

SOUTHEND BOROUGH COUNCIL

Project: RETAIL STUDY 2010
 Latest Revision: 06/07/2010

TABLE 1
SURVEY AREA POPULATION FORECASTS

Zone	Postcode	2010	2015	2020*	2025*
Zone 1	SS13/2/3;SS1 6 4	33,132	33,586	34,103	34,615
Zone 2	SS8 0/7/8/9	36,904	37,897	39,028	39,613
Zone 3	SS7 1/2/3/4/5	49,893	50,833	52,000	52,780
Zone 4	5	50,065	51,931	53,797	54,604
Zone 5	SS5 4/5/6, SS6 7/8/9	52,319	53,644	55,088	55,914
Zone 6	SS9 1/2/3/4/5	46,724	47,213	47,891	48,610
Zone 7	SS0 0/7/8/9, SS2 4, SS3 8	60,144	61,526	63,118	64,065
Zone 8	SS1 2/3, SS2 4, SS3 8	40,861	41,958	43,180	43,828
Zone 9	SS3 0/9	23,610	24,534	25,558	25,942
Zone 10	SS4 1/2/3	20,915	21,923	22,956	23,300
TOTAL		414,567	425,045	436,718	443,269

SOURCES/NOTES: (1) Survey Area based on CBRE NSLSP (2010).
 (2) Population estimates derived from MapInfo (09/02).
 (3) CBRE estimate = 0.3 % increase per year (based on 2019 data @ 1.2% increase over 4 years)

TABLE 1(a)
POPULATION GROWTH RATES

Zone	2010-2015 (%)	2010-2020 (%)	2010-2025 (%)
Zone 1		1.37	2.93
Zone 2		2.69	5.75
Zone 3		1.88	4.22
Zone 4		3.73	7.45
Zone 5		2.53	5.29
Zone 6		1.05	2.50
Zone 7		2.30	4.94
Zone 8		2.68	5.68
Zone 9		3.91	8.25
Zone 10		4.82	9.76
TOTAL		2.53	5.34

TABLE 2
CATCHMENT AREA RETAIL EXPENDITURE FORECASTS (2007 prices)

PER CAPITA EXPENDITURE IN	2007 (£)							
Convenience Goods	1,678 Excluding SFT							
Comparison Goods	2,979 Excluding SFT							
PER CAPITA EXPENDITURE IN	2010	2015	2020	2025				
Convenience Goods: (£)	1,683	1,730	1,815	1,927				
Comparison Goods (£):	3,501	4,286	5,238	6,653				
Study Area Zone	TOTAL RETAIL EXPENDITURE							
	CONVENIENCE GOODS				COMPARISON GOODS			
	2010 (£m)	2015 (£m)	2020 (£m)	2025 (£m)	2010 (£m)	2015 (£m)	2020 (£m)	2025 (£m)
1	55.8	58.1	61.9	66.7	116.0	143.9	178.6	230.3
2	62.1	65.6	70.8	76.3	129.2	162.4	204.4	263.6
3	84.0	88.0	94.4	101.7	174.7	217.9	272.4	351.2
4	84.2	89.9	97.6	105.2	175.3	222.6	281.8	363.3
5	88.0	92.8	100.0	107.7	183.2	229.9	288.6	372.0
6	78.6	81.7	86.9	93.6	163.6	202.3	250.9	323.4
7	101.2	106.5	114.6	123.4	210.5	263.7	330.6	426.3
8	68.8	72.6	78.4	84.4	143.0	179.8	226.2	291.6
9	39.7	42.5	46.4	50.0	82.7	105.1	133.9	172.6
10	35.2	37.9	41.7	44.9	73.2	94.0	120.2	155.0
TOTALS	697.6	735.5	792.6	854.0	1,451	1,822	2,288	2,949

SOURCES/NOTES:

- (1) MapInfo Area Profile Report for Southend (2009).
- (2) MapInfo Information Brief 09/02.
- (3) Table 1 for population.
- (4) Convenience and Comparison Goods Expenditure Estimates taken from MapInfo Area Profile Report for combined study
- (5) Special Forms of Trading removed for convenience goods at 2% and comparison at 5.8% (2007). Pitney Bowes Retail Expenditure Guide 2009/2010; Table 3.1, P18, (September 2009)
- (6) Convenience growth from 2007 to 2008 is the estimated actual national average growth. Growth projections 2009 to 2016 apply Pitney Bowes/Oxford Economics' March 2009 forecasts. Thereafter, resumption of 1998 to 2007 trend based growth of 1.1% pa assumed.
- (7) Convenience expenditure grown at:
 - 2007-2008 at -0.7% (Pitney Bowes Retail Expenditure Guide 2009/2010; Table 3.2, P20, September 2009)
 - 2008-2012 at 0.5% (Pitney Bowes Retail Expenditure Guide 2009/2010; Table 3.3, P22, September 2009)
 - 2012-2017 at 0.6% (Pitney Bowes Retail Expenditure Guide 2009/2010; Table 3.3, P22, September 2009)
 - 2017-2026 at 1.2% (Pitney Bowes Retail Expenditure Guide 2009/2010; Table 2.2, P9, September 2009)
- (8) Comparison expenditure grown at:
 - 2007-2008 at 4.6% (Pitney Bowes Retail Expenditure Guide 2009/2010; Table 3.3, P22, September 2009)
 - 2008-2012 at 1.6% (Pitney Bowes Retail Expenditure Guide 2009/2010; Table 3.3, P22, September 2009)
 - 2012-2017 at 2.9% (Pitney Bowes Retail Expenditure Guide 2009/2010; Table 3.3, P22, September 2009)
 - 2017-2026 at 4.9% (Pitney Bowes Retail Expenditure Guide 2009/2010; Table 2.2, P9, September 2009)

Table 2(a)
CATCHMENT AREA COMPARISON GOODS EXPENDITURE BY GOODS CATEGORIES 2007 (2007 Prices)

Per Capita Expenditure:	Comparison Goods Categories								
	Clothing & footwear	Furniture/ floorcoverings etc	Household Textiles	Domestic Appliances	Audio-visual equipment	Hardware, DIY, garden products	Chemists, medcl & beauty goods	All other comparison gds	TOTAL
Expenditure in 2007 including SFT	£ 759	£ 412	£ 105	£ 109	£ 492	£ 403	£ 414	£468	£ 3,162
Exclusion for SFT (%)	5.8	5.8	5.8	5.8	5.8	5.8	5.8	5.8	
Expenditure in 2007 excluding SFT	£ 715	£ 388	£ 99	£ 103	£ 463	£ 380	£ 390	£440.7	£ 2,979
Per capita expenditure 2007:	Total Comparison Goods Expenditure by Goods Category								
	Clothing & footwear	Furniture/ floorcoverings etc	Household Textiles	Domestic Appliances	Audio-visual equipment	Hardware, DIY, garden products	Chemists, medical & beauty goods	All other comparison gds	TOTAL
	£ 840	£ 456	£ 116	£ 121	£ 545	£ 446	£ 458	£ 518	£ 3,501
Study Zones:	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)
1	27.8	15.1	3.9	4.0	18.0	14.8	15.2	17.2	116.0
2	31.0	16.8	4.3	4.5	20.1	16.5	16.9	19.1	129.2
3	41.9	22.8	5.8	6.0	27.2	22.3	22.9	25.8	174.7
4	42.1	22.8	5.8	6.0	27.3	22.3	22.9	25.9	175.3
5	44.0	23.9	6.1	6.3	28.5	23.4	24.0	27.1	183.2
6	39.3	21.3	5.4	5.6	25.5	20.9	21.4	24.2	163.6
7	50.5	27.4	7.0	7.3	32.8	26.8	27.6	31.1	210.5
8	34.3	18.6	4.7	4.9	22.3	18.2	18.7	21.2	143.0
9	19.8	10.8	2.7	2.8	12.9	10.5	10.8	12.2	82.7
10	17.6	9.5	2.4	2.5	11.4	9.3	9.6	10.8	73.2
TOTAL	348.4	189.1	48.2	50.0	225.8	185.1	190.0	215	1,451

SOURCE/NOTES:

- (1) MapInfo Area Profile Report for Southend 2009.
- (2) MapInfo Goods Based Retail Expenditure Estimates(09/02).
- (3) Table 1 for population.
- (4) Table 2 for growth in expenditure 2005-07.

Southend Convenience Goods Allocation

Table 3
Convenience goods allocation - % Market Share

Zone	Sainsbury's				M&S				Tesco Express				Iceland				Local Stores				Total							
	2010	2015	2020	2025	2010	2015	2020	2025	2010	2015	2020	2025	2010	2015	2020	2025	2010	2015	2020	2025	2010	2015	2020	2025	2010	2015	2020	2025
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.3%	0.3%	0.3%	0.2%	0.2%	0.2%	0.2%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%	0.5%
2	0.3%	0.3%	0.3%	0.3%	0.0%	0.0%	0.0%	0.0%	0.9%	0.9%	0.9%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	1.2%	1.2%	1.2%	1.2%	1.2%	1.2%	1.2%
3	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.2%	0.2%	0.2%	0.0%	0.0%	0.0%	0.0%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%
4	0.8%	0.8%	0.8%	0.8%	0.0%	0.0%	0.0%	0.0%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%	0.0%	0.0%	0.0%	0.0%	1.2%	1.2%	1.2%	1.2%	1.2%	1.2%	1.2%	1.2%
5	0.4%	0.4%	0.4%	0.4%	0.0%	0.0%	0.0%	0.0%	0.6%	0.6%	0.6%	0.6%	0.2%	0.2%	0.2%	0.2%	0.4%	0.4%	0.4%	0.4%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%
6	3.7%	3.7%	3.7%	3.7%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	0.0%	0.0%	0.0%	0.0%	0.4%	0.4%	0.4%	0.4%	7.2%	7.2%	7.2%	7.2%	7.2%	7.2%	7.2%	7.2%
7	26.7%	26.7%	26.7%	26.7%	2.5%	2.5%	2.5%	2.5%	1.6%	1.6%	1.6%	1.6%	0.5%	0.5%	0.5%	0.5%	0.8%	0.8%	0.8%	0.8%	32.1%	32.1%	32.1%	32.1%	32.1%	32.1%	32.1%	32.1%
8	13.2%	13.2%	13.2%	13.2%	1.8%	1.8%	1.8%	1.8%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.3%	1.3%	1.3%	1.3%	18.4%	18.4%	18.4%	18.4%	18.4%	18.4%	18.4%	18.4%
9	5.7%	5.7%	5.7%	5.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.4%	0.4%	0.4%	6.1%	6.1%	6.1%	6.1%	6.1%	6.1%	6.1%	6.1%
10	1.5%	1.5%	1.5%	1.5%	0.0%	0.0%	0.0%	0.0%	3.1%	3.1%	3.1%	3.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.6%	4.6%	4.6%	4.6%	4.6%	4.6%	4.6%	4.6%

SOURCE: (1) Household survey, December 2009

Table 3(a)
Convenience goods allocation - £m

Zone	Sainsbury's				M&S				Tesco Express (The Royals)				Iceland				Local Stores (including Wilkinsons)				Total							
	2010	2015	2020	2025	2010	2015	2020	2025	2010	2015	2020	2025	2010	2015	2020	2025	2010	2015	2020	2025	2010	2015	2020	2025	2010	2015	2020	2025
	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)
1	0.0	0.0	0.0	0.0	0.0	0	0	0	0.0	0.0	0.0	0.0	0.1	0.2	0.2	0.2	0.1	0.1	0.1	0.1	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3
2	0.2	0.2	0.2	0.2	0.0	0	0	0	0.6	0.6	0.6	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.7	0.8	0.8	0.9	0.7	0.8	0.8	0.9
3	0.0	0.0	0.0	0.0	0.0	0	0	0	0.0	0.0	0.0	0.0	0.2	0.2	0.2	0.2	0.0	0.0	0.0	0.0	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2
4	0.7	0.8	0.8	0.9	0.0	0	0	0	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.0	0.0	0.0	0.0	0.8	0.9	0.9	1.0	0.8	0.9	0.9	1.0
5	0.3	0.3	0.4	0.4	0.0	0	0	0	0.6	0.6	0.6	0.7	0.2	0.2	0.2	0.2	0.3	0.4	0.4	0.4	1.0	1.1	1.2	1.3	1.0	1.1	1.2	1.3
6	2.9	3.0	3.2	3.4	1.2	1.3	1.4	1.5	1.2	1.3	1.4	1.5	0.0	0.0	0.0	0.0	0.3	0.3	0.3	0.4	1.4	1.4	1.6	1.7	1.4	1.4	1.6	1.7
7	27.0	28.4	30.6	32.9	2.5	2.6	2.8	3.0	1.6	1.7	1.8	2.0	0.6	0.6	0.6	0.7	0.9	0.9	1.0	1.0	5.7	5.9	6.3	6.8	5.7	5.9	6.3	6.8
8	9.1	9.6	10.4	11.2	1.3	1.3	1.4	1.5	0.7	0.7	0.8	0.9	0.7	0.7	0.8	0.9	0.9	0.9	1.0	1.1	32.5	34.2	36.8	39.6	32.5	34.2	36.8	39.6
9	2.3	2.4	2.7	2.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.2	0.2	0.2	12.7	13.4	14.4	15.6	12.7	13.4	14.4	15.6
10	0.5	0.6	0.6	0.7	0.0	0.0	0.0	0.0	1.1	1.2	1.3	1.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.4	2.6	2.9	3.1	2.4	2.6	2.9	3.1
Total	43.0	45.3	48.8	52.6	5.0	5.2	5.6	6.1	5.9	6.2	6.7	7.3	1.9	2.0	2.1	2.3	2.7	2.8	3.0	3.3	58.5	61.6	66.3	71.5	58.5	61.6	66.3	71.5

SOURCE: (1) Tables 2 and 3

Southend Comparison Goods Allocation

Table 4
Southend town centre's draw upon the catchment area

Market Shares indicated by Household Interview Survey 2009 remain unchanged throughout forecasting period.				
Catchment Zone	PROPORTION OF EXPENDITURE ATTRACTED TO SOUTHEND TOWN CENTRE COMPARISON GOODS			
	2010	2015	2020	2025
	(%)	(%)	(%)	(%)
Zone 1	2%	2%	2%	2%
Zone 2	9%	9%	9%	9%
Zone 3	14%	14%	14%	14%
Zone 4	2%	2%	2%	2%
Zone 5	28%	28%	28%	28%
Zone 6	38%	38%	38%	38%
Zone 7	55%	55%	55%	55%
Zone 8	56%	56%	56%	56%
Zone 9	59%	59%	59%	59%
Zone 10	49%	49%	49%	49%

SOURCE/NOTES: Household Survey, December 2009

Table 5
Forecast retail sales in Southend town centre

Catchment zone	RETAIL SALES IN SOUTHEND TOWN CENTRE BY CATCHMENT ZONE COMPARISON GOODS			
	2010	2015	2020	2025
	(£m)	(£m)	(£m)	(£m)
Zone 1	2.3	2.8	3.5	4.5
Zone 2	11.3	14.2	17.9	23.1
Zone 3	23.8	29.6	37.1	47.8
Zone 4	3.2	4.1	5.2	6.7
Zone 5	50.5	63.4	79.6	102.6
Zone 6	61.6	76.2	94.5	121.8
Zone 7	116.8	146.3	183.5	236.5
Zone 8	80.5	101.2	127.4	164.2
Zone 9	48.9	62.2	79.3	102.2
Zone 10	35.9	46.0	58.9	76.0
TOTALS	434.9	546.3	686.8	885.4

SOURCE/NOTES: Household Survey, December 2009

TABLE 6
SOUTHEND TOWN CENTRE CAPACITY

	CONVENIENCE GOODS				COMPARISON GOODS			
	2010	2015	2020	2025	2010	2015	2020	2025
Total available residents' spending (Zones 1-10) (£m)	697.6	735.5	792.6	854.0	1451.3	1821.6	2287.6	2949.3
Plus visitors' spending (£m)	0	0	0	0	0	0	0	0
Total Spending with study area (£m)	697.6	735.5	792.6	854.0	1451.3	1821.6	2287.6	2949.3
Estimated turnover of all major town centre floorspace in Southend (£m)	58.5	61.6	66.3	71.5	434.9	546.3	686.8	885.4
Market share of Southend Convenience Goods Floorspace (Zones 1-10) (%)	8%	8%	8%	8%	30%	30%	30%	30%
Existing floorspace in Southend (sqm net)	9,335	9,335	9,335	9,335	47,205	47,205	47,205	47,205
Average Sales Density (£ per sqm net)	6,264	6,712	6,712	6,712	9,214	6,500	7,002	7,544
Derived Turnover of Existing Floorspace (£m)	58.5	62.7	62.7	62.7	434.9	306.8	330.5	356.1
Estimated Turnover of Commitments (£m)	0	0	0	0	0	0	0	0
Estimated Residual Spending after Commitments (£m)	0	(1.1)	3.7	8.8	0	239.5	356.2	529.3
Assumed Average Sales Density of New Floorspace (£ per sqm net)	0	12,000	12,000	12,000	0	6,500	7,002	7,544
Capacity for New Floorspace (sqm net)	0	-88	308	736	0	36,841	50,873	70,172

SOURCES/NOTES:

- (1) Tables 2, 3a, 4a
- (2) Excludes vacant shops.
- (3) Floorspace estimates taken from GOAD, IGD and CB Richard Ellis estimates and adjusted to reflect net sales areas
- (4) Allowance for comparison turnover to increase by 1.5% pa.

Westcliff convenience goods allocation

Table 7
Convenience goods allocation - % Market Share

Tesco Express, Hamlet Court Road				
Zone	2010	2015	2020	2025
	(%)	(%)	(%)	(%)
1	0.0%	0.0%	0.0%	0.0%
2	0.0%	0.0%	0.0%	0.0%
3	0.0%	0.0%	0.0%	0.0%
4	0.0%	0.0%	0.0%	0.0%
5	0.0%	0.0%	0.0%	0.0%
6	0.0%	0.0%	0.0%	0.0%
7	1.0%	1.0%	1.0%	1.0%
8	0.0%	0.0%	0.0%	0.0%
9	0.0%	0.0%	0.0%	0.0%
10	0.0%	0.0%	0.0%	0.0%

Co Op				
2010	2015	2020	2025	
(%)	(%)	(%)	(%)	(%)
0.0%	0.0%	0.0%	0.0%	0.0%
0.0%	0.0%	0.0%	0.0%	0.0%
0.0%	0.0%	0.0%	0.0%	0.0%
0.0%	0.0%	0.0%	0.0%	0.0%
0.0%	0.0%	0.0%	0.0%	0.0%
0.0%	0.0%	0.0%	0.0%	0.0%
0.0%	0.0%	0.0%	0.0%	0.0%
0.0%	0.0%	0.0%	0.0%	0.0%
3.3%	3.3%	3.3%	3.3%	3.3%
0.0%	0.0%	0.0%	0.0%	0.0%
0.0%	0.0%	0.0%	0.0%	0.0%
0.0%	0.0%	0.0%	0.0%	0.0%

Local Stores				
2010	2015	2020	2025	
(%)	(%)	(%)	(%)	(%)
0.0%	0.0%	0.0%	0.0%	0.0%
0.0%	0.0%	0.0%	0.0%	0.0%
0.0%	0.0%	0.0%	0.0%	0.0%
0.0%	0.0%	0.0%	0.0%	0.0%
0.0%	0.0%	0.0%	0.0%	0.0%
0.0%	0.0%	0.0%	0.0%	0.0%
0.0%	0.0%	0.0%	0.0%	0.0%
0.2%	0.2%	0.2%	0.2%	0.2%
0.7%	0.7%	0.7%	0.7%	0.7%
0.0%	0.0%	0.0%	0.0%	0.0%
0.0%	0.0%	0.0%	0.0%	0.0%
2.0%	2.0%	2.0%	2.0%	2.0%

SOURCE: (1) Household survey, December 2009

Table 7(a)
Convenience goods allocation - £m

Tesco Express, Hamlet Court Road				
Zone	2010	2015	2020	2025
	£m	£m	£m	£m
1	0.0	0.0	0.0	0.0
2	0.0	0.0	0.0	0.0
3	0.0	0.0	0.0	0.0
4	0.0	0.0	0.0	0.0
5	0.0	0.0	0.0	0.0
6	0.0	0.0	0.0	0.0
7	1.0	1.1	1.2	1.3
8	0.0	0.0	0.0	0.0
9	0.0	0.0	0.0	0.0
10	0.0	0.0	0.0	0.0
Total	1.0	1.1	1.2	1.3

Co Op, Hamlet Court Road				
2010	2015	2020	2025	
£m	£m	£m	£m	£m
0.0	0.0	0.0	0.0	0.0
0.0	0.0	0.0	0.0	0.0
0.0	0.0	0.0	0.0	0.0
0.0	0.0	0.0	0.0	0.0
0.0	0.0	0.0	0.0	0.0
0.0	0.0	0.0	0.0	0.0
0.0	0.0	0.0	0.0	0.0
0.0	0.0	0.0	0.0	0.0
3.4	3.5	3.8	4.1	
0.0	0.0	0.0	0.0	0.0
0.0	0.0	0.0	0.0	0.0
0.0	0.0	0.0	0.0	0.0
3.4	3.5	3.8	4.1	

Local Stores				
2010	2015	2020	2025	
£m	£m	£m	£m	£m
0.0	0.0	0.0	0.0	0.0
0.0	0.0	0.0	0.0	0.0
0.0	0.0	0.0	0.0	0.0
0.0	0.0	0.0	0.0	0.0
0.0	0.0	0.0	0.0	0.0
0.0	0.0	0.0	0.0	0.0
0.0	0.0	0.0	0.0	0.0
0.2	0.2	0.2	0.2	0.2
0.7	0.7	0.8	0.8	0.8
0.0	0.0	0.0	0.0	0.0
0.0	0.0	0.0	0.0	0.0
0.7	0.7	0.8	0.9	0.9
1.5	1.6	1.7	1.9	

Total				
2010	2015	2020	2025	
(£m)	(£m)	(£m)	(£m)	(£m)
0.0	0.0	0.0	0.0	0.0
0.0	0.0	0.0	0.0	0.0
0.0	0.0	0.0	0.0	0.0
0.0	0.0	0.0	0.0	0.0
0.0	0.0	0.0	0.0	0.0
0.0	0.0	0.0	0.0	0.0
0.0	0.0	0.0	0.0	0.0
0.2	0.2	0.2	0.2	0.2
5.1	5.3	5.7	6.2	6.2
0.0	0.0	0.0	0.0	0.0
0.0	0.0	0.0	0.0	0.0
0.7	0.7	0.8	0.9	0.9
5.9	6.2	6.7	7.3	

SOURCE: (1) Tables 2 and 3

Table 8
Westcliff town centre's draw upon the catchment area

Market Shares indicated by Household Interview Survey 2009 remain unchanged throughout forecasting period				
Catchment Zone	PROPORTION OF EXPENDITURE ATTRACTED TO WESTCLIFF TOWN CENTRE BY CATCHMENT ZONE FOR COMPARISON GOODS			
	2010 (%)	2015 (%)	2020 (%)	2025 (%)
Zone 1	0%	0%	0%	0%
Zone 2	0%	0%	0%	0%
Zone 3	0%	0%	0%	0%
Zone 4	0%	0%	0%	0%
Zone 5	0%	0%	0%	0%
Zone 6	2%	2%	2%	2%
Zone 7	6%	6%	6%	6%
Zone 8	1%	1%	1%	1%
Zone 9	1%	1%	1%	1%
Zone 10	1%	1%	1%	1%

SOURCE: (1) Household survey, December 2009

Table 9
Forecast retail sales in Westcliff town centre

Catchment zone	RETAIL SALES IN WESTCLIFF TOWN CENTRE BY CATCHMENT ZONE FOR COMPARISON GOODS			
	2010 (£m)	2015 (£m)	2020 (£m)	2025 (£m)
Zone 1	0.2	0.3	0.4	0.5
Zone 2	0.3	0.4	0.5	0.7
Zone 3	0.5	0.6	0.8	1.0
Zone 4	0.7	0.8	1.1	1.4
Zone 5	0.4	0.6	0.7	0.9
Zone 6	3.5	4.4	5.4	7.0
Zone 7	12.0	15.0	18.8	24.2
Zone 8	1.9	2.4	3.0	3.9
Zone 9	0.7	0.9	1.2	1.6
Zone 10	0.5	0.7	0.9	1.1
TOTALS	20.8	26.1	32.7	42.2

TABLE 10
WESTCLIFF TOWN CENTRE CAPACITY

	CONVENIENCE GOODS				COMPARISON GOODS			
	2010	2015	2020	2025	2010	2015	2020	2025
Total available residents' spending (Zones 1-10) (£m)	697.6	735.5	792.6	854.0	1451.3	1821.6	2287.6	2949.3
Plus visitors' spending (£m)	0	0	0	0	0	0	0	0
Total Spending with study area (£m)	697.6	735.5	792.6	854.0	1451.3	1821.6	2287.6	2949.3
Estimated turnover of all major town centre goods floorspace in Westcliff (£m)	5.9	6.2	6.7	7.3	20.8	26.1	32.7	42.2
Market share of Westcliff Floorspace (Zones 1-10) (%)	1%	1%	1%	1%	1%	1%	1%	1%
Existing floorspace in Westcliff (sqm net)	4,303	4,303	4,303	4,303	20,456	20,456	20,456	20,456
Average Sales Density (£ per sqm net)	1,377	4,641	4,641	4,641	1,019	3,500	3,770	4,062
Derived Turnover of Existing Floorspace (£m)	5.9	20.0	20.0	20.0	20.8	71.6	77.1	83.1
Estimated Turnover of Commitments (£m)	0	0	0	0	0	0	0	0
Estimated Residual Spending after Commitments (£m)	0	(13.7)	(13.2)	(12.7)	0	(45.5)	(44.4)	(40.9)
Assumed Average Sales Density of Floorspace (£ per sqm net)	0	12,000	12,000	12,000	0	3,500	3,770	4,062
Capacity for New Floorspace (sqm net)	0	-1,144	-1,103	-1,059	0	-12,998	-11,778	-10,070

SOURCES/NOTES

- (1) Tables 2,3 and 9.
- (2) Excludes vacant shops.
- (3) Floorspace estimates taken from GOAD, IGD and CB Richard Ellis estimates and adjusted to reflect net sales
- (4) Allowance for comparison turnover to increase by 1.5% pa.

Leigh convenience goods allocation

Table 11
Convenience goods allocation - % Market Share

Zone	Tesco Express, The Broadway			
	2010	2015	2020	2025
	(%)	(%)	(%)	(%)
1	0.0%	0.0%	0.0%	0.0%
2	0.0%	0.0%	0.0%	0.0%
3	0.2%	0.2%	0.2%	0.2%
4	0.0%	0.0%	0.0%	0.0%
5	0.0%	0.0%	0.0%	0.0%
6	4.2%	4.2%	4.2%	4.2%
7	0.2%	0.2%	0.2%	0.2%
8	0.0%	0.0%	0.0%	0.0%
9	0.0%	0.0%	0.0%	0.0%
10	1.5%	1.5%	1.5%	1.5%

Co Op The Broadway				
2010	2015	2020	2025	
(%)	(%)	(%)	(%)	
0.0%	0.0%	0.0%	0.0%	
0.0%	0.0%	0.0%	0.0%	
0.2%	0.2%	0.2%	0.2%	
0.0%	0.0%	0.0%	0.0%	
0.0%	0.0%	0.0%	0.0%	
0.8%	0.8%	0.8%	0.8%	
0.0%	0.0%	0.0%	0.0%	
0.0%	0.0%	0.0%	0.0%	
0.0%	0.0%	0.0%	0.0%	
0.0%	0.0%	0.0%	0.0%	
0.0%	0.0%	0.0%	0.0%	

Co Op Leigh Road				
2010	2015	2020	2025	
(%)	(%)	(%)	(%)	
0.0%	0.0%	0.0%	0.0%	
0.0%	0.0%	0.0%	0.0%	
0.2%	0.2%	0.2%	0.2%	
0.0%	0.0%	0.0%	0.0%	
1.0%	1.0%	1.0%	1.0%	
1.2%	1.2%	1.2%	1.2%	
0.2%	0.2%	0.2%	0.2%	
0.0%	0.0%	0.0%	0.0%	
0.0%	0.0%	0.0%	0.0%	
0.0%	0.0%	0.0%	0.0%	
2.0%	2.0%	2.0%	2.0%	

Local Stores				
2010	2015	2020	2025	
(%)	(%)	(%)	(%)	
0.0%	0.0%	0.0%	0.0%	
0.0%	0.0%	0.0%	0.0%	
0.0%	0.0%	0.0%	0.0%	
0.0%	0.0%	0.0%	0.0%	
0.0%	0.0%	0.0%	0.0%	
1.4%	1.4%	1.4%	1.4%	
0.3%	0.3%	0.3%	0.3%	
0.2%	0.2%	0.2%	0.2%	
0.4%	0.4%	0.4%	0.4%	
0.0%	0.0%	0.0%	0.0%	

SOURCE: (1) Household survey, December 2009

Table 11(a)
Convenience goods allocation - £m

Zone	Tesco Express, The Broadway			
	2010	2015	2020	2025
	£m	£m	£m	£m
1	0.0	0.0	0.0	0.0
2	0.0	0.0	0.0	0.0
3	0.2	0.2	0.2	0.2
4	0.0	0.0	0.0	0.0
5	0.0	0.0	0.0	0.0
6	3.3	3.4	3.6	3.9
7	0.2	0.2	0.2	0.2
8	0.0	0.0	0.0	0.0
9	0.0	0.0	0.0	0.0
10	0.5	0.6	0.6	0.7
Total	4.1	4.3	4.6	5.0

Co Op, The Broadway				
2010	2015	2020	2025	
£m	£m	£m	£m	
0.0	0.0	0.0	0.0	
0.0	0.0	0.0	0.0	
0.2	0.2	0.2	0.2	
0.0	0.0	0.0	0.0	
0.0	0.0	0.0	0.0	
0.6	0.6	0.7	0.7	
0.0	0.0	0.0	0.0	
0.0	0.0	0.0	0.0	
0.0	0.0	0.0	0.0	
0.0	0.0	0.0	0.0	
0.0	0.0	0.0	0.0	
0.8	0.8	0.9	0.9	

Co Op Leigh Road				
2010	2015	2020	2025	
£m	£m	£m	£m	
0.0	0.0	0.0	0.0	
0.0	0.0	0.0	0.0	
0.2	0.2	0.2	0.2	
0.0	0.0	0.0	0.0	
0.9	0.9	1.0	1.1	
0.9	1.0	1.0	1.1	
0.2	0.2	0.2	0.2	
0.0	0.0	0.0	0.0	
0.0	0.0	0.0	0.0	
0.0	0.0	0.0	0.0	
0.7	0.7	0.8	0.9	
2.8	3.0	3.2	3.5	

Local Stores				
2010	2015	2020	2025	
£m	£m	£m	£m	
0.0	0.0	0.0	0.0	
0.0	0.0	0.0	0.0	
0.0	0.0	0.0	0.0	
0.0	0.0	0.0	0.0	
0.0	0.0	0.0	0.0	
1.1	1.1	1.2	1.3	
0.3	0.3	0.4	0.4	
0.2	0.2	0.2	0.2	
0.2	0.2	0.2	0.2	
0.0	0.0	0.0	0.0	
1.7	1.8	2.0	2.1	

Total				
2010	2015	2020	2025	
(£m)	(£m)	(£m)	(£m)	
0.0	0.0	0.0	0.0	
0.0	0.0	0.0	0.0	
0.3	0.3	0.4	0.4	
0.0	0.0	0.0	0.0	
0.0	0.0	0.0	0.0	
5.0	5.2	5.5	5.9	
0.5	0.5	0.6	0.6	
0.2	0.2	0.2	0.2	
0.2	0.2	0.2	0.2	
0.5	0.6	0.6	0.7	
6.7	7.0	7.5	8.0	

Table 12
Leigh on Sea town centre's draw upon the catchment area

Market Shares indicated by Household Interview Survey 2009 remain unchanged throughout forecasting period				
Catchment Zone	PROPORTION OF EXPENDITURE ATTRACTED TO LEIGH ON SEA TOWN CENTRE BY CATCHMENT ZONE			
	2010 (%)	2015 (%)	2020 (%)	2025 (%)
Zone 1	0%	0%	0%	0%
Zone 2	0%	0%	0%	0%
Zone 3	1%	1%	1%	1%
Zone 4	0%	0%	0%	0%
Zone 5	0%	0%	0%	0%
Zone 6	9%	9%	9%	9%
Zone 7	2%	2%	2%	2%
Zone 8	1%	1%	1%	1%
Zone 9	1%	1%	1%	1%
Zone 10	0%	0%	0%	0%

SOURCE: (1) Household survey, December 2009

Table 13
Forecast retail sales in Leigh on Sea town centre

Market Shares indicated by Household Interview Survey 2009 remain unchanged throughout forecasting period				
Catchment zone	RETAIL SALES IN LEIGH ON SEA TOWN CENTRE BY CATCHMENT ZONE			
	2010 (£m)	2015 (£m)	2020 (£m)	2025 (£m)
Zone 1	0.0	0.0	0.0	0.0
Zone 2	0.2	0.3	0.3	0.4
Zone 3	1.2	1.5	1.9	2.5
Zone 4	0.2	0.2	0.3	0.4
Zone 5	0.5	0.6	0.8	1.0
Zone 6	14.2	17.6	21.8	28.1
Zone 7	3.3	4.2	5.3	6.8
Zone 8	2.1	2.6	3.3	4.2
Zone 9	0.5	0.7	0.8	1.1
Zone 10	0.0	0.0	0.0	0.0
TOTALS	22.3	27.7	34.5	44.5

TABLE 14
LEIGH ON SEA TOWN CENTRE

	CONVENIENCE GOODS				COMPARISON GOODS			
	2010	2015	2020	2025	2010	2015	2020	2025
Total available residents' spending (£m)	697.6	735.5	792.6	854.0	1451.3	1821.6	2287.6	2949.3
Plus visitors' spending (£m)	0	0			0	0	0	0
Total Spending with study area (£m)	697.6	735.5	792.6	854.0	1451.3	1821.6	2287.6	2949.3
Estimated turnover of all major town centre goods floorspace in Leigh (£m)	6.7	7.0	7.5	8.0	22.3	27.7	34.5	44.5
Market share of Leigh Goods Floorspace (Zones 1-10) (%)	1%	1%	1%	1%	2%	2%	2%	2%
Existing floorspace in Leigh (sqm net)	2,706	2,706	2,706	2,706	18,789	18,789	18,789	18,789
Average Sales Density (£ per sqm net)	2,466	5,165	5,165	5,165	1,187	3,500	3,770	4,062
Derived Turnover of Existing Floorspace (£m)	6.7	14.0	14.0	14.0	22.3	65.8	70.8	76.3
Estimated Turnover of Commitments (£m)	0	0	0	0	0	0	0	0
Estimated Residual Spending after Commitments (£m)	0	(7.0)	(6.5)	(5.9)	0	(38.0)	(36.3)	(31.8)
Assumed Average Sales Density of New Floorspace (£ per sqm net)	0	12,000	12,000	12,000	0	3,500	3,770	4,062
Capacity for New Floorspace (sqm net)	0	-584	-544	-495	0	-10,865	-9,626	-7,823

SOURCES/NOTES

- (1) Tables 2,3 and 17.
- (2) Excludes vacant shops.
- (3) Tesco Express on the Broadway opened in February 2010.
Household survey underestimates potential draw of store as trading patterns had not established at the time of the survey
- (4) Turnover of Tesco Express reduced to reflect current expected turnover per sqm net

Table 15
Out of Centre (Within Southend Borough Council Administrative Boundary) Convenience goods allocation - £m

Supermarket	Within Southend Administrative Boundary			
	2010	2015	2020	2025
	£m	£m	£m	£m
Tesco Extra, Prince Avenue	33.9	35.6	38.2	41.2
Morrisons, Western Approach	16.2	16.9	18.0	19.4
Waitrose, Fossets Park	34.5	36.5	39.4	42.4
Waitrose, London Road	10.9	11.3	12.1	13.0
Asda, North Shoebury	63.2	67.1	72.8	78.5
Other Multiples	34.5	36.3	39.1	42.1
Other local stores	2.8	2.9	3.2	3.4
Total	196.0	206.6	222.8	240.0

Table 15(a)
Out of Centre Within Study Area (excluding Southend Borough Council) Convenience goods allocation - £m

Supermarket	Within Study Area			
	2010	2015	2020	2025
	£m	£m	£m	£m
Asda, South Woodham	20.8	22.2	24.1	25.9
Asda, Rayleigh	13.4	14.1	15.3	16.4
Morrisons, Hadleigh	38.6	40.5	43.4	46.8
Morrisons, Canvey Island	36.0	38.0	40.9	44.1
Sainsbury's Nevendon	21.4	22.5	24.2	26.1
Sainsbury's Thundersley	48.3	50.7	54.6	58.8
Tesco Extra, Pitsea	53.7	56.2	60.1	64.8
Makro, Rayleigh	1.1	1.1	1.2	1.3
Other Multiples	11.0	11.6	12.5	13.5
Total	244.3	256.9	276.3	297.6

Table 15(b)
Total Out of Centre Convenience goods allocation - £m

Out of centre foodstores	Out of Centre			
	2010	2015	2020	2025
	£m	£m	£m	£m
	440.3	463.6	499.0	537.6

Table 16
Out of centre's draw upon the catchment area

Market Shares indicated by Household Interview Survey 2009 remain unchanged				
Catchment Zone	PROPORTION OF EXPENDITURE ATTRACTED TO OUT OF TOWN CENTRE STORES			
	2010 (%)	2015 (%)	2020 (%)	2025 (%)
Zone 1	30%	30%	30%	30%
Zone 2	32%	32%	32%	32%
Zone 3	44%	44%	44%	44%
Zone 4	22%	22%	22%	22%
Zone 5	37%	37%	37%	37%
Zone 6	40%	40%	40%	40%
Zone 7	34%	34%	34%	34%
Zone 8	34%	34%	34%	34%
Zone 9	30%	30%	30%	30%
Zone 10	34%	34%	34%	34%

SOURCE: (1) Household survey, December 2009

Table 17
Forecast retail sales in Non Central stores

Catchment zone	RETAIL SALES IN OUT OF CENTRE STORES BY CATCHMENT ZONE			
	2010 (£m)	2015 (£m)	2020 (£m)	2025 (£m)
Zone 1	34.8	43.1	53.5	69.0
Zone 2	41.9	52.7	66.4	85.5
Zone 3	76.7	95.7	119.7	154.3
Zone 4	39.1	49.6	62.8	81.0
Zone 5	67.0	84.1	105.6	136.2
Zone 6	65.8	81.4	101.0	130.2
Zone 7	70.6	88.4	110.8	142.9
Zone 8	49.2	61.9	77.9	100.4
Zone 9	25.2	32.0	40.8	52.6
Zone 10	25.2	32.3	41.4	53.3
TOTALS	495.6	621.5	779.9	1,005.4