NORTH ESSEX RETAIL STUDY
COLCHESTER BOROUGH COUNCIL

Retail Capacity Update

September 2009

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North Essex Retail Study
Colchester Borough Council

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Background/Scope of Work

1.1 GVA Grimley has been instructed by Colchester Borough Council to update the retail capacity projections previously set out in the North Essex Authorities Joint Retail Study 2006. Recent economic circumstances have led to the need for a further review of the assessment and need for new floorspace in the Borough. This paper sets out the findings of our update, and forecasts the need for further convenience and comparison retail floorspace to the period 2024, incorporating interim years of 2014 and 2019. The capacity tables accompanying this assessment are attached in **Appendix 2** and **3**.

1.2 We should note with caution the growing margins of error when forecasting over such lengthy time periods, and as recommended in policy, Colchester Borough Council should review these forecasts at appropriate times throughout the LDF period, generally no longer than 5 year intervals. Nevertheless, long term forecasting gives a good indication of the broad levels of growth expected between 2009 and 2014, based on current research and evidence.

1.3 We have used a conventional and widely accepted step by step methodology which draws upon the results of the 2006 household telephone survey of existing shopping patterns to model the existing flows of available expenditure to each retail destination. The Household Telephone Survey Area is attached in **Appendix 1**. This piece of work has been commissioned in order to take into account planning commitments for additional retail floorspace granted consent since the 2006 study; to take into account the current economic circumstances/recession; and to assist in the consideration of recent investor interest in the Borough leading to proposals for further convenience and comparison goods retail floorspace.

1.4 Our findings are set out below. Using the same approach incorporated in the 2006 Retail Study, we have explored the capacity for further comparison and convenience goods retail floorspace within two scenarios. First, we forecast capacity at a global level for the whole of the Borough; and second, we forecast capacity within the urban areas of Colchester, Tiptree, West Mersea and Wivenhoe.

Population

1.5 We have prepared up-to-date population forecasts from the Experian E-Marketer in-house database which provides estimates of population in 2009, 2014, 2019 and 2024. Experian population projections are based on a variety of data sources that estimate and track population change over time including the 2001 Census. They take account of the most recently available government population estimates and projections, as well as changing postal geography at the local authority level. They also take account of people and households that were not recorded in the 2001 Census and they are updated to allow for changes in the housing stock, as well as population changes due to births, deaths, migration and the ageing of the population.

1.6 We estimate the overall population of the survey area is currently 676,794 (2009), which is higher than the previous study which predicted a lower total population of 654,345 by 2011. The previous estimates were derived from Experian data based on trend line projections and the 2001 census for small, localised areas; however the more recent data is based on a wider variety of data sources, incorporating mid-year estimates, to more accurately predict future changes in growth.

1.7 Based on the more up-to-date information, the total population of the survey area is forecast to grow to 708,794 by 2014, to 741,443 by 2019, and to 780,673 by 2024 (Table 1, Appendix 2). These figures represent a growth of circa 5% over each five year time period, and an overall growth of 15% between 2009 and 2024. As highlighted previously, this reflects a much higher rate of population growth than previously estimated in the 2006 retail study (8% between 2006 and 2021).

Expenditure Growth

1.8 The Experian E-Marketer database also provides estimates of per capita expenditure for convenience and comparison goods in 2007 prices. We have made deductions for special forms of trading which represents expenditure not available to spend in the shops, i.e. internet and catalogue shopping. We have currently applied uniform per capita figures across the survey area, enabling a comparison on the same basis across the whole area, and against the previous 2006 figures.

1.9 Since the 2006 North Essex Retail Study was completed the economy has rapidly deteriorated which is having far-reaching implications on available income, and consequently expenditure. Verdict's Economic Update (February 2009) states that "*while the latter half of last year was dominated by gloomy economic news, the impact on the real economy and on real people was marginal. Unfortunately, the financial crisis of last year has now started to spread into the wider economy and we expect this year (2009) to bring declines in growth and increase in unemployment*".

1.10 Verdict emphasise the UK economy is now firmly in the grips of a recession although there are more recent suggestions that the 'end is in sight'. The deterioration has been rapid with the fourth quarter of 2008 seeing a year-on-year decline of 1.5% - one of the sharpest contractions in economic growth since the early 1980s. 2009 has brought a sharp contraction in activity and they do not believe that the "pain will ease quickly". Indeed, they are forecasting that it won't be until the final quarter of 2010 that we will see positive year on year GDP growth. Moving beyond 2010, economic growth is predicted to return to positive territory but will be sluggish for a number of years as consumers and the private and public sectors all continue to pay down debt.

1.11 Growth projections used in Retail Studies and supporting retail statements for planning applications should therefore respond to advice in respect of the most recent economic expectations, followed by ultra long term trends in the longer term projections. Paragraph B21, Appendix B of the Living Draft of the Good Practice Guide on Need, Impact and the Sequential Approach states that expenditure growth rates should draw on national long-term trends, but may also have regard to expectations about future regional economic performance and to recent evidence of retail growth. It recommends that growth rates should generally adopt a conservative level of growth in order to reflect the inherent uncertainty in economic forecasts, and the cyclical nature of the retail sector. The period up to 2011, and to some extent to 2016, will be affected noticeably by the current severe recession, particularly for comparison goods, and the weak upturn that is likely to follow.

1.12 We have updated the expenditure growth rates used in the 2006 Study. We have adjusted our growth rates for comparison goods from 3.7% to 1.4% for the period 2009-2014 and 2.8% 2014-2019. For the period post 2019, we use a stronger growth rate of 4.7% per annum, which is based on the ultra-long term trend for comparison goods between 1968 and 2008, published in the August 2009 Experian Business Strategies Retail Planner Briefing Note 7.0. The 'ultra-long' term trend provides a robust basis for future projections for long term forecasts because it effectively evens out the economic cycles of growth and decline. Forecasts become subject to increasing margins of error over time as it is more difficult to accurately forecast into the future, and an ultra-long term trend is deemed appropriate in these circumstances.

1.13 For convenience goods we have amended the growth rates used in the 2006 Study from 0.7% per annum over the period 2003 to 2021 to 0.4% per annum between 2009 and 2014 and 0.9% per annum between 2014 and 2019 based on the most recent *forecasts* from Experian. Post 2019, we have adopted the Experian ultra long term trend for convenience goods of 0.5% per annum published in the August 2009 Experian Business Strategies Retail Planner Briefing Note 7.0, for the same reasons as those for comparison goods.

1.14 Changes should also be factored in, in respect of sales efficiency rates. This growth represents the ability of retailers to increase their productivity and absorb higher than inflation increases in their costs (such as rents, rates and service charges) by increasing their average sales densities. The application of a turnover 'efficiency' growth rate is a standard approach used in retail planning studies and PPS6 also advocates the use of a "…realistic assessment of forecast improvements in productivity in the use of floorspace" (paragraph 2.34).

1.15 As growth in expenditure falls it is fair to assume that growth in turnover in existing shops will also fall. Evidently, in the current economic climate many retailers have struggled to increase or even maintain sales density levels and, together with other financial problems, this has led retailers into closure, such as Woolworths and Adams. With the expectation of weaker expenditure growth in the future than over the last 10 years, sales density growth is likely to be towards the bottom end of the range. Based on advice published by Experian we have reduced sales efficiency growth to 0% in the period 2009-2014; 1% 2014-2019 and 2.0% 2019-2024.

1.16 Table 2, Appendix 2 applies per capita expenditure to population forecasts, which indicates that total available convenience goods expenditure within the North Essex survey area is currently £1.128billion (b from hereon). This is forecast to grow to £1.193b by 2014, £1.305b by 2019, and again to £1.409b by 2024. This equates to an overall growth of £281m (25%) between 2009 and 2024. This reflects a higher convenience goods growth compared to the 2006 figures (20%), although clearly the greater proportion of growth will be realised post 2014 once the economy begins its recovery.

1.17 Total available comparison goods expenditure within the North Essex survey area is currently £1.955b, and is forecast to grow to £2.133b by 2014, £2.562b by 2019, and again to £3.394b by 2024. This equates to an overall growth of £1.439b (74%) between 2009 and 2024. This is lower than the 2006 retail study which identified growth in the region of 104%; however this update reflects the growth of internet sales and significant implications of the economic downturn, particularly to the period 2014.

Convenience Goods Assessment

1.18 In the 2006 study we identified global capacity for 3,061 sqm net at 2011, increasing to 5,318 sqm net by 2016 and 7,796 sqm net by 2021 across the borough. Addressing each town centre and out-of-centre destinations in turn, we have reviewed shopping patterns derived from the 2006 telephone survey results, and the performance of existing convenience goods floorspace based on the updated population and expenditure forecasts (**Appendix 2**).

1.19 In summary, the model illustrates the total available pot of convenience goods expenditure and then identifies claims on this expenditure in respect of existing retail floorspace and the ability of this to increase their sales efficiency in the future, special forms of trading and finally retail planning commitments not yet implemented. When existing claims on expenditure have been deducted, we can identify the pot of residual expenditure to support new retail floorspace in the future.

1.20 Through discussions with the Council it is apparent that there have been several new foodstore developments since the previous study, in addition to other committed convenience goods retail floorspace which needs to be taken into account in our model as a claim on the existing pot of available expenditure. One particularly key development since the previous study has been the construction of a new Waitrose store at the site of the former Glyn Webb unit on St Andrews Avenue, which is scheduled to open in September 2009. Based on a company average sales density for convenience goods, derived from official statistics in retail rankings (£9,784 per sqm net), and a floorspace of 2,300 sqm net, we estimate that the total turnover of the new store will equate to circa £22.5m.

1.21 We have included a comprehensive list of all commitments (both built and unbuilt) which have been factored into our analysis in **Appendix 2** (Table 18). Taking into account the commitments listed, we have identified a total of 10,780 sqm net additional convenience goods floorspace in the borough. Based on company average sales derived from Mintel Retail

Rankings (2009) where possible, we estimate that this level of additional floorspace will generate a combined turnover in the region of £76m.

Convenience Goods Capacity

1.22 Based on current market shares, on a global scale, we project an oversupply of convenience goods floorspace across the borough in the short term up to 2014. This is partly the result of committed schemes, either having come forward or in the development pipeline, which absorb the pot of available expenditure between 2009 and 2014. Lower levels of expenditure growth between 2009 and 2014, reflecting the current slowdown in the economy, is a further contributing factor resulting in an overall fall in convenience floorspace capacity since the previous study.

1.23 On this basis, and following implementation of all known commitments, we project global capacity for 1,756 sqm net additional convenience goods floorspace by 2019, increasing to 4,447 sqm net by 2024. Tables 1.1 and 1.2 below demonstrate the breakdown of available expenditure and capacity for additional convenience goods floorspace in Colchester town centre and the rural centres of Tiptree, West Mersea and Wivenhoe. Our figures for each incorporate the performance of both town centre and out of centre foodstore provision within each centres' urban area, based on current market shares.

Table 1.1: Residual Convenience Goods Expenditure by Centre (£m)

	2014 (£m)	**2019 (£m)**	**2024 (£m)**
Colchester Urban Area	707	27,704	52,879
Tiptree	-3,467	-1,995	-636
West Mersea	-4,181	-3,976	-3,786
Wivenhoe	-1,363	-1,155	-966
GLOBAL*	**-11,326**	**17,556**	**44,468**

*includes proposed Tesco Express at Blackheath

Table 1.2: Future Shop Floorspace Capacity in Colchester by Centre (sqm net)

	2014 (sqm net)	**2019 (sqm net)**	**2024 (sqm net)**
Colchester Urban Area	71	2,770	5,288
Tiptree	-347	-199	-64
West Mersea	-418	-398	-379
Wivenhoe	-136	-116	-97
GLOBAL*	**-1,133**	**1,756**	**4,447**

*includes proposed Tesco Express at Blackheath

1.24 It is evident that, consistent with the previous study, the largest proportion of capacity over the longer term is arising in and around Colchester town centre. This is largely a result of the strong performance of existing foodstores within the town centre's urban area. In contrast, we have identified negative capacity arising in the smaller centres of Tiptree, West Mersea and

Wivenhoe where the main foodstores are smaller, have lower market shares and are either performing in line or below our estimates based on company averages. Also, reflecting lower growth rates, we do not project capacity for additional floorspace in any of these centres before 2024 based on current market share. In West Mersea, consent has recently been granted for a Tesco Express which has further reduced the amount of available expenditure and amplified the oversupply of floorspace in this centre.

1.25 The previous study highlighted the particularly strong performance of the Sainsbury's at Tollgate West and we are now aware of current proposals for a replacement store which will increase the current level of floorspace and therefore has potential to further enhance the overall performance of the store. According to the Retail Statement prepared by Indigo to accompany the current application, the existing Sainsbury's comprises 6,164 sqm net, of which 4,111 sqm net is dedicated to the sale of convenience goods. Based on a company average sales density of £9,150 per sqm net (Mintel UK Retailer Rankings, 2009) this equates to a current turnover of £37.6m.

1.26 Outline consent has already been granted for a replacement store involving 5,711 sqm net of convenience goods floorspace, an uplift of 1,100 sqm net. We estimate that a new store of this scale would generate a turnover of £52.3m, an increase of £14.7m upon the existing. The most recent proposals involve a larger increase in convenience goods floorspace from 5,711 sqm net (approved outline) to 6,752 sqm net. Based on company average sales, this scale of development would have the potential to generate a turnover of £61.8m, approximately £24.2m greater than the existing store and £9.5m greater than the consented store. At 2014, our analysis does not project capacity to support this level of uplift, however based on population and expenditure growth, there is capacity arising by 2019.

1.27 We have factored in the extant consent for a replacement store involving 5,711 sqm net of convenience goods floorspace, however, we have not modelled the latest proposals seeking a further uplift in convenience floorspace as the application is still under consideration by the Council. In considering proposals for new convenience floorspace the Council should take into account the levels of capacity identified by this update which reflects current market conditions and more cautious levels of growth projecting forwards. In accordance with national policy, new development should be directed towards existing centres and, where proposals seek otherwise, applicants should be required to fully satisfy the key tests of need, impact and the sequential approach to justify the development.

Comparison Goods Assessment

1.28 When forecasting capacity for new comparison goods floorspace in the Borough, our model has taken into consideration known commitments for new comparison goods floorspace. There are four known commitments in the Borough, which are outlined in Table 27, **Appendix 3**.

1.29 There are also longstanding plans for a significant retail-led scheme at Vineyard Gate in the town centre however this is currently on-hold and as there is no formal planning consent we have not modelled this as a commitment.

Comparison Goods Capacity

1.30 Taking into account all known commitments, this update is consistent with the 2006 retail study and identifies a high level capacity for additional comparison goods retail floorspace in the Borough. The previous study identified global capacity for 16,115 sqm net at 2011, increasing to 36,399 sqm net by 2016 and 59,642 sqm net by 2021.

1.31 Based on current market shares, this update projects less surplus available expenditure to support floorspace in the region of 12,750 sq m net at 2014. By virtue of population and expenditure growth, we expect this to increase to 36,883 sqm net by 2019 and 75,462 sqm net by 2026.

1.32 We have reviewed the capacity for additional comparison goods floorspace in Colchester town centre and the rural centres of Tiptree, West Mersea and Wivenhoe based on current market shares. The figures for Colchester's urban area include the retail warehouse provision. This analysis is summarised in Table 1.3 and 1.4.

Table 1.3: Residual Comparison Goods Expenditure by Centre (£m)

	2014 (£m)	2019 (£m)	2024 (£m)
Colchester Urban Area	63,752	193,081	435,491
Tiptree	136	403	917
West Mersea	71	361	983
Wivenhoe	151	426	937
GLOBAL	**64,110**	**193,820**	**437,831**

Table 1.4: Future Comparison Goods Floorspace Capacity in Colchester's Centres (sqm net)

	2014 (sqm net)	2019 (sqm net)	2024 (sqm net)
Colchester Urban Area	12,750	36,742	75,059
Tiptree	27	77	158
West Mersea	14	69	169
Wivenhoe	30	81	162
GLOBAL	**12,822**	**36,883**	**75,462**

Retail Warehousing

1.33 In accordance with Government requirements, the 2006 Retail Study forecast the capacity for comparison goods floorspace, and did not disaggregate into the capacity for bulky and nonbulky goods. The study did, however, draw on the overall assessment to outline recommendations in relation to the qualitative need for additional bulky goods retail warehousing. We undertook a qualitative and quantitative assessment of the following stores:

- Colchester Retail Park
- Colne View Retail Park
- The Tollgate Retail Park
- Turner Rise
- Pear Tree Road
- A number of free-standing retail warehouses

1.34 Overall, the results demonstrate the large proportion of out-of-centre retail warehouse units in the Borough and the dominance of the Tollgate Retail Park which is trading more than 100% above expected levels. The dominance of the Tollgate Retail Park is apparent from the results of the survey, but while the results suggest some destinations are performing better than others, our qualitative analysis and site visits identified a good choice and quality of retailer throughout the borough. We would not express any concern at this stage in respect of the performance of any particular retail warehouse destination.

Summary

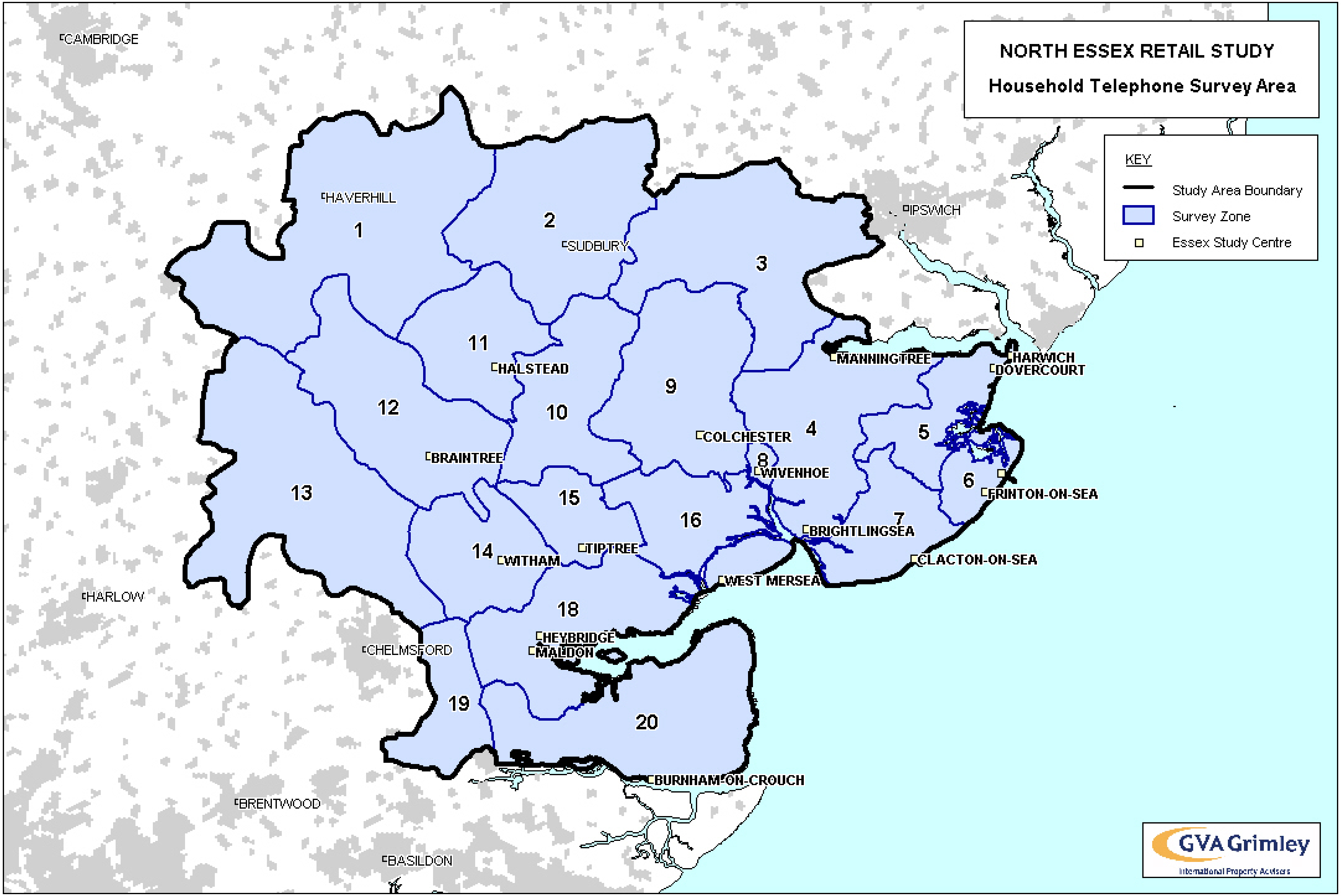
1.35 In summary, this update has taken into account an increased level of projected population growth alongside a more cautious approach to growth in retail expenditure to reflect current market conditions. The approach taken draws on the most recent advice published by Experian (August 2009) which reflects shorter term forecasts followed by ultra-long term trends.

1.36 Taking into account several commitments for additional convenience goods floorspace which have arisen since the previous study, in addition to lower levels of growth, we have identified an oversupply of floorspace in the Borough at 2014. We would therefore advice a cautious approach when considering proposals for additional convenience floorspace in the shorter term. In accordance with national policy guidance, any new development should be directed towards existing centres in the first instance.

1.37 We have also taken into account retail commitments for additional comparison goods floorspace which, alongside more cautious levels of growth and greater deductions for SFT, our analysis identifies a fall in available expenditure and capacity for additional comparison goods floorspace since the previous study. Notwithstanding this fall, there remains a high level of capacity for additional floorspace, particularly in Colchester town centre, which based on constant market share is ample to implement the Vineyard Gate scheme by 2019, if not before.

APPENDIX 1

HOUSEHOLD TELEPHONE SURVEY AREA


NORTH ESSEX RETAIL STUDY
Household Telephone Survey Area
KEY
Study Area Boundary
Survey Zone
Essex Study Centre
CAMBRIDGE
HAVERHILL
SUDBURY
IPSWICH
HALSTEAD
BRAINTREE
COLCHESTER
WIVENHOE
MANNINGTREE
HARWICH
DOVERCOURT
FRINTON-ON-SEA
BRIGHTLINGSEA
CLACTON-ON-SEA
TIPTREE
WITHAM
WEST MERSEA
HARLOW
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HEYBRIDGE
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APPENDIX 2

CONVENIENCE GOODS CAPACITY TABLES

NORTH ESSEX RETAIL STUDY
COLCHESTER BOROUGH COUNCIL CAPACITY FORECASTS UPDATE, 2009

TABLE 1

SURVEY AREA POPULATION FORECASTS

Catchment Zone	Postcode Sector Groupings	2009	2014	2019	2024
1	CB9 0/7/8/9; CB10 2; CO10 8; CO9 4	48,892	51,608	54,323	57,072
2	CO10 0/1/2/7/9	37,989	39,255	40,829	42,550
3	CO10 5; CO6 5; CO7 6; IP7 5/6; IP8 3	27,712	28,917	30,011	31,325
4	CO11 1/2; CO7 0/7/8	33,709	36,074	38,463	41,255
5	CO12 3/4/5; CO16 0	26,059	28,003	29,918	32,202
6	CO13 0/9; CO14 8	20,597	20,683	20,866	21,419
7	CO15 1/2/3/4/5/6; CO16 7/8/9	68,813	71,654	74,610	78,616
8	CO7 9	7,740	8,099	8,464	8,889
9	CO1 1/2; CO2 7/8/9; CO3 0/3/4/8/9; CO4 0/3/5/9; CO6 3/4	130,836	139,326	147,525	156,828
10	CO6 1/2; CO8 5	18,462	19,046	19,555	20,371
11	CO9 1/2/3	20,956	21,596	22,351	23,394
12	CM7 1/2/3/4/5/9; CM77 6/7/8	61,833	65,122	68,603	72,739
13	CM3 1/3; CM6 1/2/3	31,706	33,003	34,405	35,600
14	CM3 2; CM8 1/2/3	37,372	39,004	40,750	43,062
15	CO5 0/9	16,160	16,791	17,419	18,212
16	CO2 0; CO5 7	8,939	9,282	9,640	10,081
17	CO5 8	7,604	7,477	7,479	7,592
18	CM9 4/5/6; CM9 8	33,608	34,855	36,137	37,893
19	CM3 4/8	11,736	12,099	12,468	12,786
20	CM0 7/8; CM3 6	26,071	26,900	27,627	28,787
TOTAL		**676,794**	**708,794**	**741,443**	**780,673**

SOURCE: Experian E-Marketer, July 2009

TABLE 1A

POPULATION GROWTH RATES

GROWTH RATES			
2009-2014 (%)	2014-2019 (%)	2019-2024 (%)	2024-2026 (%)
6	5	5	17
3	4	4	12
4	4	4	13
7	7	7	22
7	7	8	24
0	1	3	4
4	4	5	14
5	5	5	15
6	6	6	20
3	3	4	10
3	3	5	12
5	5	6	18
4	4	3	12
4	4	6	15
4	4	5	13
4	4	5	13
-2	0	2	0
4	4	5	13
3	3	3	9
3	3	4	10
5	**5**	**5**	**15**

NORTH ESSEX RETAIL STUDY
COLCHESTER BOROUGH COUNCIL CAPACITY FORECASTS UPDATE, 2009

TABLE 2
SURVEY AREA RETAIL EXPENDITURE FORECASTS (2007 prices)

PER CAPITA EXPENDITURE	2007 (£)	2009 (£)	2014 (£)	2019 (£)	2024 (£)
Convenience Goods	1,710	1,719	1,753	1,834	1,880
Comparison Goods	3,190	3,209	3,440	3,949	4,969
Convenience SFT	2.3%	3.0%	4.0%	4.0%	4.0%
Comparison SFT	8.0%	10.0%	12.5%	12.5%	12.5%
Convenience Goods (less SFT)	**1,671**	**1,667**	**1,683**	**1,760**	**1,805**
Comparison Goods (less SFT)	**2,935**	**2,888**	**3,010**	**3,455**	**4,347**

GROWTH IN PER CAPITA RETAIL EXPENDITURE:

Convenience Goods: 0.3% 2007-2008; 0.2% 2008-2009; 0.4% 2009-2014; 0.9% 2014-2019; 0.5 2019-2024

Comparison Goods: 3.7% 2007-2008; -3.0% 2008-2009; 1.4% 2009-2014; 2.8% 2014-2019; 4.7% 2019-2024

	CONVENIENCE GOODS				COMPARISON GOODS			
ZONE	2009 (£000)	2014 (£000)	2019 (£000)	2024 (£000)	2009 (£000)	2014 (£000)	2019 (£000)	2024 (£000)
1	81,503	86,860	95,619	102,994	141,196	155,330	187,710	248,120
2	63,328	66,069	71,867	76,787	109,709	118,150	141,083	184,985
3	46,196	48,670	52,825	56,530	80,030	87,035	103,702	136,185
4	56,193	60,715	67,702	74,450	97,349	108,576	132,907	179,355
5	43,440	47,131	52,661	58,113	75,256	84,284	103,380	139,998
6	34,335	34,811	36,728	38,654	59,482	62,252	72,101	93,119
7	114,712	120,599	131,328	141,874	198,726	215,665	257,811	341,782
8	12,903	13,631	14,898	16,041	22,352	24,376	29,247	38,645
9	218,104	234,497	259,673	283,018	377,843	419,345	509,765	681,807
10	30,776	32,056	34,421	36,762	53,317	57,325	67,571	88,563
11	34,934	36,348	39,342	42,218	60,519	65,000	77,233	101,705
12	103,076	109,605	120,755	131,268	178,568	196,005	237,054	316,232
13	52,854	55,547	60,559	64,245	91,564	99,333	118,885	154,770
14	62,299	65,647	71,728	77,711	107,927	117,395	140,810	187,211
15	26,939	28,261	30,661	32,866	46,669	50,538	60,190	79,176
16	14,901	15,622	16,968	18,193	25,815	27,937	33,311	43,827
17	12,676	12,584	13,164	13,701	21,960	22,504	25,843	33,006
18	56,025	58,664	63,608	68,383	97,057	104,907	124,870	164,739
19	19,564	20,364	21,946	23,074	33,893	36,416	43,083	55,587
20	43,460	45,275	48,629	51,950	75,291	80,964	95,464	125,151
TOTAL	**1,128,218**	**1,192,956**	**1,305,083**	**1,408,834**	**1,954,520**	**2,133,335**	**2,562,019**	**3,393,963**

SOURCE: Experian E-Marketer, July 2009

NORTH ESSEX RETAIL STUDY
COLCHESTER BOROUGH COUNCIL CAPACITY FORECASTS UPDATE, 2009

CONVENIENCE GOODS
COLCHESTER TOWN CENTRE

TABLE 3
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	J SAINSBURY, CULVER ST/PRIORY WALK				OTHER TOWN CENTRE CONVENIENCE				TOTAL			
	2009	2014	2019	2024	2009	2014	2019	2024	2009	2014	2019	2024
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0	0	0	0	0	0	0	0	0	0	0	0
2	1	1	1	1	0	0	0	0	1	1	1	1
3	2	2	2	2	0	0	0	0	2	2	2	2
4	0	0	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0
8	4	4	4	4	0	0	0	0	4	4	4	4
9	5	5	5	5	1	1	1	1	5	5	5	5
10	4	4	4	4	0	0	0	0	4	4	4	4
11	2	2	2	2	0	0	0	0	2	2	2	2
12	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0
16	3	3	3	3	1	1	1	1	4	4	4	4
17	4	4	4	4	0	0	0	0	4	4	4	4
18	0	0	0	0	0	0	0	0	0	0	0	0
19	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005
NOTE: Other Town Centre includes Iceland, St Johns Street / M&S Food Hall

TABLE 4
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2007 PRICES

Catchment Zone	J SAINSBURY, CULVER ST/PRIORY WALK				OTHER TOWN CENTRE CONVENIENCE				TOTAL			
	2009	2014	2019	2024	2009	2014	2019	2024	2009	2014	2019	2024
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	0	0	0	0	0	0	0	0	0	0	0	0
2	475	496	539	576	0	0	0	0	475	496	539	576
3	832	876	951	1,018	173	183	198	212	1,005	1,059	1,149	1,230
4	0	0	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0
7	430	452	492	532	0	0	0	0	430	452	492	532
8	500	528	577	622	0	0	0	0	500	528	577	622
9	9,869	10,611	11,750	12,807	1,854	1,993	2,207	2,406	11,723	12,604	13,957	15,212
10	1,177	1,226	1,317	1,406	0	0	0	0	1,177	1,226	1,317	1,406
11	603	627	679	728	0	0	0	0	603	627	679	728
12	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0
14	218	230	251	272	0	0	0	0	218	230	251	272
15	121	127	138	148	0	0	0	0	121	127	138	148
16	484	508	551	591	175	184	199	214	659	691	751	805
17	447	444	464	483	0	0	0	0	447	444	464	483
18	0	0	0	0	0	0	0	0	0	0	0	0
19	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0
TOTALS	**15,156**	**16,124**	**17,710**	**19,182**	**2,202**	**2,359**	**2,605**	**2,831**	**17,358**	**18,484**	**20,314**	**22,014**

SOURCE: Tables 2 & 3

CONVENIENCE GOODS
COLCHESTER OUT OF CENTRE

Table 5
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

	ASDA, TURNER RISE				TESCO, HIGHWOODS				TESCO, GREENSTEAD ROAD				CO-OP, FIVEWAYS RETAIL PARK				J SAINSBURY, TOLLGATE WEST			
Catchment	2009	2014	2019	2024	2009	2014	2019	2024	2009	2014	2019	2024	2009	2014	2019	2024	2009	2014	2019	2024
Zone	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	4	4	4	4	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
3	1	1	1	1	5	5	5	5	1	1	1	1	0	0	0	0	1	1	1	1
4	5	5	5	5	20	20	20	20	10	10	10	10	0	0	0	0	2	2	2	2
5	3	3	3	3	4	4	4	4	1	1	1	1	1	1	1	1	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	2	2	2	2	11	11	11	11	32	32	32	32	0	0	0	0	4	4	4	4
9	13	13	13	13	25	25	25	25	9	9	9	9	2	2	2	2	23	23	23	23
10	3	3	3	3	1	1	1	1	0	0	0	0	0	0	0	0	38	38	38	38
11	3	3	3	3	2	2	2	2	0	0	0	0	0	0	0	0	2	2	2	2
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1
14	1	1	1	1	0	0	0	0	1	1	1	1	0	0	0	0	1	1	1	1
15	2	2	2	2	1	1	1	1	0	0	0	0	1	1	1	1	12	12	12	12
16	6	6	6	6	7	7	7	7	8	8	8	8	1	1	1	1	27	27	27	27
17	4	4	4	4	17	17	17	17	5	5	5	5	0	0	0	0	9	9	9	9
18	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
19	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005

TABLE 6
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2007 PRICES

	ASDA, TURNER RISE				TESCO, HIGHWOODS				TESCO, GREENSTEAD ROAD				CO-OP, FIVEWAYS RETAIL PARK				J SAINSBURY, TOLLGATE WEST			
Catchment	2009	2014	2019	2024	2009	2014	2019	2024	2009	2014	2019	2024	2009	2014	2019	2024	2009	2014	2019	2024
Zone	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	2,707	2,824	3,072	3,283	0	0	0	0	0	0	0	0	0	0	0	0	902	941	1,024	1,094
3	416	438	475	509	2,079	2,190	2,377	2,544	416	438	475	509	0	0	0	0	416	438	475	509
4	2,697	2,914	3,250	3,574	11,112	12,006	13,388	14,723	5,647	6,102	6,804	7,482	0	0	0	0	843	911	1,016	1,117
5	1,434	1,555	1,738	1,918	1,792	1,944	2,172	2,397	358	389	434	479	358	389	434	479	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	860	904	985	1,064	201	211	230	248	430	452	492	532	0	0	0	0	0	0	0	0
8	261	276	302	325	1,426	1,506	1,646	1,773	4,135	4,369	4,775	5,141	0	0	0	0	523	552	603	650
9	28,790	30,954	34,277	37,358	53,435	57,452	63,620	69,339	20,611	22,160	24,539	26,745	3,653	3,928	4,350	4,741	50,273	54,051	59,855	65,236
10	1,016	1,058	1,136	1,213	300	313	336	358	0	0	0	0	0	0	0	0	11,749	12,237	13,140	14,034
11	1,039	1,081	1,170	1,256	603	627	679	728	0	0	0	0	0	0	0	0	603	627	679	728
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	396	417	454	482
14	421	443	484	525	0	0	0	0	639	673	735	797	0	0	0	0	639	673	735	797
15	566	593	644	690	283	297	322	345	0	0	0	0	283	297	322	345	3,172	3,328	3,610	3,870
16	939	984	1,069	1,146	1,084	1,137	1,234	1,324	1,244	1,304	1,417	1,519	145	152	165	177	3,979	4,171	4,531	4,857
17	447	444	464	483	2,215	2,199	2,300	2,394	665	661	691	719	0	0	0	0	1,103	1,095	1,145	1,192
18	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
19	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTALS	**41,592**	**44,470**	**49,066**	**53,343**	**74,530**	**79,882**	**88,305**	**96,173**	**34,146**	**36,548**	**40,364**	**43,924**	**4,440**	**4,766**	**5,271**	**5,742**	**74,597**	**79,441**	**87,267**	**94,565**

SOURCE: Table 2 & 5

NORTH ESSEX RETAIL STUDY
COLCHESTER BOROUGH COUNCIL CAPACITY FORECASTS UPDATE, 2009

CONVENIENCE GOODS
TIPTREE TOWN CENTRE

TABLE 7
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	TESCO, CHURCH ROAD				OTHER TOWN CENTRE CONVENIENCE				TOTAL			
	2009 (%)	2014 (%)	2019 (%)	2024 (%)	2009 (%)	2014 (%)	2019 (%)	2024 (%)	2009 (%)	2014 (%)	2019 (%)	2024 (%)
1	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0
10	1	1	1	1	0	0	0	0	1	1	1	1
11	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0
14	1	1	1	1	0	0	0	0	1	1	1	1
15	51	51	51	51	3	3	3	3	54	54	54	54
16	5	5	5	5	0	0	0	0	6	6	6	6
17	0	0	0	0	0	0	0	0	0	0	0	0
18	1	1	1	1	0	0	0	0	1	1	1	1
19	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005

TABLE 8
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2007 PRICES

Catchment Zone	TESCO, CHURCH ROAD				OTHER TOWN CENTRE CONVENIENCE				TOTAL			
	2009 (£000)	2014 (£000)	2019 (£000)	2024 (£000)	2009 (£000)	2014 (£000)	2019 (£000)	2024 (£000)	2009 (£000)	2014 (£000)	2019 (£000)	2024 (£000)
1	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0
10	300	313	336	358	0	0	0	0	300	313	336	358
11	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0
14	421	443	484	525	0	0	0	0	421	443	484	525
15	13,752	14,427	15,652	16,778	761	798	866	928	14,513	15,225	16,519	17,707
16	764	801	870	932	60	62	68	73	823	863	937	1,005
17	0	0	0	0	0	0	0	0	0	0	0	0
18	462	484	525	564	0	0	0	0	462	484	525	564
19	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0
TOTALS	**15,699**	**16,467**	**17,866**	**19,158**	**821**	**861**	**934**	**1,001**	**16,519**	**17,328**	**18,801**	**20,159**

SOURCE: Tables 2 & 7

CONVENIENCE GOODS
WEST MERSEA TOWN CENTRE

TABLE 9
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	CO-OP, BARFIELD ROAD				OTHER TOWN CENTRE CONVENIENCE				TOTAL			
	2009 (%)	2014 (%)	2019 (%)	2024 (%)	2009 (%)	2014 (%)	2019 (%)	2024 (%)	2009 (%)	2014 (%)	2019 (%)	2024 (%)
1	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0	0	0	0	0
17	32	32	32	32	3	3	3	3	35	35	35	35
18	0	0	0	0	0	0	0	0	0	0	0	0
19	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005

TABLE 10
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2007 PRICES

Catchment Zone	CO-OP, BARFIELD ROAD				OTHER TOWN CENTRE CONVENIENCE				TOTAL			
	2009 (£000)	2014 (£000)	2019 (£000)	2024 (£000)	2009 (£000)	2014 (£000)	2019 (£000)	2024 (£000)	2009 (£000)	2014 (£000)	2019 (£000)	2024 (£000)
1	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0	0	0	0	0
17	4,088	4,058	4,246	4,419	396	393	411	428	4,484	4,452	4,657	4,847
18	0	0	0	0	0	0	0	0	0	0	0	0
19	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0
TOTALS	**4,088**	**4,058**	**4,246**	**4,419**	**396**	**393**	**411**	**428**	**4,484**	**4,452**	**4,657**	**4,847**

SOURCE: Tables 2 & 9

CONVENIENCE GOODS
WIVENHOE TOWN CENTRE

TABLE 11
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	CO-OP				OTHER TOWN CENTRE CONVENIENCE				TOTAL			
	2009 (%)	2014 (%)	2019 (%)	2024 (%)	2009 (%)	2014 (%)	2019 (%)	2024 (%)	2009 (%)	2014 (%)	2019 (%)	2024 (%)
1	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0
8	12	12	12	12	2	2	2	2	14	14	14	14
9	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0	0	0	0	0
17	0	0	0	0	0	0	0	0	0	0	0	0
18	0	0	0	0	0	0	0	0	0	0	0	0
19	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005

TABLE 12
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2007 PRICES

Catchment Zone	CO-OP				OTHER TOWN CENTRE CONVENIENCE				TOTAL			
	2009 (£000)	2014 (£000)	2019 (£000)	2024 (£000)	2009 (£000)	2014 (£000)	2019 (£000)	2024 (£000)	2009 (£000)	2014 (£000)	2019 (£000)	2024 (£000)
1	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0
4	169	182	203	223	0	0	0	0	169	182	203	223
5	0	0	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0
8	1,552	1,639	1,792	1,929	239	252	276	297	1,790	1,891	2,067	2,226
9	0	0	0	0	0	0	0	0	0	0	0	0
10	138	144	155	165	0	0	0	0	138	144	155	165
11	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0	0	0	0	0
17	0	0	0	0	0	0	0	0	0	0	0	0
18	0	0	0	0	0	0	0	0	0	0	0	0
19	0	0	0	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0	0	0
TOTALS	**1,859**	**1,966**	**2,150**	**2,318**	**239**	**252**	**276**	**297**	**2,097**	**2,218**	**2,425**	**2,615**

SOURCE: Tables 2 & 11

COLCHESTER BOROUGH COUNCIL

TABLE 13
COLCHESTER CONVENIENCE GOODS FLOORSPACE

	Net Flsp (sqm)	Net Con Ratio (%)	Net Convenience (sqm)	Co Average Sales (£ per sq m net)	Average Turnover (£000s)
TOWN CENTRE					
J Sainsbury, Priory Walk	1,315	90%	1,184	9,150	10,829
Other	2,371	95%	2,252	4,500	10,136
SUB-TOTAL	**3,686**		**3,436**		**20,965**
OUT OF CENTRE					
J Sainsbury, Tollgate West	6,164	70%	4,315	9,150	39,480
Tesco Extra, Highwoods Square	7,501	70%	5,251	10,873	57,091
Asda, Crouch Street, Turner Rise	4,194	70%	2,936	11,147	32,725
Tesco, Greenstead Road	5,191	70%	3,634	10,873	39,509
Co-Op, Fiveways Retail Park	629	95%	598	5,314	3,175
SUB-TOTAL	**23,679**		**16,733**		**171,981**
TOTAL	**27,365**		**20,169**	**9,567**	**192,946**

NORTH ESSEX RETAIL STUDY
COLCHESTER BOROUGH COUNCIL CAPACITY FORECASTS UPDATE, 2009

COLCHESTER BOROUGH COUNCIL

TABLE 14
TIPTREE CONVENIENCE GOODS FLOORSPACE

	Net Flsp (sqm)	Net Con Ratio (%)	Net Convenience (sqm)	Co Average Sales (£ per sq m net)	Average Turnover (£000s)
TOWN CENTRE					
Tesco Superstore, Church Road	1,697	80%	1,358	10,873	14,761
Co-Op, Church Road	1,115	95%	1,059	5,314	5,629
Other	135	100%	135	3,000	405
TOTAL	**2,947**		**2,552**	**8,149**	**20,795**

TABLE 15
WEST MERSEA CONVENIENCE GOODS FLOORSPACE

	Net Flsp (sqm)	Net Con Ratio (%)	Net Convenience (sqm)	Co Average Sales (£ per sq m net)	Average Turnover (£000s)
TOWN CENTRE					
Co-Op, Barfield Road	1,000	95%	950	5,314	5,048
Other	180	100%	180	3,000	540
TOTAL	**1,180**		**1,130**	**4,945**	**5,588**

NORTH ESSEX RETAIL STUDY
COLCHESTER BOROUGH COUNCIL CAPACITY FORECASTS UPDATE, 2009

COLCHESTER BOROUGH COUNCIL

TABLE 16
WIVENHOE CONVENIENCE GOODS FLOORSPACE

	Net Flsp (sqm)	Net Con Ratio (%)	Net Convenience (sqm)	Co Average Sales (£ per sq m net)	Average Turnover (£000s)
TOWN CENTRE					
Co-Op, The Avenue	629	95%	598	5,314	3,175
Other	135	100%	135	3,000	405
TOTAL	**764**		**733**	**4,888**	**3,580**

TABLE 17
TOTAL CONVENIENCE GOODS FLOORSPACE

	Net Flsp (sqm)		Net Convenience (sqm)	Co Average Sales (£ per sq m net)	Average Turnover (£000s)
TOTAL	**32,256**		**24,583**	**9,068**	**222,910**

Source: IGD/Colchester Borough Council/GVA Grimley Site Visits

NORTH ESSEX RETAIL STUDY
COLCHESTER BOROUGH COUNCIL CAPACITY FORECASTS UPDATE, 2009

TABLE 18
CONVENIENCE FLOORSPACE COMMITMENTS

	Net additional Convenience (sqm)	Company Average Sales (£ per sq m net)	Total Turnover (£000s)
BUILT			
Tesco Express, Barfield Road, West Mersea	280	10,873	3,044
Co-Op, Wimpole Road*	279	5,314	1,483
Aldi, Magdolen Street*	1,400	3,582	5,015
Co-op, Peartree Road*	1,684	5,314	8,950
Waitrose, St Andrew Avenue*	2,300	9,784	22,503
SUB-TOTAL	**5,943**	**6,898**	**40,995**
UNBUILT			
Tesco Express, Mersea Road, Blackheath	278	10,873	3,023
Aldi, London Road*	1,600	3,682	5,891
Sainsbury's Tollgate (Outline Consent)*	1,100	9,150	10,065
Foodstore at Peartree Road*	1,347	10,000	13,470
Foodstore proposal at Butt Road, Garrison*	512	5,000	2,560
SUB-TOTAL	**4,837**	**7,238**	**35,009**
TOTAL	**10,780**	**7,050**	**76,004**

Source: Colchester Borough Council, 2009 *Included within 'Colchester Urban Area'

Company Average Sales derived from Mintel UK Retail Rankings 2009 (adjusted to remove petrol sales)

NORTH ESSEX RETAIL STUDY
COLCHESTER BOROUGH COUNCIL CAPACITY FORECASTS UPDATE, 2009

CAPACITY PROJECTIONS: CONVENIENCE GOODS

TABLE 19
FUTURE SHOP FLOORSPACE CAPACITY IN COLCHESTER BOROUGH

	CONVENIENCE GOODS			
	2009	2014	2019	2024
Residents Spending (£000)	269,763	287,588	316,470	343,382
Existing Shop Floorspace (sq m net)	24,583	24,583	24,583	24,583
Sales per sq m net £	10,974	9,068	9,068	9,068
Sales from Existing Floorspace (£000)	269,763	222,910	222,910	222,910
Sales from Committed Floorspace (£000)*	0	76,004	76,004	76,004
Residual Spending to Support new shops (£000)	0	-11,326	17,556	44,468
Sales per sq m net in new shops (£)	10,000	10,000	10,000	10,000
Capacity for new floorspace (sq m net)	0	-1,133	1,756	4,447

*INLCUDES PLANNING CONSENT FOR TESCO EXPRESS, MERSEA ROAD, BLACKHEATH

CAPACITY PROJECTIONS: CONVENIENCE GOODS

TABLE 20
FUTURE SHOP FLOORSPACE CAPACITY IN COLCHESTER URBAN AREA

	CONVENIENCE GOODS			
	2009	2014	2019	2024
Residents Spending (£000) (See Note A)	246,662	263,590	290,587	315,762
Existing Shop Floorspace (sq m net)	20,169	20,169	20,169	20,169
Sales per sq m net £	12,230	9,567	9,567	9,567
Sales from Existing Floorspace (£000)	246,662	192,946	192,946	192,946
Sales from Committed Floorspace (£000)	0	69,937	69,937	69,937
Residual Spending to Support new shops (£000)	0	707	27,704	52,879
Sales per sq m net in new shops (£)	10,000	10,000	10,000	10,000
Capacity for new floorspace (sq m net)	0	71	2,770	5,288

NB: INCLUDES EXISTING STORES LISTED IN TABLE 13 AND THOSE MARKED WITH A * IN TABLE 18

NORTH ESSEX RETAIL STUDY
COLCHESTER BOROUGH COUNCIL CAPACITY FORECASTS UPDATE, 2009

CAPACITY PROJECTIONS: CONVENIENCE GOODS

TABLE 21
FUTURE SHOP FLOORSPACE CAPACITY IN TIPTREE

	CONVENIENCE GOODS			
	2009	2014	2019	2024
Residents Spending (£000)	16,519	17,328	18,801	20,159
Existing Shop Floorspace (sq m net)	2,552	2,552	2,552	2,552
Sales per sq m net £	6,473	8,149	8,149	8,149
Sales from Existing Floorspace (£000)	16,519	20,795	20,795	20,795
Sales from Committed Floorspace (£000)	0	0	0	0
Residual Spending to Support new shops (£000)	0	-3,467	-1,995	-636
Sales per sq m net in new shops (£)	10,000	10,000	10,000	10,000
Capacity for new floorspace (sq m net)	0	-347	-199	-64

NORTH ESSEX RETAIL STUDY
COLCHESTER BOROUGH COUNCIL CAPACITY FORECASTS UPDATE, 2009

CAPACITY PROJECTIONS: CONVENIENCE GOODS

TABLE 22
FUTURE SHOP FLOORSPACE CAPACITY IN WEST MERSEA

	CONVENIENCE GOODS			
	2009	2014	2019	2024
Residents Spending (£000)	4,484	4,452	4,657	4,847
Existing Shop Floorspace (sq m net)	1,130	1,130	1,130	1,130
Sales per sq m net £	3,968	4,945	4,945	4,945
Sales from Existing Floorspace (£000)	4,484	5,588	5,588	5,588
Sales from Committed Floorspace (£000)	0	3,044	3,044	3,044
Residual Spending to Support new shops (£000)	0	-4,181	-3,976	-3,786
Sales per sq m net in new shops (£)	10,000	10,000	10,000	10,000
Capacity for new floorspace (sq m net)	0	-418	-398	-379

CAPACITY PROJECTIONS: CONVENIENCE GOODS

TABLE 23
FUTURE SHOP FLOORSPACE CAPACITY IN WIVENHOE

	CONVENIENCE GOODS			
	2009	2014	2019	2024
Residents Spending (£000)	2,097	2,218	2,425	2,615
Existing Shop Floorspace (sq m net)	733	733	733	733
Sales per sq m net £	2,863	4,888	4,888	4,888
Sales from Existing Floorspace (£000)	2,097	3,580	3,580	3,580
Sales from Committed Floorspace (£000)	0	0	0	0
Residual Spending to Support new shops (£000)	0	-1,363	-1,155	-966
Sales per sq m net in new shops (£)	10,000	10,000	10,000	10,000
Capacity for new floorspace (sq m net)	0	-136	-116	-97

APPENDIX 3

COMPARISON GOODS CAPACITY TABLES

NORTH ESSEX RETAIL STUDY
COLCHESTER BOROUGH COUNCIL CAPACITY FORECASTS UPDATE, 2009

TABLE 1

SURVEY AREA POPULATION FORECASTS

Catchment Zone	Postcode Sector Groupings	2009	2014	2019	2024
1	CB9 0/7/8/9; CB10 2; CO10 8; CO9 4	48,892	51,608	54,323	57,072
2	CO10 0/1/2/7/9	37,989	39,255	40,829	42,550
3	CO10 5; CO6 5; CO7 6; IP7 5/6; IP8 3	27,712	28,917	30,011	31,325
4	CO11 1/2; CO7 0/7/8	33,709	36,074	38,463	41,255
5	CO12 3/4/5; CO16 0	26,059	28,003	29,918	32,202
6	CO13 0/9; CO14 8	20,597	20,683	20,866	21,419
7	CO15 1/2/3/4/5/6; CO16 7/8/9	68,813	71,654	74,610	78,616
8	CO7 9	7,740	8,099	8,464	8,889
9	CO1 1/2; CO2 7/8/9; CO3 0/3/4/8/9; CO4 0/3/5/9; CO6 3/4	130,836	139,326	147,525	156,828
10	CO6 1/2; CO8 5	18,462	19,046	19,555	20,371
11	CO9 1/2/3	20,956	21,596	22,351	23,394
12	CM7 1/2/3/4/5/9; CM77 6/7/8	61,833	65,122	68,603	72,739
13	CM3 1/3; CM6 1/2/3	31,706	33,003	34,405	35,600
14	CM3 2; CM8 1/2/3	37,372	39,004	40,750	43,062
15	CO5 0/9	16,160	16,791	17,419	18,212
16	CO2 0; CO5 7	8,939	9,282	9,640	10,081
17	CO5 8	7,604	7,477	7,479	7,592
18	CM9 4/5/6; CM9 8	33,608	34,855	36,137	37,893
19	CM3 4/8	11,736	12,099	12,468	12,786
20	CM0 7/8; CM3 6	26,071	26,900	27,627	28,787
TOTAL		**676,794**	**708,794**	**741,443**	**780,673**

SOURCE: Experian E-Marketer, July 2009

TABLE 1A

POPULATION GROWTH RATES

GROWTH RATES			
2009-2014 (%)	2014-2019 (%)	2019-2024 (%)	2024-2026 (%)
6	5	5	17
3	4	4	12
4	4	4	13
7	7	7	22
7	7	8	24
0	1	3	4
4	4	5	14
5	5	5	15
6	6	6	20
3	3	4	10
3	3	5	12
5	5	6	18
4	4	3	12
4	4	6	15
4	4	5	13
4	4	5	13
-2	0	2	0
4	4	5	13
3	3	3	9
3	3	4	10
5	**5**	**5**	**15**

NORTH ESSEX RETAIL STUDY
COLCHESTER BOROUGH COUNCIL CAPACITY FORECASTS UPDATE, 2009

TABLE 2
SURVEY AREA RETAIL EXPENDITURE FORECASTS (2007 prices)

PER CAPITA EXPENDITURE	2007 (£)	2009 (£)	2014 (£)	2019 (£)	2024 (£)
Convenience Goods	1,710	1,719	1,753	1,834	1,880
Comparison Goods	3,190	3,209	3,440	3,949	4,969
Convenience SFT	2.3%	3.0%	4.0%	4.0%	4.0%
Comparison SFT	8.0%	10.0%	12.5%	12.5%	12.5%
Convenience Goods (less SFT)	**1,671**	**1,667**	**1,683**	**1,760**	**1,805**
Comparison Goods (less SFT)	**2,935**	**2,888**	**3,010**	**3,455**	**4,347**

GROWTH IN PER CAPITA RETAIL EXPENDITURE:

Convenience Goods: 0.3% 2007-2008; 0.2% 2008-2009; 0.4% 2009-2014; 0.9% 2014-2019; 0.5 2019-2024

Comparison Goods: 3.7% 2007-2008; -3.0% 2008-2009; 1.4% 2009-2014; 2.8% 2014-2019; 4.7% 2019-2024

	CONVENIENCE GOODS				COMPARISON GOODS			
ZONE	2009 (£000)	2014 (£000)	2019 (£000)	2024 (£000)	2009 (£000)	2014 (£000)	2019 (£000)	2024 (£000)
1	81,503	86,860	95,619	102,994	141,196	155,330	187,710	248,120
2	63,328	66,069	71,867	76,787	109,709	118,150	141,083	184,985
3	46,196	48,670	52,825	56,530	80,030	87,035	103,702	136,185
4	56,193	60,715	67,702	74,450	97,349	108,576	132,907	179,355
5	43,440	47,131	52,661	58,113	75,256	84,284	103,380	139,998
6	34,335	34,811	36,728	38,654	59,482	62,252	72,101	93,119
7	114,712	120,599	131,328	141,874	198,726	215,665	257,811	341,782
8	12,903	13,631	14,898	16,041	22,352	24,376	29,247	38,645
9	218,104	234,497	259,673	283,018	377,843	419,345	509,765	681,807
10	30,776	32,056	34,421	36,762	53,317	57,325	67,571	88,563
11	34,934	36,348	39,342	42,218	60,519	65,000	77,233	101,705
12	103,076	109,605	120,755	131,268	178,568	196,005	237,054	316,232
13	52,854	55,547	60,559	64,245	91,564	99,333	118,885	154,770
14	62,299	65,647	71,728	77,711	107,927	117,395	140,810	187,211
15	26,939	28,261	30,661	32,866	46,669	50,538	60,190	79,176
16	14,901	15,622	16,968	18,193	25,815	27,937	33,311	43,827
17	12,676	12,584	13,164	13,701	21,960	22,504	25,843	33,006
18	56,025	58,664	63,608	68,383	97,057	104,907	124,870	164,739
19	19,564	20,364	21,946	23,074	33,893	36,416	43,083	55,587
20	43,460	45,275	48,629	51,950	75,291	80,964	95,464	125,151
TOTAL	**1,128,218**	**1,192,956**	**1,305,083**	**1,408,834**	**1,954,520**	**2,133,335**	**2,562,019**	**3,393,963**

SOURCE: Experian E-Marketer, July 2009

NORTH ESSEX RETAIL STUDY
COLCHESTER BOROUGH COUNCIL CAPACITY FORECASTS UPDATE, 2009

COMPARISON GOODS
COLCHESTER TOWN CENTRE

TABLE 3
COMPARISON GOODS ALLOCATION - MARKET SHARE %

	COLCHESTER TOWN CENTRE			
Catchment Zone	2009 (%)	2014 (%)	2019 (%)	2024 (%)
1	1	1	1	1
2	23	23	23	23
3	17	17	17	17
4	44	44	44	44
5	39	39	39	39
6	23	23	23	23
7	19	19	19	19
8	55	55	55	55
9	56	56	56	56
10	43	43	43	43
11	27	27	27	27
12	4	4	4	4
13	0	0	0	0
14	6	6	6	6
15	50	50	50	50
16	70	70	70	70
17	54	54	54	54
18	4	4	4	4
19	1	1	1	1
20	1	1	1	1

SOURCE: North Essex Telephone Survey, September 2005

TABLE 4
COMPARISON GOODS ALLOCATION - SPEND (£) 2007 PRICES

	COLCHESTER TOWN CENTRE			
Catchment Zone	2009 (£000)	2014 (£000)	2019 (£000)	2024 (£000)
1	963	1,059	1,280	1,692
2	25,262	27,206	32,487	42,596
3	13,865	15,078	17,965	23,593
4	42,757	47,688	58,375	78,776
5	29,230	32,736	40,153	54,375
6	13,687	14,324	16,590	21,426
7	36,841	39,982	47,795	63,362
8	12,209	13,315	15,975	21,108
9	210,023	233,091	283,351	378,980
10	22,783	24,496	28,875	37,845
11	16,437	17,654	20,976	27,623
12	8,033	8,818	10,664	14,226
13	0	0	0	0
14	6,671	7,256	8,703	11,571
15	23,438	25,382	30,229	39,765
16	18,164	19,657	23,438	30,837
17	11,960	12,257	14,076	17,977
18	3,466	3,746	4,459	5,883
19	194	209	247	319
20	610	656	773	1,014
Total	496,593	544,609	656,412	872,968

Source: Table 2 & 3

NORTH ESSEX RETAIL STUDY
COLCHESTER BOROUGH COUNCIL CAPACITY FORECASTS UPDATE, 2009

COMPARISON GOODS
TIPTREE TOWN CENTRE

TABLE 5
COMPARISON GOODS ALLOCATION - MARKET SHARE %

	TIPTREE TOWN CENTRE			
Catchment Zone	2009 (%)	2014 (%)	2019 (%)	2024 (%)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	0	0	0	0
5	0	0	0	0
6	0	0	0	0
7	0	0	0	0
8	0	0	0	0
9	0	0	0	0
10	0	0	0	0
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	3	3	3	3
16	0	0	0	0
17	1	1	1	1
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005

TABLE 6
COMPARISON GOODS ALLOCATION - SPEND (£) 2007 PRICES

	TIPTREE TOWN CENTRE			
Catchment Zone	2009 (£000)	2014 (£000)	2019 (£000)	2024 (£000)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	0	0	0	0
5	0	0	0	0
6	0	0	0	0
7	0	0	0	0
8	0	0	0	0
9	0	0	0	0
10	52	56	67	87
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	102	111	133	177
15	1,427	1,545	1,840	2,420
16	0	0	0	0
17	197	202	232	296
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0
Total	1,778	1,914	2,272	2,981

Source: Table 2 & 5

NORTH ESSEX RETAIL STUDY
COLCHESTER BOROUGH COUNCIL CAPACITY FORECASTS UPDATE, 2009

COMPARISON GOODS
WEST MERSEA TOWN CENTRE

TABLE 7
COMPARISON GOODS ALLOCATION - MARKET SHARE %

	WEST MERSEA TOWN CENTRE			
Catchment Zone	2009 (%)	2014 (%)	2019 (%)	2024 (%)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	0	0	0	0
5	0	0	0	0
6	0	0	0	0
7	0	0	0	0
8	0	0	0	0
9	0	0	0	0
10	0	0	0	0
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	0	0	0	0
16	0	0	0	0
17	13	13	13	13
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005

TABLE 8
COMPARISON GOODS ALLOCATION - SPEND (£) 2007 PRICES

	WEST MERSEA TOWN CENTRE			
Catchment Zone	2009 (£000)	2014 (£000)	2019 (£000)	2024 (£000)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	0	0	0	0
5	0	0	0	0
6	0	0	0	0
7	0	0	0	0
8	0	0	0	0
9	0	0	0	0
10	0	0	0	0
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	0	0	0	0
16	0	0	0	0
17	2,868	2,940	3,376	4,311
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0
Total	2,868	2,940	3,376	4,311

Source: Table 2 & 7

NORTH ESSEX RETAIL STUDY
COLCHESTER BOROUGH COUNCIL CAPACITY FORECASTS UPDATE, 2009

COMPARISON GOODS
WIVENHOE TOWN CENTRE

TABLE 9
COMPARISON GOODS ALLOCATION - MARKET SHARE %

	WIVENHOE TOWN CENTRE			
Catchment Zone	2009 (%)	2014 (%)	2019 (%)	2024 (%)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	0	0	0	0
5	0	0	0	0
6	0	0	0	0
7	0	0	0	0
8	6	6	6	6
9	0	0	0	0
10	0	0	0	0
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	0	0	0	0
16	0	0	0	0
17	0	0	0	0
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005

TABLE 10
COMPARISON GOODS ALLOCATION - SPEND (£) 2007 PRICES

	WIVENHOE TOWN CENTRE			
Catchment Zone	2009 (£000)	2014 (£000)	2019 (£000)	2024 (£000)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	278	310	380	512
5	0	0	0	0
6	0	0	0	0
7	0	0	0	0
8	1,315	1,434	1,721	2,274
9	0	0	0	0
10	0	0	0	0
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	0	0	0	0
16	0	0	0	0
17	0	0	0	0
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0
Total	1,593	1,745	2,101	2,786

Source: Table 2 & 9

NORTH ESSEX RETAIL STUDY
COLCHESTER BOROUGH COUNCIL CAPACITY FORECASTS UPDATE, 2009

COMPARISON GOODS
TURNER RISE RETAIL PARK

TABLE 11
COMPARISON GOODS ALLOCATION - MARKET SHARE %

	TURNER RISE RETAIL PARK			
Catchment Zone	2009 (%)	2014 (%)	2019 (%)	2024 (%)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	1	1	1	1
5	1	1	1	1
6	0	0	0	0
7	0	0	0	0
8	0	0	0	0
9	1	1	1	1
10	1	1	1	1
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	0	0	0	0
16	0	0	0	0
17	0	0	0	0
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005

TABLE 12
COMPARISON GOODS ALLOCATION - SPEND (£) 2007 PRICES

	TURNER RISE RETAIL PARK			
Catchment Zone	2009 (£000)	2014 (£000)	2019 (£000)	2024 (£000)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	1,106	1,234	1,511	2,039
5	689	772	947	1,282
6	129	135	157	202
7	0	0	0	0
8	0	0	0	0
9	3,066	3,403	4,136	5,532
10	294	316	372	488
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	0	0	0	0
16	0	0	0	0
17	83	85	97	124
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0
Total	5,367	5,945	7,220	9,668

Source: Table 2 & 11

NORTH ESSEX RETAIL STUDY
COLCHESTER BOROUGH COUNCIL CAPACITY FORECASTS UPDATE, 2009

COMPARISON GOODS
COLCHESTER RETAIL PARK

TABLE 13
COMPARISON GOODS ALLOCATION - MARKET SHARE %

	COLCHESTER RETAIL PARK			
Catchment Zone	2009 (%)	2014 (%)	2019 (%)	2024 (%)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	2	2	2	2
5	1	1	1	1
6	2	2	2	2
7	0	0	0	0
8	1	1	1	1
9	2	2	2	2
10	2	2	2	2
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	0	0	0	0
16	1	1	1	1
17	1	1	1	1
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005

TABLE 14
COMPARISON GOODS ALLOCATION - SPEND (£) 2007 PRICES

	COLCHESTER RETAIL PARK			
Catchment Zone	2009 (£000)	2014 (£000)	2019 (£000)	2024 (£000)
1	0	0	0	0
2	132	142	170	223
3	0	0	0	0
4	1,759	1,962	2,402	3,241
5	860	963	1,181	1,599
6	930	974	1,128	1,456
7	679	737	881	1,168
8	121	132	159	210
9	6,927	7,688	9,346	12,500
10	819	880	1,038	1,360
11	201	216	256	337
12	431	473	572	763
13	0	0	0	0
14	0	0	0	0
15	233	252	301	395
16	144	156	186	245
17	185	190	218	279
18	169	182	217	287
19	97	104	123	159
20	0	0	0	0
Total	13,688	15,053	18,178	24,223

Source: Table 2 & 13

NORTH ESSEX RETAIL STUDY
COLCHESTER BOROUGH COUNCIL CAPACITY FORECASTS UPDATE, 2009

COMPARISON GOODS
THE TOLLGATE RETAIL PARK

TABLE 15
COMPARISON GOODS ALLOCATION - MARKET SHARE %

	TOLLGATE RETAIL PARK			
Catchment Zone	2009 (%)	2014 (%)	2019 (%)	2024 (%)
1	1	1	1	1
2	1	1	1	1
3	3	3	3	3
4	7	7	7	7
5	3	3	3	3
6	2	2	2	2
7	1	1	1	1
8	13	13	13	13
9	15	15	15	15
10	21	21	21	21
11	4	4	4	4
12	2	2	2	2
13	0	0	0	0
14	0	0	0	0
15	19	19	19	19
16	10	10	10	10
17	11	11	11	11
18	0	0	0	0
19	0	0	0	0
20	1	1	1	1

SOURCE: North Essex Telephone Survey, September 2005

TABLE 16
COMPARISON GOODS ALLOCATION - SPEND (£) 2003 PRICES

	TOLLGATE RETAIL PARK			
Catchment Zone	2009 (£000)	2014 (£000)	2019 (£000)	2024 (£000)
1	957	1,053	1,272	1,682
2	943	1,016	1,213	1,591
3	2,702	2,939	3,502	4,598
4	6,555	7,311	8,949	12,076
5	2,304	2,581	3,165	4,287
6	1,352	1,415	1,639	2,117
7	1,767	1,917	2,292	3,039
8	2,834	3,091	3,708	4,900
9	56,110	62,273	75,701	101,249
10	10,966	11,791	13,898	18,216
11	2,552	2,741	3,257	4,290
12	3,303	3,625	4,384	5,849
13	304	329	394	513
14	533	579	695	924
15	8,647	9,364	11,153	14,671
16	2,630	2,847	3,394	4,466
17	2,358	2,416	2,775	3,544
18	109	117	140	184
19	0	0	0	0
20	563	606	714	936
Total	107,490	118,012	142,246	189,130

Source: Table 2 & 15

NORTH ESSEX RETAIL STUDY
COLCHESTER BOROUGH COUNCIL CAPACITY FORECASTS UPDATE, 2009

COMPARISON GOODS
COLNE VIEW RETAIL PARK

TABLE 17
COMPARISON GOODS ALLOCATION - MARKET SHARE %

	COLNE VIEW RETAIL PARK			
Catchment Zone	2009 (%)	2014 (%)	2019 (%)	2024 (%)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	1	1	1	1
5	0	0	0	0
6	0	0	0	0
7	0	0	0	0
8	0	0	0	0
9	0	0	0	0
10	1	1	1	1
11	0	0	0	0
12	0	0	0	0
13	0	0	0	0
14	0	0	0	0
15	0	0	0	0
16	0	0	0	0
17	0	0	0	0
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005

TABLE 18
COMPARISON GOODS ALLOCATION - SPEND (£) 2003 PRICES

	COLNE VIEW RETAIL PARK			
Catchment Zone	2009 (£000)	2014 (£000)	2019 (£000)	2024 (£000)
1	0	0	0	0
2	0	0	0	0
3	0	0	0	0
4	656	732	896	1,209
5	0	0	0	0
6	0	0	0	0
7	210	228	272	361
8	0	0	0	0
9	1,192	1,323	1,609	2,152
10	294	316	372	488
11	242	260	309	406
12	181	199	240	321
13	0	0	0	0
14	179	195	234	311
15	151	163	194	256
16	0	0	0	0
17	0	0	0	0
18	0	0	0	0
19	0	0	0	0
20	79	85	101	132
Total	3,184	3,500	4,227	5,634

Source: Table 2 & 17

NORTH ESSEX RETAIL STUDY
COLCHESTER BOROUGH COUNCIL CAPACITY FORECASTS UPDATE, 2009

COMPARISON GOODS
FREESTANDING RETAIL WAREHOUSES

TABLE 19
COMPARISON GOODS ALLOCATION - MARKET SHARE %

Catchment Zone	COLCHESTER - FREESTANDING RETAIL WAREHOUSING 2009 (%)	2014 (%)	2019 (%)	2024 (%)
1	0	0	0	0
2	1	1	1	1
3	1	1	1	1
4	4	4	4	4
5	2	2	2	2
6	0	0	0	0
7	0	0	0	0
8	9	9	9	9
9	5	5	5	5
10	6	6	6	6
11	1	1	1	1
12	0	0	0	0
13	0	0	0	0
14	1	1	1	1
15	4	4	4	4
16	4	4	4	4
17	6	6	6	6
18	0	0	0	0
19	0	0	0	0
20	0	0	0	0

SOURCE: North Essex Telephone Survey, September 2005

TABLE 20
COMPARISON GOODS ALLOCATION - SPEND (£) 2003 PRICES

Catchment Zone	COLCHESTER - FREESTANDING RETAIL WAREHOUSING 2009 (£000)	2014 (£000)	2019 (£000)	2024 (£000)
1	509	560	676	894
2	577	622	743	974
3	810	881	1,049	1,378
4	4,005	4,466	5,467	7,378
5	1,184	1,326	1,627	2,203
6	138	144	167	216
7	294	319	381	505
8	1,952	2,128	2,554	3,374
9	18,199	20,198	24,554	32,840
10	3,269	3,515	4,144	5,431
11	655	703	835	1,100
12	0	0	0	0
13	0	0	0	0
14	551	599	719	956
15	1,923	2,083	2,480	3,263
16	1,023	1,107	1,320	1,736
17	1,341	1,374	1,578	2,016
18	354	383	456	601
19	38	41	48	63
20	0	0	0	0
Total	36,821	40,450	48,798	64,927

Source: Table 2 & 19

NORTH ESSEX RETAIL STUDY
COLCHESTER BOROUGH COUNCIL CAPACITY FORECASTS UPDATE, 2009

FLOORSPACE SCHEDULE - COLCHESTER BOROUGH

TABLE 21
COLCHESTER TOWN CENTRE COMPARISON GOODS FLOORSPACE

	Net Floorspace Sq m
Colchester Town Centre	41,665

Source: Experian Goad

TABLE 22
TIPTREE TOWN CENTRE COMPARISON GOODS FLOORSPACE

	Net Floorspace Sq m
Tiptree Town Centre	650

Source: GVA Grimley Site Visit

TABLE 23
WIVENHOE TOWN CENTRE COMPARISON GOODS FLOORSPACE

	Net Floorspace Sq m
Wivehoe Town Centre	315

Source: GVA Grimley Site Visit

TABLE 24
WEST MERSEA TOWN CENTRE COMPARISON GOODS FLOORSPACE

	Net Floorspace Sq m
West Mersea Town Centre	990

Source: GVA Grimley Site Visit

TABLE 25
TOTAL COMPARISON GOODS FLOORSPACE

	Net Floorspace Sq m
TOTAL	109,706

NORTH ESSEX RETAIL STUDY
COLCHESTER BOROUGH COUNCIL CAPACITY FORECASTS UPDATE, 2009

FLOORSPACE SCHEDULE - COLCHESTER BOROUGH

TABLE 26
COLCHESTER RETAIL WAREHOUSING FLOORSPACE

	Net Floorspace Sq m	Sales Density £ per sq m	Turnover 2004 £000's
B&Q, Hythe Quay	6,240	1,960	12,230
Homebase, St Andrews Avenue	3,600	1,328	4,781
Homebase, Tollgate Road	3,252	1,328	4,319
Sea Pets, Tollgate Road	511	2,538	1,297
Wickes, Clarendon Way	2,158	2,445	5,276
MFI, London Road	2,508	2,531	6,348
The Range, Cowdray Avenue	2,341	1,644	3,849
Vacant (previously Land of Leather, Tollgate Road)	725		
SUB-TOTAL	**21,335**	**1,786**	**38,099**
Colchester Retail Park			
Oddbins	325		
Blockbuster	325		
JJB Sport	1,022	2,239	2,288
Brantano	818	5,125	4,192
Matalan	2,583	2,213	5,716
SUB-TOTAL	**5,073**	**2,404**	**12,197**
Colne View Retail Park			
DFS	1,886	6,273	11,831
Staples	1,737	2,155	3,743
Pets at Home	978	2,538	2,482
Halfords	978	2,494	2,439
SUB-TOTAL	**5,579**	**3,674**	**20,495**
The Tollgate Retail Park			
AHF	1,994	2,154	4,295
Allied Carpets	929	1,353	1,257
Carpetright	1,015	1,341	1,361
Carpets4Less	648	1,341	869
Comet	1,858	7,690	14,288
Dreams	929	1,749	1,625
Harveys	613	1,776	1,089
Tiles R Us	650	1,467	954
Currys	1,285	6,754	8,679
PC World	1,575	7,146	11,255
Millers	754	4,743	3,576
Power House	482	2,602	1,254
Staples	1,023	2,155	2,205
SUB-TOTAL	**13,755**	**3,832**	**52,706**
Turner Rise Retail Park			
Dunelm Mill	2,923	2,548	
Carpetright	750	1,341	1,006
Bensons	950	1,776	1,687
Bathstore.com	456	2,000	912
Bennetts Electrical	1,259	6,948	8,748
Vacant (previously Floors-2-Go)	583		
Vacant (previously Focus)	3,110		
SUB-TOTAL	**10,031**	**1,231**	**12,352**
Peartree Road, Stanway			
Vacant (previously Focus)	1,793		
Paul Simon Curtains	849	1,000	849
Vacant (previously Porcelanosa)	889		
Topps Tiles	557	1,467	817
Hatfields Furniture	2,230	1,000	2,230
Vacant (previously Evergreen)	448	1,000	448
Rustic Country	655	1,500	983
Co-Operative Homemaker	1,628	1,500	2,442
World of Beds (Jayrest Centre)	1,264	1,000	1,264
SUB-TOTAL	**10,313**	**876**	**9,033**
TOTAL	**66,086**	**2,192**	**144,882**

Source: Trevor Wood Retail Warehouse Database / Essex Structure Plan Study 2001 / EGi

NORTH ESSEX RETAIL STUDY
COLCHESTER BOROUGH COUNCIL CAPACITY FORECASTS UPDATE, 2009

TABLE 27
COMPARISON FLOORSPACE COMMITMENTS

	Net Comparison (sqm)	Company Average Sales (£ per sq m net)	Total Turnover 2009 (£000s)	Total Turnover 2014 (£000s)	Total Turnover 2019 (£000s)	Total Turnover 2024 (£000s)
BUILT						
Boots Drive-Thru	215	8,777	1,883	1,883	1,979	2,185
Co-Op, Peartree Road	474	5,000	2,369	2,369	2,490	2,749
SUB-TOTAL	**688**	**6,177**	**4,252**	**4,252**	**4,468**	**4,934**
UNBUILT						
Sainsbury's Tollgate (Outline Consent)	371	4,508	1,672	1,672	1,758	1,941
Colchester Garrison	513	5,000	2,565	2,565	2,696	2,976
SUB-TOTAL	**884**	**4,794**	**4,237**	**4,237**	**4,454**	**4,917**
TOTAL	**1,572**	**5,399**	**8,489**	**8,489**	**8,922**	**9,851**

Source: Colchester Borough Council, 2009

Note: Assumes 0% Growth in Sales Density 2009-2014 / 1% Growth 2014-2019 / 2.0% Growth 2019-2024

Company Average Sales dervied from Mintel UK Retail Rankings 2009 (adjusted to include VAT) aside from £4,508/sqm for Sainsbury's based on Indigo Retail Statement, 2009

NORTH ESSEX RETAIL STUDY
COLCHESTER BOROUGH COUNCIL CAPACITY FORECASTS UPDATE, 2009

TABLE 28
FUTURE SHOP FLOORSPACE CAPACITY: COLCHESTER BOROUGH

GROWTH IN SALES PER SQ M	COMPARISON GOODS	0.0 %pa '09-'14 1.0 %pa '14-'19 2.0 %pa '19-'24		
	COMPARISON GOODS			
	2009	2014	2019	2024
Total Available Expenditure (£000)	1,954,520	2,133,335	2,562,019	3,393,963
Market Share from Survey Area	34	34	34	34
Survey Area Residents Spending (£000)	669,384	734,166	884,828	1,176,629
Inflow to ***Colchester Town Centre*** from Beyond Survey Area (14%) £000	80,841	88,657	106,858	142,111
TOTAL RETAIL TURNOVER IN COLCHESTER BOROUGH £000	**750,224**	**822,824**	**991,686**	**1,318,740**
Existing Shop Floorspace (sq m net)	109,706	109,706	109,706	109,706
Sales per sq m net £	6,838	6,838	7,187	7,935
Sales from Existing Floorspace (£000)	750,224	750,224	788,493	870,560
Sales from Committed Floorspace (£000)	0	8,489	9,373	10,348
Residual Spending to Support new shops (£000)	0	64,110	193,820	437,831
Sales per sq m net in new shops (£)	5,000	5,000	5,255	5,802
Capacity for new floorspace (sq m net)	0	12,822	36,883	75,462

NORTH ESSEX RETAIL STUDY
COLCHESTER BOROUGH COUNCIL CAPACITY FORECASTS UPDATE, 2009

TABLE 29
FUTURE SHOP FLOORSPACE CAPACITY: COLCHESTER URBAN AREA

GROWTH IN SALES PER SQ M	COMPARISON GOODS	0.0 %pa '09-'14		
		1.0 %pa '14-'19		
		2.0 %pa '19-'24		

	COMPARISON GOODS			
	2009	2014	2019	2024
Total Available Expenditure (£000)	1,954,520	2,133,335	2,562,019	3,393,963
Market Share from Survey Area	34	34	34	34
Survey Area Residents Spending (£000)	663,144	727,568	877,080	1,166,550
Inflow to ***Colchester Town Centre*** from Beyond Survey Area (14%) £000	80,841	88,657	106,858	142,111
TOTAL RETAIL TURNOVER IN COLCHESTER URBAN AREA £000	**743,984**	**816,225**	**983,938**	**1,308,661**
Existing Shop Floorspace (sq m net)	107,751	107,751	107,751	107,751
Sales per sq m net £	6,905	6,905	7,257	8,012
Sales from Existing Floorspace (£000)	743,984	743,984	781,935	863,319
Sales from Committed Floorspace (£000)	0	8,489	8,922	9,851
Residual Spending to Support new shops (£000)	0	63,752	193,081	435,491
Sales per sq m net in new shops (£)	5,000	5,000	5,255	5,802
Capacity for new floorspace (sq m net)	0	12,750	36,742	75,059

NORTH ESSEX RETAIL STUDY
COLCHESTER BOROUGH COUNCIL CAPACITY FORECASTS UPDATE, 2009

TABLE 30
FUTURE SHOP FLOORSPACE CAPACITY: TIPTREE TOWN CENTRE

GROWTH IN SALES PER SQ M	COMPARISON GOODS	0.0 %pa '09-'14 1.0 %pa '14-'19 2.0 %pa '19-'24		
	COMPARISON GOODS			
	2009	2014	2019	2024
Total Available Expenditure (£000)	1,954,520	2,133,335	2,562,019	3,393,963
Market Share from Survey Area	0	0	0	0
Survey Area Residents Spending (£000)	1,778	1,914	2,272	2,981
Existing Shop Floorspace (sq m net)	650	650	650	650
Sales per sq m net £	2,736	2,736	2,875	3,175
Sales from Existing Floorspace (£000)	1,778	1,778	1,869	2,064
Sales from Committed Floorspace (£000)	0	0	0	0
Residual Spending to Support new shops (£000)	0	136	403	917
Sales per sq m net in new shops (£)	5,000	5,000	5,255	5,802
Capacity for new floorspace (sq m net)	0	27	77	158

NORTH ESSEX RETAIL STUDY
COLCHESTER BOROUGH COUNCIL CAPACITY FORECASTS UPDATE, 2009

TABLE 31
FUTURE SHOP FLOORSPACE CAPACITY: WEST MERSEA TOWN CENTRE

GROWTH IN SALES PER SQ M	COMPARISON GOODS	0.0 %pa '09-'14		
		1.0 %pa '14-'19		
		2.0 %pa '19-'24		
	COMPARISON GOODS			
	2009	2014	2019	2024
Total Available Expenditure (£000)	1,954,520	2,133,335	2,562,019	3,393,963
Market Share from Survey Area	0	0	0	0
Survey Area Residents Spending (£000)	2,868	2,940	3,376	4,311
Existing Shop Floorspace (sq m net)	990	990	990	990
Sales per sq m net £	2,897	2,897	3,045	3,362
Sales from Existing Floorspace (£000)	2,868	2,868	3,015	3,329
Sales from Committed Floorspace (£000)	0	0	0	0
Residual Spending to Support new shops (£000)	0	71	361	983
Sales per sq m net in new shops (£)	5,000	5,000	5,255	5,802
Capacity for new floorspace (sq m net)	0	14	69	169

NORTH ESSEX RETAIL STUDY
COLCHESTER BOROUGH COUNCIL CAPACITY FORECASTS UPDATE, 2009

TABLE 32
FUTURE SHOP FLOORSPACE CAPACITY: WIVENHOE TOWN CENTRE

GROWTH IN SALES PER SQ M	COMPARISON GOODS	0.0 %pa '09-'14 1.0 %pa '14-'19 2.0 %pa '19-'24		
	COMPARISON GOODS			
	2009	2014	2019	2024
Total Available Expenditure (£000)	1,954,520	2,133,335	2,562,019	3,393,963
Market Share from Survey Area	0	0	0	0
Survey Area Residents Spending (£000)	1,593	1,745	2,101	2,786
Existing Shop Floorspace (sq m net)	315	315	315	315
Sales per sq m net £	5,059	5,059	5,317	5,870
Sales from Existing Floorspace (£000)	1,593	1,593	1,675	1,849
Sales from Committed Floorspace (£000)	0	0	0	0
Residual Spending to Support new shops (£000)	0	151	426	937
Sales per sq m net in new shops (£)	5,000	5,000	5,255	5,802
Capacity for new floorspace (sq m net)	0	30	81	162