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Planning. Design. Economics.

**Proposed Sainsbury's Store
Colchester**

Retail Critique - Final Report

Colchester Borough Council

27 November 2014

13184/PW/PW

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1.0 Introduction

- 1.1 Sainsbury's Supermarkets Ltd submitted a planning application for the reuse of the B&Q store at Lightship Way in Colchester to provide a Sainsbury's food store. The application proposals seek a food store of 15,787 sq.m gross external floorspace and a net sales area of 7,197 sq.m net.
- 1.2 Nathaniel Lichfield & Partners (NLP) was commissioned by Colchester Borough Council to undertake an independent review of the Planning and Retail Statement prepared for the applicant by Indigo Planning Ltd (IPL). NLP's conclusions were set out in the Retail Critique Report May 2014.
- 1.3 IPL prepared a response to NLP's critique in a letter dated 12th June 2014. NLP prepared an addendum to the Retail Critique Report to address the issues raised by IPL's response. This addendum was dated July 2014. IPL responded to the addendum in a letter dated 18th August 2014.
- 1.4 An objection letter dated 24th July 2014 was submitted by Martin Robeson Planning Practice (MRPP) on behalf of Tesco Stores. This letter addressed matters relating to IPL's Planning and Retail Statement and NLP's Retail Critique Report May 2014.
- 1.5 A series of response letters from IPL and MRPP followed, as set out below:
- IPL response letter dated 19th August 2014;
 - MRPP further response dated 12th September 2014;
 - IPL further response dated 24th October 2014;
 - MRPP further response dated 7th November 2014; and
 - MRPP further response dated 13th November 2014;
- 1.6 IPL's responses primarily relate to the sequential approach. MRPP's responses dispute the findings of impact assessments prepared by IPL and NLP and the sequential approach.
- 1.7 NLP has reviewed this correspondence and assessed the implications for NLP's previous retail planning advice provided to the Council. This report pulls together and updated previous advice in the light of submission received from the applicant and MRPP on behalf of Tesco Stores Limited.

2.0

Base Data and Assumptions

Introduction

2.1

This section compares the base data and approached adopted by NLP and IPL, and highlights relevant information submitted by the applicant and objector. Key base data was circulated and agreed in January 2013.

2.2

The IPL letter dated 12th June 2014 highlights a number of areas of agreement relating to NLP's original May 2014 conclusions, summarised below.

- The proposed Sainsbury's store is unlikely to lead to the closure of stores in Colchester town centre.
- The longer term convenience impact of the proposed Sainsbury's store and North Colchester Urban Extension (NCUE) store is not expected to be significant.
- The level of comparison trade diversion generated by the proposed Sainsbury's store is not expected to lead to store closures in the town centre.
- There is no clarity regarding the extent of new retail floorspace provision at the Vineyard Gate redevelopment but even if plans were delayed for two years, this is unlikely to jeopardise the redevelopment.
- The Tesco store at Greenstead Road is not likely to close as a consequence of the opening of the proposed Sainsbury's store.

2.3

However IPL raised a number of remaining issues relating to the sequential approach and the retail impact assessment in subsequent submissions. MRPP also provided comments on behalf of Tesco Stores Ltd. These issues are assessed in Section 2 and 3 of this report, respectively.

Base Year, Design Year and Price Base

2.4

As agreed a 2014 base year and 2017 design year has been adopted by IPL, with horizon year figures for 2019. IPL suggests (paragraph 6.49) that the 2017 design year is optimistic, because Sainsbury cannot occupy the store until B&Q relocate. Assuming B&Q requires planning permission to construct a new store it seems unlikely Sainsbury's can commence work on converting the store until 2016 at the earliest. The Sainsbury's store is unlikely to be completed until early 2017. We would normally allow between 18 months to two years to achieve settled trading levels. On this basis the 2017 design year provides an appropriate worst case (earliest) impact scenario.

2.5

NPPF (para. 26) suggests impact assessments should assess impact up to five years from the time the application is made, which is in this case 2019.

- 2.6 IPL's expenditure and turnover figures are quoted at 2011 prices. NLP's retail study update adopts a 2011 price base.

Study Area and Population

- 2.7 IPL has adopted the study area and nine zones adopted in the CRTCS 2013.
- 2.8 The CRTCS adopts Experian population data from the 2011 Census. ONS 2011 interim sub-national projections were adopted. These sub-national projections are expected to be updated on the 29th May 2014. In the meantime population projections within the CRTCS should be adopted. It is unlikely the updated projections will significantly change population projections at 2014, 2017 and 2019.

Convenience Goods Expenditure

- 2.9 As agreed IPL has adopted Experian local convenience goods expenditure data. The CRTCS Experian 2011 base year local expenditure data is adopted, but adjusted based on Experian's latest forecasts (October 2013).

Shopping Patterns

- 2.10 IPL has adopted base year, design year and horizon year convenience goods shopping patterns as provided by NLP. These figures have been adopted in IPL's impact analysis.
- 2.11 No detailed analysis of comparison goods expenditure is provided. IPL refers to data within the CRTCS. Given the scale of comparison sales floorspace proposed (3,115 sq.m net) we believe a more detailed analysis should be undertaken.

Turnover of the Proposed Sainsbury's Store

- 2.12 The proposed Sainsbury's store has a gross external floor area of 15,787 sq.m. This includes a mezzanine floor for a proposed café (370 sq.m), a "Goods On-line" facility, colleague area and domestic area.
- 2.13 The net retail space as stated at IPL's paragraph 3.3 is 7,197 sq.m net. The net sales floorspace figure quoted in IPL's Table 9 is 6,831 sq.m net, which presumably excludes checkouts. These figures suggest a net to gross ratio of less than 46% or 43% without checkouts. These figures are at the bottom of the range NLP would normally expect for stores of this size. For example increase the net to gross ratio to 55% would increase the sales area to 8,683 sq. net and would significantly increase the predicted turnover of the store (an additional £18 million pro rata based on IPL's figures).
- 2.14 In order to control the level of impact of the proposed store, the net retail floorspace excluding checkouts should be restricted to not more than 6,831 sq.m net as tested by IPL. We understand this condition is acceptable to

Sainsbury's, and therefore the implications of a larger net sales area does not need to be tested.

- 2.15 IPL estimates that about 54% of the sales area will be devoted to convenience goods (3,716 sq.m net). ILP's estimated convenience goods turnover of the store is £46.59 million, based on an average sales density of £12,537 per sq.m net. The comparison turnover of the store is £20.72 million, based on an average sales density of £6,652 per sq.m net. IPL's overall turnover for the store is £67.31 million.
- 2.16 Based on Verdict data, NLP would currently normally adopt an adjusted average sales density of £13,115 per sq.net for convenience goods sales floorspace and £5,258 per sq. net, exclusive of checkout areas for Sainsbury's store. This figure would produce a higher expected convenience goods turnover of £48.73 million and a comparison goods turnover of £16.38 million. NLP's overall turnover of the store is marginally lower at £65.11 million.
- 2.17 IPL correctly points out that a figure of £12,537 per sq.m net for convenience sales was adopted for Sainsbury's within the CRTCS, and the revised figure is now 4.6% higher. Sainsbury's suggests this level of growth is not credible and adopt the CRTCS figure should be adopted.
- 2.18 We have revisited the figures and the key issue is not the growth in Sainsbury's overall turnover, but it is the breakdown in turnover assumed by Verdict and the split between comparison and convenience turnover. The adjusted sales density adopted from Verdict data within the CTRCS assumed 2% of Sainsbury's turnover was attributed to petrol/café sales (98% via traditional store sales). Verdict's latest suggested reduction based on Sainsbury's own data is only 1% (i.e. 99% via traditional store sales). Previous Verdict data also suggested that 82.1% of the remaining turnover related to convenience goods, the revised latest figure is now 87% for Sainsbury's. As a result of these two changes the convenience goods sales density for Sainsbury's has increased by 4.6%.
- 2.19 If Sainsbury's suggests that Verdict's data is not correct then it does not automatically follow that the previous data adopted in the CRTCS was correct and the latest data is wrong.
- 2.20 For this reason, NLP has undertaken an impact sensitivity analysis based on IPL's turnover figures and NLP's figures, in order to test the significance of these differences.

Trade Diversion

- 2.21 IPL estimates convenience trade diversion from facilities in Colchester at 2017 in Table 10B. The trade diversion within this table totals £44.75 million, of which £39.38 million is diverted from facilities in Colchester Borough, which is 84.5% of the store's total turnover.
- 2.22 Colchester has a good choice of large food stores and levels of expenditure retention within Colchester Zone 1 is very high (98.3%). There is limited scope

to claw back expenditure leakage. IPL's assumed £7.21 million trade draw from stores outside the Borough needs to be tested. Furthermore comparison goods impact needs to be considered in more detail.

2.23 MRPP (letters dated 24th July 2014 and 12th September 2014) also questions IRP trade diversion figures, e.g. the similar levels of trade diversion from the Tesco stores at Greenstead Road and at Highwoods. MRPP criticises IPL's failure to apply judgments regarding the propensity of the proposed store to compete with existing stores and the principle of "*like competes with like*".

2.24 MRPP also criticises NLP for not identifying these alleged failings. This is not the case. NLP also has a number of reservations regarding IPL's impact figures, and therefore NLP undertook its own retail impact assessment, including weighted judgements regarding the location and propensity of the proposed store to compete with existing stores. NLP's impact figures show higher levels of impact on other large store, and in particular on the nearby Tesco store at Greenstead Road (see Section 4).

Sequential Approach

Policy Considerations

- 3.1 The sequential approach to site selection for main town centre use is set out in paragraph 24 of the NPPF. The application site is in an out-of-centre location in Colchester. For the purposes of retail development, Annex 2 of the NPPF indicates that town centre and edge of centre sites that are locations well connected and up to 300 metres of the primary shopping area should be considered by the applicant.
- 3.2 If the Council is satisfied the proposed store will not have a significant adverse effect on designated centres, then the availability of suitable sites should be considered. The NPPF (paragraph 27) states that where an application fails the sequential test it should be refused.
- 3.3 The hierarchy of centres and sequential approach is set out in the Core Strategy (Policies CE1 and CE2). Colchester town centre is at the top of the hierarchy, followed by three rural district centres and five urban district centres and then local centres. Policy CE2a indicates that the sequential priority for retail is the Town Centre Core, followed by Urban Gateways and the Town Centre Fringe. These policies were based on National Policy within PPS6. The policy approach regarding the definition of the hierarchy of centres and the application of the sequential approach remains largely unchanged within the NPPF. Policies CE1 and CE2 remain up-to-date and must be considered by the applicant.
- 3.4 Within urban district centres, Policy CE2b indicates new retail is not supported unless it meets identified local needs and does not compete with the town centre. Town centre uses outside the district centre boundary should comply with the sequential approach as set out in Policy CE2a.
- 3.5 The NPPF indicates that applicants must demonstrate flexibility on issues such as scale and format.

Analysis

- 3.6 The proposal seeks to provide a large food superstore to improve food shopping provision in Colchester. It should be noted the applicant is not required to demonstrate their proposals are needed, but the NPPF suggests an applicant must demonstrate the development cannot be met in sequentially preferable locations, allowing for flexibility. Applicants should be flexible in terms of the scale of store proposed and the amount of car parking.
- 3.7 IPL suggests the proposal is for the conversion of existing retail premises to accommodate a food store, and claim it would be disproportionate and inappropriate to expect Sainsbury's to develop a new store. NLP and MRPP have not accepted this approach. The key issue is whether a new food store would be suitable and viable. These issues are addressed later.

- 3.8 IPL indicates (paragraph 6.13) that the Council has confirmed there are only two potential areas that are sequentially preferable i.e. the Vineyard Gate/St Botolphs area and the Cowdray Centre.
- 3.9 IPL sought to address the issues raised by NLP in relation to the potential availability and timing of the Vineyard Gate site and the Cowdray Centre. IPL's letters dated 12th June 2014 and 18th August 2014 provide further commentary on both sites.

Vineyard Gate

- 3.10 IPL indicate that the Council officers have confirmed that an application is not imminent for the Vineyard Gate redevelopment. IPL discounts this site on the grounds that it is not available within a reasonable period of time, it is unsuitable and unviable.
- 3.11 NLP's May 2014 critique report suggested that the Vineyard Gate redevelopment could be completed in 2017/18 if planning permission was secured in 2014/15. IPL disputes this timetable and suggests the scheme is unlikely to be completed until 2019. This later completion date is based on a presentation to Council Cabinet (17 March 2014), where representatives from Caddick Developments confirmed that they expect to be start on site some time in 2016. If the expected start on site is 2016 then NLP's agrees that a 2019 earliest completion date is realistic.
- 3.12 NLP previously understood that Sainsbury's could not occupy the application premises until B&Q relocate, but IPL now indicate vacant possession will be obtained in 2016, regardless of B&Q's relocation. Assuming vacant possession in 2016, the Sainsbury's store could be completed in 2017. As indicated above, an alternative Vineyard Gate redevelopment could in theory be completed by 2019, which would mean a two year delay for Sainsbury's.
- 3.13 The recent Rushden decision, highlighted in IPL's letter dated 18th August 2014, suggests this delay is likely to indicate that an alternative site is unavailable in sequential terms.
- 3.14 Notwithstanding the timing of the Vineyard Gate development, IPL suggests the site is unavailable and unsuitable because it is unclear that the proposed food store can be accommodated within the scheme. IPL suggest that the revised Vineyard Gate scheme includes one anchor store (size unknown), but IPL suggests there is no indication of whether this is intended for a convenience or comparison retailer. In any event the anchor store may not be large enough to accommodate the size of food store proposed on the application site.
- 3.15 Accommodating a large Sainsbury's store on the Vineyard Gate site will prevent the delivery of a department store, but it is for the Council and the developers of the Vineyard Gate site (rather than NLP, IPL or Sainsbury's) to determine whether this will make the site unsuitable for a Sainsbury's store.

- 3.16 As indicated in NLP previous advice, the Council needs to consider the suitability of a large food superstore on the Vineyard Gate site.
- 3.17 IPL questions the suitability and viability of the Vineyard Gate for a Sainsbury's food store. IPL suggests the site is unsuitable for Sainsbury's because they already have a store within Colchester town centre. IPL suggests a second Sainsbury's store in the town centre would not achieve the Council's aspirations for the site or town centre. IPL suggests two Sainsbury's stores within the town centre would be unviable. NLP accepts Sainsbury's are unlikely to occupy two food stores within the town centre.
- 3.18 IPL states that duplication of Sainsbury's offer in the town centre would "*not represent a good or reasonable planning decision to strengthen the town centre's retail offer and would not improve consumer range and choice of convenience goods and it would undermine the opportunity to deliver a significant improvement in the town's retail offer, and particularly the delivery of a department store.*"
- 3.19 Notwithstanding the viability of two Sainsbury's store within the town centre, a more likely scenario is Sainsbury's relocate their existing town centre store (1,235 sq.m net) into a much larger store of a similar size (7,197 sq.m net) to that proposed at Lightship Way. IPL suggests this is a possible scenario but suggests the town centre store would serve a different catchment area. NLP is not convinced the catchment areas of the two stores are significantly different.
- 3.20 The Council needs to consider the following issues when determining the planning application. First the Council should consider whether a large food store (of the size proposed on the application site) would be suitable on the Vineyard Gate site, e.g. recognising that it would prevent a new department store. The site could be discounted as unsuitable for the application proposal.
- 3.21 If the site is considered suitable for a food store of the size proposed by Sainsbury's then the Council should consider the availability and timetable for delivery. The Council needs to consider whether the development of the Vineyard Gate site can be brought forward to deliver a new food store by 2017. If this earlier timetable is considered feasible, then the Council should liaise with the developer to establish whether they consider that a large Sainsbury store would be suitable and that the site is available for that use. NLP notes that Caddick Developments has not objected to Sainsbury's planning application.
- 3.22 Subject to the Vineyard Gate site being suitable and available for completion by 2017, Sainsbury's would then need to provide further evidence to demonstrate this opportunity is unviable for this site to be discounted.
- 3.23 Based on the information available NLP has reservations about the suitability and availability of this site for the size of food store proposed by Sainsbury's.

Cowdray Centre

- 3.24 IPL disputes the availability and timing of the Cowdray Centre, because there are no clear plans for its development. IPL also claims that a Sainsbury's store would not deliver the mixed use regeneration that the Council like to see on this site. However, MRPP claims the site is eminently suitable for the proposed development.
- 3.25 IPL has conceded the site is large enough to accommodate the proposed Sainsbury's store, but its suitability is questioned in terms of access, traffic, noise and amenity issues. IPL suggests these issues have not been considered in detail. NLP suggested the onus is on the applicant to demonstrate a sequential site is unsuitable for their proposals. IPL's response to this conclusion (letter dated 18th August 2014) states *"it does not seem sensible or proportionate to expect Sainsbury's to spend money looking at the suitability of a site which is not available and unlikely to come forward in the short to medium term."*
- 3.26 From this statement one can deduce IPL is relying on discounting this site as unavailable. Unfortunately NLP has insufficient information to draw any conclusions regarding the suitability of the site. MRPP draw attention to a Spatial Policy statement that refers to the *"acceptability of some retail on the site in the future as being established through the designation of the site as a Mixed Use centre including retail."* This statement does not on its own indicate a large food store is suitable on this site.
- 3.27 Council needs to consider whether a food store of the size proposed by Sainsbury's would meet the Council's objectives for the site. The site could be discounted as unsuitable if a large food store of the size proposed does not meet these objectives.
- 3.28 In terms of availability, IPL (letter dated 18th August 2014) suggests it will take only four months to refit the B&Q store, but the construction of a new store will take 12 months. These timetables may be correct, but IPL has indicated that vacant possession of the B&Q unit will be obtained in 2016, therefore refit work cannot commence for some time.
- 3.29 IPL also implies that the construction of a new Sainsbury's store rather than a re-fit of a B&Q store would not be viable. No evidence has been submitted to support this claim. Refitting a store may cost less than building a new store, subject to site acquisition costs, but the issue is whether a new build option is viable or unviable, not whether it is more or less costly. The Dundee decision does not suggest only similar refit opportunities should be considered. MRPP also agrees with this interpretation of the Dundee decision.
- 3.30 The relevant issue is viability. IPL's own figures suggest the store will achieve a significant turnover of over £67 million. Based on NLP's experience this level of turnover would normally fund the construction of a new Sainsbury's store.
- 3.31 The additional information provided by IPL does not adequately discount the Cowdray Centre site. The Council needs to consider the suitability of a large

food superstore of the size proposed on this site. If the Council considers that a large food store would not be suitable for the regeneration of this site then it can be discounted.

- 3.32 The Council then needs to explore whether the site can be brought forward quickly. A food store would need to be completed on the site by 2017, which would mean obtaining planning permission during 2015 and start on site in 2016 at the latest.
- 3.33 If the site is considered suitable for a large food store and the Council considers the site could be brought forward for development quickly, then the Council should liaise with the developer to establish whether they consider that a large Sainsbury store is suitable and that the site is available for that use.
- 3.34 Subject to the site being suitable and available for completion by 2017, Sainsbury's would then need to provide further evidence to demonstrate this opportunity is unviable for this site to be discounted.

4.0

Retail Impact

Introduction

4.1

Government guidance contained within the NPPF indicates proposals for sustainable development should be approved unless there are likely to be significant adverse impacts which outweigh the benefits of the proposal.

4.2

Paragraph 26 of the NPPF suggests, where there is no locally set floorspace threshold within an up to date development plan, then retail impact assessments will normally only be required for retail developments of 2,500 sq.m gross or more. This application is over 15,000 sq.m gross and is above the NPPF threshold. The applicant has prepared a retail impact assessment.

4.3

NPPF states that planning applications for town centre uses should be assessed against:

- 1 the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal;
- 2 the impact of the proposal on the town centre's vitality and viability, including local consumer choice and trade in the town centre and wider area.

4.4

If a proposal is likely to lead to a significant adverse impact then this material consideration may still warrant refusal.

4.5

MRPP points out (on behalf of Tesco Store Limited) that development plan policy requires an assessment of impact on the Greenstead Road and Highwoods Urban District Centres and on the Garrison Butt Road Local Centre, in addition to Colchester Town Centre.

4.6

As noted in Section 2, IPL notes NLP's conclusions relating to impact, but does not agree with some of the assumptions made by NLP. IPL only accepts NLP's figures as a worst case level of impact. Nothing within the submissions made by MRPP or IPL warrant changes to NLP's methodology or key assumptions. NLP's retail impact assessment is set out in this section.

4.7

MRPP also suggests the implications of loss of choice and competition in the DIY sector (i.e. B&Q) needs to be taken into account. This may be a material consideration when weighing up the benefits and disbenefits of the proposals. However if B&Q has taken a business decision to change their representation within Colchester then the closure of this store is not necessarily linked to the Sainsbury's planning application.

Convenience Goods Impact Analysis

4.8 As indicated in Section 2, most of the base data has been agreed and adopted by IPL. The areas of difference are the split between comparison and convenience and potentially the distribution of trade diversion.

4.9 The Colchester study area has been adopted. Population within the study area is shown in Table 1 in Appendix 1. Convenience goods expenditure per person is shown in Table 2 in Appendix 1. Total expenditure is shown in Table 3 in Appendix 1.

Base Year Trading Patterns in 2014

4.10 Base year trading levels have been derived from the market shares for food and grocery (convenience goods) shopping, as adopted in the CRTCS. Food and grocery market shares are shown in Table 4. Base year shopping expenditure patterns are shown in Table 5.

4.11 The base year total convenience turnover of facilities in Colchester (including Stanway) is estimated to be £351.72 million as shown in Table 5. IPL has adopted this base year trading figure. The benchmark turnover of existing food stores in Colchester is £324.48 million as shown in Table 14. IPL's comparable figure is £319.18 million, because a slightly lower turnover density is adopted for Sainsbury's stores and NLP has added the new Tesco Express store on Magdalen Street. These figures indicate that existing food stores in Colchester are on average trading 8.4% to 10.2% above benchmark levels.

4.12 MRPP questions the trading performance of the Tesco store at Greenstead Road. MRPP suggest previous information provided by IPL in 2009 based on GVA's North Essex Retail Study suggested this Tesco store was under-trading. MRPP claims IPL has not adequately explained why the Tesco store is now considered to be over-trading.

4.13 The GVA 2009 study was based on household survey results from 2006. This data is now out of date and unreliable. NLP's figures are based on a comprehensive household survey in September 2012. NLP's figures suggest the Tesco store is trading about 22% above the current Tesco company average. The GVA study suggested the store was trading about 13% below the company average in 2009. There two main reasons for this change:

- allowing for inflation, Tesco's company average sales density has fallen by 23%. GVA adopted a figure of £10,873 per sq.m net at 2007 prices, whilst NLP adopts £10,670 sq.m net at 2011 prices. MRPP recently adopted an average sales density of £10,182 per sq.m net (2012 prices) for a proposed Tesco store in Market Harborough, i.e. an even lower average sales density figure.
- GVA estimated the Tesco store devoted 70% of its sales floorspace to convenience goods, NLP estimates a lower figure of 60%.

- 4.14 As a result of these two changes, the benchmark (company average) convenience goods turnover of the Tesco store has reduced significantly.
- 4.15 The GVA 2009 study suggested the convenience goods turnover of the Tesco store was £34.15 million in 2009 (2007). This turnover is £43.73 million at 2011 price. NLP estimates the actual turnover of the Tesco store is £44.06 million in 2014 (2011 prices). The actual turnover of the Tesco store does not appear to have been over-estimated, nor has it changed significantly since 2009.
- 4.16 Based on the information available, we are satisfied the Tesco store is trading well above the current company average, and the change from the 2009 position is credible.

Design Year Trading Patterns – Assuming No Development

- 4.17 The future convenience shopping patterns at 2017 for food grocery shopping is shown in Table 6 in Appendix 1. The total convenience turnover of facilities in Colchester is estimated to increase by 4.8% from £351.72 million in 2014 to £368.73 million in 2017, due to population and expenditure growth.

Design Year Trading Patterns – With commitments

- 4.18 NLP's estimated trade draw for the proposed food store commitments is shown in Table 7 in Appendix 1. The trade draw is based on existing evidence from the household survey results in relation to the trade draw of existing large food stores in Colchester. The convenience goods turnover of all commitments is £30.55 million.
- 4.19 The projected shopping patterns with commitments included are shown in Table 8 in the Appendix 1. The pattern of trade diverted from existing facilities is based on current shopping patterns, the expected trade draw of the commitments, and judgments about the propensity for commitments to compete with other facilities for food and grocery shopping trips.
- 4.20 The impact of commitments in Colchester is summarised in Table 15. The proportional impact on food stores in Colchester ranges from -1.6% to -10.8%. The highest impact (-10.8%) will fall on the Tesco store on Greenstead Road.

Design Year Trading Patterns – With Proposed Sainsbury's Store

- 4.21 NLP's estimated trade draw for the proposed Sainsbury's store is shown in Table 9 in Appendix 1. The expected convenience goods turnover is £48.73 million, as set out in paragraph 2.13. IPL's adopted figure is slightly lower (£46.59 million).
- 4.22 The projected shopping patterns with commitments and the Sainsbury's store included are shown in Table 10 in the Appendix 1. The cumulative impact of commitments and the Sainsbury's store is summarised in Table 15. The proportional impact on food stores in Colchester ranges from -6% to -28%. The highest impact (-28%) will again fall on the Tesco store on Greenstead Road.

- 4.23 A summary of NLP and IPL's cumulative impact results at 2017 is shown in Table 4.1 over leaf. This table also includes NLP's revised impact figures, adopting IPL's lower convenience good turnover of £46.59 million.

Table 4.1 – Cumulative Retail Impact Summary 2017 (% Impact)

Centre	IPL	NLP	NLP (IPL turnover)
Asda, Colchester	-13.2	-17.9	-17.4
Sainsbury's, Priory Walk, Colchester	-8.6	-13.4	-13.0
Other Colchester town centre	-2.2	-6.0	-5.8
Tesco Extra, Colchester	-13.7	-16.2	-15.7
Tesco, Greenstead Road, Colchester	-27.6	-28.1	-27.3
Waitrose, Colchester	-14.5	-13.8	-13.4
Colchester Other	-8.4	-10.2	-10.0
Sainsbury's Stanway	-26.0	-22.8	-22.2
Co-op, Stanway	-9.9	-16.0	-15.7
Tiptree	-13.0	-11.2	-10.9
West Mersea	-3.0	-7.2	-7.0
Wivenhoe	-5.5	-8.6	-8.4

- 4.24 In general NLP's impact percentages are higher than IPL's figures, and only a small element of this difference is due to NLP's higher adopted store turnover.
- 4.25 NLP predict higher trade diversion from food stores in Colchester town centre than IPL, whilst IPL predicts higher trade diversion from Sainsbury's in Stanway.

Horizon Year Trading Patterns – With Proposed Sainsbury's Store

- 4.26 The projected shopping patterns with commitments and the Sainsbury's store at 2019 are shown in Table 11 in the Appendix 1. The total convenience turnover of facilities in Colchester is estimated to increase by 2.8% from £380.94 million in 2017 to £391.57 million in 2019, due to population and expenditure growth.

Horizon Year Trading Patterns – With North Colchester UE Store

- 4.27 NLP's estimated trade draw for the proposed food store within the North Colchester Urban Extension neighbourhood centre is shown in Table 12 in Appendix 1. The expected convenience goods turnover is £29.14 million. The impact of the NCUE store is summarised in Table 16. The proportional impact on food stores in Colchester ranges from -2.4% to -10.1%. The highest impact (10.1%) will fall on the Asda and Tesco Extra stores.
- 4.28 The projected turnover of existing stores is compared with company average benchmark turnovers in Table 16. The reduction in base year (2014) trading levels is also shown hopping patterns with commitments, the NCUE store and the Sainsbury's store at 2019 are shown in Table 13 in the Appendix 1.

- 4.29 The total convenience turnover of facilities in Colchester is estimated to increase by 2.8% from £380.94 million in 2017 to £391.57 million in 2019, due to population and expenditure growth.

Comparison Goods Impact Analysis

- 4.30 Comparison goods expenditure per person is shown in Table 1 in Appendix 2. Total expenditure is shown in Table 2 in Appendix 2.

Base Year Trading Patterns in 2014

- 4.31 Base year trading levels have been derived from the market shares, as adopted in the CRTCS. Separate market shares have been estimated for the B&S store and comparison goods sales within food stores in order to assess impact in more detail. Comparison market shares are shown in Table 3. Base year shopping expenditure patterns are shown in Table 4.
- 4.32 The base year total comparison turnover of facilities in Colchester Borough is estimated to be £770.48 million as shown in Table 4.

Design Year Trading Patterns – Assuming No Development

- 4.33 The future comparison goods shopping patterns at 2017 are shown in Table 5 in Appendix 2, based on constant market shares. The total comparison turnover of facilities in Colchester Borough is estimated to increase by 10% from £770.48 million in 2014 to £847.65 million in 2017, due to population and expenditure growth.

Design Year Trading Patterns – With Commitments

- 4.34 Proposed improvements to the Williams and Griffin department store area expected to increase the turnover of the store by £17.5 million (3,500 sq.m net at £5,000 per sq.m. Future comparison goods shopping patterns with these improvements at 2017 are shown in Table 6 in Appendix 2.

Design Year Trading Patterns – With Reduced B&Q Store

- 4.35 The B&Q store is expected to relocate and we understand B&Q is looking to downsize and occupy a store 40% smaller than their existing store. We would not expect the B&Q store's turnover to reduce by 40%. In the same way store extensions generally do not result in an increase in turnover proportionate to the amount of additional sales floorspace. We estimate the B&Q's store is likely to reduce by up to 20%.
- 4.36 The projected shopping patterns with a 20% reduction in the B&Q store's turnover in 2017 are shown in Table 7 in the Appendix 2.

Design Year Trading Patterns – With Proposed Sainsbury's Store

- 4.37 NLP's estimated comparison goods trade draw for the proposed Sainsbury's store is shown in Table 8 in Appendix 2. The expected comparison goods

turnover is £16.38 million, as set out in paragraph 2.13. IPL's adopted figure is higher (£20.72 million).

4.38 The projected shopping patterns with Williams & Griffin, the reduced B&Q and the Sainsbury's store included are shown in Table 9 in the Appendix 2.

4.39 The cumulative impact on comparison sales in Colchester's food store is -4.1%, whilst the turnover of retail warehouse facilities in Colchester will increase by 0.9%, due to the reduced B&Q store. The proportional impact on other comparison shops in Colchester is -3.9%.

Horizon Year Trading Patterns – With Proposed Sainsbury's Store

4.40 The projected shopping patterns with the Sainsbury's store at 2019 are shown in Table 10 in the Appendix 2. The total comparison turnover of facilities in Colchester Borough is estimated to increase by 6.5% from £851.67 million in 2017 to £907.14 million in 2019, due to population and expenditure growth.

Horizon Year Trading Patterns – With North Colchester Urban Extension

4.41 The projected shopping patterns with the Sainsbury's store and NCUE at 2019 are shown in Table 11 in the Appendix 2.

Implications for Colchester Town Centre

4.42 If the Sainsbury's store is implemented along with commitments then the convenience turnover of existing facilities within Colchester town centre is estimated to decrease from £34.78 million to £31.41 million in 2017. Total convenience goods trade diversion from the town centre is £3.37 million.

4.43 The average impact on convenience goods facilities in Colchester town centre is -9.7%. Impact on the Priory Walk Sainsbury's store is expected to be higher than this average (-13.4%), whilst impact on other convenience facilities is lower (-6.0%). This -6% impact will primarily be focused on the Marks & Spencer, Iceland and Tesco Express stores within the town centre.

4.44 The Priory Walk Sainsbury's store is estimated to be trading 12.7% above the company average in 2014, and this is expected to increase to 18.4% above average in 2017. If commitments and the proposed Sainsbury's store are implemented then the trading performance of this Sainsbury's store will reduce by £2.32 million, but the store will still be trading 2.6% above the company average. There is no evidence to suggest the Sainsbury's store will be forced to close.

4.45 Other convenience goods floorspace in the town centre is estimated to have a 2014 turnover of £16.66 million. The residual turnover at 2017 with the Sainsbury store and commitments is marginally lower (1.2%) at £16.46 million. It is unlikely this reduction in convenience goods trade will lead to shop closures within the town centre.

- 4.46 By 2019 the convenience goods turnover of the town centre is expected to increase from £31.41 million to £32.42 million, due to population and expenditure growth. However, the food store commitment within the North Colchester Urban Extension will reduce this turnover to £31.29 million (-3.5%).
- 4.47 The Priory Walk Sainsbury's store will continue to trade around the company average (+0.7%) in 2019. The residual turnover of other town centre convenience facilities will reduce to £16.62 million, which is only marginally lower than the 2014 turnover (£16.66 million). The longer term convenience goods impact of the Sainsbury's store and the NCUE store is not expected to be significant.
- 4.48 If the Sainsbury's store is implemented along with the Williams & Griffin improvements commitments then the comparison turnover of existing facilities within Colchester (excluding food stores and retail warehouses) is estimated to decrease from £629.34 million to £605 million in 2017, a cumulative impact of -3.9%. The 2014 comparison turnover is £572.19 million. These figures suggest the cumulative trade diversion will be more than offset by population and expenditure growth.
- 4.49 The Sainsbury store accounts for about £10 million of this £24 million reduction. The remaining reduction in turnover will be retained within the town centre within the improved Williams & Griffin store, therefore the actual impact on the town centre's overall comparison turnover is only 1.1%. This level of trade diversion is not expected to lead to shop closures within the town centre. The main concern is the potential impact on longer term planned investment.
- 4.50 The base year (2014) turnover of comparison facilities in Colchester Borough is £770.48 million. Based on Experian projections this turnover should increase to £817.64 million in 2017, allowing for a 2% per annum growth in turnover efficiency. The projected expected benchmark turnover at 2019 would be £850.67 million.
- 4.51 The residual turnover of these existing facilities, taking into account Williams & Griffin, B&Q and Sainsbury's at 2017 is estimated to be £818.07 million, which is about 6% higher than the base year turnover (£770.48 million). This projected actual turnover is marginally higher than the projected benchmark turnover at 2017 (£817.64 million).
- 4.52 These projections suggest comparison good trade diversion will be offset by expenditure growth between 2014 and 2017, and would still leave sufficient expenditure growth to allow a 2% growth in turnover efficiency.
- 4.53 In the short term the Sainsbury proposal is unlikely to lead to a decrease in the number of comparison shops within the town centre or delay or prevent the implementation of the Williams and Griffin department store improvements. However there will be less theoretical comparison goods expenditure capacity to support the reoccupation of vacant shop units within the town centre.
- 4.54 By 2019 the residual turnover of existing comparison facilities is expected to increase to £864.16 million, compared with the base year turnover of £770.48

million. As indicated above, the projected benchmark turnover allowing for a 2% per annum increase in turnover efficiency is £850.67 million in 2019. These projections suggest surplus comparison expenditure available to support new comparison goods retail floorspace in Colchester Borough at 2019 could be about £13.5 million, taking into account Sainsbury's proposals and the North Colchester UE.

4.55 Previous Vineyard Gate proposals were expected to provide around 9,000 sq.m net of comparison sales floorspace, with a turnover of around £63 million. One would expect some of this £63 million turnover will be attracted from competing centres rather than Colchester. Nevertheless, the projections suggest there is insufficient expenditure capacity to support this level of comparison sales floorspace by 2019. The maximum theoretical expenditure deficit at 2019 would be £49.50 million, which represents about 5% of total expenditure available in the Borough at 2019, or around two years growth in expenditure.

4.56 As indicated in Section 3 the timing of the Vineyard Gate development proposals is unclear. Even if planning permission was secured in 2014, the development would not be completed until 2017 and would not achieve full and settled trading levels until 2019. A two year delay for completion in 2019 and full trading at 2021, would not necessarily jeopardise this development, particularly if the Vineyard Gate developers have not objected to the Sainsbury's store planning application and the amount of comparison sales floorspace proposed.

4.57 IPL (letter dated 24th July 2014) suggested that the combined impact estimate of convenience and comparison goods trade diversion, in addition to the separate figures would be instructive for the Council.

4.58 The figures shown in IPL's table are mathematically correct. They show the town centre's overall turnover will increase from £605.28 million in 2014 to £688.60 million in 2019, taking into account commitments, an increase of 13.8%. However it should be noted that the increase in turnover also includes the turnover of the William and Griffin commitment. The implications for existing comparison businesses in the town centre needs to be considered. If this commitment is excluded then the increase in comparison goods turnover for existing businesses will be 11.7% rather than 14.9%. This does not affect the overall conclusions.

Implications for Greenstead Road UDC

4.59 Technically the Tesco store on Greenstead Road is a designated urban district centre, although it is a standalone store.

4.60 If the Sainsbury's store is implemented along with commitments then the convenience turnover of the Tesco store will decrease from £44.79 million to £32.22 million in 2017, a cumulative impact of -28.1%.

- 4.61 The company average benchmark turnover of the Tesco store is £33.24 million. The residual turnover (£32.22 million) in 2017 is only slightly lower (- 3.1%). The Tesco store is not expected to close despite the significant level of trade diversion.
- 4.62 MRPP letter dated 24th July 2014, also implies that the Tesco store will not close, but claims the level of trade diversion represents a significant adverse impact that warrants refusals of the proposed Sainsbury's food store. NLP does not accept MRPP's assertion that "*significant trade diversion*" must mean "*significant adverse impact*" as set out in the NPPF. MRPP's claim (letter dated 12th September 2014) that NLP has "*identified that impact on Greenstead Road UDC will be significant*" is inaccurate.
- 4.63 NLP agrees the significance of adverse impact will relate to the role and function of the location, which goes beyond the quantification of trade diversion. MRPP claims the erosion of trade from the Tesco store at Greenstead Road "*dilutes how an actively trading superstore meets consumer requirements in an effective and sustainable way, then there must be a significant adverse impact arising.*" Unfortunately MRPP does not explain how the store will no longer meet consumer's requirements due to the reduction in trade.
- 4.64 If the reduction in trade does not result in the closure of the Tesco store, then we fail to see how this will result in an impact on local consumer choice or a dilution in Tesco's offer/role. Tesco is unlikely to reduce the store's sales area or sell a reduced number of products. If anything Tesco will improve their store to counter the increased competition from Sainsbury's. Competition is generally good for customers.
- 4.65 NLP agrees with IPL that the appeal decisions relating to store closures referred to by MRPP (letter dated 12th September 2014) are very different to the circumstances in Colchester and therefore provide limited if any relevant guidance.
- 4.66 The reduction in Tesco's turnover will reduce trading levels from above to slightly below average trading densities. This reduction will if anything improve the shopping experience for Tesco customers, i.e. less congestion and queuing at peak periods.
- 4.67 MRPP does not identify any planned investment e.g. proposed improvements to the Tesco store that would be jeopardised by the implementation Sainsbury's store.
- 4.68 In our view there is no significant adverse impact on Greenstead Road urban district centre.

Garrison Local Centre

- 4.69 MRPP criticises NLP and IPL for not assessing the potential impact on planned investment, specifically relating to proposals to provide the Garrison Local centre at Butt Road.

4.70

This is not correct. NLP has assessed the impact of the Sainsbury's food store on the Tesco Garrison Local Centre. Trade diversion is estimated to be £0.39 million and an impact of only 3%. This level of trade diversion will not harm planned investment or the new local centre.

5.0

Conclusions

The Sequential Approach

- 5.1 The applicant appears to concede that a large food store can physically be accommodated on either the Vineyard Gate or Cowdray Centre sites.
- 5.2 Based on the evidence provided by the applicant, these two sites have not been adequately discounted on viability and/or suitability grounds. The Council needs to first consider, the suitability of a large food superstore of the size proposed by Sainsbury's on both sites. As indicated in NLP's previous advice it may be difficult to sustain a sequential ground for refusal if the landowner/ developers of these two sites have not objected to the Sainsbury's store planning application or stated their willingness to accommodate a large food store on their sites.
- 5.3 If the Council considers a large food store of the size proposed by Sainsbury's could be suitable on either of these two sites then the availability and timing of delivery needs to be considered. Recent legal/Secretary of State decisions suggest these sites would need to be brought forward quickly to match Sainsbury's programme to deliver a store by 2017 on the application site. If this timetable is considered feasible, then the Council should liaise with the developer(s) to establish whether they consider that a large Sainsbury store would be suitable and that the site is available for that use.
- 5.4 Subject to one of the sites being suitable and available for completion by 2017, Sainsbury's would then need to provide further evidence to demonstrate the opportunities are unviable.
- 5.5 Based on the information available NLP has reservations about the suitability and availability of the Vineyard Gate site for the size of food store proposed by Sainsbury's. More information is required regarding the suitability and likely timetable for delivery at the Cowdray Centre.

Retail Impact

- 5.6 MRPP has raised concerns regarding IPL's retail impact figures. These concerns have been considered by NLP. In order to address NLP's own concerns regarding IPL's figure, NLP has undertaken its own impact assessment.
- 5.7 The NPPF (paragraph 27) states that if the adverse impacts of a proposal are significant then it should be refused. NPPF (paragraph 14) also indicates there is a presumption in favour of sustainable development and planning permission should be granted unless any adverse impacts would significantly and demonstrably outweigh the benefits of the development.
- 5.8 The average impact on convenience goods facilities in Colchester town centre is -9.7% in 2017, primarily focused on the Priory Walk Sainsbury's store. There

is no evidence to suggest the Sainsbury's store will be forced to close. It is unlikely the reduction in convenience goods trade will lead to other shop closures within the town centre. The longer term convenience goods impact of the Sainsbury's store and the NCUE store is not expected to be significant.

- 5.9 The comparison turnover of existing facilities within Colchester is estimated to decrease by -3.9% in 2017. This reduction will be offset by population and expenditure growth between 2014 to 2017 and this level of trade diversion is not expected to lead to shop closures within the town centre. The main concern is the potential impact on longer term planned investment.
- 5.10 The 2019 projections suggest there is insufficient comparison goods expenditure capacity to support the level of comparison sales floorspace proposed as suggested by previous Vineyard Gate proposals. The maximum theoretical expenditure deficit at 2019 could be £49.50 million, about 5% of total expenditure available in the Borough at 2019, or around two year's growth in expenditure.
- 5.11 A two year delay would not necessarily jeopardise the Vineyard Gate development, particularly if the Vineyard Gate developers have not objected to the Sainsbury's store planning application and the amount of comparison sales floorspace proposed.
- 5.12 The Tesco store at Greenstead Road is not expected to close despite the significant level of trade diversions. Significant trade diversion does not necessarily equate to a significant adverse impact in terms of the NPPF tests. This will depend on specific circumstances. In this case there will be no impact on local consumer choice or a dilution in Tesco's offer/role. The reduction in Tesco's turnover will reduce trading levels from above to slightly below average trading densities. This reduction will if anything improve the shopping experience for Tesco customers, i.e. less congestion and queuing at peak periods.
- 5.13 NLP has assessed the impact of the Sainsbury's food store on the Tesco Garrison Local Centre. Trade diversion is estimated to be £0.39 million and an impact of only 3%. This level of trade diversion will not harm planned investment or the new local centre.

Appendix 1 Convenience Goods Impact

Table 1: Population Projections

Zone Area	2011	2014	2017	2019
Zone 1 - Colchester	128,066	134,410	140,390	144,079
Zone 2 - Colchester Rural North	34,115	34,592	35,168	35,620
Zone 3 - Colchester Rural South	44,088	45,991	47,883	49,131
Zone 4 - Clacton	65,317	67,877	70,526	72,353
Zone 5 - Frinton/Harwich	43,959	45,682	47,465	48,694
Zone 6 - Tiptree/Kelvedon	15,990	16,444	16,882	17,179
Zone 7 - Halstead	21,054	21,226	21,435	21,580
Zone 8 - Coggeshall	19,127	19,454	19,773	19,996
Zone 9 - Braintree	62,715	62,762	62,750	62,694
Total	434,431	448,438	462,271	471,326

Sources: Experian MMG3

Population in Zone 6 to 9 sourced from Braintree Retail Study Update 2012, based on Council's projected ward population estimates and housing completions
ONS 2011 sub-national population projections

Table 2: Convenience Goods Expenditure Per Capita (2011 Prices)

Expenditure Per Capita	2014	2017	2019
Zone 1: Colchester	£1,695	£1,709	£1,728
Zone 2 - Colchester Rural North	£1,950	£1,968	£1,989
Zone 3 - Colchester Rural South	£1,876	£1,892	£1,913
Zone 4 - Clacton	£1,794	£1,810	£1,829
Zone 5 - Frinton/Harwich	£1,836	£1,852	£1,872
Zone 6 - Tiptree/Kelvedon	£1,874	£1,890	£1,911
Zone 7 - Halstead	£1,853	£1,869	£1,889
Zone 8 - Coggeshall	£1,912	£1,929	£1,950
Zone 9 - Braintree	£1,831	£1,847	£1,867

Sources:

Experian local estimates for 2011 convenience goods expenditure per capita
(Excluding special forms of trading)

Experian Business Strategies - recommended forecast growth rates October 2013

Table 3: Total Available Convenience Goods Expenditure (£M - 2011 Prices)

Zone	2014	2017	2019
Zone 1: Colchester			£248.97
Zone 2 - Colchester Rural North	£227.83	£239.93	£70.85
Zone 3 - Colchester Rural South	£67.45	£69.21	£93.99
Zone 4 - Clacton	£86.28	£90.59	£132.33
Zone 5 - Frinton/Harwich	£121.77	£127.65	£91.16
Zone 6 - Tiptree/Kelvedon	£83.87	£87.90	£32.83
Zone 7 - Halstead	£30.82	£31.91	£40.77
Zone 8 - Coggeshall	£39.33	£40.06	£38.99
Zone 9 - Braintree	£37.20	£38.14	£117.05
	£114.92	£115.90	
Total	£809.46	£841.30	£866.93

Sources: Table 1 and Table 2

Table 4: Convenience Shopping Penetration Rates 2012

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow
Asda, Colchester	15.0%	8.4%	4.7%	1.6%	1.4%	3.9%	0.9%	6.4%	0.3%	5.0%
Sainsbury's, Priory Walk, Colchester	4.6%	0.6%	4.6%	0.0%	0.3%	0.5%	0.9%	0.0%	0.0%	5.0%
Other Colchester town centre	5.6%	1.5%	2.1%	0.2%	0.0%					5.0%
Tesco Extra, Colchester	18.7%	17.0%	7.3%	0.2%	3.0%	0.0%	0.0%	0.4%	0.0%	5.0%
Tesco, Greenstead Road, Colchester	9.4%	0.6%	19.8%	0.0%	0.5%	0.9%	0.0%	2.4%	0.0%	5.0%
Waitrose, Colchester	6.3%	2.7%	7.0%	1.1%	0.6%	0.8%	0.0%	0.8%	0.4%	5.0%
Colchester Other	12.6%	1.0%	6.0%	0.4%	0.3%	0.9%	0.6%	2.1%	0.0%	5.0%
Sainsbury's, Stanway	17.0%	3.3%	8.9%	1.5%	1.7%	18.9%	2.6%	26.3%	1.0%	5.0%
Co-op, Fiveways Retail Park, Stanway	4.6%	0.6%	3.6%	1.1%	0.8%	1.0%	0.0%	0.0%	0.0%	5.0%
Colchester Sub-Total	93.8%	35.7%	64.0%	6.1%	8.6%	26.9%	5.0%	38.4%	1.7%	
Tiptree	0.2%	0.0%	0.6%	0.0%	0.6%	53.2%	0.0%	2.0%	0.0%	5.0%
West Mersea	0.0%	0.0%	5.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%
Wivenhoe	0.0%	0.0%	10.1%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	5.0%
Other Colchester Borough	4.4%	1.9%	0.8%	0.0%	0.0%	0.0%	0.3%	1.7%	0.0%	5.0%
Other Sub-Total	4.6%	1.9%	16.8%	0.0%	1.1%	53.2%	0.3%	3.7%	0.0%	
Colchester Borough Total	98.4%	37.6%	80.8%	6.1%	9.7%	80.1%	5.3%	42.1%	1.7%	
Elsewhere										
Braintree	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	23.1%	10.9%	67.8%	30.0%
Chelmsford	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.4%	1.6%	99.0%
Clacton	0.5%	1.5%	7.2%	88.6%	18.2%	0.0%	0.0%	0.0%	0.0%	5.0%
Frinton	0.0%	0.0%	0.6%	0.0%	13.2%	0.0%	0.0%	0.0%	0.0%	5.0%
Ipswich	0.5%	18.8%	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	95.0%
Sudbury	0.0%	8.7%	0.0%	0.0%	0.0%	0.0%	18.3%	10.1%	0.0%	90.0%
Other Outside Borough	0.4%	33.4%	11.4%	5.3%	58.6%	19.9%	52.4%	36.5%	28.9%	30.0%
Market Share Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

Source: NEMS Household Survey, September 2012 and Braintree Retail Study Update 2012

Table 5: Base Year Convenience Expenditure 2014 £Million

Centre /Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total
Expenditure 2014	£227.83	£67.45	£86.28	£121.77	£83.87	£30.82	£39.33	£37.20	£114.92		£809.46
Asda, Colchester	£34.17	£5.67	£4.06	£1.95	£1.17	£1.20	£0.35	£2.38	£0.34	£2.70	£54.00
Sainsbury's, Priory Walk, Colchester	£10.48	£0.40	£3.97	£0.00	£0.25	£0.15	£0.35	£0.00	£0.00	£0.82	£16.43
Other Colchester town centre	£12.76	£1.01	£1.81	£0.24	£0.00	£0.00	£0.00	£0.00	£0.00	£0.83	£16.66
Tesco Extra, Colchester	£42.60	£11.47	£6.30	£0.24	£2.52	£0.00	£0.00	£0.15	£0.00	£3.33	£66.61
Tesco, Greenstead Road, Colchester	£21.42	£0.40	£17.08	£0.00	£0.42	£0.28	£0.00	£0.89	£0.00	£2.13	£42.62
Waitrose, Colchester	£14.35	£1.82	£6.04	£1.34	£0.50	£0.25	£0.00	£0.30	£0.46	£1.32	£26.38
Colchester Other	£28.71	£0.67	£5.18	£0.49	£0.25	£0.28	£0.24	£0.78	£0.00	£1.93	£38.52
Sainsbury's, Stanway	£38.73	£2.23	£7.68	£1.83	£1.43	£5.82	£1.02	£9.78	£1.15	£3.67	£73.33
Co-op, Fiveways Retail Park, Stanway	£10.48	£0.40	£3.11	£1.34	£0.67	£0.31	£0.00	£0.00	£0.00	£0.86	£17.17
Colchester Sub-Total	£213.70	£24.08	£55.22	£7.43	£7.21	£8.29	£1.97	£14.28	£1.95	£17.59	£351.72
Tiptree	£0.46	£0.00	£0.52	£0.00	£0.50	£16.39	£0.00	£0.74	£0.00	£0.98	£19.59
West Mersea	£0.00	£0.00	£4.57	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.24	£4.81
Wivenhoe	£0.00	£0.00	£8.71	£0.00	£0.42	£0.00	£0.00	£0.00	£0.00	£0.48	£9.61
Other Colchester Borough	£10.02	£1.28	£0.69	£0.00	£0.00	£0.00	£0.12	£0.63	£0.00	£0.67	£13.42
Other Sub-Total	£10.02	£1.28	£14.50	£0.00	£0.92	£16.39	£0.12	£1.38	£0.00	£2.37	£47.44
Colchester Borough Total	£223.72	£25.36	£69.71	£7.43	£8.14	£24.68	£2.08	£15.66	£1.95	£19.96	£399.16
Eisewhere											
Braintree	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£9.09	£4.05	£77.91	£39.02	£130.08
Chelmsford	£0.46	£0.00	£0.00	£0.00	£0.00	£0.00	£0.35	£0.15	£1.84	£276.91	£279.71
Clacton	£1.14	£1.01	£6.21	£107.89	£15.26	£0.00	£0.00	£0.00	£0.00	£6.92	£138.44
Frinton	£0.00	£0.00	£0.52	£0.00	£11.07	£0.00	£0.00	£0.00	£0.00	£0.61	£12.20
Ipswich	£1.14	£12.68	£0.00	£0.00	£0.25	£0.00	£0.00	£0.00	£0.00	£267.37	£281.44
Sudbury	£0.00	£5.87	£0.00	£0.00	£0.00	£0.00	£7.20	£3.76	£0.00	£151.41	£168.23
Other Outside Borough	£0.91	£22.53	£9.84	£6.45	£49.15	£6.13	£20.61	£13.58	£33.21	£69.60	£232.01
Total	£227.37	£67.45	£86.28	£121.77	£83.87	£30.82	£39.33	£37.20	£114.92	£831.80	£1,641.27

Table 6: Design Year Convenience Expenditure 2017 £Million - No Development

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total
Expenditure 2017	£239.93	£69.21	£90.59	£127.65	£87.90	£31.91	£40.06	£38.14	£115.90		£841.30
Asda, Colchester	£35.99	£5.81	£4.26	£2.04	£1.23	£1.24	£0.36	£2.44	£0.35	£2.83	£56.56
Sainsbury's, Priory Walk, Colchester	£11.04	£0.42	£4.17	£0.00	£0.26	£0.16	£0.36	£0.00	£0.00	£0.86	£17.27
Other Colchester town centre	£13.44	£1.04	£1.90	£0.26	£0.00	£0.00	£0.00	£0.00	£0.00	£0.88	£17.51
Tesco Extra, Colchester	£44.87	£11.77	£6.61	£0.26	£2.64	£0.00	£0.00	£0.15	£0.00	£3.49	£69.78
Tesco, Greenstead Road, Colchester	£22.55	£0.42	£17.94	£0.00	£0.44	£0.29	£0.00	£0.92	£0.00	£2.24	£44.79
Waitrose, Colchester	£15.12	£1.87	£6.34	£1.40	£0.53	£0.26	£0.00	£0.31	£0.46	£1.38	£27.66
Colchester Other	£30.23	£0.69	£5.44	£0.51	£0.26	£0.29	£0.24	£0.80	£0.00	£2.02	£40.49
Sainsbury's, Stanway	£40.79	£2.28	£8.06	£1.91	£1.49	£6.03	£1.04	£10.03	£1.16	£3.83	£76.64
Co-op, Fiveways Retail Park, Stanway	£11.04	£0.42	£3.26	£1.40	£0.70	£0.32	£0.00	£0.00	£0.00	£0.90	£18.04
Colchester Sub-Total	£225.05	£24.71	£57.98	£7.79	£7.56	£8.58	£2.00	£14.65	£1.97	£18.44	£368.73
Tiptree	£0.48	£0.00	£0.54	£0.00	£0.53	£16.98	£0.00	£0.76	£0.00	£1.02	£20.30
West Mersea	£0.00	£0.00	£4.80	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.25	£5.05
Wivenhoe	£0.00	£0.00	£9.15	£0.00	£0.44	£0.00	£0.00	£0.00	£0.00	£0.50	£10.09
Other Colchester Borough	£10.56	£1.31	£0.72	£0.00	£0.00	£0.00	£0.12	£0.65	£0.00	£0.70	£14.07
Other Sub-Total	£11.04	£1.31	£15.22	£0.00	£0.97	£16.98	£0.12	£1.41	£0.00	£2.48	£49.52
Colchester Borough Total	£236.09	£26.02	£73.20	£7.79	£8.53	£25.56	£2.12	£16.06	£1.97	£20.91	£418.25
Elsewhere											
Braintree	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£9.25	£4.16	£78.58	£39.42	£131.42
Chelmsford	£0.48	£0.00	£0.00	£0.00	£0.00	£0.00	£0.36	£0.15	£1.85	£281.89	£284.74
Clacton	£1.20	£1.04	£6.52	£113.10	£16.00	£0.00	£0.00	£0.00	£0.00	£7.26	£145.11
Frinton	£0.00	£0.00	£0.54	£0.00	£11.60	£0.00	£0.00	£0.00	£0.00	£0.64	£12.79
Ipswich	£1.20	£13.01	£0.00	£0.00	£0.26	£0.00	£0.00	£0.00	£0.00	£275.02	£289.50
Sudbury	£0.00	£6.02	£0.00	£0.00	£0.00	£0.00	£7.33	£3.85	£0.00	£154.84	£172.05
Other Outside Borough	£0.96	£23.12	£10.33	£6.77	£51.51	£6.35	£20.99	£13.92	£33.49	£71.76	£239.20
Total	£239.93	£69.21	£90.59	£127.65	£87.90	£31.91	£40.06	£38.14	£115.90	£830.83	£1,693.04

Table 7: Trade Draw of Food Store Commitments at 2017 £Million

% Trade Draw	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total
Tesco Garrison Local Centre	65%	0%	20%	0%	0%	5%	0%	5%	0%	5%	100%
Tesco Express Blackheath	70%	0%	25%	0%	0%	0%	0%	0%	0%	5%	100%
Gosbecks Road Neighbourhood Store	50%	0%	35%	0%	0%	5%	0%	5%	0%	5%	100%
£M Trade Draw											
Tesco Garrison Local Centre	£8.32	£0.00	£2.56	£0.00	£0.00	£0.64	£0.00	£0.64	£0.00	£0.64	£12.80
Tesco Express Blackheath	£1.87	£0.00	£0.67	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.13	£2.67
Gosbecks Road Neighbourhood Store	£7.54	£0.00	£5.28	£0.00	£0.00	£0.75	£0.00	£0.75	£0.00	£0.75	£15.08
Total	£17.73	£0.00	£8.51	£0.00	£0.00	£1.39	£0.00	£1.39	£0.00	£1.53	£30.55

Tesco Garrison store = 1,250 sq.m net at £10,670 per sq.m = £12.80m
Tesco Express Blackheath = 250 sq.m net at £10,670 per sq.m = £2.67m
Gosbeck Road Food store = 1,250 sq.m net at £12,063 per sq.m = £15.08m

Table 8: Design Year Convenience Expenditure 2017 £Million - With Commitments

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total
Expenditure 2017	£239.93	£69.21	£90.59	£127.65	£87.90	£31.91	£40.06	£38.14	£115.90		£841.30
Tesco Garrison Local Centre	£8.32	£0.00	£2.56	£0.00	£0.00	£0.64	£0.00	£0.64	£0.00	£0.64	£12.80
Tesco Express Blackheath	£1.87	£0.00	£0.67	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.13	£2.67
Gosbecks Road Neighbourhood Store	£7.54	£0.00	£5.28	£0.00	£0.00	£0.75	£0.00	£0.75	£0.00	£0.75	£15.08
Asda, Colchester	£32.68	£5.81	£3.63	£2.04	£1.23	£1.15	£0.36	£2.27	£0.35	£2.78	£52.31
Sainsbury's, Priory Walk, Colchester	£10.53	£0.42	£3.86	£0.00	£0.26	£0.15	£0.36	£0.00	£0.00	£0.86	£16.44
Other Colchester town centre	£13.20	£1.04	£1.85	£0.26	£0.00	£0.00	£0.00	£0.00	£0.00	£0.87	£17.22
Tesco Extra, Colchester	£41.77	£11.77	£5.88	£0.26	£2.64	£0.00	£0.00	£0.14	£0.00	£3.45	£65.90
Tesco, Greenstead Road, Colchester	£20.48	£0.42	£15.29	£0.00	£0.44	£0.27	£0.00	£0.85	£0.00	£2.20	£39.95
Waitrose, Colchester	£14.25	£1.87	£5.76	£1.40	£0.53	£0.24	£0.00	£0.29	£0.46	£1.37	£26.17
Colchester Other	£28.84	£0.69	£5.04	£0.51	£0.26	£0.28	£0.24	£0.77	£0.00	£2.01	£38.64
Sainsbury's, Stanway	£36.10	£2.28	£6.58	£1.91	£1.49	£5.48	£1.04	£9.14	£1.16	£3.75	£68.95
Co-op, Fiveways Retail Park, Stanway	£9.77	£0.42	£2.66	£1.40	£0.70	£0.29	£0.00	£0.00	£0.00	£0.88	£16.13
Colchester Sub-Total	£225.36	£24.71	£59.05	£7.79	£7.56	£9.26	£2.00	£14.86	£1.97	£19.70	£372.26
Tiptree	£0.46	£0.00	£0.50	£0.00	£0.53	£16.36	£0.00	£0.74	£0.00	£1.01	£19.59
West Mersea	£0.00	£0.00	£4.62	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.25	£4.88
Wivenhoe	£0.00	£0.00	£8.64	£0.00	£0.44	£0.00	£0.00	£0.00	£0.00	£0.50	£9.59
Other Colchester Borough	£10.31	£1.31	£0.70	£0.00	£0.00	£0.00	£0.12	£0.64	£0.00	£0.70	£13.78
Other Sub-Total	£10.77	£1.31	£14.47	£0.00	£0.97	£16.36	£0.12	£1.37	£0.00	£2.46	£47.83
Colchester Borough Total	£236.13	£26.02	£73.52	£7.79	£8.53	£25.62	£2.12	£16.24	£1.97	£22.16	£420.09
Elsewhere											
Braintree	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£9.25	£4.12	£78.58	£39.34	£131.30
Chelmsford	£0.48	£0.00	£0.00	£0.00	£0.00	£0.00	£0.36	£0.15	£1.85	£281.60	£284.45
Clacton	£1.19	£1.04	£6.40	£113.10	£16.00	£0.00	£0.00	£0.00	£0.00	£7.24	£144.97
Frinton	£0.00	£0.00	£0.53	£0.00	£11.60	£0.00	£0.00	£0.00	£0.00	£0.64	£12.77
Ipswich	£1.19	£13.01	£0.00	£0.00	£0.26	£0.00	£0.00	£0.00	£0.00	£274.46	£288.92
Sudbury	£0.00	£6.02	£0.00	£0.00	£0.00	£0.00	£7.33	£3.84	£0.00	£154.69	£171.87
Other Outside Borough	£0.95	£23.12	£10.14	£6.77	£51.51	£6.29	£20.99	£13.80	£33.49	£71.61	£238.67
Total	£239.93	£69.21	£90.59	£127.65	£87.90	£31.91	£40.06	£38.14	£115.90	£851.75	£1,693.04

Table 9: Trade Draw of Sainsbury's Food Store at 2017 £Million

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total
% Trade Draw	50%	5%	20%	5%	5%	5%	0%	5%	0%	5%	100%
£M Trade Draw	£24.37	£2.44	£9.75	£2.44	£2.44	£2.44	£0.00	£2.44	£0.00	£2.44	£48.73

Sainsbury's Store = 3,716 sq.m net at £13,115 per sq.m = £48.73m

Table 10: Design Year Convenience Expenditure 2017 £Million - With Commitments and Sainsbury's

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total
Expenditure 2017	£239.93	£69.21	£90.59	£127.65	£87.90	£31.91	£40.06	£38.14	£115.90		£841.30
Sainsbury's Lightship Way	£24.37	£2.44	£9.75	£2.44	£2.44	£2.44	£0.00	£2.44	£0.00	£2.44	£48.73
Tesco Garrison Local Centre	£8.07	£0.00	£2.46	£0.00	£0.00	£0.62	£0.00	£0.62	£0.00	£0.64	£12.41
Tesco Express Blackheath	£1.81	£0.00	£0.64	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.13	£2.59
Gosbecks Road Neighbourhood Store	£7.09	£0.00	£4.86	£0.00	£0.00	£0.71	£0.00	£0.71	£0.00	£0.74	£14.11
Asda, Colchester	£28.76	£5.33	£3.06	£1.81	£1.06	£1.03	£0.36	£1.98	£0.35	£2.71	£46.45
Sainsbury's, Priory Walk, Colchester	£9.58	£0.39	£3.40	£0.00	£0.24	£0.14	£0.36	£0.00	£0.00	£0.84	£14.95
Other Colchester town centre	£12.61	£1.01	£1.74	£0.24	£0.00	£0.00	£0.00	£0.00	£0.00	£0.86	£16.46
Tesco Extra, Colchester	£36.76	£10.78	£4.96	£0.23	£2.28	£0.00	£0.00	£0.13	£0.00	£3.36	£58.48
Tesco, Greenstead Road, Colchester	£16.79	£0.36	£11.68	£0.00	£0.35	£0.22	£0.00	£0.69	£0.00	£2.12	£32.22
Waitrose, Colchester	£12.96	£1.75	£5.08	£1.29	£0.47	£0.22	£0.00	£0.26	£0.46	£1.34	£23.85
Colchester Other	£27.11	£0.66	£4.64	£0.48	£0.25	£0.26	£0.24	£0.72	£0.00	£1.98	£36.35
Sainsbury's, Stanway	£30.68	£2.04	£5.28	£1.65	£1.24	£4.74	£1.04	£7.71	£1.16	£3.63	£59.18
Co-op, Fiveways Retail Park, Stanway	£9.18	£0.40	£2.45	£1.33	£0.66	£0.27	£0.00	£0.00	£0.00	£0.87	£15.16
Colchester Sub-Total	£225.76	£25.16	£60.00	£9.46	£8.98	£10.67	£2.00	£15.26	£1.97	£21.67	£380.94
Tiptree	£0.42	£0.00	£0.44	£0.00	£0.47	£15.03	£0.00	£0.67	£0.00	£0.99	£18.02
West Mersea	£0.00	£0.00	£4.44	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.25	£4.69
Wivenhoe	£0.00	£0.00	£8.30	£0.00	£0.42	£0.00	£0.00	£0.00	£0.00	£0.50	£9.23
Other Colchester Borough	£10.00	£1.29	£0.67	£0.00	£0.00	£0.00	£0.12	£0.62	£0.00	£0.70	£13.40
Other Sub-Total	£10.42	£1.29	£13.86	£0.00	£0.90	£15.03	£0.12	£1.28	£0.00	£2.43	£45.34
Colchester Borough Total	£236.18	£26.44	£73.86	£9.46	£9.88	£25.70	£2.12	£16.55	£1.97	£24.11	£426.27
Elsewhere											
Braintree	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£9.25	£4.06	£78.58	£39.22	£131.11
Chelmsford	£0.47	£0.00	£0.00	£0.00	£0.00	£0.00	£0.36	£0.15	£1.85	£281.15	£283.99
Clacton	£1.17	£1.03	£6.28	£111.52	£15.73	£0.00	£0.00	£0.00	£0.00	£7.22	£142.93
Frinton	£0.00	£0.00	£0.52	£0.00	£11.41	£0.00	£0.00	£0.00	£0.00	£0.64	£12.56
Ipswich	£1.17	£12.88	£0.00	£0.00	£0.26	£0.00	£0.00	£0.00	£0.00	£273.59	£287.89
Sudbury	£0.00	£5.99	£0.00	£0.00	£0.00	£0.00	£7.33	£3.81	£0.00	£154.44	£171.57
Other Outside Borough	£0.93	£22.87	£9.94	£6.67	£50.64	£6.21	£20.99	£13.58	£33.49	£71.39	£236.72
Total	£239.93	£69.21	£90.59	£127.65	£87.90	£31.91	£40.06	£38.14	£115.90	£851.75	£1,693.04

Table 11: Convenience Expenditure 2019 £Million - With Commitments and Sainsbury's

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total
Expenditure 2019	£248.97	£70.85	£93.99	£132.33	£91.16	£32.83	£40.77	£38.99	£117.05		£866.93
Sainsbury's Lightship Way	£25.28	£2.49	£10.11	£2.53	£2.53	£2.51	£0.00	£2.49	£0.00	£2.52	£50.46
Tesco Garrison Local Centre	£8.37	£0.00	£2.55	£0.00	£0.00	£0.64	£0.00	£0.63	£0.00	£0.64	£12.84
Tesco Express Blackheath	£1.88	£0.00	£0.67	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.13	£2.68
Gosbecks Road Neighbourhood Store	£7.35	£0.00	£5.04	£0.00	£0.00	£0.73	£0.00	£0.72	£0.00	£0.73	£14.58
Asda, Colchester	£29.84	£5.45	£3.17	£1.88	£1.10	£1.06	£0.37	£2.03	£0.35	£2.38	£47.63
Sainsbury's, Priory Walk, Colchester	£9.94	£0.40	£3.53	£0.00	£0.25	£0.15	£0.37	£0.00	£0.00	£0.77	£15.40
Other Colchester town centre	£13.08	£1.03	£1.81	£0.25	£0.00	£0.00	£0.00	£0.00	£0.00	£0.85	£17.02
Tesco Extra, Colchester	£38.14	£11.03	£5.14	£0.24	£2.36	£0.00	£0.00	£0.13	£0.00	£3.00	£60.05
Tesco, Greenstead Road, Colchester	£17.42	£0.37	£12.12	£0.00	£0.36	£0.23	£0.00	£0.71	£0.00	£1.64	£32.85
Waitrose, Colchester	£13.45	£1.79	£5.27	£1.33	£0.49	£0.23	£0.00	£0.27	£0.47	£1.23	£24.53
Colchester Other	£28.13	£0.68	£4.81	£0.50	£0.25	£0.27	£0.24	£0.74	£0.00	£1.88	£37.51
Sainsbury's, Stanway	£31.84	£2.09	£5.48	£1.71	£1.29	£4.88	£1.06	£7.88	£1.17	£3.02	£60.42
Co-op, Fiveways Retail Park, Stanway	£9.53	£0.41	£2.54	£1.37	£0.68	£0.28	£0.00	£0.00	£0.00	£0.78	£15.59
Colchester Sub-Total	£234.27	£25.75	£62.24	£9.81	£9.31	£10.98	£2.04	£15.60	£1.99	£19.58	£391.57
Tiptree	£0.43	£0.00	£0.46	£0.00	£0.49	£15.47	£0.00	£0.68	£0.00	£0.92	£18.45
West Mersea	£0.00	£0.00	£4.61	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.24	£4.85
Wivenhoe	£0.00	£0.00	£8.61	£0.00	£0.44	£0.00	£0.00	£0.00	£0.00	£0.48	£9.53
Other Colchester Borough	£10.38	£1.32	£0.70	£0.00	£0.00	£0.00	£0.12	£0.63	£0.00	£0.69	£13.84
Other Sub-Total	£10.81	£1.32	£14.38	£0.00	£0.93	£15.47	£0.12	£1.31	£0.00	£2.33	£46.68
Colchester Borough Total	£245.08	£27.07	£76.62	£9.81	£10.24	£26.44	£2.16	£16.92	£1.99	£21.91	£438.25
Elsewhere											
Braintree	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£9.42	£4.15	£79.36	£40.41	£133.34
Chelmsford	£0.49	£0.00	£0.00	£0.00	£0.00	£0.00	£0.37	£0.15	£1.87	£289.72	£292.60
Clacton	£1.21	£1.05	£6.51	£115.61	£16.31	£0.00	£0.00	£0.00	£0.00	£7.44	£148.13
Frinton	£0.00	£0.00	£0.54	£0.00	£11.83	£0.00	£0.00	£0.00	£0.00	£0.66	£13.03
Ipswich	£1.21	£13.18	£0.00	£0.00	£0.27	£0.00	£0.00	£0.00	£0.00	£281.92	£296.58
Sudbury	£0.00	£6.13	£0.00	£0.00	£0.00	£0.00	£7.46	£3.89	£0.00	£159.15	£176.63
Other Outside Borough	£0.97	£23.42	£10.31	£6.92	£52.51	£6.39	£21.36	£13.89	£33.83	£73.56	£243.14
Total	£248.97	£70.85	£93.99	£132.33	£91.16	£32.83	£40.77	£38.99	£117.05		£1,741.70

Table 12: Trade Draw of Food Store North Colchester Urban Extension at 2019 £Million

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total
% Trade Draw	50%	15%	10%	5%	0%	5%	5%	5%	0%	5%	100%
£M Trade Draw	£14.57	£4.37	£2.91	£1.46	£0.00	£1.46	£1.46	£1.46	£0.00	£1.46	£29.14

Food store = 2,416 sq.m net at £12,063 per sq.m = £29.14m

Table 13: Convenience Expenditure 2019 £Million - With Commitments, Sainsbury's and Food store at North Colchester Urban Extension

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total
Expenditure 2019	£248.97	£70.85	£93.99	£132.33	£91.16	£32.83	£40.77	£38.99	£117.05		£866.93
North Colchester Food Store	£14.57	£4.37	£2.91	£1.46	£0.00	£1.46	£1.46	£1.46	£0.00	£1.46	£29.14
Sainsbury's Lightship Way	£23.66	£2.20	£9.60	£2.32	£2.53	£2.31	£0.00	£2.29	£0.00	£2.49	£47.41
Tesco Garrison Local Centre	£8.24	£0.00	£2.52	£0.00	£0.00	£0.63	£0.00	£0.62	£0.00	£0.64	£12.65
Tesco Express Blackheath	£1.85	£0.00	£0.66	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.13	£2.64
Gosbecks Road Neighbourhood Store	£7.18	£0.00	£4.95	£0.00	£0.00	£0.71	£0.00	£0.70	£0.00	£0.73	£14.27
Asda, Colchester	£26.97	£4.50	£2.93	£1.65	£1.10	£0.94	£0.24	£1.79	£0.35	£2.33	£42.80
Sainsbury's, Priory Walk, Colchester	£9.46	£0.36	£3.40	£0.00	£0.25	£0.14	£0.30	£0.00	£0.00	£0.76	£14.67
Other Colchester town centre	£12.77	£0.98	£1.77	£0.25	£0.00	£0.00	£0.00	£0.00	£0.00	£0.85	£16.62
Tesco Extra, Colchester	£34.48	£9.11	£4.75	£0.21	£2.36	£0.00	£0.00	£0.11	£0.00	£2.94	£53.96
Tesco, Greenstead Road, Colchester	£16.31	£0.33	£11.51	£0.00	£0.36	£0.21	£0.00	£0.65	£0.00	£1.62	£30.99
Waitrose, Colchester	£12.81	£1.64	£5.07	£1.25	£0.49	£0.22	£0.00	£0.25	£0.47	£1.21	£23.41
Colchester Other	£27.23	£0.64	£4.69	£0.48	£0.25	£0.26	£0.22	£0.71	£0.00	£1.86	£36.34
Sainsbury's, Stanway	£29.80	£1.85	£5.20	£1.57	£1.29	£4.50	£0.82	£7.26	£1.17	£2.98	£56.43
Co-op, Fiveways Retail Park, Stanway	£9.15	£0.38	£2.46	£1.30	£0.68	£0.27	£0.00	£0.00	£0.00	£0.77	£15.01
Colchester Sub-Total	£234.47	£26.37	£62.43	£10.48	£9.31	£11.64	£3.04	£15.84	£1.99	£20.75	£396.33
Tiptree	£0.42	£0.00	£0.45	£0.00	£0.49	£14.87	£0.00	£0.65	£0.00	£0.92	£17.79
West Mersea	£0.00	£0.00	£4.58	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.24	£4.82
Wivenhoe	£0.00	£0.00	£8.56	£0.00	£0.44	£0.00	£0.00	£0.00	£0.00	£0.48	£9.48
Other Colchester Borough	£10.22	£1.28	£0.69	£0.00	£0.00	£0.00	£0.12	£0.62	£0.00	£0.69	£13.60
Other Sub-Total	£10.63	£1.28	£14.28	£0.00	£0.93	£14.87	£0.12	£1.27	£0.00	£2.32	£45.70
Colchester Borough Total	£245.11	£27.65	£76.71	£10.48	£10.24	£26.50	£3.15	£17.12	£1.99	£23.08	£442.03
Elsewhere											
Braintree	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£9.15	£4.11	£79.36	£40.34	£132.95
Chelmsford	£0.49	£0.00	£0.00	£0.00	£0.00	£0.00	£0.36	£0.15	£1.87	£289.45	£292.33
Clacton	£1.21	£1.04	£6.49	£115.01	£16.31	£0.00	£0.00	£0.00	£0.00	£7.43	£147.49
Frinton	£0.00	£0.00	£0.54	£0.00	£11.83	£0.00	£0.00	£0.00	£0.00	£0.65	£13.02
Ipswich	£1.20	£12.99	£0.00	£0.00	£0.27	£0.00	£0.00	£0.00	£0.00	£281.40	£295.86
Sudbury	£0.00	£6.09	£0.00	£0.00	£0.00	£0.00	£7.35	£3.87	£0.00	£159.00	£176.31
Other Outside Borough	£0.96	£23.08	£10.25	£6.84	£52.51	£6.32	£20.75	£13.75	£33.83	£73.42	£241.71
Total	£248.97	£70.85	£93.99	£132.33	£91.16	£32.83	£40.77	£38.99	£117.05		£1,741.70

Table 14: Convenience Floorspace and Benchmark Turnover

Town/Store	Sales Floorspace sq.m net	Convenience Sales %	Convenience sq.m net	Turnover Density £ per sq.m net	Total Turnover £Million
Asda, Colchester	5,216	65%	3,390	£12,922	£43.81
Aldi, Magdalen Street Colchester	1,305	60%	783	£7,815	£6.12
Aldi, London Road Colchester	1,614	95%	1,533	£7,815	£11.98
Co-op, Abbots Road, Colchester	1,239	80%	991	£7,378	£7.31
Co-op, Nayland Road, Mile End, Colchester	127	95%	121	£7,378	£0.89
Co-op, Mersea Road, Colchester	641	85%	545	£7,378	£4.02
Co-op, Old Heath Road, Colchester	240	95%	228	£7,378	£1.68
Co-op, Regent Street, Rowhedge, Colchester	109	95%	104	£7,378	£0.76
Co-op, The Centre, Greenstead Estate, Colchester	552	90%	497	£7,378	£3.67
Co-op, The Square, Shrub End, Colchester	176	95%	167	£7,378	£1.23
Co-op, Old Heath Road, Colchester	239	95%	227	£7,378	£1.68
Co-op, Wimpole Road Colchester	279	80%	223	£7,378	£1.65
Co-op, Harwich Road, Colchester	100	98%	98	£7,378	£0.72
Iceland, St John's Walk, Colchester	432	95%	410	£7,025	£2.88
Iceland, Turner Rise, Colchester	487	95%	463	£7,025	£3.25
Marks & Spencer, Colchester	1,059	100%	1,059	£10,837	£11.48
Sainsbury's, Priory Walk, Colchester	1,235	90%	1,112	£13,115	£14.58
Tesco, Greenstead Road, Colchester	5,192	60%	3,115	£10,670	£33.24
Tesco Extra, Colchester	6,241	60%	3,745	£10,670	£39.95
Tesco Express, Crouch Street	315	95%	299	£10,670	£3.19
Tesco Express, Bromley Road	130	95%	124	£10,670	£1.32
Tesco Express, Magdalen Street	250	95%	238	£10,670	£2.53
Tesco Express, St Christopher Road	192	95%	182	£10,670	£1.95
Waitrose, Colchester	2,209	75%	1,657	£11,426	£18.93
Small Convenience shops	3,200	99%	3,168	£4,500	£14.26
Colchester Total	32,779		24,478		£233.08
Co-op, Fiveways Retail Park, Stanway, Colchester	3,901	75%	2,926	£7,378	£21.59
Sainsbury's, Stanway, Colchester	9,027	60%	5,416	£13,115	£71.03
Iceland, Tollgate Centre, Colchester	439	95%	417	£7,265	£3.03
Stanway Total	13,367		8,759		£95.65
Asda, Tiptree	1,115	85%	948	£12,922	£12.25
Tesco, Tiptree	1,697	85%	1,442	£10,670	£15.39
Local Shops	320	99%	317	£4,500	£1.43
Tiptree Total	3,132		2,707		£29.06
Co-op, Barfield Road, West Mersea	855	90%	770	£7,378	£5.68
Tesco Express, West Mersea	280	90%	204	£10,670	£2.18
Local Shops	202	99%	200	£4,500	£0.90
West Mersea Total	1,337		1,173		£8.75
Co-op, The Avenue, Wivenhoe	628	85%	534	£7,378	£3.94
Local Shops	108	99%	107	£4,500	£0.48
Wivenhoe Total	736		641		£4.42
GRAND TOTAL	51,351		37,758		£370.97

Sources: Institute of Grocery Distribution, Verdict, VOA and Goad Plans

Table 15: Summary of Convenience Goods Impacts at 2017 (£ millions)

Centre/Facilities	Base Year 2014	Design Year (no stores) 2017	Design Year (commitments) 2017	% Impact (commitments) 2017	Design Year (Sainsbury's) 2017	% Impact Cumulative 2017	Benchmark Average Turnover	% Trading Above/Below Benchmark
Sainsbury's Lightship Way	n/a	n/a	n/a	n/a	£48.73	n/a	£48.73	0.0%
Tesco Garrison Local Centre	n/a	n/a	£12.80	n/a	£12.41	n/a	£12.08	2.7%
Tesco Express Blackheath	n/a	n/a	£2.67	n/a	£2.59	n/a	£2.67	-3.1%
Gosbicks Road Neighbourhood Store	n/a	n/a	£15.08	n/a	£14.11	n/a	£15.08	-6.4%
Asda, Colchester	£54.00	£56.56	£52.31	-7.5%	£46.45	-17.9%	£43.81	6.0%
Sainsbury's, Priory Walk, Colchester	£16.43	£17.27	£16.44	-4.8%	£14.95	-13.4%	£14.58	2.6%
Other Colchester town centre	£16.66	£17.51	£17.22	-1.6%	£16.46	-6.0%	£17.55	-6.2%
Tesco Extra, Colchester	£66.61	£69.78	£65.90	-5.6%	£58.48	-16.2%	£39.95	46.4%
Tesco, Greenstead Road, Colchester	£42.62	£44.79	£39.95	-10.8%	£32.22	-28.1%	£33.24	-3.1%
Waitrose, Colchester	£26.38	£27.66	£26.17	-5.4%	£23.85	-13.8%	£18.93	26.0%
Colchester Other	£38.52	£40.49	£38.64	-4.6%	£36.35	-10.2%	£68.05	-46.6%
Sainsbury's, Stanway	£73.33	£76.64	£68.95	-10.0%	£59.18	-22.8%	£71.03	-16.7%
Co-op, Fiveways Retail Park, Stanway	£17.17	£18.04	£16.13	-10.6%	£15.16	-16.0%	£21.59	-29.8%
Colchester Sub-Total	£351.72	£368.73	£372.26		£380.94		£407.29	
Tiptree	£19.59	£20.30	£19.59	-3.5%	£18.02	-11.2%	£29.06	-38.0%
West Mersea	£4.81	£5.05	£4.88	-3.5%	£4.69	-7.2%	£8.75	-46.4%
Wivenhoe	£9.61	£10.09	£9.59	-5.0%	£9.23	-8.6%	£4.42	108.8%
Other Colchester Borough	£13.42	£14.07	£13.78	-2.0%	£13.40	-4.8%	n/a	n/a
Other Sub-Total	£27.85	£29.22	£28.25		£27.32		£13.17	
Colchester Borough Total	£379.57	£397.94	£400.51		£408.25		£420.47	
Elsewhere								
Braintree	£130.08	£131.42	£131.30	-0.1%	£131.11	-0.2%	n/a	n/a
Chelmsford	£279.71	£284.74	£284.45	-0.1%	£283.99	-0.3%	n/a	n/a
Clacton	£138.44	£145.11	£144.97	-0.1%	£142.93	-1.5%	n/a	n/a
Frinton	£12.20	£12.79	£12.77	-0.1%	£12.56	-1.7%	n/a	n/a
Ipswich	£281.44	£289.50	£288.92	-0.2%	£287.89	-0.6%	n/a	n/a
Sudbury	£168.23	£172.05	£171.87	-0.1%	£171.57	-0.3%	n/a	n/a
Other Outside Borough	£232.01	£239.20	£238.67	-0.2%	£236.72	-1.0%	n/a	n/a
Total	£1,621.67	£1,672.74	£1,673.46		£1,675.02			

Table 16: Summary of Convenience Goods Impacts at 2019 (£ millions)

Centre/Facilities	Base Year 2014	Horizon Year (without NCUE) 2019	Horizon Year (with NCUE) 2019	% Impact (NCUE) 2019	% Impact Cumulative 2014 trading	Benchmark Average Turnover	% Trading Above/Below Benchmark
North Colchester Food Store	n/a	n/a	£29.14	n/a	n/a	£29.14	n/a
Sainsbury's Lightship Way	n/a	£50.46	£47.41	n/a	n/a	£48.73	-2.7%
Tesco Garrison Local Centre	n/a	£12.84	£12.65	n/a	n/a	£12.08	4.7%
Tesco Express Blackheath	n/a	£2.68	£2.64	n/a	n/a	£2.67	-1.1%
Gosbecks Road Neighbourhood Store	n/a	£14.58	£14.27	n/a	n/a	£15.08	-5.4%
Asda, Colchester	£54.00	£47.63	£42.80	-10.1%	-20.7%	£43.81	-2.3%
Sainsbury's, Priory Walk, Colchester	£16.43	£15.40	£14.67	-4.7%	-10.7%	£14.58	0.7%
Other Colchester town centre	£16.66	£17.02	£16.62	-2.4%	-0.2%	£17.55	-5.3%
Tesco Extra, Colchester	£66.61	£60.05	£53.96	-10.1%	-19.0%	£39.95	35.1%
Tesco, Greenstead Road, Colchester	£42.62	£32.85	£30.99	-5.7%	-27.3%	£33.24	-6.8%
Waitrose, Colchester	£26.38	£24.53	£23.41	-4.6%	-11.3%	£18.93	23.6%
Colchester Other	£38.52	£37.51	£36.34	-3.1%	-5.6%	£68.05	-46.6%
Sainsbury's, Stanway	£73.33	£60.42	£56.43	-6.6%	-23.1%	£71.03	-20.6%
Co-op, Fiveways Retail Park, Stanway	£17.17	£15.59	£15.01	-3.7%	-12.6%	£21.59	-30.5%
Colchester Sub-Total	£351.72	£391.57	£396.33			£436.43	
Tiptree	£19.59	£18.45	£17.79	-3.6%	-9.2%	£29.06	-38.8%
West Mersea	£4.81	£4.85	£4.82	-0.6%	0.2%	£8.75	-44.9%
Wivenhoe	£9.61	£9.53	£9.48	-0.6%	-1.4%	£4.42	114.4%
Other Colchester Borough	£13.42	£13.84	£13.60	-1.7%	1.4%	n/a	n/a
Other Sub-Total	£27.85	£28.22	£27.90			£13.17	
Colchester Borough Total	£379.57	£419.80	£424.23			£449.61	
Elsewhere							
Braintree	£130.08	£133.34	£132.95	-0.3%	2.2%	n/a	n/a
Chelmsford	£279.71	£292.60	£292.33	-0.1%	4.5%	n/a	n/a
Clacton	£138.44	£148.13	£147.49	-0.4%	6.5%	n/a	n/a
Frinton	£12.20	£13.03	£13.02	0.0%	6.7%	n/a	n/a
Ipswich	£281.44	£296.58	£295.86	-0.2%	5.1%	n/a	n/a
Sudbury	£168.23	£176.63	£176.31	-0.2%	4.8%	n/a	n/a
Other Outside Borough	£232.01	£243.14	£241.71	-0.6%	4.2%	n/a	n/a
Total	£1,621.67	£1,723.24	£1,723.90				

Appendix 2 Comparison Goods Impact

Table 1: Comparison Goods Expenditure Per Capita (2011 Prices)

Expenditure Per Capita	2014	2017	2019
Zone 1: Colchester	£2,729	£2,896	£3,021
Zone 2 - Colchester Rural North	£3,180	£3,375	£3,520
Zone 3 - Colchester Rural South	£3,051	£3,238	£3,377
Zone 4 - Clacton	£2,441	£2,591	£2,702
Zone 5 - Frinton/Harwich	£2,682	£2,846	£2,963
Zone 6 - Tiptree/Kelvedon	£3,192	£3,388	£3,533
Zone 7 - Halstead	£2,963	£3,145	£3,279
Zone 8 - Coggeshall	£3,246	£3,445	£3,592
Zone 9 - Braintree	£3,062	£3,250	£3,389

Sources:

Experian local estimates for 2011 comparison goods expenditure per capita

(Excluding special forms of trading)

Experian Business Strategies - recommended forecast growth rates October 2013

Table 2: Total Available Comparison Goods Expenditure (£M - 2011 Prices)

Zone	2014	2017	2019	Growth 2014-2017	Growth 2014-2019
Zone 1: Colchester	£366.81	£406.57	£435.26	10.8%	18.7%
Zone 2 - Colchester Rural North	£110.00	£118.69	£125.38	7.9%	14.0%
Zone 3 - Colchester Rural South	£140.32	£155.05	£165.91	10.5%	18.2%
Zone 4 - Clacton	£165.69	£182.73	£195.50	10.3%	18.0%
Zone 5 - Frinton/Harwich	£122.52	£135.08	£144.28	10.3%	17.8%
Zone 6 - Tiptree/Kelvedon	£52.49	£57.20	£60.69	9.0%	15.6%
Zone 7 - Halstead	£62.89	£67.41	£70.76	7.2%	12.5%
Zone 8 - Coggeshall	£63.15	£68.12	£71.83	7.9%	13.7%
Zone 9 - Braintree	£192.18	£203.94	£212.47	6.1%	10.6%
Total	£1,276.04	£1,394.79	£1,482.09	9.3%	16.1%

Sources: Table 1 Appendix 1 and Table 1 Appendix 2

Table 3: Comparison Shopping Penetration Rates 2012

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow
Colchester	61.6%	42.6%	60.7%	27.6%	49.9%	50.2%	26.1%	39.6%	5.7%	5.0%
Colchester food stores	4.6%	0.3%	2.3%	0.1%	1.0%	1.0%	0.1%	1.0%	0.0%	5.0%
B&Q Colchester	4.0%	1.0%	3.0%	0.2%	2.0%	0.5%	0.1%	0.5%	0.0%	5.0%
Colchester retail warehouses	17.4%	9.8%	15.4%	4.4%	7.9%	12.9%	6.6%	15.0%	1.4%	5.0%
Tiptree	0.1%	0.0%	0.0%	0.0%	0.0%	5.4%	0.2%	0.2%	0.2%	5.0%
West Mersea	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%
Borough Total	87.7%	53.7%	82.7%	32.3%	60.8%	70.0%	33.1%	56.3%	7.3%	
Braintree	1.1%	0.4%	2.0%	0.8%	0.3%	12.8%	31.6%	17.5%	63.1%	30.0%
Chelmsford	1.1%	0.1%	0.9%	0.3%	1.1%	7.7%	2.9%	1.0%	18.7%	95.0%
Clacton	0.5%	2.3%	3.7%	59.9%	12.2%	0.0%	0.0%	0.0%	0.0%	5.0%
Frinton	0.0%	0.0%	1.3%	0.5%	6.9%	0.0%	0.0%	0.0%	0.0%	5.0%
Ipswich	4.3%	27.7%	3.8%	3.8%	4.6%	0.2%	0.3%	0.0%	0.1%	95.0%
Sudbury	0.2%	2.4%	0.0%	0.0%	0.0%	1.5%	9.2%	8.3%	0.1%	90.0%
Other Outside Borough	5.1%	13.4%	5.6%	2.4%	14.1%	7.8%	22.9%	16.9%	10.7%	30.0%
Market Share Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

Source: NEMS Household Survey, September 2012 and Braintree District Council Retail Study Update 2012

Table 4: Base Year Comparison Expenditure 2014 £Million

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total
Expenditure 2014	£366.81	£110.00	£140.32	£165.69	£122.52	£52.49	£62.89	£63.15	£192.18		£1,276.04
Colchester	£225.95	£46.86	£85.17	£45.73	£61.14	£26.35	£16.41	£25.01	£10.95	£28.61	£572.19
Colchester food stores	£16.87	£0.33	£3.23	£0.17	£1.23	£0.52	£0.06	£0.63	£0.00	£1.21	£24.25
B&Q Colchester	£14.67	£1.10	£4.21	£0.33	£2.45	£0.26	£0.06	£0.32	£0.00	£1.23	£24.64
Colchester retail warehouses	£63.82	£10.78	£21.61	£7.29	£9.68	£6.77	£4.15	£9.47	£2.69	£7.17	£143.44
Tiptree	£0.37	£0.00	£0.00	£0.00	£0.00	£2.83	£0.13	£0.13	£0.38	£0.20	£4.04
West Mersea	£0.00	£0.00	£1.82	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.10	£1.92
Borough Total	£321.69	£59.07	£116.04	£53.52	£74.49	£36.74	£20.82	£35.55	£14.03	£38.52	£770.48
Braintree	£4.03	£0.44	£2.81	£1.33	£0.37	£6.72	£19.87	£11.05	£121.26	£71.95	£239.83
Chelmsford	£4.03	£0.11	£1.26	£0.50	£1.35	£4.04	£1.82	£0.63	£35.94	£944.04	£993.73
Clacton	£1.83	£2.53	£5.19	£99.25	£14.95	£0.00	£0.00	£0.00	£0.00	£6.51	£130.26
Frinton	£0.00	£0.00	£1.82	£0.83	£8.45	£0.00	£0.00	£0.00	£0.00	£0.58	£11.69
Ipswich	£15.77	£30.47	£5.33	£6.30	£5.64	£0.10	£0.19	£0.00	£0.19	£1,215.87	£1,279.86
Sudbury	£0.73	£2.64	£0.00	£0.00	£0.00	£0.79	£5.79	£5.24	£0.19	£138.42	£153.80
Other Outside Borough	£18.71	£14.74	£7.86	£3.98	£17.28	£4.09	£14.40	£10.67	£20.56	£48.12	£160.41
Total	£366.81	£110.00	£140.32	£165.69	£122.52	£52.49	£62.89	£63.15	£192.18		£2,746.34

Table 5: Design Year Comparison Expenditure 2017 £Million - No Development

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total
Expenditure 2017	£406.57	£118.69	£155.05	£182.73	£135.08	£57.20	£67.41	£68.12	£203.94		£1,394.79
Colchester	£250.45	£50.56	£94.11	£50.43	£67.41	£28.71	£17.59	£26.97	£11.62	£31.47	£629.34
Colchester food stores	£18.70	£0.36	£3.57	£0.18	£1.35	£0.57	£0.07	£0.68	£0.00	£1.34	£26.82
B&Q Colchester	£16.26	£1.19	£4.65	£0.37	£2.70	£0.29	£0.07	£0.34	£0.00	£1.36	£27.22
Colchester retail warehouses	£70.74	£11.63	£23.88	£8.04	£10.67	£7.38	£4.45	£10.22	£2.86	£7.89	£157.75
Tiptree	£0.41	£0.00	£0.00	£0.00	£0.00	£3.09	£0.13	£0.14	£0.41	£0.22	£4.39
West Mersea	£0.00	£0.00	£2.02	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.11	£2.12
Borough Total	£356.56	£63.74	£128.22	£59.02	£82.13	£40.04	£22.31	£38.35	£14.89	£42.38	£847.65
Braintree	£4.47	£0.47	£3.10	£1.46	£0.41	£7.32	£21.30	£11.92	£128.68	£76.78	£255.92
Chelmsford	£4.47	£0.12	£1.40	£0.55	£1.49	£4.40	£1.95	£0.68	£38.14	£1,010.74	£1,063.94
Clacton	£2.03	£2.73	£5.74	£109.46	£16.48	£0.00	£0.00	£0.00	£0.00	£7.18	£143.62
Frinton	£0.00	£0.00	£2.02	£0.91	£9.32	£0.00	£0.00	£0.00	£0.00	£0.64	£12.89
Ipswich	£17.48	£32.88	£5.89	£6.94	£6.21	£0.11	£0.20	£0.00	£0.20	£1,328.66	£1,398.59
Sudbury	£0.81	£2.85	£0.00	£0.00	£0.00	£0.86	£6.20	£5.65	£0.20	£149.22	£165.79
Other Outside Borough	£20.74	£15.90	£8.68	£4.39	£19.05	£4.46	£15.44	£11.51	£21.82	£52.28	£174.27
Total	£406.57	£118.69	£155.05	£182.73	£135.08	£57.20	£67.41	£68.12	£203.94		£2,998.73

Table 6: Design Year Comparison Expenditure 2017 £Million - With William & Griffin Improvements

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total
Expenditure 2017	£406.57	£118.69	£155.05	£182.73	£135.08	£57.20	£67.41	£68.12	£203.94		£1,394.79
Williams & Griffin	£6.96	£1.41	£2.62	£1.40	£1.87	£0.80	£0.49	£0.75	£0.32	£0.88	£17.50
Colchester	£244.35	£49.42	£91.77	£49.18	£65.69	£28.04	£17.26	£26.38	£11.56	£31.42	£615.07
Colchester food stores	£18.53	£0.35	£3.53	£0.18	£1.34	£0.57	£0.07	£0.68	£0.00	£1.34	£26.59
B&Q Colchester	£16.16	£1.18	£4.62	£0.36	£2.68	£0.28	£0.07	£0.34	£0.00	£1.36	£27.06
Colchester retail warehouses	£70.31	£11.57	£23.73	£7.99	£10.60	£7.34	£4.43	£10.16	£2.85	£7.88	£156.86
Tiptree	£0.41	£0.00	£0.00	£0.00	£0.00	£3.09	£0.13	£0.14	£0.41	£0.22	£4.39
West Mersea	£0.00	£0.00	£2.01	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.11	£2.12
Borough Total	£356.72	£63.93	£128.29	£59.11	£82.19	£40.11	£22.44	£38.44	£15.13	£43.22	£849.59
Braintree	£4.45	£0.47	£3.08	£1.45	£0.40	£7.28	£21.20	£11.85	£128.49	£76.75	£255.43
Chelmsford	£4.45	£0.12	£1.39	£0.54	£1.48	£4.38	£1.95	£0.68	£38.08	£1,010.41	£1,063.46
Clacton	£2.03	£2.73	£5.73	£109.42	£16.48	£0.00	£0.00	£0.00	£0.00	£7.18	£143.57
Frinton	£0.00	£0.00	£2.01	£0.91	£9.32	£0.00	£0.00	£0.00	£0.00	£0.64	£12.89
Ipswich	£17.38	£32.69	£5.86	£6.90	£6.17	£0.11	£0.20	£0.00	£0.20	£1,328.22	£1,397.74
Sudbury	£0.81	£2.84	£0.00	£0.00	£0.00	£0.86	£6.19	£5.64	£0.20	£149.19	£165.73
Other Outside Borough	£20.74	£15.90	£8.68	£4.39	£19.05	£4.46	£15.44	£11.51	£21.82	£52.28	£174.27
Total	£406.57	£118.69	£155.05	£182.73	£135.08	£57.20	£67.41	£68.12	£203.94		£2,999.22

Table 7: Design Year Comparison Expenditure 2017 £Million - B&Q Store 20% reduction

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total
Expenditure 2017	£406.57	£118.69	£155.05	£182.73	£135.08	£57.20	£67.41	£68.12	£203.94		£1,394.79
Williams & Griffin	£6.98	£1.41	£2.63	£1.40	£1.88	£0.80	£0.49	£0.75	£0.32	£0.88	£17.54
Colchester	£245.00	£49.48	£91.97	£49.20	£65.86	£28.05	£17.26	£26.39	£11.56	£31.43	£616.18
Colchester food stores	£18.55	£0.35	£3.54	£0.18	£1.34	£0.57	£0.07	£0.68	£0.00	£1.34	£26.61
B&Q Colchester	£12.93	£0.94	£3.70	£0.29	£2.15	£0.23	£0.05	£0.27	£0.00	£1.09	£21.65
Colchester retail warehouses	£72.81	£11.72	£24.42	£8.04	£10.95	£7.38	£4.44	£10.21	£2.85	£7.90	£160.72
Tiptree	£0.41	£0.00	£0.00	£0.00	£0.00	£3.09	£0.13	£0.14	£0.41	£0.22	£4.39
West Mersea	£0.00	£0.00	£2.01	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.11	£2.12
Borough Total	£356.67	£63.91	£128.27	£59.11	£82.17	£40.11	£22.44	£38.43	£15.13	£42.97	£849.21
Braintree	£4.45	£0.47	£3.09	£1.45	£0.40	£7.28	£21.20	£11.86	£128.49	£76.76	£255.46
Chelmsford	£4.45	£0.12	£1.39	£0.54	£1.48	£4.38	£1.95	£0.68	£38.08	£1,010.51	£1,063.57
Clacton	£2.03	£2.73	£5.74	£109.43	£16.48	£0.00	£0.00	£0.00	£0.00	£7.18	£143.58
Frinton	£0.00	£0.00	£2.02	£0.91	£9.32	£0.00	£0.00	£0.00	£0.00	£0.64	£12.89
Ipswich	£17.41	£32.71	£5.86	£6.90	£6.18	£0.11	£0.20	£0.00	£0.20	£1,328.35	£1,397.94
Sudbury	£0.81	£2.84	£0.00	£0.00	£0.00	£0.86	£6.19	£5.64	£0.20	£149.20	£165.74
Other Outside Borough	£20.74	£15.91	£8.68	£4.39	£19.05	£4.46	£15.44	£11.51	£21.82	£52.28	£174.28
Total	£406.57	£118.69	£155.05	£182.73	£135.08	£57.20	£67.41	£68.12	£203.94		£2,999.10

Table 8: Comparison Goods Trade Draw of Proposed Sainsbury's Food Store at 2017 £Million

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total
% Trade Draw	50%	5%	20%	5%	5%	5%	0%	5%	0%	5%	100%
£M Trade Draw	£8.19	£0.82	£3.28	£0.82	£0.82	£0.82	£0.00	£0.82	£0.00	£0.82	£16.38

Sainsbury's Store = 3,115 sq.m net at £5,258 per sq.m = £16.38m

Table 9: Design Year Comparison Expenditure 2017 £Million - With Proposed Sainsbury's Store

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total
Expenditure 2017	£406.57	£118.69	£155.05	£182.73	£135.08	£57.20	£67.41	£68.12	£203.94		£1,394.79
Sainsbury Store	£8.19	£0.82	£3.28	£0.82	£0.82	£0.82	£0.00	£0.82	£0.00	£0.82	£16.38
Williams & Griffin	£6.81	£1.40	£2.56	£1.38	£1.86	£0.79	£0.49	£0.74	£0.32	£0.88	£17.22
Colchester	£239.06	£49.00	£89.48	£48.60	£65.21	£27.52	£17.26	£25.92	£11.56	£31.42	£605.00
Colchester food stores	£17.87	£0.35	£3.39	£0.18	£1.32	£0.55	£0.07	£0.66	£0.00	£1.34	£25.72
B&Q Colchester	£12.93	£0.94	£3.70	£0.29	£2.15	£0.23	£0.05	£0.27	£0.00	£1.09	£21.65
Colchester retail warehouses	£71.92	£11.67	£24.09	£7.99	£10.90	£7.31	£4.44	£10.12	£2.85	£7.90	£159.18
Tiptree	£0.41	£0.00	£0.00	£0.00	£0.00	£3.08	£0.13	£0.14	£0.41	£0.22	£4.39
West Mersea	£0.00	£0.00	£2.01	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.11	£2.12
Borough Total	£357.19	£64.17	£128.50	£59.26	£82.25	£40.29	£22.44	£38.66	£15.13	£43.77	£851.67
Braintree	£4.37	£0.47	£3.02	£1.44	£0.40	£7.18	£21.20	£11.70	£128.49	£76.73	£255.01
Chelmsford	£4.37	£0.12	£1.36	£0.54	£1.47	£4.32	£1.95	£0.67	£38.08	£1,010.19	£1,063.05
Clacton	£2.03	£2.73	£5.73	£109.36	£16.47	£0.00	£0.00	£0.00	£0.00	£7.18	£143.50
Frinton	£0.00	£0.00	£2.01	£0.91	£9.31	£0.00	£0.00	£0.00	£0.00	£0.64	£12.88
Ipswich	£17.09	£32.48	£5.74	£6.84	£6.14	£0.11	£0.20	£0.00	£0.20	£1,327.93	£1,396.74
Sudbury	£0.80	£2.83	£0.00	£0.00	£0.00	£0.85	£6.19	£5.59	£0.20	£149.17	£165.62
Other Outside Borough	£20.71	£15.90	£8.67	£4.38	£19.04	£4.46	£15.44	£11.50	£21.82	£52.28	£174.21
Total	£406.57	£118.69	£155.05	£182.73	£135.08	£57.20	£67.41	£68.12	£203.94		£2,999.62

Table 10: Horizon Year Comparison Expenditure 2019 £Million - With Sainsbury's Store

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total
Expenditure 2019	£435.26	£125.38	£165.91	£195.50	£144.28	£60.69	£70.76	£71.83	£212.47		£1,482.09
Sainsbury's	£8.77	£0.87	£3.51	£0.88	£0.87	£0.87	£0.00	£0.86	£0.00	£0.87	£17.50
Williams & Griffin	£7.29	£1.48	£2.73	£1.48	£1.98	£0.83	£0.51	£0.78	£0.33	£0.92	£18.34
Colchester	£255.93	£51.76	£95.75	£52.00	£69.65	£29.20	£18.11	£27.33	£12.04	£32.20	£643.96
Colchester food stores	£19.13	£0.37	£3.63	£0.19	£1.41	£0.58	£0.07	£0.69	£0.00	£1.37	£27.45
B&Q Cochester	£13.84	£1.00	£3.96	£0.31	£2.29	£0.24	£0.06	£0.29	£0.00	£1.16	£23.14
Colchester retail warehouses	£77.00	£12.33	£25.78	£8.54	£11.64	£7.75	£4.66	£10.67	£2.97	£8.49	£169.84
Tiptree	£0.43	£0.00	£0.00	£0.00	£0.00	£3.27	£0.14	£0.14	£0.42	£0.23	£4.65
West Mersea	£0.00	£0.00	£2.15	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.11	£2.27
Borough Total	£382.40	£67.79	£137.51	£63.40	£87.85	£42.75	£23.55	£40.76	£15.77	£45.36	£907.14
Braintree	£4.68	£0.50	£3.24	£1.54	£0.43	£7.61	£22.25	£12.34	£133.87	£81.54	£267.99
Chelmsford	£4.68	£0.12	£1.46	£0.58	£1.57	£4.58	£2.04	£0.70	£39.67	£1,073.41	£1,128.82
Clacton	£2.17	£2.88	£6.13	£117.00	£17.59	£0.00	£0.00	£0.00	£0.00	£7.63	£153.40
Frinton	£0.00	£0.00	£2.15	£0.98	£9.95	£0.00	£0.00	£0.00	£0.00	£0.69	£13.76
Ipswich	£18.30	£34.31	£6.15	£7.32	£6.56	£0.12	£0.21	£0.00	£0.21	£1,411.05	£1,484.22
Sudbury	£0.86	£2.99	£0.00	£0.00	£0.00	£0.90	£6.49	£5.89	£0.21	£158.50	£175.85
Other Outside Borough	£22.18	£16.79	£9.28	£4.69	£20.34	£4.73	£16.20	£12.13	£22.73	£55.55	£184.62
Total	£435.26	£125.38	£165.91	£195.50	£144.28	£60.69	£70.76	£71.83	£212.47		£3,186.99

Table 11: Horizon Year Comparison Expenditure 2019 £Million - With North Colchester UE

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total
Expenditure 2019	£435.26	£125.38	£165.91	£195.50	£144.28	£60.69	£70.76	£71.83	£212.47		£1,482.09
North Colchester UE	£6.60	£1.10	£0.10	£0.00	£0.00	£0.10	£0.45	£0.10	£0.10	£0.45	£9.00
Sainsbury's	£8.57	£0.85	£3.50	£0.88	£0.87	£0.87	£0.00	£0.86	£0.00	£0.87	£17.27
Williams & Griffin	£7.18	£1.46	£2.73	£1.48	£1.98	£0.83	£0.51	£0.78	£0.33	£0.92	£18.21
Colchester	£252.03	£51.16	£95.69	£52.00	£69.65	£29.14	£17.94	£27.28	£12.03	£32.19	£639.10
Colchester food stores	£18.41	£0.36	£3.62	£0.19	£1.41	£0.58	£0.07	£0.69	£0.00	£1.37	£26.70
B&Q Colchester	£13.74	£0.99	£3.96	£0.31	£2.29	£0.24	£0.06	£0.29	£0.00	£1.16	£23.03
Colchester retail warehouses	£75.83	£12.18	£25.76	£8.54	£11.64	£7.74	£4.61	£10.66	£2.97	£8.49	£168.42
Tiptree	£0.43	£0.00	£0.00	£0.00	£0.00	£3.27	£0.14	£0.14	£0.42	£0.23	£4.65
West Mersea	£0.00	£0.00	£2.15	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.11	£2.27
Borough Total	£382.79	£68.11	£137.52	£63.40	£87.85	£42.77	£23.78	£40.79	£15.85	£45.79	£899.64
Braintree	£4.64	£0.49	£3.23	£1.54	£0.43	£7.61	£22.15	£12.33	£133.81	£81.52	£267.76
Chelmsford	£4.64	£0.12	£1.46	£0.58	£1.57	£4.58	£2.03	£0.70	£39.66	£1,073.25	£1,128.58
Clacton	£2.17	£2.88	£6.13	£117.00	£17.59	£0.00	£0.00	£0.00	£0.00	£7.63	£153.40
Frinton	£0.00	£0.00	£2.15	£0.98	£9.95	£0.00	£0.00	£0.00	£0.00	£0.69	£13.76
Ipswich	£18.16	£34.11	£6.15	£7.32	£6.56	£0.12	£0.21	£0.00	£0.21	£1,410.83	£1,483.65
Sudbury	£0.85	£2.97	£0.00	£0.00	£0.00	£0.90	£6.46	£5.89	£0.21	£158.48	£175.76
Other Outside Borough	£22.01	£16.70	£9.28	£4.69	£20.34	£4.72	£16.13	£12.12	£22.72	£55.54	£184.24
Total	£435.26	£125.38	£165.91	£195.50	£144.28	£60.69	£70.76	£71.83	£212.47		£3,178.23

Table 12: Summary of Comparison Goods Impacts 2017 (£ millions)

Centre/Facilities	Base Year 2014	Design Year (no stores) 2017	Design Year (W&G) 2017	Design Year (B&Q reduced) 2017	Design Year (Sainsbury's) 2017	% Impact Cumulative 2017
Sainsbury's	n/a	n/a	n/a	n/a	£16.38	n/a
Williams & Griffin	n/a	n/a	£17.50	£17.54	£17.22	n/a
Colchester	£572.19	£629.34	£615.07	£616.18	£605.00	-3.9%
Colchester food stores	£24.25	£26.82	£26.59	£26.61	£25.72	-4.1%
B&Q Cochester	£24.64	£27.22	£27.06	£21.65	£21.65	-20.5%
Colchester retail warehouses	£143.44	£157.75	£156.86	£160.72	£159.18	0.9%
Tiptree	£4.04	£4.39	£4.39	£4.39	£4.39	-0.1%
West Mersea	£1.92	£2.12	£2.12	£2.12	£2.12	-0.2%
Borough Total	£770.48	£847.65	£849.59	£849.21	£851.67	
Braintree	£239.83	£255.92	£255.43	£255.46	£255.01	-0.4%
Chelmsford	£993.73	£1,063.94	£1,063.46	£1,063.57	£1,063.05	-0.1%
Clacton	£130.26	£143.62	£143.57	£143.58	£143.50	-0.1%
Frinton	£11.69	£12.89	£12.89	£12.89	£12.88	-0.1%
Ipswich	£1,279.86	£1,398.59	£1,397.74	£1,397.94	£1,396.74	-0.1%
Sudbury	£153.80	£165.79	£165.73	£165.74	£165.62	-0.1%
Other Outside Borough	£160.41	£174.27	£174.27	£174.28	£174.21	0.0%
Total	£3,740.07	£4,062.68	£4,062.68	£4,062.68	£4,062.68	

Table 13: Summary of Comparison Goods Impacts 2019 (£ millions)

Centre/Facilities	Base Year 2014	Horizon Year (with Sainsbury's) 2019	Horizon Year (with NCUE) 2019	NCUE Impact
North Colchester UE	n/a	n/a	£9.00	n/a
Sainsbury's	n/a	£17.50	£17.27	1.3%
Williams & Griffin	n/a	£18.34	£18.21	0.8%
Colchester	£572.19	£643.96	£639.10	0.8%
Colchester food stores	£24.25	£27.45	£26.70	2.8%
B&Q Cochester	£24.64	£23.14	£23.03	0.5%
Colchester retail warehouses	£143.44	£169.84	£168.42	0.8%
Tiptree	£4.04	£4.65	£4.65	0.0%
West Mersea	£1.92	£2.27	£2.27	0.0%
Borough Total	£770.48	£907.14	£908.64	
Braintree	£239.83	£267.99	£267.76	0.1%
Chelmsford	£993.73	£1,128.82	£1,128.58	0.0%
Clacton	£130.26	£153.40	£153.40	0.0%
Frinton	£11.69	£13.76	£13.76	0.0%
Ipswich	£1,279.86	£1,484.22	£1,483.65	0.0%
Sudbury	£153.80	£175.85	£175.76	0.0%
Other Outside Borough	£160.41	£184.62	£184.24	0.2%
Total	£3,740.07	£4,315.81	£3,407.17	



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