol (off trade) per Person				
Beer (off trade)	48	49	97.654	96
Spirits (off trade)	42	54	78.232	77
Wine, cider and perry (off trade)	86	102	84.964	84
Total Retail per Person	4,570	4,499	101.578	100

	Target	Base	Penetration	Index
Aplliances for personal care per Person				
Electric appliances for personal care per Person	17	17	101.968	100
Other appliances, articles & prods for personal care per Person	236	237	99.888	98
Appliances for personal care per Person	254	254	100.027	98
Total Retail per Person	4,570	4,499	101.578	100

	Target	Base	Penetration	Index

Babergh Household Study Area

Target Area(s):	Zone 5
Base Area(s):	Standard Geography; United Kingdom
Sorted On:	Default (Ascending)
Date:	22/05/2008

Retail Planner 2006

Consumer Retail Expenditure (Coarse)

Small tools and miscellaneous accessories per Household

Small tools and miscellaneous accessories per Household	197	128	153.552	126
Total Retail per Household	12,816	10,557	121.395	100

Therapeutic appliances and equipment per Household

	Target	Base	Penetration	Index
Therapeutic appliances and equipment per Household	222	121	183.681	151
Total Retail per Household	12,816	10,557	121.395	100

Tobacco (Retail) per Household

	Target	Base	Penetration	Index
Tobacco per Household	221	368	60.064	49
Total Retail per Household	12,816	10,557	121.395	100

Prescription costs per Household

	Target	Base	Penetration	Index
Prescription costs per Household	356	356	100.000	-

Leisure per Household

Total Leisure per Household

	Target	Base	Penetration	Index
Accommodation services per Household	368	265	138.650	130
Cultural services per Household	613	543	112.873	106
Games of chance per Household	301	379	79.397	74
Hairdressing salons & personal grooming establishments per Household	289	199	144.881	136
Recreational and sporting services per Household	400	274	145.990	137
Restaurants, cafes etc per Household	2,576	2,603	98.954	93
Total Leisure per Household	4,546	4,264	106.622	100

Total Retail per Person

2006 Total Expenditure per Person (in 2006 prices)

	Target	Base	Penetration	Index
Total Comparison per Person	3,707	2,850	130.053	103
Total Convenience per Person	1,986	1,649	120.445	95
Total Retail per Person	5,693	4,499	126.532	100

Alcohol (off trade) per Person

	Target	Base	Penetration	Index
Beer (off trade)	44	49	89.714	71
Spirits (off trade)	49	54	91.913	73
Wine, cider and perry (off trade)	155	102	152.407	120
Total Retail per Person	5,693	4,499	126.532	100

Aplliances for personal care per Person

	Target	Base	Penetration	Index
Electric appliances for personal care per Person	18	17	108.516	86
Other appliances, articles & prods for personal care per Person	277	237	117.160	93
Appliances for personal care per Person	296	254	116.584	92
Total Retail per Person	5,693	4,499	126.532	100

	Target	Base	Penetration	Index

Babergh Household Study Area

Target Area(s):	Zone 6
Base Area(s):	Standard Geography; United Kingdom
Sorted On:	Default (Ascending)
Date:	22/05/2008

Retail Planner 2006

Consumer Retail Expenditure (Coarse)

Small tools and miscellaneous accessories per Household				
Small tools and miscellaneous accessories per Household	179	128	139.401	123
Total Retail per Household	12,003	10,557	113.697	100

	Target	**Base**	**Penetration**	**Index**
Therapeutic appliances and equipment per Household				
Therapeutic appliances and equipment per Household	192	121	159.527	140
Total Retail per Household	12,003	10,557	113.697	100

	Target	**Base**	**Penetration**	**Index**
Tobacco (Retail) per Household				
Tobacco per Household	274	368	74.677	66
Total Retail per Household	12,003	10,557	113.697	100

	Target	**Base**	**Penetration**	**Index**
Prescription costs per Household				
Prescription costs per Household	356	356	100.000	-
Leisure per Household				

	Target	**Base**	**Penetration**	**Index**
Total Leisure per Household				
Accommodation services per Household	312	265	117.795	116
Cultural services per Household	599	543	110.310	108
Games of chance per Household	335	379	88.446	87
Hairdressing salons & personal grooming establishments per Household	250	199	125.352	123
Recreational and sporting services per Household	348	274	127.131	125
Restaurants, cafes etc per Household	2,503	2,603	96.157	94
Total Leisure per Household	4,348	4,264	101.973	100
Total Retail per Person				

	Target	**Base**	**Penetration**	**Index**
2006 Total Expenditure per Person (in 2006 prices)				
Total Comparison per Person	3,320	2,850	116.489	102
Total Convenience per Person	1,794	1,649	108.817	96
Total Retail per Person	5,114	4,499	113.677	100

	Target	**Base**	**Penetration**	**Index**
Alcohol (off trade) per Person				
Beer (off trade)	45	49	92.142	81
Spirits (off trade)	45	54	83.213	73
Wine, cider and perry (off trade)	123	102	121.429	107
Total Retail per Person	5,114	4,499	113.677	100

	Target	**Base**	**Penetration**	**Index**
Aplliances for personal care per Person				
Electric appliances for personal care per Person	17	17	103.301	91
Other appliances, articles & prods for personal care per Person	257	237	108.587	96
Appliances for personal care per Person	275	254	108.234	95
Total Retail per Person	5,114	4,499	113.677	100

	Target	**Base**	**Penetration**	**Index**

Babergh Household Study Area

Target Area(s):	Zone 7
Base Area(s):	Standard Geography; United Kingdom
Sorted On:	Default (Ascending)
Date:	22/05/2008

Retail Planner 2006

Consumer Retail Expenditure (Coarse)

Small tools and miscellaneous accessories per Household

Small tools and miscellaneous accessories per Household	186	128	144.976	122
Total Retail per Household	12,537	10,557	118.752	100

	Target	Base	Penetration	Index
Therapeutic appliances and equipment per Household				
Therapeutic appliances and equipment per Household	219	121	181.610	153
Total Retail per Household	12,537	10,557	118.752	100

	Target	Base	Penetration	Index
Tobacco (Retail) per Household				
Tobacco per Household	245	368	66.742	56
Total Retail per Household	12,537	10,557	118.752	100

	Target	Base	Penetration	Index
Prescription costs per Household				
Prescription costs per Household	356	356	100.000	-

Leisure per Household

	Target	Base	Penetration	Index
Total Leisure per Household				
Accommodation services per Household	344	265	129.845	123
Cultural services per Household	620	543	114.101	108
Games of chance per Household	306	379	80.666	76
Hairdressing salons & personal grooming establishments per Household	284	199	142.396	135
Recreational and sporting services per Household	382	274	139.716	132
Restaurants, cafes etc per Household	2,565	2,603	98.544	93
Total Leisure per Household	4,502	4,264	105.575	100

Total Retail per Person

	Target	Base	Penetration	Index
2006 Total Expenditure per Person (in 2006 prices)				
Total Comparison per Person	3,417	2,850	119.872	103
Total Convenience per Person	1,819	1,649	110.307	95
Total Retail per Person	5,235	4,499	116.366	100

	Target	Base	Penetration	Index
Alcohol (off trade) per Person				
Beer (off trade)	43	49	88.203	76
Spirits (off trade)	45	54	83.601	72
Wine, cider and perry (off trade)	134	102	131.372	113
Total Retail per Person	5,235	4,499	116.366	100

	Target	Base	Penetration	Index
Aplliances for personal care per Person				
Electric appliances for personal care per Person	18	17	104.539	90
Other appliances, articles & prods for personal care per Person	261	237	110.191	95
Appliances for personal care per Person	279	254	109.814	94
Total Retail per Person	5,235	4,499	116.366	100

	Target	Base	Penetration	Index

Babergh Household Study Area

Target Area(s):	Zone 8
Base Area(s):	Standard Geography; United Kingdom
Sorted On:	Default (Ascending)
Date:	22/05/2008

Retail Planner 2006

Consumer Retail Expenditure (Coarse)

	Target	Base	Penetration	Index
Small tools and miscellaneous accessories per Household				
Small tools and miscellaneous accessories per Household	188	128	146.257	124
Total Retail per Household	12,468	10,557	118.104	100

	Target	Base	Penetration	Index
Therapeutic appliances and equipment per Household				
Therapeutic appliances and equipment per Household	208	121	172.480	146
Total Retail per Household	12,468	10,557	118.104	100

	Target	Base	Penetration	Index
Tobacco (Retail) per Household				
Tobacco per Household	254	368	69.144	59
Total Retail per Household	12,468	10,557	118.104	100

	Target	Base	Penetration	Index
Prescription costs per Household				
Prescription costs per Household	356	356	100.000	-

Leisure per Household

	Target	Base	Penetration	Index
Total Leisure per Household				
Accommodation services per Household	331	265	124.808	118
Cultural services per Household	621	543	114.351	108
Games of chance per Household	311	379	82.008	77
Hairdressing salons & personal grooming establishments per Household	272	199	136.446	129
Recreational and sporting services per Household	373	274	136.390	129
Restaurants, cafes etc per Household	2,606	2,603	100.108	95
Total Leisure per Household	4,514	4,264	105.876	100

Total Retail per Person

	Target	Base	Penetration	Index
2006 Total Expenditure per Person (in 2006 prices)				
Total Comparison per Person	3,199	2,850	112.237	103
Total Convenience per Person	1,698	1,649	102.949	95
Total Retail per Person	4,897	4,499	108.833	100

	Target	Base	Penetration	Index
Alcohol (off trade) per Person				
Beer (off trade)	43	49	87.364	80
Spirits (off trade)	42	54	77.844	72
Wine, cider and perry (off trade)	120	102	117.909	108
Total Retail per Person	4,897	4,499	108.833	100

	Target	Base	Penetration	Index
Aplliances for personal care per Person				
Electric appliances for personal care per Person	17	17	99.196	91
Other appliances, articles & prods for personal care per Person	249	237	105.167	97
Appliances for personal care per Person	266	254	104.769	96
Total Retail per Person	4,897	4,499	108.833	100

	Target	Base	Penetration	Index

APPENDIX 3C

Expenditure Forecasts (Extract)

3. Projections and forecasts

3.1 CONCEPTS

Future spending levels will have a critical bearing on the need for retail space. Consequently, stakeholders in the planning process, such as the local authority, retailers, consultants and surveyors, need to understand how spending on goods and services will change.

Traditionally, planners have used a mixture of methods to forecast spending levels. There is no one correct method for the different considerations of each planning application. But experts must decide which is best suited to the particular circumstance.

Retail Planner presents the two principal methods of looking at trends in spending on retail and leisure goods:

1. **Projections** – estimates based on the extrapolation of past trends, with alternative projections estimated over different time periods (say 5, 10, 20 and 40 years).
2. **Forecasts** – estimates of future spending based on an econometric model of consumer spending. This approach also allows scenarios to be produced with different assumptions about the key macroeconomic drivers (such as interest rates).

The following sections describe the methodology used to forecast retail spending and the results achieved, though we do not make value judgments about which is best.

3.2 CHAIN LINKING

Before we can estimate past trends in convenience and comparison goods spending, we need historical time series. Traditionally this has involved aggregating ONS constant price (or inflation adjusted) estimates of spending by detailed category. This is problematic because:

"Comparisons of aggregates of volume series over time are complicated by changes in the relative prices of different goods and services and by qualitative changes in the goods and services themselves. As time passes some goods escalate in price more rapidly than others. Others change so much that they become, in effect, different goods and services from those produced previously under the same name."[1]

Because of these shifts, relative prices of goods and services in the base year become increasingly unrepresentative over time. As a result, changes in measured volumes will also be less reliable in periods distant from the base year. This is particularly problematic for goods or services such as audio-visual equipment that have seen sharp declines in price over time. So, valuing this spending at 2005 prices, when estimating aggregate retail spending growth rates from 1965 for example, is likely to cause distortions.

Until 2003, the ONS approach used fixed-base chain linking, whereby estimates using different price bases were spliced together every five years. In 2003, the ONS moved to annual chain-linking for its constant price aggregates. This is similar to fixed-base chain linking except that the weights change every year and growth over time is estimated by linking together year-to-year estimates. This method is in line with the recommendations of the *System for National Accounts 1993 (SNA93)*, which is incorporated into the *European System of Accounts 1995*

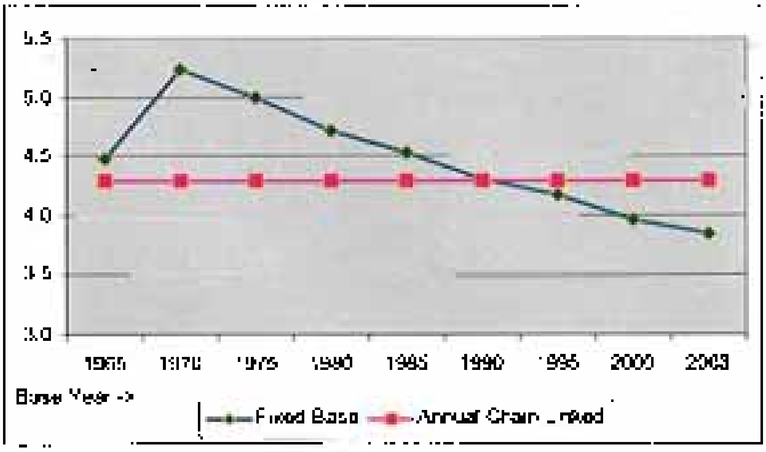
[1] National Statistics (1999) *United Kingdom National Accounts, the Blue Book*, p 25

(ESA95) and has been widely adopted internationally. The main drawback of annual chain linking is a loss of additivity – as the components of, say, comparison spending only sum to totals in the base year.

Since 2004, we have adopted the annual chain-linking methodology. This brings an additional advantage in increasing the stability of retail spending growth, particularly for comparison goods where changes in relative prices are most pronounced. This is largely because the volume of spending on audio-visual equipment has been rising particularly rapidly in recent years, accompanied by sharp falls in price. So comparison spending growth tends to fall relative to the last estimate, as audio-visual equipment has a lower weight each time the data is re-based and this revision affects all previous years. This problem disappears with annual chain-linking.

Figure 3.1 shows how the estimated ultra long-term trend (25 years to 2003 in this example) would have varied with different base years and compares it against the stability in the annual chain-linked estimate. Using 1990 prices, for example, the fixed-base method gives an estimated annual growth rate of 4.3 per cent per annum, which is similar to the annual chain-linked estimate. But the fixed-based estimate gives an estimate of 5.2 per cent per annum when estimated at 1970 prices and a rate of 3.9 per cent per annum when estimated at 2003 prices.

FIGURE 3.1: COMPARISON GOODS ULTRA LONG-TERM TREND: FIXED BASED VS. ANNUAL CHAIN LINKING



National Accounts currently use annual chain linking to 2003 and a fixed-base methodology for 2004 onwards, with volumes being presented in 2003 prices. Retail Planner has adopted a slightly different convention, with annual chain linking for every year to the latest data point and volumes in 2006 prices. We believe it is useful to have spending volumes based in the closest year possible to current prices.

The annual chain-linked data has been used to estimate past trends for the broad aggregates and for projections. Forecasts have been prepared at a more detailed level and aggregated up to the broad totals using annual chain linking. Note the lack of additivity means spending on retail goods no longer equals the sum of convenience and comparison spend except in the base year, although the discrepancies tend to be small.

3.3 PROJECTIONS

We have estimated trends in spending per head on retail goods using the following equation

$$\Delta \ln(Spend_t) = \beta + u_t$$

where:

$\Delta \ln(Spend_t)$ is the annual change in the log of spending per head.

β is the estimated annual growth rate.

This method has been used to estimate trends over the following time periods:

1. **1967-2006 – ultra long-term trend**
2. **1977-2006 – long-term trend**
3. **1987-2006 – medium-term trend**

Tables 3.1 and 3.2 show projections and forecasts of future spending volume growth by broad retail headings.

Results summary:

- Projections for future spending based on the medium-term (20-year) trend show the highest rates, reflecting the surge in retail expenditure during the 1980s and 1990s.
- Total retail spending growth over the next ten years is projected to be between 2.5 per cent (EBS, consensus) and 3.9 per cent per person a year (medium-term trend).
- Spending on comparison goods over the next ten years is projected to grow by between 3.5 per cent (EBS, consensus) and 6.0 per cent per cent, with projections of convenience spending growth of between 0.6 and 1.0 per cent.

TABLE 3.1

FORECASTS & PROJECTIONS OF UK SPENDING PER HEAD VOLUMES 2007-2011 (2006 PRICES)

	EBS forecast	Consensus forecast	Ultra long-term trend	Long-term trend	Medium-term trend
Convenience	0.7	0.6	0.6	0.8	1.0
Comparison	3.8	3.6	4.8	5.3	6.0
Total retail	2.6	2.5	2.9	3.3	3.9
Core DIY	2.4	2.2	3.0	3.5	3.0
Core DIY excluding gardening	2.5	2.3	2.9	3.6	2.7
Bulky goods	4.0	3.8	5.6	6.0	6.6
Non-bulky goods*	3.7	3.6	4.4	5.0	5.7
Leisure services	1.2	1.0	2.4	1.8	1.9
Total consumer spending	1.9	1.8	2.4	2.6	2.7

TABLE 3.2

FORECASTS & PROJECTIONS OF UK SPENDING PER HEAD VOLUMES 2007-2016 (2006 PRICES)

	EBS forecast	Consensus forecast	Ultra long-term trend	Long-term trend	Medium-term trend
Convenience	0.8	0.8	0.6	0.8	1.0
Comparison	3.5	3.5	4.8	5.3	6.0
Total retail	2.5	2.5	2.9	3.3	3.9
Core DIY	2.3	2.3	3.0	3.5	3.0
Core DIY excluding gardening	2.5	2.5	2.9	3.6	2.7
Bulky goods	3.5	3.5	5.6	6.0	6.6
Non-bulky goods*	3.4	3.4	4.4	5.0	5.7
Leisure services	1.1	1.1	2.4	1.8	1.9
Total consumer spending	1.8	1.8	2.4	2.6	2.7

* comparison goods only

3.4 FORECASTS

3.4.1 Experian Business Strategies

The forecasts presented in this paper are from Experian Business Strategies' model of disaggregated consumer spending. This uses our UK macroeconomic forecast variables (chiefly consumer spending, incomes and inflation) as an input and projects forward using assumptions about income and price elasticities. The shares of the individual components of consumer spending, not just the levels, will be sensitive to the UK outlook. Growth forecasts are also sensitive to the position of the base year in the economic cycle. If this is near to a cyclical peak, future growth will generally be lower than when close to a trough.

3.4.2 Consensus forecasts

Consensus views for GDP growth are taken from the Treasury (*Forecasts for the UK Economy, September 2007*) and also from Medium-Term Fiscal Projections in the 2007 *Budget Report*. Forecasts for household spending for 2007-08 are also from the Treasury. Differences between household spending and GDP growth after 2009 are taken from Consensus Economics (October 2007). We have not used their household spending or GDP forecasts, as they can be erratic due to the small sample.

Results summary:

- Experian Business Strategies' forecasts for total household spending over the next 5-10 years have moved close to the consensus, with growth at 1.6 per cent a year over the next decade.
- Forecasts for total retail and comparison goods spending growth are less buoyant than trend-based projections. This reflects a view among economists that the growth in spending will slow. Household savings rates are already very low and household indebtedness is at an all-time high - regarded as unsustainable in the long term
- The trend-based projections are little changed from the last report, aside from some downward revisions to DIY spending.
- Spend per head volumes grew by 0.9, 4.9 and 3.5 per cent for convenience, comparison and total retail last year. The current forecasts for 2007 are for a pick up in convenience good growth to 1.9 per cent, but for comparison demand to slow to 4.6 per cent with total retail growing at 3.6 per cent
- Note that the growth rates given are in volume terms. Trends in relative prices vary considerably between different categories of goods and services, so the volumes figures are not necessarily a guide to value trends. Annex 1 gives our view of future trends in values, volumes and prices.

TABLE 3.3
FORECAST VOLUME GROWTH FOR THE COARSE CATEGORIES (2006 PRICES)[1]

	2007-2011	2007-2016
Food and non-alcoholic beverages	1.1	1.2
Tobacco	-4.2	-3.5
Alcohol (off trade)	2.7	2.3
Newspapers and periodicals	-3.3	2.6
Clothing materials & garments	4.0	4.2
Shoes and other footwear	2.9	2.4
Materials for maintenance & repair of the dwelling	1.7	1.5
Furniture and furnishings; carpets & other floor coverings	1.9	2.0
Household textiles	4.7	4.4
Major household appliances whether electric or not	2.6	2.6
Small electric household appliances	-0.4	-0.1
Tools and miscellaneous accessories	4.0	4.4
Glassware, tableware and household utensils	3.2	3.3
Non-durable household goods	1.6	2.0
Medical goods & other pharmaceutical products	2.8	2.6
Therapeutic appliances and equipment	1.4	1.1
Bicycles	3.5	3.9
Recording media	3.0	3.3
Games, toys & hobbies; sport & camping equipment; musical instruments	5.1	4.6
Gardens, plants and flowers	1.5	1.0
Pets and related products	[illegible]	1.5
Books & stationery	1.5	2.0
Audio-visual, photographic & info processing equipment	8.6	6.0
Appliances for personal care	2.8	2.8
Jewellery, clocks and watches	0.3	0.3
Other personal effects	3.7	3.5
Total Convenience	0.7	0.8
Total Comparison	3.8	3.5
Total Retail	2.6	2.5
Other Aggregations		
Core DIY Goods	2.4	2.3
Core DIY Goods and Gardening	2.5	2.5
Bulky Goods (Comparison)	4.0	3.5
Non-Bulky Goods (Comparison)	3.7	3.4
Leisure	1.2	[illegible]

[1] Experian Business Strategies Forecasts, September 2007

APPENDIX 3D

Forecasts by Special Forms of Trading (Extract)

5. Non-store retail sales (special forms of trading)

The ONS/ABI definition of non-store retail sales fails to cover the full market, as it does not include the internet sales (e-tailing) of stores with a physical presence. This has been the subject of an earlier briefing paper[3]. Table 5.1, below, gives an update of this based on more recent data from ONS and IMRG.

Table 5.1
ESTIMATED AND PROJECTED MARKET SHARE OF NON-STORE RETAIL SALES

	ONS Definition of Non-store Retail Sales excluding E-tailing			E-tailing			Broad Definition of Non-Store Retail sales		
	Convenience	Comparison	Total	Convenience	Comparison	Total	Convenience	Comparison	Total
2004	0.8	4.0	2.9	1.6	3.1	2.6	2.5	7.1	5.5
2005	0.5	3.5	2.4	2.2	4.5	3.6	2.7	8.0	6.1
2006	0.5	3.2	2.2	3.0	5.6	4.7	3.6	8.8	6.9
2007	0.5	2.8	2.0	4.3	8.7	6.8	4.8	11.0	8.8
2008	0.5	2.0	1.8	5.0	9.5	7.9	5.6	12.1	9.7
2009	0.5	2.3	1.7	5.6	10.7	8.8	6.1	13.0	10.5
2010	0.5	2.1	1.5	6.1	11.8	9.6	6.6	13.6	11.1
2011	0.5	1.9	1.4	6.5	12.2	10.2	7.0	14.1	11.6
2012	0.5	1.7	1.3	6.7	12.7	10.6	7.2	14.3	11.8
2013	0.5	1.5	1.1	6.8	12.9	10.7	7.3	14.4	11.9
2014	0.5	1.5	1.1	6.8	12.8	10.7	7.3	14.4	11.9
2015	0.5	1.5	1.2	6.8	12.9	10.8	7.3	14.4	11.8
2016	0.5	1.5	1.2	6.8	12.9	10.8	7.3	14.4	11.9

Sources: National Statistics, Experian

The current estimates are based on the ONS e-commerce Survey of Business, updated using data from the monthly Interactive Media Research Group (IMRG) survey. The projections are based on work done by Forrester Research on behalf of IMRG.

Important points to note are:

- An internet sale does not necessarily imply that items have not passed through a retail outlet. Some supermarkets source internet goods from store space. This means that the 3.0 per cent share of e-tailing in convenience sales in 2006 may be an over-estimate.
- There is a high degree of uncertainty in projecting the uptake of new technology. Much speculation about e-commerce could be exaggerated, with the recent acceleration a one-off surge due to broadband.
- A plausible "low case" from the broad market share of all Non-Store Retail sales in 2016 (i.e. including e-tailing) would be around 6, 13 and 10 per cent for convenience, comparison and total spending respectively.

[3] Retail Planner Briefing Note 2.30 "Estimates & Projections of the Share of E-tailing in UK Retail Spending" December 2005

APPENDIX 3E

Changing Store Productivities (Extract)

8. Changes in the efficiency of retail floor space

8.1 ESTIMATING SALES DENSITY

Experian Business Strategies has recently completed a research project for the British Council of Shopping Centres, which re-assessed retail efficiency estimates and projections.[11]

This new work includes a number of additions and, most importantly, it gives more coverage to two neglected areas: [12]

- changes in net-to-gross space ratios
- comparison sales in convenience stores

8.2 RETAIL SPACE AND SALES DENSITY

The total volume of sales that can be delivered by a given floorspace – the sales density – is a variable in any planning inquiry. Projections of sales density will profoundly influence how much of any increase in in-store retail sales can be accommodated from existing space without new building.

Sales density can change for many reasons, including:

- Improvements in the efficiency of existing processes or technology, for example, a more effective till arrangement to reduce peak-time queues
- The replacement of older capacity with newer, more efficient space
- Changes in opening hours (such as Sunday trading), potentially increasing the amount of sales made from the same floorspace in a given time
- Shifts in the mix of goods offered towards smaller or higher value items, such as a move from furniture to electronic equipment
- Planning restrictions limiting the amount of new space, forcing densities higher as sales increase from existing capacity
- Retailers squeezing more selling space out of a building, for example by cutting down on storage, increasing gross, but not net density

Sales densities also tend to move with the economic cycle. In sales booms, they tend to rise as people buy more, only to decline again in the subsequent slowdown. Although they do have an impact on sales density, such cyclical fluctuations in demand are temporary and need to be carefully isolated from the underlying trend in any long-term analysis.

Generally, more successful centres or stores in the UK will see high and rising densities, while those in decline experience the opposite. But this does not mean that high densities are good for profitability, as retailers face different cost structures in different places. It is entirely possible, for example, that a retailer could meet stronger demand and make more profit from a lower sales density, provided the space enabled the more efficient use of labour or logistics, or was in a location where rents and overheads were lower.

[11] Previous estimates and projections for the changes in the efficiency of retail floorspace were presented in Retail Planner Briefing Note 2.2 (April 2005)
[12] See http://www.bcsc.org.uk/publication.asp?pub_id=221 for a summary of the BCSC work.

8.3 MEASURING SALES DENSITIES

Sales density is typically measured as either:

- Sales relative to the total floorspace (gross) – as used in official statistics and planning requirements. This is sales relative to the actual area covered by the buildings.
- Sales relative to the net sales area (shopping space) only, as quoted by retailers. This excludes storage space, offices and toilets, but includes display areas.

An investigation of trends in sales densities is hampered by a lack of quantitative information. Estimation of sale density requires a space measure. At present, UK retail floorspace estimates are derived from two sources:

- The Valuation Office Agency (VOA), which is part of HM Customs and Revenues and publishes a measure of retail space close to the property industry's gross definition
- Larger retailers provide net density estimates, although definitions are not standardised.

The VOA data is potentially most valuable, although it has limitations:

- These figures are defined as net space, but exclude only non-useable areas – such as staircases, but not storage – and so are actually closer to a total or gross floorspace.
- VOA totals vary between an all-retail and A1 space definition, depending on the year. Neither is precise and there are large jumps in the data, notably in 1998 and 2005.
- The data only covers England and Wales.
- There is no breakdown into comparison and convenience stores, or between comparison and convenience goods space.[11]

VOA numbers only indicate gross retail space (i.e. the total space occupied by the buildings), with no details on the split for different goods, or of how net capacity has changed. To provide a fuller breakdown, a combination of industry benchmarks and consultation was used to split the total into convenience and comparison, into in-town and out-of-town and to identify net, or actual shopping space, as well as the total space occupied by the buildings.

Experian's new methodology uses expert estimates to inform a view on the key unknowns:

- Gross floorspace split in-town, out-of-town, modern, old, convenience and comparison
- Net-to-gross ratios
- Proportions of convenience store space used for selling comparison goods
- Detailed sales densities in 2006 and growth rates between the benchmark years

These estimates are combined to estimate figures that can be compared with official data. For example, does net comparison floorspace multiplied by its sales density, summed across all types of comparison space (including space in convenience stores) give total in-store comparison goods sales? Afterwards, if there is any mismatch, this process is repeated until estimates are within £½ million of the figures

The results are not data in the strict sense, but an educated guess consistent with the available evidence. There is little alternative to the iterative process used for the final figures and, given the uncertainty, some experts may reasonably question the estimates. But they provide the most satisfactory combination of the official data and expert opinion available.

The detailed calculations are given below, with data in bold type.[12] All other numbers are derived using assumptions in italics. Note spending and density figures are expressed in constant (2006) prices. This means that historical sales densities will be different from current price figures, except in the base year. Constant prices measures are necessary to gauge the relationship between sales and space required.

[11] It is important for this kind of analysis to distinguish between comparison and convenience goods (as defined earlier in this report) and convenience and comparison stores. Convenience or comparison stores can and do sell a mix of both convenience and comparison goods and an increasing share of convenience stores' sales has been coming from comparison goods.

[12] That is total gross space estimates (Valuation Office Agency definition) and constant price spending

FIGURE 5.1: ESTIMATED FLOORSPACE, SALES AND SALES DENSITIES 1986-2006

			1986	1999	2005	1987-99	2000-05	1987-05
						Growth rates (%p.a.)		
1 Total (England & Wales) A1 Retail			57,827	72,408	77,438	1.7	1.1	1.5
2	*Proportion in town*		0.85	0.80	0.75			
3	*Proportion out-of-town*		0.15	0.20	0.25			
4	In-town		49,153	57926	58,079	1.3	0.0	0.9
5	Out-of-town		8,674	14,482	19,360	4.0	5.0	4.3
6 Allowance for Gross-VO definition discrepancy			1.025	1.025	1.025			
7	Convenience Store Share							
8	*In-town*		0.30	0.25	0.25			
9	*Out of town*		0.55	0.41	0.34			
Convenience Stores								
Stock of Space (VO definition)								
10	**In-town**		14746	14539	14520	0.1	0.0	-0.1
11	*Proportion modern*		0.50	0.55	0.60			
12	Modern space		7373	7907	8712	0.6	1.4	0.9
13	Old space		7373	6543	5808	0.9	-2.0	-1.2
14	**Out-of-town**		4771	5937	6582	1.7	1.7	1.7
15	*Proportion modern*		1.00	1.00	1.00			
16	Modern space		4771	5937	6557	1.7	1.7	1.7
17	Old space		0	0	0			
18	Total		19517	20477	21102	0.4	0.5	0.4
19	Proportion of all retail		0.34	0.28	0.27			
Net-to-Gross ratios								
20	In-town	modern	0.64	0.67	0.70			
21		old	0.60	0.60	0.60			
22	Out of town	modern	0.64	0.67	0.70			
23		old	0.60	0.60	0.60			
24	All modern		0.64	0.67	0.70			
Stock of Space (net)								
25	In-town	modern	4837	5402	6251	1.0	2.2	1.4
26		old	4534	4024	3572	-0.9	-2.0	-1.2
27	Out-of-town	modern	3133	4078	4723	2.1	2.5	2.2
28		old	0	0	0			
29	Total		12501	13503	14545	0.6	1.1	0.8

8. 1 continued

			1986	1999	2005	1987-99	2000-05	1987-05
Proportion of Convenience Store Sales Area Devoted to Comparison Goods								
30	In-town	modern	0.05	0.10	0.20			
31		old	0.00	0.05	0.10			
32	Out-of-town	modern	0.10	0.20	0.30			
33		old	0.00	0.00	0.00			
34	Total		0.04	0.12	0.21			
Stock of Convenience Space (net) in Convenience Stores								
35	In-town	modern	4595	4943	5001	0.6	0.2	0.4
36		old	4534	3823	3213	-1.3	-2.0	-1.8
37	Out-of-town	modern	2817	3262	3306	1.1	0.2	0.8
38		old	0	0	0			
39	Total		11946	12027	11521	0.1	-0.7	-0.2
Sales Densities for Convenience Space in Convenience Stores (net)								
40	In-town	modern	6329	7148	7724	0.9	1.3	1.1
41		old	2959	3063	3099	0.2	0.2	0.2
42	Out-of-town	modern	8480	9587	10299	0.9	1.2	1.0
43		old	2971	3356	3605	0.9	1.2	1.0
44	Total		5659	6508	7170	1.2	1.6	1.3
Convenience Spending - Total								
45	Spending (constant prices, UK)		76974	90814	98761	1.3	1.4	1.3
46	E&W share of UK		0.891	0.893	0.890			
47	Spending (KP, E&W)		68584	81097	87897	1.3	1.4	1.3
48	Share of non store share		0.009	0.009	0.027			
49	Sales of convenience goods		67967	80367	85524	1.3	1.0	1.2
50	Convenience goods space (net)		11946	12027	11521	0.1	-0.7	-0.2
Aggregate Convenience Goods Sales Densities (net)								
51			5643	6509	7170	1.2	1.6	1.4

Comparison Stores

		1986	1999	2005	1987-99	2000-05	1987-05
Stock of Space (VO definition)							
52	In-town	34407	43387	43559	1.8	0.1	1.2
53	Proportion modern	0.35	0.38	0.40			
54	Modern space	12042	16487	17424	2.4	0.9	2.0
55	Old space	22365	26900	26135	1.4	-0.5	0.8
56	Out-of-town	3903	8544	12777	6.2	6.9	6.4
57	Proportion modern	1.00	0.95	0.90			
58	Modern space	3903	8117	11500	5.8	6.0	5.9
59	Old space	0	427	1278			
60	Total	38310	51931	56336	2.4	1.4	2.1
61	Proportion of all retail	0.66	0.72	0.73			

5.1 continued

			1986	1999	2005	1987-99	2000-05	1987-05
Net-to-Gross Ratios								
62	*In-town*	*modern*	0.59	0.65	0.70			
63		*old*	0.55	0.59	0.58			
64	*Out-of-town*	*modern*	0.65	0.70	0.80			
65		*old*	0.60	0.70	0.70			
66	All modern		0.60	0.67	0.74			
Stock of Space in Comparison Stores(net)								
67	In-town	modern	7283	10984	1250'	3.2	2.2	2.9
68		old	12608	15092	15537	1.8	-0.5	1.1
69	Out-of-town	modern	2601	5024	9400	6.1	8.4	7.0
70		old	0	307	917			
71	Total		22491	33107	38385	3.0	2.5	2.9
Comparison Space in Convenience Stores (net)								
72	In-town	modern	242	549	1250			
73		old	0	201	357			
74	Out-of-town	modern	313	816	1417			
75		old	0	0	0			
76	Total		555	1566	3024	8.3	1'.6	9.3
77 **Total Comparison Space**			23046	34673	41409	3.2	3.0	3.1
Sales Densities for Comparison Stores (net)								
78	*In-town*	*modern*	2644	3645	4585	2.5	3.9	2.9
79		*old*	1616	2228	2802	2.5	3.9	3.1
80	*Out-of-town*	*modern*	1469	2025	2548	2.5	3.9	3.1
81		*old*	735	1013	1274	2.5	3.9	3.1
82	Total		1932	2651	3264	2.5	3.6	2.8
Sales Densities for Comparison Goods in Convenience Stores (net)								
83	*In-town*	*modern*	2938	4050	5095	2.5	3.9	2.9
84		*old*	2057	2835	3567	2.5	3.9	3.1
85	*Out-of-town*	*modern*	2938	4050	5095	2.5	3.9	3.1
86		*old*	2057	2835	3567	2.5	3.9	3.1
87	Total		2938	3594	4915	2.2	4.0	2.7
Comparison Spending - Total								
88	**Spending (KP, UK)**		**51113**	**105880**	**184077**			
89	*E&W share of UK*		*0.891*	*0.893*	*0.85*			
90	Spending (KP, E&W)		45547	94559	147809	5.8	7.7	6.4
91	*Non-store share*		*0.026*	*0.026*	*0.080*			
92	Sales of comparison Goods		44357	92101	135984	5.8	6.7	6.1
93	- from convenience stores		1630	6098	14863	10.7	16.0	17.3
94	- from comparison stores		42727	86003	121121	5.5	5.9	5.6
Aggregate Comparison Goods Sales Densities (net)								
95			1956	2707	3403	2.5	3.9	2.9

8.1 continued

		1986	1999	2005	1987-99	2000-05	1987-05
Summary (net)							
96	Convenience spending	67967	90367	85524	1.3	1.0	1.2
97	Convenience goods space	11940	12027	11521	0.1	-0.7	-0.2
98	Convenience goods sales densities	5690	6862	7423	1.2	1.3	1.4
99	Comparison spending	44357	82101	135984	5.8	6.7	6.1
100	Comparison goods space	23046	34673	41409	3.2	3.0	3.1
101	Comparison sales densities	1925	2366	3284	2.5	3.6	2.9
102	Total spending	112324	172468	221508	3.4	4.3	3.6
103	Total space	34992	46700	52931	2.2	2.1	2.2
104	Total sales densities	3210	3693	4185	1.1	2.1	1.4
Summary Gross (all space)							
105	Total space	57,827	72,408	77,438	1.7	1.1	1.5
106	Total spending	112324	172468	221508	3.4	4.3	3.6
107	Total sales densities	1942	2382	2860	1.6	3.1	2.1

Units: Floorspace is in thousands of square metres, densities are £ per square metre and spending is £m at constant (2005) prices.
Source: Experian. Spending data are in constant (2005) prices. Estimates may not sum exactly.

The relationship between the rows

Rows 1-9 – show the breakdown of total gross space (VOA basis) into in-town and out-of-town and the assumed shares of convenience and comparison stores. The estimates show a continuing rise in total out-of-town share and a downward drift in the convenience share out of town.

Rows 10-19 – show the breakdown of convenience store space into 'modern' and 'old' space. Modern space can be newly built or created by the refurbishment of old space. So:
Row 10 = Row 4 x Row 8 Row 12 = Row 10 x Row 11 Row 13 = Row 10 - Row 12

Rows 20-29 – show the conversion of convenience store gross space into net space. This involves multiplying VOA basis space by a VOA discrepancy[13] and by the net-gross ratio. Thus: Row 25 = Row 11 x Row 6 x Row 20.

Estimates show although gross convenience space increased by 0.4 per cent a year between 1987 and 2005, net space increased twice as fast, as a result of increases in the net-gross ratio.

Rows 30-39 – show the proportions of convenience store net floorspace devoted to the sale of comparison goods. It is estimated that this was 21 per cent for all space and 30 per cent for modern out-of-town space. The relationship between the rows, for example, is:
Row 35 = Row 25 x (1 – Row 30)

Estimates imply only a small increase in net convenience floorspace in convenience stores between 1987 and 1999 and a decline after 2000. Note estimates were put together with consistency to the data in mind and informed by net sales densities published by the major supermarket chains[14] (allowing for the increased share of comparison goods and performance more applicable to modern than old space).

Rows 40-51 – reconcile net floorspace, net sales densities and spending on convenience goods.

Row 44 is the weighted average of Rows 40-43 and Row 49 approximately equals Row 39 multiplied by Row 44 (divided by a thousand to correct the units). The answer is approximate because of the iterative process.

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[13] The VOA measure is closest to the property industry definition, but still excludes gross space such as stairwells.
[14] These average under 1 per cent a year between 1987 and 1999 and under 1½ per cent between 2000 and 2005.

Convenience goods densities increased at an average rate of 1.2 per cent a year between 1987 and 2000, but each of the individual components (Rows 40-43) increased more slowly. The reason for the discrepancy is the move from relatively-low-sales-density old space to relatively-high-sales-density modern space. A similar change is observed between 2000 and 2005.

Rows 52-61 – show the breakdown of comparison store space into 'modern' and 'old'. Thus. Row 52 = Row 4 x (1 - Row 8) Row 54 = Row 52 x Row 53 Row 55 = Row 52 – Row 54

Rows 62-71 – show the conversion of comparison store gross space into net space by multiplying estimated VOA space by VOA discrepancy and by the net-gross ratio. For example: Row 67 = Row 53 x Row 6 x Row 30

Estimates show average annual increases in net comparison store space of 3.0 per cent between 1987 and 1999, and 2.5 per cent from 2000 to 2005, comfortably outstripping the growth in gross comparison store space (at 2.4 and 1.4 per cent). As with convenience store space, this is due to increases in the net-gross ratio for comparison stores.

Rows 72-77 – show the estimated amount of comparison goods space in convenience stores and the implied total amount of comparison goods space. This is derived from Rows 25-28 multiplied by Rows 30-33.

We estimate that the amount of comparison goods space in convenience stores has been growing quite rapidly. So the total amount of comparison goods space (comparison store space plus comparison space in convenience stores) has been growing even faster (at 3.2 per cent and 3 per cent in 19987-99 and 2000-05, or Row 77 compared with Row 71).

Rows 78-92 – attempt to reconcile disaggregated estimated increases in sales densities (Rows 78-87) with estimate net floorspace (Rows 67-77) and estimated spending (Rows 88-92) for comparison goods. Thus: Row 71 x Row 82 + Row 76 x 87 = Row 92

Where the relationship is close, but not exact, it is because of the iterative process. Estimates show sales and net space are consistent with densities for each type of comparison good space, increasing at average annual rates of 2.5 for 1987-1999 and 3.9 per cent in 2000-2005.

Rows 93-94 – show the derived estimates of sales and sales gross of comparison goods from convenience and comparison stores separately. Note that the new estimate for 1987-99 is less than the 3.1 per cent a year previously published by Experian.[17] The main reason for this is that the new sales density estimates are net rather than gross. More recent data on the impact of non-store retail sales also made a contribution.

Row 95 – shows sales density for all comparison goods space from Row 92 and Row 77.

Rows 89-107 – show a set of summary comparisons.

Our adjusted version of this series provides the most consistent estimate of recent trends in retail space available summarised below (see Figure 8.2). This shows growth in available retail space averaging 1.5 per cent a year between 1987 and 2005, though slowing in the recent past.

[17] Retail Planner Briefing Note 2.2, Table 1, April 2005.

FIGURE 8.2: FLOORSPACE, SALES AND SALES DENSITY GROWTH (ENGLAND & WALES)
(average annual growth, sales in constant prices)

	1987-1999	2000-2005	1987-2005
Floorspace (% p.a.)			
Total (gross)	*1.7*	*1.1*	*1.5*
Total (net)	2.2	2.1	2.2
Convenience (net)[1]	0.1	-0.7	-0.2
Comparison (net)[2]	3.2	3.0	3.1
Sales (% p.a.)[3]			
Convenience	1.3	1.0	1.2
Comparison	5.8	6.7	6.1
Sales Densities (% p.a.)			
Total (gross)	*1.6*	*3.1*	*2.1*
Total (net)	1.1	2.1	1.4
Convenience (net)[1]	1.2	1.6	1.3
Comparison (net)[2]	2.5	3.6	2.9

[1] excludes comparison space in convenience stores, volumes

[2] includes comparison space in convenience stores, volumes

[3] Based on official estimates of sales growth less non-store retail sales estimates described in the previous section

Our estimates highlight a number of interesting trends since the late 1980s:

- **Comparison goods sales densities have shown exceptional growth** in the recent past. Comparison goods sales space increased at an average annual rate of 3.0 per cent between 2000 and 2005 (including for comparison goods sales in convenience stores). But sales volumes rose at an annual rate of almost 7 per cent over the same period, implying that net sales density has risen by 3.6 per cent a year to accommodate this (after rounding). This average was actually dragged down by an increase in the share of floor space taken by, lower density, out-of-town stores. Allowing for this the underlying growth rates were actually 3.9 per cent per annum. Retailers are therefore using new and existing space more efficiently to make more sales. For the earlier period, 1987-1999, both the underlying and actual growth rates were 2.5 per cent per annum.
- **Convenience goods sales density growth** has been considerably slower than comparison. In the case of convenience goods, however, the change in the space mix towards larger more efficient stores has pushed up the observed total increase relative to the underlying. Between 2000 and 2005 the overall increase in sales densities for convenience goods was 1.6 per cent per annum but the underlying growth rate was 1.2 per cent, the difference being accounted for by a move towards newer higher density stores. The equivalent figures for 1987-1999 were 1.2 and 0.9 per cent for actual and underlying respectively.
- **Net floorspace has consistently grown faster than gross** since the 1980s, implying an increasing proportion of floorspace has been converted to selling, and that space for storage and back-of-house activities has been reduced.
- **The growth in comparison space has greatly exceeded that for convenience**, which has been static or, more recently, contracting. This is partly because convenience stores such as supermarkets have expanded comparison goods lines, like clothes, electrical goods or DVDs. This trend is expected to continue, with Tesco aiming to reach an even balance between food and non-food in its larger stores in the next few years.
- **Comparison goods sales densities have increased at a far faster rate** than convenience goods, partly due to technological advances leading to smaller, higher-value products, for example the difference in size between a flat-screen and a traditional television.

On balance, the early 2000s was an unusually rapid phase of sales growth, reflected in big increases in densities. Part of this rise is likely to be cyclical and thus not sustainable. So it is important to also examine the 1987-99 figures in establishing a benchmark.

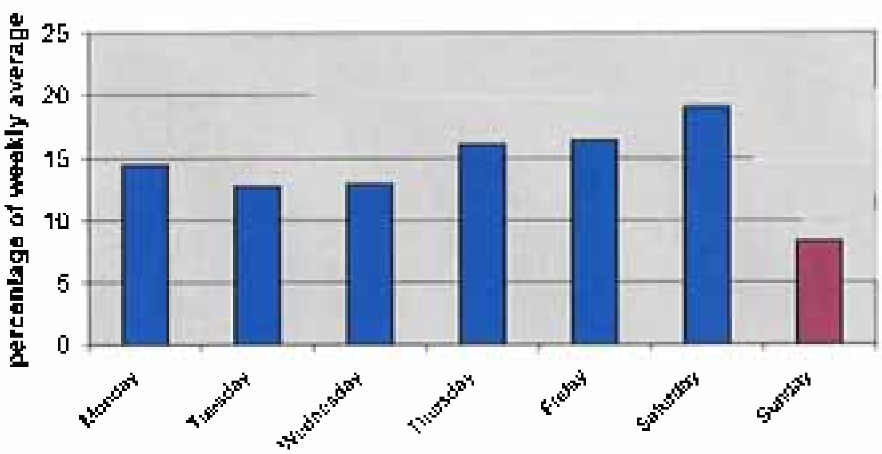
8.4 INFLUENCE OF LONGER OPENING HOURS

The introduction of Sunday shopping significantly lengthened opening hours in the 1990s, with profound implications for the trend in sales densities.[16] Unfortunately, there are no statistics on Sunday business, or, more importantly, on how the extension affected sales in the rest of the week. But related evidence points to a major shift in consumer behaviour. Footfall figures on visits to retail centres, for instance, show that shopping patterns have changed markedly, with on average, around 8 per cent of weekly activity now taking place on a Sunday (Figure 8.3).[17]

When Sunday trading was first introduced it is likely that total retail spending remained largely unaffected and was spread over more days, with little impact on sales or densities. Over time, however – as Sunday trading effectively increased retail capacity at a stroke – it enables more sales to be made from the existing floorspace. As such, it allows new sales growth without the corresponding requirement for new retail space.

A store opening for 16 hours for example, could potentially realise twice the sales density of one open for eight hours. In practice this would require a considerable change in consumer behaviour, not least the desire to shop first thing in the morning or last thing at night. Along the same lines, the impact of an extra day's trading is less, but still implies the potential for an increase in sales densities over time.

FIGURE 8.3: AVERAGE FOOTFALL BY THE DAY OF THE WEEK



Source: Footfall

But how much of the change in sales density does this explain? We can adjust our previous estimates to account for Sunday trading. Assuming that all of the impact occurred between 1986 and 1999 and that daily sales are proportional to footfall, longer opening would have accounted for 0.7 per cent of the annual increase in sales densities over this period.[18]

[16] The Sunday Shopping Act was brought in in 1994 but a number of chains were already opening by then.

[17] At any given time of the day stores may be busier on Sundays than on some weekdays, but shorter Sunday opening hours brings average Sunday footfall down relative to other days. Footfall data also shows big differences between shopping centres with Sunday being the second busiest day of the week in some centres.

[18] The Footfall figures show Sunday footfall accounting for just over 8 per cent of the weekly total, implying that the introduction of Sunday trading has increased capacity by just over 9 per cent (eight divided by one hundred minus eight per cent). This is the equivalent of 0.7 per cent per annum over thirteen years.

8.4 INFLUENCE OF 24-HOUR SHOPPING

Sunday trading is now a normal part of the UK retail environment, but 24-hour shopping's potential remains disputed: it could have a similar impact on potential sales densities as Sunday trading. At one extreme, it can be argued that the move to all-day shopping alone could cause any future growth in retail sales to be absorbed in higher densities and remove the need for more retail space in future

But the evidence is not strong. Although there is 24-hour opening in some supermarkets, this is usually seen at out-of-town convenience stores, or at times of heavy demand such as Christmas, or in urban centres where footfall is particularly heavy. This has often been possible because the stores are staffed anyway, with the need for over-night restocking, rather than a result of demand from shoppers. Few other retailers have followed the supermarkets. Current lifestyles and habits do not suggest a wholesale move to 24 hour shopping. This may change in the future, but it is too early to make strong assumptions in our forecasts.

8.6 THE FUTURE FOR RETAIL SALES DENSITIES

The rapid increase in comparison goods sales densities in the recent past was a product of the retail spending boom and is unlikely to be sustainable. On balance the 1987-99 trend of 2.5 per cent a year increases in sales density may be a better start point for projections.

Yet even this includes one-off changes because of the advent of Sunday trading. As noted, the introduction of Sunday trading could have accounted for up to 0.7 per cent a year of the estimated increase in sales densities in this period. On the other hand, not all Sunday trading effects occurred between 1986-99 and there is still scope for further changes were the current restrictions on hours to be relaxed.

Consequently, projected sales densities are only reduced from the 1987 and 1999 by 0.3 per cent a year in the central case, to **2.2 per cent and 0.6 per cent a year for comparison and convenience space respectively**. The move towards more modern, higher density, stores and the demolition of older inefficient space means that the observed comparison rate is likely to be closer to 2.4 per cent a year.

The combination of unsatisfactory data and uncertainty about underlying trends mean that risk analysis is particularly important. Much slower density increases than in the central forecast imply there is higher demand for capacity. One possible cause is that the impact of longer opening hours has been overstated; another that the gains from technological change and efficiency are exhausted. As a result, increased sales growth can only be met by new retail.

In this alternative view, it is assumed that comparison goods sales densities grow at only 1.5 per cent a year (or 0.25 per cent a year for convenience goods). This was the benchmark figure for retail planning studies until recently and is significantly slower than historical trends. On the other hand, the more recent growth rates (2000-2005) were much higher than for the 1987-99 growth rates that we have used to create the central case. This means that there must be a significant upside and we suggest that a realistic upside would be 2.8 and 0.8 per cent for comparison and convenience goods sales densities respectively.

APPENDIX 4

Retail Floorspace Data

APPENDIX 4A

Existing Convenience Goods Sales Floorspace and Benchmark Turnovers by Town

SUDBURY : CONVENIENCE GOODS - Schedule of Shops and Estimated Convenience Goods Floorspace (as at March 2008)					
Fascia	**Estimated Gross Floorspace (SqM)**	**Source**	**Estimated Net Floorspace (SqM)**	**Estimated Benchmark Sales Density (£ per SqM Net)**	**Estimated Benchmark Turnover (£m)**
Tesco - out of town	4,138	2, 3	2,390*	13,000	31.07
Farmfoods - out of town	394	3	256	4,000	1.02
Aldi - edge of centre	760	1	494	3,700	1.83
Waitrose - edge of centre	2,877	2, 3	1,788*	11,000	19.67
Roys Variety Store - edge of centre	3,021	2, 3	591*	6,000	3.55
Marks & Spencer Simply Food	826	2	357	10,700	3.82
Somerfield	1,271	2	765	6,300	4.82
Meat Inn	83	1	54	4,000	0.22
A & G News	89	1	58	4,000	0.23
Watson's Fruit and Vega.	48	1	31	4,000	0.12
Sweet Times	30	1	20	4,000	0.08
Rafi's Spice Box	74	1	48	4,000	0.19
McColls/The Liquer Store	361	1	235	7,000	1.64
Bakers Oven	288	1	187	4,000	0.75
Julian Graves	44	1	29	4,000	0.11
North Street News	49	1	32	4,000	0.13
Meat Inn	97	1	63	4,000	0.25
Golden Harvest Health Foods	108	1	70	4,000	0.28
The Local	97	1	63	4,000	0.25
Kandy Kiosk Papers	15	1	10	4,000	0.04
	14,670		**7,540**	**9,294**	**70.07**

Notes:
Sources: 1) Babergh District Council; 2) Institue of Grocery Distribution; 3) Colliers CRE estimates
* Net floorspace excludes estimated comparison goods floorspace.

HADLEIGH : CONVENIENCE GOODS - Schedule of Shops and Estimated Convenience Goods Floorspace (as at March 2008)					
Fascia	**Estimated Gross Floorspace (SqM)**	**Source**	**Estimated Net Floorspace (SqM)**	**Estimated Benchmark Sales Density (£ per SqM Net)**	**Estimated Benchmark Turnover (£m)**
Buyright - out of town	6,588	3	1,186*	3,750	4.45
Co-op	1,326	1	862	5,250	4.53
The Beer Barrel	18	1	12	3,750	0.04
Bakers Oven	108	1	70	3,750	0.26
Andrews Butchers	69	1	45	3,750	0.17
Pierpoints Butchers	186	1	121	3,750	0.45
Chocoholics	18	1	12	3,750	0.04
Fergusons Delicatessan	71	1	46	3,750	0.17
Patridges Farm Shop	154	1	100	3,750	0.38
Sunflower	75	1	49	3,750	0.18
Threshers	179	1	116	7,000	0.81
Toffee Cavern	8	1	5	3,750	0.02
	8,800		**2,624**	**4,387**	**11.51**

Notes:
Sources: 1) Babergh District Council; 2) Institue of Grocery Distribution; 3) Colliers CRE estimates
* Net floorspace excludes estimated comparison goods floorspace.

COPDOCK MILL : CONVENIENCE GOODS - Schedule of Shops and Estimated Convenience Goods Floorspace (as at March 2008)					
Fascia	Estimated Gross Floorspace (SqM)	Source	Estimated Net Floorspace (SqM)	Estimated Benchmark Sales Density (£ per SqM Net)	Estimated Benchmark Turnover (£m)
Tesco	8,862	1, 2	4,228*	13,000	54.96
	8,862		**4,228**	**13,000**	**54.96**

Notes:
Sources: 1) Insiturte of Grocery Distribution; 2) Colliers CRE estimate
* Net floorspace excludes estimated comparison goods floorspace.

APPENDIX 4B

Existing Comparison Goods Sales Floorspace and Benchmark Turnovers by Town

SUDBURY : COMPARISON GOODS - Schedule of Shops and Estimated Comparison Goods Floorspace (as at March 2008)					
Fascia	Estimated Gross Floorspace (SqM)	Source	Estimated Net Floorspace (SqM)	Estimated Benchmark Sales Density (£ per SqM Net)	Estimated Benchmark Turnover (£m)
Tesco - out of town	4,138	2, 3	265*	6,000	1.59
Homebase - out of town	2,323	3	2,091	1,200	2.51
FOCUS - out of town	2,793	3	2,514	1,000	2.51
Carpetright - out of town	604	3	544	1,100	0.60
Halfords - out of town	465	3	419	2,000	0.84
Pets at Home - out of town	394	3	355	2,000	0.71
Topps Tiles - out of town	418	3	376	1,200	0.45
Currys - out of town	791	3	712	6,100	4.34
Roys Variety Store - edge of centre	3,021	2, 3	1,379*	4,500	6.21
Town Centre Shops	14,656	1	9,526	4,500	42.87
	32,624		**18,180**	**3,748**	**68.14**

Notes:
Sources: 1) Babergh District Council; 2) Institue of Grocery Distribution; 3) Colliers CRE estimates
* Net floorspace excludes estimated convenience goods floorspace.

HADLEIGH : COMPARISON GOODS - Schedule of Shops and Estimated Comparison Goods Floorspace (as at March 2008)					
Fascia	Estimated Gross Floorspace (SqM)	Source	Estimated Net Floorspace (SqM)	Estimated Benchmark Sales Density (£ per SqM Net)	Estimated Benchmark Turnover (£m)
Buyright - out of town	6,588	2	4,743*	1,500	7.11
Town Centre Shops	4,235	1	2,753	3,000	8.26
	10,823		**7,496**	**2,051**	**15.37**

Notes:
Sources: 1) Babergh District Council; 2) Colliers CRE estimates
* Net floorspace excludes estimated convenience goods floorspace.

COPDOCK MILL : COMPARISON GOODS - Schedule of Shops and Estimated Comparison Goods Floorspace (as at March 2008)					
Fascia	**Estimated Gross Floorspace (SqM)**	**Source**	**Estimated Net Floorspace (SqM)**	**Estimated Benchmark Sales Density (£ per SqM Net)**	**Estimated Benchmark Turnover (£m)**
Tesco	8,862	1	1,812*	6,000	10.87
Toys R Us	3,716	1	3,344	2,230	7.46
Mothercare	1,359	1	1,223	2,420	2.96
Currys	2,323	1	2,091	6,160	12.88
PC World	2,323	1	2,091	6,300	13.17
Multi York	697	1	627	2,500	1.57
	28,142		**11,188**	**4,372**	**48.91**

Notes:
Sources: 1) Institurte of Grocery Distribution; 2) Colliers CRE estimate
* Net floorspace excludes estimated convenience goods floorspace.

APPENDIX 4C

Details of Retail Floorspace Commitments within Babergh District

Retail Commitments: Babergh District

1.	Tesco – Retail Commitment
	Tesco, Woodhall, Sudbury (extension to store is currently under construction) Comparison good floorspace: 2,397 sq m gross Estimated net comparison goods floorspace: 1,558 sq m Estimated sales density: £6,000 psm net @2008 in 2006 prices Turnover estimate: £9.3 million @ 2008.

2.	Aldi – Retail Commitment
	Girling Street, Sudbury (extension to store is currently under construction) Convenience goods floorspace: 213 sq m gross Estimated net convenience goods floorspace: 138 sq m net Estimated sales density: £3,700 psm net @ 2008 in 2006 prices Turnover estimate: £0.5 million @ 2008

APPENDIX 5

Retail Floorspace Need Assessment

APPENDIX 5A

Methodology for Assessing Retail Floorspace Need/Capacity

Methodology for Assessing Quantitative Retail Need / Capacity

Step 1 Catchment Area Definition and Study Time Frame

Step 1A The catchment (or survey) area should be defined with regard to the study objective.

Step 1B The catchment should then be subdivided into zones (or sub-areas) to reflect the number and location of retail centres and the accessibility between them.

The number of zones will depend on the size of the sample for the household survey. Ideally a minimum of around 80 interviews should be carried out within each zone.

Zone boundaries are normally defined in terms of administrative boundaries or postal geography.

Step 1C An assessment will normally adopt the current year as its starting point or "base year". The end year, or "forecast year", will normally be determined by the end date of the Plan.

In preparing quantitative need studies it is normally helpful to also produce need estimates for selected intermediate years, since this will show how floorspace need (if any) changes or grows over time.

Step 1D A constant price base must be adopted for the quantitative need assessment. Thus all monetary figures are given in real values and discounted for the affects of price inflation.

Step 2 Analyse Consumer Demand

Step 2A Population estimates for each zone at the base year are required. Each of the zone populations must then be projected forwards to the forecast year(s).

Step 2B Estimates of retail expenditure per head are required for either the catchment area as a whole or ideally for each zone.

Estimates are also likely to be required for different categories of goods; the most common are: convenience goods and comparison goods.

All expenditure data providers produce estimates for user defined areas which reflect the socio-demographics and affluence of the localities.

It is essential that the expenditure per head estimates are adjusted to the correct price base (see Step 1D) and also that spending on special forms of trading is excluded (i.e. this is expenditure that does not take place in shops e.g. that through mail order, through vending machines and also over the internet).

Step 2C Projection of Expenditure Per Head Estimates Through to the Forecast Year(s)

National expenditure growth forecasts are published by a number of organisations (e.g. Experian).

Step 2D Total available retail expenditure (for each goods category) should be calculated for the survey area and the constituent zones at both the base year and the forecast year(s). Thus the "growth" in available expenditure can be identified.

Total available expenditure at any particular year will originate from two sources:- inside the survey area and from outside the survey area.

Within the survey area – generated expenditure is calculated by multiplying the resident population by the estimate of average spend per head. This calculation can also be undertaken for each zone.

Outside the survey area – it is likely that there will be an in-flow of retail expenditure from people living outside the survey area. This is likely to be particularly significant if the survey area contains higher order centres and/or a popular tourist centre. The main types of in-flow are as follows:-

- Long distance shopping trips – the amount of spending from this source can be determined from household surveys carried out in adjoining areas or should be estimated by reference to the best available sources.

- Workers – a large daily working population will generate retail expenditure. For major commuter areas the spending produced by workers who live outside the survey area should be estimated and included.

- Tourists – visitors from the UK and overseas may for certain locations be an important generator of retail expenditure. Using survey data where available the spending from this source must also be estimated and included.

Estimates must be made of the extent to which the scale of in-flow retail expenditure will change through to the forecast year(s) in real terms.

Step 3 Analyse Retail Supply

Step 3A The existing stock of retail floorspace in the Plan area must be determined by the main goods categories analysed at Step 2B. This is essential since it is virtually impossible to provide a robust estimate of future quantitative need if the current floorspace supply is unknown.

All retail floorspace must be included – in centre, edge of centre and out-of-centre.

If existing stock figures are unavailable, it will normally be necessary to undertake or commission a thorough retail audit of the current retail provision.

As well as estimates of floorspace quantity, a survey of retail occupiers should ideally be carried out. This will ascertain information on the quality of the retail offer, the physical condition of the floorspace stock (e.g. size and configuration of units) and the trading performance of the shops.

The combination of comprehensive information on both the quantity and quality of the existing retail offer / floorspace stock will inform the assessment of whether the retail economy is currently trading at equilibrium or not (see Step 4A below).

Step 3B A household survey should be commissioned to establish the existing pattern of shopper behaviour and retail consumer expenditure flows within the Plan area and between the Plan area and adjoining areas.

This survey as a minimum should cover the whole of the Plan area. However, there are important benefits if the survey can be extended to cover other adjoining and nearby areas (i.e. it can then inform on the extent of in-flow expenditure from beyond the Plan area).

The most cost-effective form of household survey is by telephone. As stated at Step 1B, a minimum of 100 completed interviews per zone is recommended.

The survey should quantify shopper behaviour separately for the main goods categories.

Step 3C The household survey results can then be applied to the totals of available expenditure by zone (from Step 2D) in order to estimate the existing retail turnovers of centres and stores within the Plan area.

For centres which attract long distance shopping trips and/or which benefit from commuter and tourist expenditure (see Step 2D), allowances must be made for turnover contributions from these sources.

The actual centre and store turnovers derived from the household survey should, wherever possible, be cross-checked against actual turnover figures from other sources (e.g. the retailers themselves) where these are available.

The household survey will determine the actual levels of available retail expenditure retained by individual centres and the Plan area as a whole. These are the base year market shares and can be calculated for each main category of goods.

Step 3D A "benchmark" turnover for each of the main goods categories must be derived for the Plan area as a whole and for each centre. When compared to the actual turnovers calculated at Step 3C, this allows one to determine whether the existing floorspace is under or over-trading.

The best way to identify whether the existing floorspace is over or under-trading is to carry out a survey of the retailers themselves.

If this is not possible, then published company average sales densities for leading retailers may be used, although this will only give a partial view. In any event, company averages should be weighted up or down as appropriate to reflect local circumstances (e.g. the affluence of the area, the type and size of stores and the costs of the location to retailers).

Step 4 **Retail Demand vs. Retail Supply in the Base Year**

Step 4A It is necessary to test the adequacy of existing retail provision in the Plan area. If actual turnovers (from Step 3C) exceed the benchmark turnovers (from Step 3D) then it can be said that the current floorspace stock is over-trading, and that there is an existing need for additional floorspace. Conversely, if actual turnovers are less than the benchmark turnovers then there is an existing over-supply of floorspace. Lastly, if actual and benchmark turnovers are the same (or close) then the Plan area's retail economy for that category of goods can be said to be in equilibrium.

The extent of the existing retail floorspace over or under-supply can be estimated by converting the existing turnover surplus or deficit into floorspace by applying an appropriate average sales density.

Step 5 **Changes in Retail Demand and Retail Supply through to the Forecast Year(s)**

Step 5A Step 2D estimated the total available retail expenditure within the Plan area at the forecast year(s) for each of the main goods categories. The base year market shares (from Step 3C) may then be applied in order to obtain estimates of the levels of retained available expenditure at the forecast year(s).

It should be considered whether the application of the base year market shares are appropriate at the forecast year(s) in relation to the Plan area as a whole and/or individual centres. If it is considered that expenditure outflow (or leakage) is too high, or a centre is not achieving its true retailing potential, then a case could be made for increasing the market share(s). Alternatively, if it is thought that the proportion of expenditure being retained is too high, then the market share(s) could be reduced.

In either situation, the adjustment of the market shares should be the result of an interactive process, which focuses on realistic expectations of trade retention within individual zones within the Plan area.

It should also be borne in mind that adjusting the market share of a centre will have direct implications for the market shares of other centres. Similarly, increasing the market share for the Plan area as a whole will mean adjoining areas will lose their share of available expenditure. This may require collaboration and agreement with nearby Planning Authorities otherwise double counting of available expenditure is likely.

Step 5B Step 3D estimated the benchmark retail turnovers generated within the Plan area in the base year for the main categories of goods. These turnovers must then be projected to the forecast (year(s)) by taking into account any expected improvements in store efficiency (i.e. sales densities). In addition, the turnovers of any retail commitments (normally taken as comprising floorspace under construction or with planning consent) within the Plan area, must be added. It may also be appropriate to take into account the turnover associated with retail proposals and / or the re-use of vacant space.

Step 5C The monetary difference between the total potential retained expenditure at 5A and the forecast retail turnover at 5B gives a measure of the quantitative need for additional retail floorspace within the Plan area since the base year. If there is an expenditure surplus this is converted into a floorspace total by dividing through by an appropriate average sales density. Similarly, if there is an expenditure deficit, a floorspace over-supply can be calculated in the same way.

Step 5D To arrive at a final estimate of overall quantitative need the floorspace outputs from Step 5C must be combined with the existing floorspace over / under supply figures derived at Step 4A.

APPENDIX 5B

The Need for Additional Comparison Goods Floorspace

RETAIL FLOORSPACE NEED ASSESSMENT: COMPARISON GOODS (INCORPORATING ESTIMATES OF (ANY) UNDER / OVER TRADING AT THE BASE YEAR, 2008)
CONTENTS

TABLE 1 - POPULATION CHANGE BY ZONE						
Zone	**2008 Population (Base Year)**	**2011 Population**	**2016 Population**	**2021 Population**	**Total Increase (2008-2021)**	**Percentage Increase (2008-2021)**
Zone 1	17,980	18,417	19,097	19,807	1,827	10.2%
Zone 2	31,412	32,538	34,321	36,035	4,623	14.7%
Zone 3	19,508	19,676	19,967	20,294	786	4.0%
Zone 4	20,665	20,843	21,152	21,498	833	4.0%
Zone 5	7,474	7,538	7,650	7,775	301	4.0%
Zone 6	12,346	12,452	12,637	12,844	498	4.0%
Zone 7	26,664	26,893	27,292	27,739	1,075	4.0%
Zone 8	11,744	11,959	12,257	12,526	782	6.7%
TOTAL	**147,793**	**150,316**	**154,373**	**158,518**	**10,725**	**7.3%**

Notes:
Population figures for zones 1 to 8 are based on ward populations for 2005 produced by ONS and incorporate forecasts from 2005 to 2021 produced by Suffolk Observatory, Braintree District Council and Colchester Borough Council for the appropriate wards.

TABLE 2 - EXPENDITURE ON COMPARISON GOODS PER HEAD OF POPULATION BY ZONE (INCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING)							
Zone		Expenditure Per Head (£) (1)					
	2006	2008 (Base Year)	2011	2016	2021	Increase (£) (2008-2021)	Increase % (2008-2021)
Zone 1	3,382	3,644	4,075	4,911	5,701	2,057	56.4%
Zone 2	3,295	3,550	3,970	4,784	5,554	2,004	56.4%
Zone 3	3,345	3,604	4,031	4,857	5,638	2,034	56.4%
Zone 4	2,896	3,120	3,490	4,205	4,882	1,761	56.4%
Zone 5	3,707	3,994	4,467	5,383	6,249	2,255	56.4%
Zone 6	3,320	3,577	4,001	4,821	5,596	2,019	56.4%
Zone 7	3,417	3,682	4,117	4,962	5,760	2,078	56.4%
Zone 8	3,199	3,447	3,855	4,645	5,392	1,946	56.4%

Notes:
(1) Average consumer expenditure per head on comparison goods for 2006 has been estimated by Experian for each zone. The 2006 expenditure per head figures in each zone have been projected forwards to 2008 (the base year) and the forecast years of 2011, 2016, and 2021 by using UK expenditure per head growth forecasts published by Experian (see Appendix 3c).

TABLE 3 - EXPENDITURE ON COMPARISON GOODS PER HEAD OF POPULATION BY ZONE (EXCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING)						
Zone	Expenditure Per Head (£) (1)					
	2008 (Base Year)	2011	2016	2021	Increase (£) (2008-2021)	Increase % (2008-2021)
Zone 1	3,203	3,501	4,204	4,880	1,677	52.4%
Zone 2	3,121	3,411	4,095	4,754	1,634	52.4%
Zone 3	3,168	3,462	4,158	4,827	1,659	52.4%
Zone 4	2,743	2,998	3,600	4,179	1,436	52.4%
Zone 5	3,511	3,837	4,608	5,349	1,838	52.4%
Zone 6	3,144	3,437	4,127	4,790	1,646	52.4%
Zone 7	3,236	3,537	4,247	4,930	1,694	52.4%
Zone 8	3,030	3,311	3,976	4,616	1,586	52.4%

Notes:
(1) Expenditure per head on comparison goods has been discounted by 12.1% (over the figures in Table 2) for the base year of 2008, to exclude non store retail which includes e-tailing. At 2011 and 2016, discounts of 14.1% and 14.4% have been assumed. For the forecast year of 2021 we assume the same discount of 14.4%, since the level of SFT is expected to plateau.
The SFT percentages are derived from in-depth research carried out by Experian (see Appendix 3d).

TABLE 4 - TOTAL AVAILABLE COMPARISON GOODS EXPENDITURE ZONE (EXCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING)						
Zone	Total Available Expenditure (£m) [1]					
	2008 (Base Year)	2011	2016	2021	Increase (£) (2008-2021)	Increase % (2008-2021)
Zone 1	57.6	64.5	80.3	96.7	39.1	67.8%
Zone 2	98.0	111.0	140.6	171.3	73.3	74.8%
Zone 3	61.8	68.1	83.0	97.9	36.1	58.5%
Zone 4	56.7	62.5	76.1	89.8	33.2	58.5%
Zone 5	26.2	28.9	35.2	41.6	15.3	58.5%
Zone 6	38.8	42.8	52.1	61.5	22.7	58.5%
Zone 7	86.3	95.1	115.9	136.8	50.5	58.5%
Zone 8	35.6	39.6	48.7	57.8	22.2	62.5%
TOTAL	**461.0**	**512.5**	**632.0**	**753.5**	**292.4**	**63.4%**

Notes:
(1) Total available expenditure totals for comparison goods are calculated as follows: Population (Table 1) multiplied by consumer expenditure after making appropriate reductions for SFT (Table 3).

TABLE 5 - TOTAL AVAILABLE COMPARISON GOODS EXPENDITURE ZONE (EXCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING) DISAGGREGATED BETWEEN NON BULKY AND BULKY COMPARISON GOODS			
Zone	Non-Bulky Comparison Goods (£m)	Bulky Comparison Goods [(1)] (£m)	Total Comparison Goods [(2)] (£m)
	A	B	C = A + B
Zone 1	39.1	18.5	57.6
Zone 2	67.5	30.6	98.0
Zone 3	42.2	19.6	61.8
Zone 4	39.5	17.2	56.7
Zone 5	17.8	8.4	26.2
Zone 6	26.7	12.1	38.8
Zone 7	58.8	27.5	86.3
Zone 8	24.4	11.2	35.6
TOTAL	**316.0**	**145.0**	**461.0**

Notes:
(1) For each zone, the total available comparison goods expenditure (excl. SFT) has been disaggregated into available spend on non-bulky and bulky comparison goods. This allocation is based on the consumer expenditure per head data provided by Experian for each zone (see Appendix 3b).
(2) Figures derived from Table 4.

TABLE 6a - ESTIMATED NON BULKY COMPARISON GOODS CENTRE MARKET SHARES BY ZONE IN THE BASE YEAR, 2008 (COLUMN PERCENT)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)							
	Study Area							
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
WITHIN BABERGH DISTRICT								
Sudbury	28.5	23.2	28.8	61.0	37.7	6.7	0.0	0.0
Hadleigh	0.0	0.0	3.9	0.0	1.2	5.8	0.0	0.0
Copdock Mill	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Centres / Stores	3.4	0.9	2.9	0.0	0.0	0.3	0.0	0.0
SUB TOTAL	**31.9**	**24.1**	**35.5**	**61.0**	**38.9**	**12.8**	**0.0**	**0.0**
OUTSIDE BABERGH DISTRICT								
All Centres / Stores	68.1	75.9	64.5	39.0	61.1	87.2	100.0	100.0
SUB TOTAL	**68.1**	**75.9**	**64.5**	**39.0**	**61.1**	**87.2**	**100.0**	**100.0**
TOTAL	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Notes:
The market share percentages are derived from the household telephone survey carried out within Babergh District and its shopping hinterland during April/May 2008.

TABLE 6b - ESTIMATED BULKY COMPARISON GOODS CENTRE MARKET SHARES BY ZONE IN THE BASE YEAR, 2008 (COLUMN PERCENT)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)							
	Study Area							
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
WITHIN BABERGH DISTRICT								
Sudbury	31.8	14.1	54.7	90.0	35.7	8.4	0.0	0.0
Hadleigh	0.0	0.0	8.3	0.0	4.6	15.6	0.0	0.0
Copdock Mill	0.0	0.0	0.0	0.0	0.0	17.1	41.6	33.8
Other Centres / Stores	0.8	3.4	1.7	0.0	0.0	0.0	0.0	0.0
SUB TOTAL	**32.5**	**17.6**	**64.7**	**90.0**	**40.3**	**41.1**	**41.6**	**33.8**
OUTSIDE BABERGH DISTRICT								
All Centres / Stores	67.5	82.4	35.3	10.0	59.7	58.9	58.4	66.2
SUB TOTAL	**67.5**	**82.4**	**35.3**	**10.0**	**59.7**	**58.9**	**58.4**	**66.2**
TOTAL	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Notes:
The market share percentages are derived from the household telephone survey carried out within Babergh District and its shopping hinterland during April/May 2008.

TABLE 7a - ESTIMATED NON BULKY COMPARISON GOODS EXPENDITURE PATTERN AND CENTRE TURNOVER ESTIMATES IN THE BASE YEAR, 2008 (£ MILLION)												
Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)											
	Study Area								TOTAL HOUSEHOLD SURVEY AREA	Expenditure Drawn From Survey Area (Zones 1-8)	Estimated Inflow Expenditure (1)	Total Comparison Goods Turnover
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8		A	B	C = A + B
WITHIN BABERGH DISTRICT												
Sudbury	11.1	15.7	12.2	24.1	6.7	1.8	0.0	0.0	71.6	71.6	0.0	71.6
Hadleigh	0.0	0.0	1.6	0.0	0.2	1.5	0.0	0.0	3.4	3.4	0.0	3.4
Copdock Mill	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Centres / Stores	1.3	0.6	1.2	0.0	0.0	0.1	0.0	0.0	3.2	3.2	0.0	3.2
SUB TOTAL	12.5	16.3	15.0	24.1	6.9	3.4	0.0	0.0	78.2	78.2	0.0	78.2
OUTSIDE BABERGH DISTRICT												
All Centres / Stores	26.7	51.2	27.2	15.4	10.9	23.2	58.8	24.4	237.9			
SUB TOTAL	26.7	51.2	27.2	15.4	10.9	23.2	58.8	24.4	237.9			
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA)	39.1	67.5	42.2	39.5	17.8	26.7	58.8	24.4	316.0			

Notes:
(1) Estimated by Colliers CRE.
(2) Floorpsace estimated from a range of sources (see Appendix 4b for full details).
(3) Benchmark sales densities estimated by Colliers CRE (see Appendix 4b for full details).

TABLE 7b - ESTIMATED BULKY COMPARISON GOODS EXPENDITURE PATTERN AND CENTRE TURNOVER ESTIMATES IN THE BASE YEAR, 2008 (£ MILLION)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)											
	Study Area								TOTAL HOUSEHOLD SURVEY AREA	Expenditure Drawn From Survey Area (Zones 1-8)	Estimated Inflow Expenditure (1)	Total Comparison Goods Turnover
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8		A	B	C = A + B
WITHIN BABERGH DISTRICT												
Sudbury	5.9	4.3	10.7	15.5	3.0	1.0	0.0	0.0	40.4	40.4	0.0	40.4
Hadleigh	0.0	0.0	1.6	0.0	0.4	1.9	0.0	0.0	3.9	3.9	0.0	3.9
Copdock Mill	0.0	0.0	0.0	0.0	0.0	2.1	11.4	3.8	17.3	17.3	0.0	17.3
Other Centres / Stores	0.1	1.0	0.3	0.0	0.0	0.0	0.0	0.0	1.5	1.5	0.0	1.5
SUB TOTAL	6.0	5.4	12.7	15.5	3.4	5.0	11.4	3.8	63.1	63.1	0.0	63.1
OUTSIDE BABERGH DISTRICT												
All Centres / Stores	12.5	25.2	6.9	1.7	5.0	7.2	16.1	7.4	81.9			
SUB TOTAL	12.5	25.2	6.9	1.7	5.0	7.2	16.1	7.4	81.9			
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA)	18.5	30.6	19.6	17.2	8.4	12.1	27.5	11.2	145.0			

Notes:
(1) Estimated by Colliers CRE.
(2) Floorpsace estimated from a range of sources (see Appendix 4b for full details).
(3) Benchmark sales densities estimated by Colliers CRE (see Appendix 4b for full details).

TABLE 8 - ESTIMATED ALL COMPARISON GOODS EXPENDITURE PATTERN AND CENTRE TURNOVER ESTIMATES IN THE BASE YEAR, 2008 (£ MILLION)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)																
	Study Area								TOTAL HOUSEHOLD SURVEY AREA	Expenditure Drawn From Survey Area (Zones 1-8)	Estimated Inflow Expenditure (1)	Total Comparison Goods Turnover	Comparison Goods Floorspace (sq.m. net) (2)	Average Sales Density (£ per sq.m. net)	Benchmark Average Sales Density (£ per sq.m net) (3)	Benchmark Comparison Goods Turnover (£m)	Extent of Any Over / Under Trading (£m)
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8		A	B	C = A + B	D	E = C / D	F	G = F x D	H = C - G
WITHIN BABERGH DISTRICT																	
Sudbury	17.0	20.0	22.9	39.5	9.7	2.8	0.0	0.0	111.9	111.9	0.0	111.9	18,180	6157.4	3,748	68.1	43.8
Hadleigh	0.0	0.0	3.2	0.0	0.6	3.4	0.0	0.0	7.3	7.3	0.0	7.3	7,496	972.6	2,051	15.4	-8.1
Copdock Mill	0.0	0.0	0.0	0.0	0.0	2.1	11.4	3.8	17.3	17.3	33.5	50.8	15,416	3294.0	3,173	48.9	-
Other Centres / Stores	1.5	1.6	1.6	0.0	0.0	0.1	0.0	0.0	4.8	4.8	0.0	4.8	-	-	-	4.8	-
SUB TOTAL	18.5	21.6	27.7	39.5	10.3	8.4	11.4	3.8	141.3	141.3	33.5	174.8	41,092	10424.1		137.2	35.7
OUTSIDE BABERGH DISTRICT																	
All Centres / Stores	39.1	76.4	34.1	17.1	15.9	30.4	74.9	31.8	319.7								
SUB TOTAL	39.1	76.4	34.1	17.1	15.9	30.4	74.9	31.8	319.7								
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA)	57.6	98.0	61.8	56.7	26.2	38.8	86.3	35.6	461.0								

Notes:
(1) Estimated by Colliers CRE.
(2) Floorpsace estimated from a range of sources (see Appendix 4b for full details).
(3) Benchmark sales densities estimated by Colliers CRE (see Appendix 4b for full details).

TABLE 9a - UNADJUSTED ALL COMPARISON GOODS CENTRE MARKET SHARES BY ZONE (COLUMN PERCENT)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone) – Study Area							
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
WITHIN BABERGH DISTRICT								
Sudbury	29.5	20.4	37.0	69.8	37.1	7.2	0.0	0.0
Hadleigh	0.0	0.0	5.3	0.0	2.3	8.9	0.0	0.0
Copdock Mill	0.0	0.0	0.0	0.0	0.0	5.3	13.2	10.6
Other Centres / Stores	2.6	1.7	2.5	0.0	0.0	0.2	0.0	0.0
SUB TOTAL	**32.1**	**22.1**	**44.8**	**69.8**	**39.4**	**21.7**	**13.2**	**10.6**
OUTSIDE BABERGH DISTRICT								
All Centres / Stores	67.9	77.9	55.2	30.2	60.6	78.3	86.8	89.4
SUB TOTAL	**67.9**	**77.9**	**55.2**	**30.2**	**60.6**	**78.3**	**86.8**	**89.4**
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**

Notes:
Market share percentages are derived from the figures in Table 8.

TABLE 9b - ADJUSTED ALL COMPARISON GOODS CENTRE MARKET SHARES BY ZONE (COLUMN PERCENT)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)							
	Study Area							
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
WITHIN BABERGH DISTRICT								
Sudbury	29.5	20.4	37.0	69.8	37.1	7.2	0.0	0.0
Hadleigh	0.0	0.0	5.3	0.0	2.3	20.0	0.0	0.0
Copdock Mill	0.0	0.0	0.0	0.0	0.0	5.3	13.2	10.6
Other Centres / Stores	2.6	1.7	2.5	0.0	0.0	0.2	0.0	0.0
SUB TOTAL	**32.1**	**22.1**	**44.8**	**69.8**	**39.4**	**32.8**	**13.2**	**10.6**
OUTSIDE BABERGH DISTRICT								
All Centres / Stores	67.9	77.9	55.2	30.2	60.6	67.2	86.8	89.4
SUB TOTAL	**67.9**	**77.9**	**55.2**	**30.2**	**60.6**	**67.2**	**86.8**	**89.4**
TOTAL	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Notes:
Some of the market shares for Sudury and Hadleigh have been adjusted from those set out in Table 9a, to reflect the future potential of these towns to retain higher proportions of locally generated retail expenditure, which is in line with Council aspirations and the Government's sustainability objectives of reducing the number and distance of car journeys for shopping purposes.

TABLE 10 - ALL COMPARISON GOODS EXPENDITURE PATTERN AND CENTRE TURNOVER ESTIMATES, 2011 (£ MILLION)												
Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)											
	Study Area								TOTAL HOUSEHOLD SURVEY AREA	Expenditure Drawn From Survey Area (Zones 1-8)	Estimated Inflow Expenditure [1]	Total Comparison Goods Turnover
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8		A	B	C = A + B
WITHIN BABERGH DISTRICT												
Sudbury	19.0	22.6	25.2	43.6	10.7	3.1	0.0	0.0	**124.3**	124.3	0.0	124.3
Hadleigh	0.0	0.0	3.6	0.0	0.7	3.8	0.0	0.0	**8.0**	8.0	0.0	8.0
Copdock Mill	0.0	0.0	0.0	0.0	0.0	2.3	12.6	4.2	**19.1**			
Other Centres / Stores	1.7	1.9	1.7	0.0	0.0	0.1	0.0	0.0	**5.3**			
SUB TOTAL	**20.7**	**24.5**	**30.5**	**43.6**	**11.4**	**9.3**	**12.6**	**4.2**	**156.7**			
OUTSIDE BABERGH DISTRICT												
All Centres / Stores	43.8	86.5	37.6	18.9	17.5	33.5	82.5	35.4	**355.7**			
SUB TOTAL	**43.8**	**86.5**	**37.6**	**18.9**	**17.5**	**33.5**	**82.5**	**35.4**	**355.7**			
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	**64.5**	**111.0**	**68.1**	**62.5**	**28.9**	**42.8**	**95.1**	**39.6**	**512.5**			

Notes:
For each cell, the monetry figure is derived by multiplying the 2011 available comparison goods expenditure in the zone (excl. SFT) (Table 4) by the adjusted comparison goods market share of the specific centre in that zone (Table 9b).
(1) Estimated by Colliers CRE.

TABLE 11 - CALCULATION OF POTENTIAL ALL COMPARISON GOODS HEADROOM EXPENDITURE, 2011 (£ MILLION)					
Centre	2008 Turnover	2011 Turnover Potential	Turnover Allocation for Existing Retailers 2008-2011	Residual Turnover Potential by 2011	Potential Headroom Expenditure by 2011
	A	B	C [1]	D = B - C	E = D - A
	(Table 8, C)	(Table 10, C)			
Sudbury	111.9	124.3	1.2	123.1	11.1
Hadleigh	7.3	8.0	0.3	7.8	0.5
TOTAL: BABERGH DISTRICT	**174.8**	**132.3**	**1.5**	**130.8**	**11.6**

Notes:
(1) We assume that all existing comparison goods floorspace at the base year (2008) will achieve a real sales productivity gain of 2.2% per annum. This figure is based on in-depth research carried out by Experian (see Appendix 3e). The sales productivity gains are applied to the estimated 2008 benchmark comparison goods turnovers of each centre as set out in Table 8 (Column G).

TABLE 12 - QUANTITATIVE RETAIL FLOORSPACE NEED AT 2011							
Centre	Potential Headroom Expenditure by 2011 (£m)	Adjustment for Over / Under Trading in Base Year (£m)	Adjusted Headroom Expenditure by 2011 (£m)	Reduction in Expenditure due to Comparison Goods Floorspace Commitments (as at May 2008) (1)	Adjusted Residual Headroom Expenditure by 2011 (£m)	Assumed Sales Density in 2011 (2) (£ per sq.m net)	Estimated Retail Floorspace Need in 2011 (sq.m net)
	A	B	C = A + B	D	E = C - D	F	G = E / F
	(Table 11, E)	(Table 8, H)					
Sudbury	11.1	43.8	54.9	10.0	44.9	5,070	8,859
Hadleigh	0.5	-8.1	-7.6	0.0	-7.6	5,070	-1,502
TOTAL: BABERGH DISTRICT	**11.6**	**35.7**	**47.3**	**10.0**	**37.3**		**7,356**

Notes:
(1) Details and estimated 2011 turnovers of comparison goods floorspace commitments and proposals are set out in Appendix 4c.
(2) The derivation of our 2011 benchmark centre sales density estimates are set out in Section 3.

TABLE 13 - ALL COMPARISON GOODS EXPENDITURE PATTERN AND CENTRE TURNOVER ESTIMATES, 2016 (£ MILLION)												
Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)											
	Study Area								TOTAL HOUSEHOLD SURVEY AREA	Expenditure Drawn From Survey Area (Zones 1-8)	Estimated Inflow Expenditure (1)	Total Comparison Goods Turnover
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8		A	B	C = A + B
WITHIN BABERGH DISTRICT												
Sudbury	23.7	28.7	30.7	53.1	13.1	3.8	0.0	0.0	**153.0**	153.0	0.0	153.0
Hadleigh	0.0	0.0	4.4	0.0	0.8	4.6	0.0	0.0	**9.8**	9.8	0.0	9.8
Copdock Mill	0.0	0.0	0.0	0.0	0.0	2.8	15.4	5.2	**23.3**			
Other Centres / Stores	2.1	2.4	2.1	0.0	0.0	0.1	0.0	0.0	**6.6**			
SUB TOTAL	**25.8**	**31.0**	**37.2**	**53.1**	**13.9**	**11.3**	**15.4**	**5.2**	**192.8**			
OUTSIDE BABERGH DISTRICT												
All Centres / Stores	54.5	109.5	45.8	23.0	21.4	40.8	100.6	43.6	**439.3**			
SUB TOTAL	**54.5**	**109.5**	**45.8**	**23.0**	**21.4**	**40.8**	**100.6**	**43.6**	**439.3**			
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	**80.3**	**140.6**	**83.0**	**76.1**	**35.2**	**52.1**	**115.9**	**48.7**	**632.0**			

Notes:
For each cell, the monetry figure is derived by multiplying the 2016 available comparison goods expenditure in the zone (excl. SFT) (Table 4) by the adjusted comparison goods market share of the specific centre in that zone (Table 9b).
(1) Estimated by Colliers CRE.

TABLE 14 - CALCULATION OF POTENTIAL ALL COMPARISON GOODS HEADROOM EXPENDITURE, 2016 (£ MILLION)					
Centre	2008 Turnover	2016 Turnover Potential	Turnover Allocation for Existing Retailers 2008-2016	Residual Turnover Potential by 2016	Potential Headroom Expenditure by 2016
	A	B	C [1]	D = B - C	E = D - A
	(Table 8, C)	(Table 13, C)			
Sudbury	111.9	153.0	3.3	149.7	37.8
Hadleigh	7.3	9.8	0.8	9.0	1.7
TOTAL: BABERGH DISTRICT	**174.8**	**162.8**	**4.1**	**158.7**	**39.5**

Notes:
(1) We assume that all existing comparison goods floorspace at the base year (2008) will achieve a real sales productivity gain of 2.2% per annum. This figure is based on in-depth research carried out by Experian (see Appendix 3e). The sales productivity gains are applied to the estimated 2008 benchmark comparison goods turnovers of each centre as set out in Table 8 (Column G).

TABLE 15 - QUANTITATIVE RETAIL FLOORSPACE NEED AT 2016							
Centre	Potential Headroom Expenditure by 2016 (£m)	Adjustment for Over / Under Trading in Base Year (£m)	Adjusted Headroom Expenditure by 2016 (£m)	Reduction in Expenditure due to Comparison Goods Floorspace Commitments (as at May 2008) (1)	Adjusted Residual Headroom Expenditure by 2016 (£m)	Assumed Sales Density in 2016 (2) (£ per sq.m net)	Estimated Retail Floorspace Need in 2016 (sq.m net)
	A	B	C = A + B	D	E = C - D	F	G = E / F
	(Table 14, E)	(Table 8, H)					
Sudbury	37.8	43.8	81.6	11.1	70.5	5,653	12,465
Hadleigh	1.7	-8.1	-6.3	0.0	-6.3	5,653	-1,121
TOTAL: BABERGH DISTRICT	**39.5**	**35.7**	**75.2**	**11.1**	**64.1**		**11,344**

Notes:
(1) Details and estimated 2016 turnovers of comparison goods floorspace commitments and proposals are set out in Appendix 4c.
(2) The derivation of our 2016 benchmark centre sales density estimates are set out in Section 3.

TABLE 16 - ALL COMPARISON GOODS EXPENDITURE PATTERN AND CENTRE TURNOVER ESTIMATES, 2021 (£ MILLION)												
Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)											
	Study Area								TOTAL HOUSEHOLD SURVEY AREA	Expenditure Drawn From Survey Area (Zones 1-8)	Estimated Inflow Expenditure (1)	Total Comparison Goods Turnover
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8		A	B	C = A + B
WITHIN BABERGH DISTRICT												
Sudbury	28.5	34.9	36.2	62.7	15.4	4.5	0.0	0.0	**182.3**	182.3	0.0	182.3
Hadleigh	0.0	0.0	5.1	0.0	1.0	5.5	0.0	0.0	**11.6**	11.6	0.0	11.6
Copdock Mill	0.0	0.0	0.0	0.0	0.0	3.3	18.1	6.1	**27.5**			
Other Centres / Stores	2.5	2.9	2.5	0.0	0.0	0.1	0.0	0.0	**8.0**			
SUB TOTAL	**31.0**	**37.8**	**43.9**	**62.7**	**16.4**	**13.3**	**18.1**	**6.1**	**229.3**			
OUTSIDE BABERGH DISTRICT												
All Centres / Stores	65.6	133.5	54.1	27.2	25.2	48.2	118.6	51.7	**524.1**			
SUB TOTAL	**65.6**	**133.5**	**54.1**	**27.2**	**25.2**	**48.2**	**118.6**	**51.7**	**524.1**			
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	**96.7**	**171.3**	**97.9**	**89.8**	**41.6**	**61.5**	**136.8**	**57.8**	**753.5**			

Notes:
For each cell, the monetry figure is derived by multiplying the 2021 available comparison goods expenditure in the zone (excl. SFT) (Table 4) by the adjusted comparison goods market share of the specific centre in that zone (Table 9b).
(1) Estimated by Colliers CRE.

TABLE 17 - CALCULATION OF POTENTIAL ALL COMPARISON GOODS HEADROOM EXPENDITURE, 2021 (£ MILLION)					
Centre	2008 Turnover	2021 Turnover Potential	Turnover Allocation for Existing Retailers 2008-2021	Residual Turnover Potential by 2021	Potential Headroom Expenditure by 2021
	A	B	C [1]	D = B - C	E = D - A
	(Table 8, C)	(Table 16, C)			
Sudbury	111.9	182.3	5.5	176.8	64.8
Hadleigh	7.3	11.6	1.2	10.3	3.0
TOTAL: BABERGH DISTRICT	**174.8**	**193.8**	**6.8**	**187.1**	**67.8**

Notes:
(1) We assume that all existing comparison goods floorspace at the base year (2008) will achieve a real sales productivity gain of 2.2% per annum. This figure is based on in-depth research carried out by Experian (see Appendix 3e). The sales productivity gains are applied to the estimated 2008 benchmark comparison goods turnovers of each centre as set out in Table 8 (Column G).

TABLE 18 - QUANTITATIVE RETAIL FLOORSPACE NEED AT 2021							
Centre	Potential Headroom Expenditure by 2021 (£m)	Adjustment for Over / Under Trading in Base Year (£m)	Adjusted Headroom Expenditure by 2021 (£m)	Reduction in Expenditure due to Comparison Goods Floorspace Commitments (as at May 2008) (1)	Adjusted Residual Headroom Expenditure by 2021 (£m)	Assumed Sales Density in 2021 (2) (£ per sq.m net)	Estimated Retail Floorspace Need in 2021 (sq.m net)
	A	B	C = A + B	D	E = C - D	F	G = E / F
	(Table 17, E)	(Table 8, H)					
Sudbury	64.8	43.8	108.6	12.4	96.2	6,303	15,265
Hadleigh	3.0	-8.1	-5.1	0.0	-5.1	6,303	-803
TOTAL: BABERGH DISTRICT	**67.8**	**35.7**	**103.6**	**12.4**	**91.2**		**14,462**

Notes:
(1) Details and estimated 2021 turnovers of comparison goods floorspace commitments and proposals are set out in Appendix 4c.
(2) The derivation of our 2021 benchmark centre sales density estimates are set out in Section 3.

APPENDIX 5C

The Need for Additional Convenience Goods Floorspace

RETAIL FLOORSPACE NEED ASSESSMENT: CONVENIENCE GOODS
(INCORPORATING ESTIMATES OF (ANY) UNDER / OVER TRADING AT THE BASE YEAR, 2008)

CONTENTS

TABLE 1 - POPULATION CHANGE BY ZONE						
Zone	**2008 Population (Base Year)**	**2011 Population**	**2016 Population**	**2021 Population**	**Total Increase (2008-2021)**	**Percentage Increase (2008-2021)**
Zone 1	17,980	18,417	19,097	19,807	1,827	10.2%
Zone 2	31,412	32,538	34,321	36,035	4,623	14.7%
Zone 3	19,508	19,676	19,967	20,294	786	4.0%
Zone 4	20,665	20,843	21,152	21,498	833	4.0%
Zone 5	7,474	7,538	7,650	7,775	301	4.0%
Zone 6	12,346	12,452	12,637	12,844	498	4.0%
Zone 7	26,664	26,893	27,292	27,739	1,075	4.0%
Zone 8	11,744	11,959	12,257	12,526	782	6.7%
TOTAL	**147,793**	**150,316**	**154,373**	**158,518**	**10,725**	**7.3%**

Notes:
Population figures for zones 1 to 8 are based on ward populations for 2005 produced by ONS and incorporate forecasts from 2005 to 2021 produced by Suffolk Observatory, Braintree District Council and Colchester Borough Council for the appropriate wards.

TABLE 2 - EXPENDITURE ON CONVENIENCE GOODS PER HEAD OF POPULATION BY ZONE (INCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING)							
Zone		Expenditure Per Head (£) [1]					
	2006	2008 (Base Year)	2011	2016	2021	Increase (£) (2008-2021)	Increase % (2008-2021)
Zone 1	1,835	1,861	1,900	1,968	2,023	162	8.7%
Zone 2	1,800	1,825	1,864	1,930	1,985	159	8.7%
Zone 3	1,854	1,880	1,920	1,988	2,044	164	8.7%
Zone 4	1,674	1,698	1,733	1,795	1,846	148	8.7%
Zone 5	1,986	2,014	2,056	2,129	2,190	176	8.7%
Zone 6	1,794	1,819	1,858	1,924	1,978	159	8.7%
Zone 7	1,819	1,845	1,884	1,950	2,006	161	8.7%
Zone 8	1,698	1,722	1,758	1,821	1,872	150	8.7%

Notes:
(1) Average consumer expenditure per head on convenience goods for 2006 has been estimated by Experian for each zone. The 2006 expenditure per head figures in each zone have been projected forwards to 2008 (the base year) and the forecast years of 2011, 2016, and 2021 by using UK expenditure per head growth forecasts provided by Experian (see Appendix 3c).

TABLE 3 - EXPENDITURE ON CONVENIENCE GOODS PER HEAD OF POPULATION BY ZONE (EXCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING)

Zone	Expenditure Per Head (£) [1]					
	2008 (Base Year)	2011	2016	2021	Increase (£) (2008-2021)	Increase % (2008-2021)
Zone 1	1,757	1,767	1,824	1,876	119	6.8%
Zone 2	1,723	1,733	1,789	1,840	117	6.8%
Zone 3	1,775	1,785	1,843	1,895	120	6.8%
Zone 4	1,602	1,612	1,664	1,711	109	6.8%
Zone 5	1,901	1,913	1,974	2,030	129	6.8%
Zone 6	1,717	1,728	1,783	1,834	116	6.8%
Zone 7	1,741	1,752	1,808	1,859	118	6.8%
Zone 8	1,625	1,635	1,688	1,736	110	6.8%

Notes:
(1) Expenditure per head on convenience goods has been discounted by 5.6% (over the figures in Table 2) for the base year of 2008, to exclude non store retail which includes e-tailing. At 2011 and 2016, discounts of 7% and 7.3% have been assumed. For the forecast year of 2021 we assume the same discount of 7.3%, since the level of SFT is expected to plateau.
The SFT percentages are derived from in-depth research carried out by Experian (see Appendix 3d).

TABLE 4 - TOTAL AVAILABLE CONVENIENCE GOODS EXPENDITURE ZONE (EXCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING)						
Zone	Total Available Expenditure (£m) (1)					
	2008 (Base Year)	2011	2016	2021	Increase (£) (2008-2021)	Increase % (2008-2021)
Zone 1	31.6	32.5	34.8	37.1	5.6	17.6%
Zone 2	54.1	56.4	61.4	66.3	12.2	22.5%
Zone 3	34.6	35.1	36.8	38.5	3.8	11.1%
Zone 4	33.1	33.6	35.2	36.8	3.7	11.1%
Zone 5	14.2	14.4	15.1	15.8	1.6	11.1%
Zone 6	21.2	21.5	22.5	23.6	2.3	11.1%
Zone 7	46.4	47.1	49.3	51.6	5.1	11.1%
Zone 8	19.1	19.6	20.7	21.7	2.7	13.9%
TOTAL	**254.4**	**260.3**	**275.9**	**291.3**	**37.0**	**14.5%**

Notes:
(1) Total available expenditure totals for convenience goods are calculated as follows: Population (Table 1) multiplied by consumer expenditure after making appropriate reductions for SFT (Table 3).

TABLE 5 - CONVENIENCE GOODS CENTRE MARKET SHARES BY ZONE IN THE BASE YEAR, 2008 (COLUMN PERCENT)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)							
	Study Area							
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
WITHIN BABERGH DISTRICT								
Sudbury	25.0	33.4	41.3	84.7	48.1	5.2	0.0	0.0
Hadleigh	0.0	0.0	2.1	0.4	1.1	38.1	2.5	0.0
Copdock Mill	0.0	0.0	2.0	0.0	0.0	14.1	35.1	0.0
Other Centres / Stores	14.5	5.3	23.4	8.1	13.0	14.5	3.4	0.3
SUB TOTAL	**39.5**	**38.8**	**68.8**	**93.1**	**62.2**	**71.9**	**41.0**	**0.3**
OUTSIDE BABERGH DISTRICT								
All Centres / Stores	60.5	61.2	31.2	6.9	37.8	28.1	59.0	99.7
SUB TOTAL	**60.5**	**61.2**	**31.2**	**6.9**	**37.8**	**28.1**	**59.0**	**99.7**
TOTAL	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Notes:
The market share percentages are derived from the household telephone survey carried out within Babergh District and its shopping hinterland during April/May 2008.

TABLE 6 - ESTIMATED CONVENIENCE GOODS EXPENDITURE PATTERN AND CENTRE TURNOVER ESTIMATES IN THE BASE YEAR, 2008 (£ MILLION)																	
Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)																
	Study Area								TOTAL HOUSEHOLD SURVEY AREA	Expenditure Drawn From Survey Area (Zones 1-8)	Estimated Inflow Expenditure [1]	Total Convenience Goods Turnover	Convenience Goods Floorspace (sq.m. net) [2]	Average Sales Density (£ per sq.m. net)	Benchmark Average Sales Density (£ per sq.m net) [3]	Benchmark Convenience Goods Turnover (£m)	Extent of Any Over / Under Trading (£m)
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8		A	B	C = A + B	D	E = C / D	F	G = F x D	H = C - G
WITHIN BABERGH DISTRICT																	
Sudbury	7.9	18.1	14.3	28.0	6.8	1.1	0.0	0.0	76.3	76.3	0.0	76.3	7,540	10,116	9,294	70.1	6.2
Hadleigh	0.0	0.0	0.7	0.1	0.2	8.1	1.2	0.0	10.3	10.3	0.0	10.3	2,624	3,914	4,387	11.5	-1.2
Copdock Mill	0.0	0.0	0.7	0.0	0.0	3.0	16.3	0.0	20.0	20.0	37.8	57.8	4,228	13,668	13,000	55.0	-
Other Centres / Stores	4.6	2.9	8.1	2.7	1.8	3.1	1.6	0.0	24.8	24.8	0.0	24.8	-	-	-	24.5	-
SUB TOTAL	12.5	21.0	23.8	30.8	8.8	15.2	19.0	0.0	131.3	131.3	37.8	169.1	14,392	27698.7		161.1	5.0
OUTSIDE BABERGH DISTRICT																	
All Centres / Stores	19.1	33.1	10.8	2.3	5.4	6.0	27.4	19.0	123.1								
SUB TOTAL	19.1	33.1	10.8	2.3	5.4	6.0	27.4	19.0	123.1								
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	31.6	54.1	34.6	33.1	14.2	21.2	46.4	19.1	254.4								

Notes:
(1) Estimated by Colliers CRE.
(2) Floorspace figures derived from a number of sources (see Appendix 4a for full details).
(3) Benchmark sales densities estimated by Colliers CRE (see Appendix 4a for full details).

TABLE 7 - ADJUSTED CONVENIENCE GOODS CENTRE MARKET SHARES BY ZONE (COLUMN PERCENT)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)							
	Study Area							
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
WITHIN BABERGH DISTRICT								
Sudbury	25.0	33.4	50.0	90.0	60.0	1.6	0.0	0.0
Hadleigh	0.0	0.0	2.1	0.4	1.1	80.0	2.5	0.0
Copdock Mill	0.0	0.0	2.0	0.0	0.0	2.6	35.1	0.0
Other Centres / Stores	14.5	5.3	23.4	8.1	13.0	14.5	3.4	0.3
SUB TOTAL	**39.5**	**38.8**	**77.5**	**98.5**	**74.1**	**98.7**	**41.0**	**0.3**
OUTSIDE BABERGH DISTRICT								
All Centres / Stores	60.5	61.2	22.5	1.5	25.9	1.3	59.0	99.7
SUB TOTAL	**60.5**	**61.2**	**22.5**	**1.5**	**25.9**	**1.3**	**59.0**	**99.7**
TOTAL	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Notes:
Some of the market shares for Sudury and Hadleigh have been adjusted from those set out in Table 5, to reflect the future potential of these towns to retain higher proportions of locally generated retail expenditure, which is in line with Council aspirations and the Government's sustainability objectives of reducing the number and distance of car journeys for shopping purposes.

TABLE 8 - CONVENIENCE GOODS EXPENDITURE PATTERN AND CENTRE TURNOVER ESTIMATES, 2011 (£ MILLION)												
Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)											
	Study Area								TOTAL HOUSEHOLD SURVEY AREA	Expenditure Drawn From Survey Area (Zones 1-8)	Estimated Inflow Expenditure [1]	Total Convenience Goods Turnover
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8		A	B	C = A + B
WITHIN BABERGH DISTRICT												
Sudbury	8.1	18.9	17.6	30.2	8.7	0.3	0.0	0.0	**83.8**	83.8	0.0	83.8
Hadleigh	0.0	0.0	0.7	0.1	0.2	17.2	1.2	0.0	**19.4**	19.4	0.0	19.4
Copdock Mill	0.0	0.0	0.7	0.0	0.0	0.6	16.5	0.0	**17.8**			
Other Centres / Stores	4.7	3.0	8.2	2.7	1.9	3.1	1.6	0.1	**25.3**			
SUB TOTAL	**12.9**	**21.9**	**27.2**	**33.1**	**10.7**	**21.2**	**19.3**	**0.1**	**146.3**			
OUTSIDE BABERGH DISTRICT												
All Centres / Stores	19.7	34.5	7.9	0.5	3.7	0.3	27.8	19.5	**113.9**			
SUB TOTAL	**19.7**	**34.5**	**7.9**	**0.5**	**3.7**	**0.3**	**27.8**	**19.5**	**113.9**			
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	**32.5**	**56.4**	**35.1**	**33.6**	**14.4**	**21.5**	**47.1**	**19.6**	**260.3**			

Notes:
For each cell, the monetry figure is derived by multiplying the 2011 available convenience goods expenditure in the zone (excl. SFT) (Table 4) by the adjusted convenience goods market share of the specific centre in that zone (Table 7).
(1) Estimated by Colliers CRE .

TABLE 9 - CALCULATION OF POTENTIAL CONVENIENCE GOODS HEADROOM EXPENDITURE, 2011 (£ MILLION)					
Centre	2008 Turnover	2011 Turnover Potential	Turnover Allocation for Existing Retailers 2008-2011	Residual Turnover Potential by 2011	Potential Headroom Expenditure by 2011
	A	B	C (1)	D = B - C	E = D - A
	(Table 6, C)	(Table 8, C)			
Sudbury	76.3	83.8	1.3	82.5	6.3
Hadleigh	10.3	19.4	0.2	19.2	9.0
TOTAL	**169.1**	**103.2**	**1.5**	**101.8**	**15.2**

Notes:
(1) We assume that all existing convenience goods floorspace at the base year (2008) will achieve a real sales productivity gain of 0.6% per annum. This figure is based on in-depth research carried out by Experian (see Appendix 3e). The sales productivity gains are applied to the estimated 2008 benchmark convenience goods turnovers of each centre as set out in Table 6 (Column G).

TABLE 10 - QUANTITATIVE RETAIL FLOORSPACE NEED AT 2011							
Centre	Potential Headroom Expenditure by 2011 (£m)	Adjustment for Over / Under Trading in Base Year (£m)	Adjusted Headroom Expenditure by 2011 (£m)	Reduction in Expenditure due to Convenience Goods Floorspace Commitments (as at April 2008) (1)	Adjusted Residual Headroom Expenditure by 2011 (£m)	Assumed Sales Density in 2011 (2) (£ per sq.m net)	Estimated Retail Floorspace Need in 2011 (sq.m net)
	A	B	C = A + B	D	E = C - D	F	G = E / F
	(Table 9, E)	(Table 6, H)					
Sudbury	6.3	6.2	12.5	0.5	12.0	8,145	1,467
Hadleigh	9.0	-1.2	7.7	0.0	7.7	8,145	947
TOTAL	**15.2**	**5.0**	**20.2**	**0.5**	**19.7**		**2,414**

Notes:
(1) Details and estimated 2011 turnovers of convenience goods floorspace commitments and proposals are set out in Appendix 4c.
(2) The derivation of our 2011 benchmark centre sales density estimates are set out in Section 3.

TABLE 11 - CONVENIENCE GOODS EXPENDITURE PATTERN AND CENTRE TURNOVER ESTIMATES, 2016 (£ MILLION)												
Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)											
	Study Area								TOTAL HOUSEHOLD SURVEY AREA	Expenditure Drawn From Survey Area (Zones 1-8)	Estimated Inflow Expenditure (1)	Total Convenience Goods Turnover
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8		A	B	C = A + B
WITHIN BABERGH DISTRICT												
Sudbury	8.7	20.5	18.4	31.7	9.1	0.4	0.0	0.0	**88.7**	88.7	0.0	88.7
Hadleigh	0.0	0.0	0.8	0.1	0.2	18.0	1.2	0.0	**20.4**	20.4	0.0	20.4
Copdock Mill	0.0	0.0	0.7	0.0	0.0	0.6	17.3	0.0	**18.7**			
Other Centres / Stores	5.1	3.3	8.6	2.8	2.0	3.3	1.7	0.1	**26.7**			
SUB TOTAL	**13.8**	**23.8**	**28.5**	**34.7**	**11.2**	**22.2**	**20.2**	**0.1**	**154.5**			
OUTSIDE BABERGH DISTRICT												
All Centres / Stores	21.1	37.6	8.3	0.5	3.9	0.3	29.1	20.6	**121.4**			
SUB TOTAL	**21.1**	**37.6**	**8.3**	**0.5**	**3.9**	**0.3**	**29.1**	**20.6**	**121.4**			
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	**34.8**	**61.4**	**36.8**	**35.2**	**15.1**	**22.5**	**49.3**	**20.7**	**275.9**			

Notes:
For each cell, the monetry figure is derived by multiplying the 2016 available convenience goods expenditure in the zone (excl. SFT) (Table 4) by the adjusted convenience goods market share of the specific centre in that zone (Table 7).
(1) Estimated by Colliers CRE.

TABLE 12 - CALCULATION OF POTENTIAL CONVENIENCE GOODS HEADROOM EXPENDITURE, 2016 (£ MILLION)					
Centre	2008 Turnover	2016 Turnover Potential	Turnover Allocation for Existing Retailers 2008-2016	Residual Turnover Potential by 2016	Potential Headroom Expenditure by 2016
	A	B	C [(1)]	D = B - C	E = D - A
	(Table 6, C)	(Table 10, C)			
Sudbury	76.3	88.7	3.4	85.3	9.0
Hadleigh	10.3	20.4	0.6	19.8	9.5
TOTAL	**169.1**	**109.1**	**4.0**	**105.1**	**18.5**

Notes:
(1) We assume that all existing convenience goods floorspace at the base year (2008) will achieve a real sales productivity gain of 0.6% per annum. This figure is based on in-depth research carried out by Experian (see Appendix 3e). The sales productivity gains are applied to the estimated 2008 benchmark convenience goods turnovers of each centre as set out in Table 6 (Column G).

TABLE 13 - QUANTITATIVE RETAIL FLOORSPACE NEED AT 2016							
Centre	Potential Headroom Expenditure by 2016 (£m)	Adjustment for Over / Under Trading in Base Year (£m)	Adjusted Headroom Expenditure by 2016 (£m)	Reduction in Expenditure due to Convenience Goods Floorspace Commitments (as at April 2008) (1)	Adjusted Residual Headroom Expenditure by 2016 (£m)	Assumed Sales Density in 2016 (2) (£ per sq.m net)	Estimated Retail Floorspace Need in 2016 (sq.m net)
	A	B	C = A + B	D	E = C - D	F	G = E / F
	(Table 12, E)	(Table 6, H)					
Sudbury	9.0	6.2	15.2	0.5	14.7	8,392	1,755
Hadleigh	9.5	-1.2	8.3	0.0	8.3	8,392	987
TOTAL	**18.5**	**5.0**	**23.5**	**0.5**	**23.0**		**2,741**

Notes:
(1) Details and estimated 2016 turnovers of convenience goods floorspace commitments and proposals are set out in Appendix 4c.
(2) The derivation of our 2016 benchmark centre sales density estimates are set out in Section 3.

TABLE 14 - CONVENIENCE GOODS EXPENDITURE PATTERN AND CENTRE TURNOVER ESTIMATES, 2021 (£ MILLION)												
Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)											
	Study Area								TOTAL HOUSEHOLD SURVEY AREA	Expenditure Drawn From Survey Area (Zones 1-8)	Estimated Inflow Expenditure (1)	Total Convenience Goods Turnover
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8		A	B	C = A + B
WITHIN BABERGH DISTRICT												
Sudbury	9.3	22.2	19.2	33.1	9.5	0.4	0.0	0.0	**93.6**	93.6	0.0	93.6
Hadleigh	0.0	0.0	0.8	0.1	0.2	18.8	1.3	0.0	**21.3**	21.3	0.0	21.3
Copdock Mill	0.0	0.0	0.8	0.0	0.0	0.6	18.1	0.0	**19.5**			
Other Centres / Stores	5.4	3.5	9.0	3.0	2.1	3.4	1.7	0.1	**28.2**			
SUB TOTAL	**14.7**	**25.7**	**29.8**	**36.2**	**11.7**	**23.2**	**21.1**	**0.1**	**162.6**			
OUTSIDE BABERGH DISTRICT												
All Centres / Stores	22.5	40.6	8.7	0.6	4.1	0.3	30.4	21.7	**128.8**			
SUB TOTAL	**22.5**	**40.6**	**8.7**	**0.6**	**4.1**	**0.3**	**30.4**	**21.7**	**128.8**			
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	**37.1**	**66.3**	**38.5**	**36.8**	**15.8**	**23.6**	**51.6**	**21.7**	**291.3**			

Notes:
For each cell, the monetry figure is derived by multiplying the 2021 available convenience goods expenditure in the zone (excl. SFT) (Table 4) by the adjusted convenience goods market share of the specific centre in that zone (Table 7).
(1) Estimated by Colliers CRE.

TABLE 15 - CALCULATION OF POTENTIAL CONVENIENCE GOODS HEADROOM EXPENDITURE, 2021 (£ MILLION)					
Centre	2008 Turnover	2021 Turnover Potential	Turnover Allocation for Existing Retailers 2008-2021	Residual Turnover Potential by 2021	Potential Headroom Expenditure by 2021
	A	B	C (1)	D = B - C	E = D - A
	(Table 6, C)	(Table 14, C)			
Sudbury	76.3	93.6	5.7	88.0	11.7
Hadleigh	10.3	21.3	0.9	20.3	10.1
TOTAL	**169.1**	**114.9**	**6.6**	**108.3**	**21.8**

Notes:
(1) We assume that all existing convenience goods floorspace at the base year (2008) will achieve a real sales productivity gain of 0.6% per annum. This figure is based on in-depth research carried out by Experian (see Appendix 3e). The sales productivity gains are applied to the estimated 2008 benchmark convenience goods turnovers of each centre as set out in Table 6 (Column G).

TABLE 16 - QUANTITATIVE RETAIL FLOORSPACE NEED AT 2021							
Centre	Potential Headroom Expenditure by 2021 (£m)	Adjustment for Over / Under Trading in Base Year (£m)	Adjusted Headroom Expenditure by 2021 (£m)	Reduction in Expenditure due to Convenience Goods Floorspace Commitments (as at April 2008) (1)	Adjusted Residual Headroom Expenditure by 2021 (£m)	Assumed Sales Density in 2021 (2) (£ per sq.m net)	Estimated Retail Floorspace Need in 2021 (sq.m net)
	A	B	C = A + B	D	E = C - D	F	G = E / F
	(Table 15, E)	(Table 6, H)					
Sudbury	11.7	6.2	17.9	0.6	17.3	8,647	2,000
Hadleigh	10.1	-1.2	8.8	0.0	8.8	8,647	1,021
TOTAL	**21.8**	**5.0**	**26.7**	**0.6**	**26.1**		**3,021**

Notes:
(1) Details and estimated 2021 turnovers of convenience goods floorspace commitments and proposals are set out in Appendix 4c.
(2) The derivation of our 2021 benchmark centre sales density estimates are set out in Section 3.