



# 9B: CONVENIENCE TABLES SCENARIO 1 LOW

**RETAIL FLOORSPACE NEED ASSESSMENT: CONVENIENCE GOODS: SCENARIO 1: LOW POPULATION PROJECTION  
(INCORPORATING ESTIMATES OF (ANY) UNDER / OVER TRADING AT THE BASE YEAR, 2010)**

**CONTENTS**

TABLE 1 - POPULATION CHANGE BY ZONE
TABLE 2 - EXPENDITURE ON CONVENIENCE GOODS PER HEAD OF POPULATION BY ZONE (INCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING)
TABLE 3 - EXPENDITURE ON CONVENIENCE GOODS PER HEAD OF POPULATION BY ZONE (EXCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING)
TABLE 4 - TOTAL AVAILABLE CONVENIENCE GOODS EXPENDITURE ZONE (EXCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING)
TABLE 5 - CONVENIENCE GOODS MARKET SHARES BY ZONE IN THE BASE YEAR, 2010 (COLUMN PERCENT)
TABLE 6 - ESTIMATED CONVENIENCE GOODS EXPENDITURE PATTERN AND CENTRE TURNOVER ESTIMATES IN THE BASE YEAR, 2010 (£ MILLION)
TABLE 7 - UNADJUSTED CONVENIENCE GOODS MARKET SHARES BY ZONE AT THE DESIGN YEARS, 2010 (COLUMN PERCENT)
TABLE 8 - CONVENIENCE GOODS EXPENDITURE PATTERN AND CENTRE TURNOVER ESTIMATES, 2016 (£ MILLION)
TABLE 9 - CALCULATION OF POTENTIAL CONVENIENCE GOODS HEADROOM EXPENDITURE, 2016 (£ MILLION)
TABLE 10 - RETAIL FLOORSPACE NEED AT 2016
TABLE 11 - CONVENIENCE GOODS EXPENDITURE PATTERN AND CENTRE TURNOVER ESTIMATES, 2021 (£ MILLION)
TABLE 12 - CALCULATION OF POTENTIAL CONVENIENCE GOODS HEADROOM EXPENDITURE, 2021 (£ MILLION)
TABLE 13 - RETAIL FLOORSPACE NEED AT 2021
TABLE 14 - CONVENIENCE GOODS EXPENDITURE PATTERN AND CENTRE TURNOVER ESTIMATES, 2026 (£ MILLION)
TABLE 15 - CALCULATION OF POTENTIAL CONVENIENCE GOODS HEADROOM EXPENDITURE, 2026 (£ MILLION)
TABLE 16 - RETAIL FLOORSPACE NEED AT 2026

**TABLE 1 - POPULATION CHANGE BY ZONE**

Zone	2010 Population (Base Year)	2016	2021	2026	Total Increase (2010-2026)	Percentage Increase (2010- 2026)
Zone 1	79,006	87,465	91,721	93,648	14,642	18.5%
Zone 2	69,495	71,254	71,868	72,527	3,032	4.4%
Zone 3	101,528	106,858	109,263	109,401	7,873	7.8%
Zone 4	77,268	84,138	90,140	94,354	17,087	22.1%
Zone 5	49,246	51,404	51,839	51,946	2,700	5.5%
Zone 6	83,650	87,483	98,888	113,735	30,084	36.0%
Zone 7	61,143	62,174	63,514	64,550	3,407	5.6%
Zone 8	85,771	90,268	93,096	94,943	9,172	10.7%
Zone 9	88,819	90,833	93,675	96,584	7,765	8.7%
Zone 10	69,657	72,640	73,833	74,800	5,143	7.4%
Zone 11	157,600	163,500	169,600	175,800	18,200	11.5%
Zone 12	83,100	88,400	93,500	98,200	15,100	18.2%
Zone 13	325,700	336,800	347,700	358,200	32,500	10.0%
Zone 14	409,500	428,400	445,000	461,100	51,600	12.6%
Zone 15	203,000	212,900	222,000	230,600	27,600	13.6%
Zone 16	512,900	548,800	578,500	605,800	92,900	18.1%

**Note:**

Population projections for zones 1 to 10 inclusive (those zones within Leeds District) have been provided by Leeds City Council. Population projections for the remaining zones 11-16 inclusive (those outside of Leeds District) are ONS figures.

**TABLE 2 - EXPENDITURE ON CONVENIENCE GOODS PER HEAD OF POPULATION BY ZONE (INCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING)**

Zone	Expenditure Per Head (£) <sup>(1)</sup>						Increase (£) (2010-2026)	Increase (%) (2010-2026)
	2008	2010 (base year)	2016	2021	2026			
Zone 1	1,619	1,577	1,634	1,706	1,784	207	13.1%	
Zone 2	1,939	1,888	1,957	2,043	2,137	248	13.1%	
Zone 3	1,946	1,895	1,964	2,050	2,144	249	13.1%	
Zone 4	1,832	1,784	1,849	1,930	2,019	234	13.1%	
Zone 5	1,781	1,735	1,798	1,877	1,963	228	13.1%	
Zone 6	1,889	1,840	1,907	1,990	2,082	242	13.1%	
Zone 7	2,091	2,036	2,111	2,203	2,304	268	13.1%	
Zone 8	2,024	1,971	2,043	2,133	2,230	259	13.1%	
Zone 9	1,902	1,852	1,920	2,004	2,096	243	13.1%	
Zone 10	1,875	1,826	1,893	1,976	2,066	240	13.1%	
Zone 11	1,991	1,939	2,010	2,098	2,194	255	13.1%	
Zone 12	1,966	1,915	1,985	2,071	2,166	252	13.1%	
Zone 13	1,862	1,813	1,880	1,962	2,052	238	13.1%	
Zone 14	1,821	1,773	1,838	1,919	2,007	233	13.1%	
Zone 15	1,686	1,642	1,702	1,776	1,858	216	13.1%	
Zone 16	1,744	1,699	1,761	1,838	1,922	223	13.1%	

**Note:**

Average consumer expenditure per head on convenience goods for 2008 has been estimated by Experian for each zone. The 2008 figures in each zone have been forecast forwards to 2010 (the base year) and the design years of 2016, 2021 and 2026 by using UK expenditure per head growth forecasts published by Experian (see Appendix 8G).

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

Zone	Expenditure Per Head (£) <sup>(1)</sup>						Increase (£) (2010-2026)	Increase (%) (2010-2026)
	2008	2010 (base year)	2016	2021	2026			
Zone 1	1,579	1,518	1,556	1,621	1,688	169	11.1%	
Zone 2	1,891	1,819	1,863	1,941	2,021	203	11.1%	
Zone 3	1,897	1,825	1,870	1,948	2,029	203	11.1%	
Zone 4	1,786	1,718	1,761	1,834	1,910	191	11.1%	
Zone 5	1,736	1,670	1,712	1,783	1,857	186	11.1%	
Zone 6	1,842	1,772	1,815	1,891	1,969	197	11.1%	
Zone 7	2,039	1,961	2,009	2,093	2,180	219	11.1%	
Zone 8	1,973	1,898	1,945	2,026	2,110	212	11.1%	
Zone 9	1,854	1,784	1,828	1,904	1,983	199	11.1%	
Zone 10	1,828	1,759	1,802	1,877	1,955	196	11.1%	
Zone 11	1,941	1,867	1,913	1,993	2,075	208	11.1%	
Zone 12	1,917	1,844	1,889	1,968	2,049	206	11.1%	
Zone 13	1,815	1,746	1,789	1,864	1,941	195	11.1%	
Zone 14	1,775	1,708	1,750	1,823	1,898	190	11.1%	
Zone 15	1,644	1,581	1,620	1,688	1,757	176	11.1%	
Zone 16	1,700	1,636	1,676	1,746	1,818	182	11.1%	

**Note:**

(1) Expenditure per head on convenience goods has been discounted by 3.7% (over the figures in Table 2) for the base year of 2010, to exclude non-store retail expenditure, which includes e-tailing. At 2016, 2021 and 2026 discounts of 4.8%, 5.0% and 5.4% respectively have been assumed. The SFT percentages are derived from in-depth research carried out by Experian (see Appendix 8H).

**TABLE 4 - TOTAL AVAILABLE CONVENIENCE GOODS EXPENDITURE ZONE (EXCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING)**

Zone	Total Available Expenditure (£m) <sup>(1)</sup>						Increase (£m) (2010-2026)	Increase % (2010-2026)
	2010 (Base year)	2016	2021	2026				
Zone 1	124.6	142.9	156.5	167.1	42.5	34.1%		
Zone 2	131.2	139.5	146.8	155.0	23.7	18.1%		
Zone 3	192.4	209.9	224.0	234.6	42.2	21.9%		
Zone 4	137.9	155.6	174.0	190.5	52.6	38.2%		
Zone 5	85.4	92.4	97.3	101.9	16.5	19.3%		
Zone 6	153.9	166.8	196.8	236.7	82.8	53.8%		
Zone 7	124.5	131.2	139.9	148.7	24.2	19.4%		
Zone 8	169.1	184.4	198.5	211.7	42.7	25.2%		
Zone 9	164.5	174.4	187.7	202.4	37.9	23.0%		
Zone 10	127.2	137.5	145.9	154.5	27.3	21.5%		
Zone 11	305.6	328.6	355.8	385.7	80.1	26.2%		
Zone 12	159.1	175.4	193.7	212.7	53.6	33.7%		
Zone 13	590.6	633.1	682.1	734.9	144.3	24.4%		
Zone 14	726.2	787.5	853.8	925.2	199.0	27.4%		
Zone 15	333.3	362.4	394.4	428.4	95.1	28.5%		
Zone 16	871.2	966.2	1063.0	1164.2	293.0	33.6%		
<b>TOTAL</b>	<b>4396.8</b>	<b>4787.9</b>	<b>5210.3</b>	<b>5654.4</b>	<b>1257.6</b>	<b>28.6%</b>		

Note:

(1) Total available expenditure totals for convenience goods are calculated as follows: Population (Table 1) multiplied by average consumer expenditure per head on convenience goods after making appropriate deductions for SFT (Table 3).

**TABLE 5 - CONVENIENCE GOODS MARKET SHARES BY ZONE IN THE BASE YEAR, 2010 (COLUMN PERCENT)**

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)															
	Study Area															
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16
<b>INSIDE LEEDS DISTRICT</b>																
Zone 1 - Inner East	68.5	17.0	2.3	2.5	0.0	37.0	15.0	0.0	1.7	0.3	0.0	0.5	1.1	0.8	0.0	0.0
Zone 2 - Inner North East	15.7	43.0	0.0	0.0	0.2	0.2	3.5	0.2	0.0	0.0	0.0	0.8	0.0	1.4	0.0	0.0
Zone 3 - Inner North West	0.7	0.0	36.4	1.7	22.6	0.0	0.3	0.1	0.0	2.4	0.0	0.5	0.0	0.0	0.0	0.0
Zone 4 - Inner South (City Centre)	9.0	4.0	12.6	68.6	1.6	0.6	1.2	1.9	5.6	5.2	0.0	0.8	0.4	0.4	0.3	0.6
Zone 5 - Inner West	0.6	0.5	0.2	0.0	45.0	0.2	0.0	1.4	1.3	17.3	0.0	0.0	0.0	0.0	0.0	0.0
Zone 6 - Outer East	2.1	0.4	0.0	0.0	0.0	51.3	1.6	0.0	3.8	0.0	0.0	5.2	0.9	0.0	0.0	0.0
Zone 7 - Outer North East	2.1	29.6	6.1	0.0	0.0	0.0	66.1	1.8	0.0	0.0	6.5	2.5	0.0	0.0	0.0	0.0
Zone 8 - Outer North West	0.0	2.7	32.5	0.0	1.3	0.0	2.4	84.6	0.0	1.1	0.0	0.0	0.0	0.0	0.0	19.7
Zone 9 - Outer South	0.0	2.8	2.4	27.1	1.2	7.4	0.4	0.6	83.6	3.5	0.0	0.0	1.2	5.4	0.0	0.0
Zone 10 - Outer West	0.0	0.0	0.9	0.0	24.9	0.7	1.9	7.7	0.0	42.2	0.0	0.0	0.0	0.0	0.0	1.5
<b>SUB TOTAL</b>	<b>98.7</b>	<b>100.0</b>	<b>93.4</b>	<b>99.9</b>	<b>96.6</b>	<b>97.4</b>	<b>92.4</b>	<b>98.3</b>	<b>96.0</b>	<b>72.0</b>	<b>6.5</b>	<b>10.3</b>	<b>3.6</b>	<b>8.0</b>	<b>0.3</b>	<b>21.8</b>
<b>OUTSIDE LEEDS DISTRICT</b>																
All Centres/Stores	1.3	0.0	6.6	0.1	3.4	2.6	7.6	1.7	4.0	28.0	93.5	89.7	96.4	92.0	99.7	78.2
<b>SUB TOTAL</b>	<b>1.3</b>	<b>0.0</b>	<b>6.6</b>	<b>0.1</b>	<b>3.4</b>	<b>2.6</b>	<b>7.6</b>	<b>1.7</b>	<b>4.0</b>	<b>28.0</b>	<b>93.5</b>	<b>89.7</b>	<b>96.4</b>	<b>92.0</b>	<b>99.7</b>	<b>78.2</b>
<b>TOTAL</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>

**Note:** The market share percentages are derived from the household telephone survey carried out within Leeds District and its shopping hinterland during July & August, 2010.





TABLE 7 - UNADJUSTED CONVENIENCE GOODS MARKET SHARES BY ZONE AT THE DESIGN YEARS, 2010 (COLUMN PERCENT)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)															
	Study Area															
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16
<b>INSIDE LEEDS DISTRICT</b>																
Zone 1 - Inner East	68.5	17.0	2.3	2.5	0.0	37.0	15.0	0.0	1.7	0.3	0.0	0.5	1.1	0.8	0.0	0.0
Zone 2 - Inner North East	15.7	43.0	0.0	0.0	0.0	0.2	3.5	0.2	0.0	0.0	0.0	0.8	0.0	1.4	0.0	0.0
Zone 3 - Inner North West	0.7	0.0	36.4	1.7	22.6	0.0	0.3	0.1	0.0	2.4	0.0	0.5	0.0	0.0	0.0	0.0
Zone 4 - Inner South (City Centre)	9.0	4.0	12.6	68.6	1.6	0.6	1.2	1.9	5.6	5.2	0.0	0.8	0.4	0.4	0.3	0.6
Zone 5 - Inner West	0.6	0.5	0.2	0.0	45.0	0.2	0.0	1.4	1.3	17.3	0.0	0.0	0.0	0.0	0.0	0.0
Zone 6 - Outer East	2.1	0.4	0.0	0.0	0.0	51.3	1.6	0.0	3.8	0.0	0.0	5.2	0.9	0.0	0.0	0.0
Zone 7 - Outer North East	2.1	29.6	6.1	0.0	0.0	0.0	66.1	1.8	0.0	0.0	6.5	2.5	0.0	0.0	0.0	0.0
Zone 8 - Outer North West	0.0	2.7	32.5	0.0	1.3	0.0	2.4	84.6	0.0	1.1	0.0	0.0	0.0	0.0	0.0	19.7
Zone 9 - Outer South	0.0	2.8	2.4	27.1	1.2	7.4	0.4	0.6	83.6	3.5	0.0	0.0	1.2	5.4	0.0	0.0
Zone 10 - Outer West	0.0	0.0	0.9	0.0	24.9	0.7	1.9	7.7	0.0	42.2	0.0	0.0	0.0	0.0	0.0	1.5
<b>SUB TOTAL</b>	<b>98.7</b>	<b>100.0</b>	<b>93.4</b>	<b>99.9</b>	<b>96.6</b>	<b>97.4</b>	<b>92.4</b>	<b>98.3</b>	<b>96.0</b>	<b>72.0</b>	<b>6.5</b>	<b>10.3</b>	<b>3.6</b>	<b>8.0</b>	<b>0.3</b>	<b>21.8</b>
<b>OUTSIDE LEEDS DISTRICT</b>																
All Centres/Stores	1.3	0.0	6.6	0.1	3.4	2.6	7.6	1.7	4.0	28.0	93.5	89.7	96.4	92.0	99.7	78.2
<b>SUB TOTAL</b>	<b>1.3</b>	<b>0</b>	<b>6.6</b>	<b>0.1</b>	<b>3.4</b>	<b>2.6</b>	<b>7.6</b>	<b>1.7</b>	<b>4.0</b>	<b>28</b>	<b>93.5</b>	<b>89.7</b>	<b>96.4</b>	<b>92</b>	<b>99.7</b>	<b>78.2</b>
<b>TOTAL</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>

Note: The market shares are the same as those set out in Table 5. We adopt the traditional "constant market shares approach".

**TABLE 8 - CONVENIENCE GOODS EXPENDITURE PATTERN AND CENTRE TURNOVER ESTIMATES, 2016 (£ MILLION)**

Retail Supply: Where the Money is Spent		Consumer Demand: Where the Money Comes From (Zone)																TOTAL HOUSEHOLD SURVEY AREA	Expenditure Drawn From Survey Area (Zones 1-16) A	Estimated Inflow Expenditure <sup>(1)</sup> B	Total Convenience Goods Turnover C = A + B
		Study Area																			
		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16				
<b>INSIDE LEEDS DISTRICT</b>																					
Zone 1 - Inner East	97.9	23.7	4.8	3.9	0.0	0.0	61.7	19.7	0.0	3.0	0.4	0.0	0.9	7.0	6.3	0.0	0.0	229.3	229.3	0.0	229.3
Zone 2 - Inner North East	22.4	60.0	0.0	0.0	0.0	0.3	4.6	0.4	0.0	0.0	0.0	1.4	0.0	11.0	0.0	0.0	0.0	100.1	100.1	0.0	100.1
Zone 3 - Inner North West	1.0	0.0	76.4	2.6	20.9	0.0	0.4	0.2	0.0	3.3	0.0	0.9	0.0	0.0	0.0	0.0	0.0	105.7	105.7	0.0	105.7
Zone 4 - Inner South (City Centre)	12.9	5.6	26.4	106.7	1.5	1.0	1.6	3.5	9.8	7.1	0.0	1.4	2.5	3.2	1.1	5.8	190.1	190.1	0.0	190.1	
Zone 5 - Inner West	0.9	0.7	0.4	0.0	41.6	0.3	0.0	2.6	2.3	23.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	72.5	72.5	0.0	72.5
Zone 6 - Outer East	3.0	0.6	0.0	0.0	0.0	85.6	2.1	0.0	6.6	0.0	0.0	9.1	5.7	0.0	0.0	0.0	0.0	112.7	112.7	0.0	112.7
Zone 7 - Outer North East	3.0	41.3	12.8	0.0	0.0	0.0	86.7	3.3	0.0	0.0	21.4	4.4	0.0	0.0	0.0	0.0	0.0	172.9	172.9	0.0	172.9
Zone 8 - Outer North West	0.0	3.8	68.2	0.0	1.2	0.0	3.1	156.0	0.0	1.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	424.2	424.2	0.0	424.2
Zone 9 - Outer South	0.0	3.9	5.0	42.2	1.1	12.3	0.5	1.1	145.8	4.8	0.0	0.0	7.6	42.5	0.0	0.0	0.0	266.9	266.9	0.0	266.9
Zone 10 - Outer West	0.0	0.0	1.9	0.0	23.0	1.2	2.5	14.2	0.0	58.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	115.3	115.3	0.0	115.3
<b>SUB TOTAL</b>	<b>141.1</b>	<b>139.5</b>	<b>196.1</b>	<b>155.4</b>	<b>89.3</b>	<b>162.5</b>	<b>121.3</b>	<b>181.3</b>	<b>167.4</b>	<b>99.0</b>	<b>21.4</b>	<b>18.1</b>	<b>22.8</b>	<b>63.0</b>	<b>1.1</b>	<b>210.6</b>	<b>1789.7</b>	<b>1789.7</b>	<b>0.0</b>	<b>1789.7</b>	
<b>OUTSIDE LEEDS DISTRICT</b>																					
All Centres/Stores	1.9	0.0	13.9	0.2	3.1	4.3	10.0	3.1	7.0	38.5	307.3	157.4	610.3	724.5	361.3	755.6	2998.2				
<b>SUB TOTAL</b>	<b>1.9</b>	<b>0.0</b>	<b>13.9</b>	<b>0.2</b>	<b>3.1</b>	<b>4.3</b>	<b>10.0</b>	<b>3.1</b>	<b>7.0</b>	<b>38.5</b>	<b>307.3</b>	<b>157.4</b>	<b>610.3</b>	<b>724.5</b>	<b>361.3</b>	<b>755.6</b>	<b>2998.2</b>				
<b>TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)</b>	<b>142.9</b>	<b>139.5</b>	<b>209.9</b>	<b>155.6</b>	<b>92.4</b>	<b>166.8</b>	<b>131.2</b>	<b>184.4</b>	<b>174.4</b>	<b>137.5</b>	<b>328.6</b>	<b>175.4</b>	<b>633.1</b>	<b>787.5</b>	<b>362.4</b>	<b>966.2</b>	<b>4787.9</b>				

**Notes:**  
 (1) For each cell, the monetary figure is derived by multiplying the 2016 available convenience goods expenditure in the zone (excl. SFT) (Table 4) by the unadjusted convenience goods market share of the specific centre in that zone (Table 7).  
 (2) Estimated by Colliers International. (See Section 8 in main report).

**TABLE 9 - CALCULATION OF POTENTIAL CONVENIENCE GOODS HEADROOM EXPENDITURE, 2016 (£ MILLION)**

Zone	2010 Turnover	2016 Turnover Potential	Turnover Allocation for Existing Retailers 2010-2016	Residual Turnover Potential by 2016	Potential Headroom Expenditure by 2016
	A (Table 6, C)	B (Table 8, C)	C <sup>(1)</sup>	D = B - C	E = D - A
<b>INSIDE LEEDS DISTRICT</b>					
Zone 1 - Inner East	207.4	229.3	1.2	228.1	20.7
Zone 2 - Inner North East	92.4	100.1	0.9	99.2	6.8
Zone 3 - Inner North West	97.0	105.7	1.0	104.7	7.8
Zone 4 - Inner South (City Centre)	170.9	190.1	2.7	187.4	16.5
Zone 5 - Inner West	67.0	72.5	0.7	71.8	4.8
Zone 6 - Outer East	103.9	112.7	1.4	111.3	7.4
Zone 7 - Outer North East	162.4	172.9	1.0	171.9	9.6
Zone 8 - Outer North West	386.2	424.2	2.5	421.8	35.5
Zone 9 - Outer South	247.9	266.9	2.7	264.2	16.3
Zone 10 - Outer West	106.2	115.3	1.0	114.3	8.1
<b>TOTAL: LEEDS DISTRICT</b>	<b>1,641.3</b>	<b>1,789.7</b>	<b>15.0</b>	<b>1,774.7</b>	<b>133.4</b>

**Notes:**

(1) We assume that all existing convenience goods floorspace at the base year (2010) will achieve a real sales productivity gain over the long-term. This assumption is based on research carried out by Experian (see Appendix 8j). The assumed sales productivity gains are applied to the estimated 2010 benchmark convenience goods turnover of each zone as set out in Table 6 (Column G).

TABLE 10 - RETAIL FLOORSPACE NEED AT 2016

Zone	Potential Headroom Expenditure by 2016 (£m)	Adjustment for Over / Under Trading in Base Year (£m)	Adjusted Headroom Expenditure by 2016 (£m)	Reduction in Expenditure due to Convenience Goods Floorspace Commitments (as at September 2010) <sup>(1)</sup>	Adjusted Residual Headroom Expenditure by 2016 (£m)	Assumed Sales Density in 2016 <sup>(2)</sup> (£ per sq.m net)	Estimated Retail Floorspace Need in 2016 (sq.m net)
	A	B	C = A + B	D	E = C - D	F	G = E / F
<b>INSIDE LEEDS DISTRICT</b>							
Zone 1 - Inner East	20.7	100.4	121.1	39.7	81.4	10,111	8,050
Zone 2 - Inner North East	6.8	7.7	14.5	32.7	-18.2	10,111	-1,800
Zone 3 - Inner North West	7.8	8.1	15.9	3.3	12.6	10,111	1,248
Zone 4 - Inner South (City Centre)	16.5	-75.5	-59.0	63.3	-122.3	10,111	-12,091
Zone 5 - Inner West	4.8	3.0	7.8	40.0	-32.2	10,111	-3,182
Zone 6 - Outer East	7.4	-19.1	-11.7	5.9	-17.6	10,111	-1,739
Zone 7 - Outer North East	9.6	75.4	84.9	0.0	84.9	10,111	8,401
Zone 8 - Outer North West	35.5	162.5	198.0	2.4	195.6	10,111	19,345
Zone 9 - Outer South	16.3	-0.4	15.9	8.4	7.5	10,111	746
Zone 10 - Outer West	8.1	13.7	21.8	15.2	6.6	10,111	649
<b>TOTAL : LEEDS DISTRICT</b>	<b>133.4</b>	<b>276.0</b>	<b>409.3</b>	<b>210.9</b>	<b>198.4</b>	<b>-</b>	<b>19,626</b>

**Notes:**

(1) Details and estimated 2016 benchmark turnovers of commitments are set out in Appendix X.

(2) The derivation of our 2016 benchmark sales density estimates are set out in Section 8 in the main report.

**TABLE 11 - CONVENIENCE GOODS EXPENDITURE PATTERN AND CENTRE TURNOVER ESTIMATES, 2021 (£ MILLION)**

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)																TOTAL HOUSEHOLD SURVEY AREA	Expenditure Drawn From Survey Area (Zones 1-16)	Estimated Inflow Expenditure <sup>(1)</sup>	Total Convenience Goods Turnover
	Study Area																			
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16				
<b>INSIDE LEEDS DISTRICT</b>																				
Zone 1 - Inner East	107.2	25.0	5.2	4.3	0.0	72.8	21.0	0.0	3.2	0.4	0.0	1.0	7.5	6.8	0.0	0.0	254.4	254.4	0.0	254.4
Zone 2 - Inner North East	24.6	63.1	0.0	0.0	0.0	0.4	4.9	0.4	0.0	0.0	0.0	1.5	0.0	0.0	0.0	0.0	106.9	106.9	0.0	106.9
Zone 3 - Inner North West	1.1	0.0	81.5	3.0	22.0	0.0	0.4	0.2	0.0	3.5	0.0	1.0	0.0	0.0	0.0	0.0	112.7	112.7	0.0	112.7
Zone 4 - Inner South (City Centre)	14.1	5.9	28.2	119.4	1.6	1.2	1.7	3.8	10.5	7.6	0.0	1.5	2.7	3.4	1.2	6.4	209.1	209.1	0.0	209.1
Zone 5 - Inner West	0.9	0.7	0.4	0.0	43.8	0.4	0.0	2.8	2.4	25.2	0.0	0.0	0.0	0.0	0.0	0.0	76.7	76.7	0.0	76.7
Zone 6 - Outer East	3.3	0.6	0.0	0.0	0.0	101.0	2.2	0.0	7.1	0.0	0.0	10.1	6.1	0.0	0.0	0.0	130.4	130.4	0.0	130.4
Zone 7 - Outer North East	3.3	43.5	13.7	0.0	0.0	0.0	92.5	3.6	0.0	23.1	4.8	0.0	0.0	0.0	0.0	0.0	184.4	184.4	0.0	184.4
Zone 8 - Outer North West	0.0	4.0	72.8	0.0	1.3	0.0	3.4	188.0	0.0	1.6	0.0	0.0	0.0	0.0	0.0	209.4	460.4	460.4	0.0	460.4
Zone 9 - Outer South	0.0	4.1	5.4	47.2	1.2	14.6	0.6	1.2	156.9	5.1	0.0	0.0	8.2	46.1	0.0	0.0	290.5	290.5	0.0	290.5
Zone 10 - Outer West	0.0	0.0	2.0	0.0	24.2	1.4	2.7	15.3	0.0	61.6	0.0	0.0	0.0	0.0	0.0	15.9	123.1	123.1	0.0	123.1
<b>SUB TOTAL</b>	<b>154.4</b>	<b>146.8</b>	<b>209.2</b>	<b>173.8</b>	<b>94.0</b>	<b>191.7</b>	<b>129.3</b>	<b>195.2</b>	<b>180.2</b>	<b>105.0</b>	<b>23.1</b>	<b>19.9</b>	<b>24.6</b>	<b>63.3</b>	<b>1.2</b>	<b>231.7</b>	<b>1948.5</b>	<b>1948.5</b>	<b>0.0</b>	<b>1948.5</b>
<b>OUTSIDE LEEDS DISTRICT</b>																				
All Centres/Stores	2.0	0.0	14.8	0.2	3.3	5.1	10.6	3.4	7.5	40.8	332.7	173.7	657.6	785.5	393.2	831.3	3261.7			
<b>SUB TOTAL</b>	<b>2.0</b>	<b>0.0</b>	<b>14.8</b>	<b>0.2</b>	<b>3.3</b>	<b>5.1</b>	<b>10.6</b>	<b>3.4</b>	<b>7.5</b>	<b>40.8</b>	<b>332.7</b>	<b>173.7</b>	<b>657.6</b>	<b>785.5</b>	<b>393.2</b>	<b>831.3</b>	<b>3261.7</b>			
<b>TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)</b>	<b>156.5</b>	<b>146.8</b>	<b>224.0</b>	<b>174.0</b>	<b>97.3</b>	<b>196.8</b>	<b>139.9</b>	<b>198.5</b>	<b>187.7</b>	<b>145.9</b>	<b>355.8</b>	<b>193.7</b>	<b>682.1</b>	<b>853.8</b>	<b>394.4</b>	<b>1063.0</b>	<b>5210.3</b>			

**Notes:**  
 For each cell, the monetary figure is derived by multiplying the 2021 available convenience goods expenditure in the zone (excl. SFT) (Table 4) by the unadjusted convenience goods market share of the convenience goods shopping in that zone (Table 7).  
 (1) Estimated by Colliers International (see Section 8 in main report).

**TABLE 12 - CALCULATION OF POTENTIAL CONVENIENCE GOODS HEADROOM EXPENDITURE, 2021 (£ MILLION)**

Zone	2010 Turnover	2021 Turnover Potential	Turnover Allocation for Existing Retailers 2010-2021	Residual Turnover Potential by 2021	Potential Headroom Expenditure by 2021
	A (Table 6, C)	B (Table 11, C)	C <sup>(1)</sup>	D = B - C	E = D - A
<b>INSIDE LEEDS DISTRICT</b>					
Zone 1 - Inner East	207.4	254.4	3.8	250.6	43.2
Zone 2 - Inner North East	92.4	106.9	3.0	103.9	11.4
Zone 3 - Inner North West	97.0	112.7	3.2	109.5	12.6
Zone 4 - Inner South (City Centre)	170.9	209.1	8.7	200.3	29.5
Zone 5 - Inner West	67.0	76.7	2.3	74.5	7.4
Zone 6 - Outer East	103.9	130.4	4.4	126.1	22.1
Zone 7 - Outer North East	162.4	184.4	3.1	181.4	19.0
Zone 8 - Outer North West	386.2	460.4	7.9	452.4	66.2
Zone 9 - Outer South	247.9	290.5	8.8	281.6	33.8
Zone 10 - Outer West	106.2	123.1	3.3	119.8	13.6
<b>TOTAL: LEEDS DISTRICT</b>	<b>1,641.3</b>	<b>1,948.5</b>	<b>48.5</b>	<b>1,900.0</b>	<b>258.7</b>

**Notes:**

(1) We assume that all existing convenience goods floorspace at the base year (2010) will achieve a real sales productivity gain over the long term. This assumption is based on research carried out by Experian (see Appendix 8I). The assumed sales productivity gains are applied to the estimated 2010 benchmark convenience goods turnovers of each centre as set out in Table 6 (Column G).

TABLE 13 - RETAIL FLOORSPACE NEED AT 2021

Zone	Potential Headroom Expenditure by 2021 (£m)	Adjustment for Over / Under Trading in Base Year (£m)	Adjusted Headroom Expenditure by 2021 (£m)	Reduction in Expenditure due to Convenience Goods Floorspace Commitments (as at September 2010) <sup>(1)</sup>	Adjusted Residual Headroom Expenditure by 2021 (£m)	Assumed Sales Density in 2021 <sup>(2)</sup> (£ per sq.m net)	Estimated Retail Floorspace Need in 2021 (sq.m net)
	A	B	C = A + B	D	E = C - D	F	G = E / F
<b>INSIDE LEEDS DISTRICT</b>							
Zone 1 - Inner East	43.2	100.4	143.6	40.7	102.9	10,355	9,935
Zone 2 - Inner North East	11.4	7.7	19.2	33.5	-14.3	10,355	-1,383
Zone 3 - Inner North West	12.6	8.1	20.7	3.6	17.1	10,355	1,653
Zone 4 - Inner South (City Centre)	29.5	-75.5	-46.0	64.8	-110.8	10,355	-10,609
Zone 5 - Inner West	7.4	3.0	10.5	40.9	-30.4	10,355	-2,939
Zone 6 - Outer East	22.1	-19.1	3.0	6.1	-3.1	10,355	-296
Zone 7 - Outer North East	19.0	75.4	94.4	0.0	94.4	10,355	9,112
Zone 8 - Outer North West	66.2	162.5	228.7	2.5	226.2	10,355	21,842
Zone 9 - Outer South	33.8	-0.4	33.4	8.6	24.8	10,355	2,394
Zone 10 - Outer West	13.6	13.7	27.3	15.6	11.7	10,355	1,128
<b>TOTAL: LEEDS DISTRICT</b>	<b>258.7</b>	<b>276.0</b>	<b>534.7</b>	<b>216.3</b>	<b>318.4</b>		<b>30,747</b>

**Notes:**

(1) Details and estimated 2021 turnovers of convenience goods floorspace commitments and proposals are set out in Appendix 9C.

(2) The derivation of our 2021 benchmark centre sales density estimates are set out in Section 8 in the main report.

TABLE 14 - CONVENIENCE GOODS EXPENDITURE PATTERN AND CENTRE TURNOVER ESTIMATES, 2026 (£ MILLION)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)																TOTAL HOUSEHOLD SURVEY AREA	Expenditure Drawn From Survey Area (Zones 1-16)	Estimated Inflow Expenditure <sup>(1)</sup>	Total Convenience Goods Turnover
	Study Area																			
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16				
<b>INSIDE LEEDS DISTRICT</b>																		A	B	C = A + B
Zone 1 - Inner East	114.4	26.3	5.4	4.8	0.0	87.6	22.3	0.0	3.4	0.5	0.0	1.1	8.1	7.4	0.0	0.0	281.3	0.0	281.3	
Zone 2 - Inner North East	26.2	66.6	0.0	0.0	0.0	0.5	5.2	0.4	0.0	0.0	0.0	1.7	0.0	13.0	0.0	0.0	113.6	0.0	113.6	
Zone 3 - Inner North West	1.2	0.0	85.4	3.2	23.0	0.0	0.4	0.2	0.0	3.7	0.0	1.1	0.0	0.0	0.0	0.0	118.3	0.0	118.3	
Zone 4 - Inner South (City Centre)	15.0	6.2	29.6	130.7	1.6	1.4	1.8	4.0	11.3	8.0	0.0	1.7	2.9	3.7	1.3	7.0	226.3	0.0	226.3	
Zone 5 - Inner West	1.0	0.8	0.5	0.0	45.9	0.5	0.0	3.0	2.6	26.7	0.0	0.0	0.0	0.0	0.0	0.0	80.9	80.9	80.9	
Zone 6 - Outer East	3.5	0.6	0.0	0.0	0.0	121.4	2.4	0.0	7.7	0.0	0.0	11.1	6.6	0.0	0.0	0.0	153.3	0.0	153.3	
Zone 7 - Outer North East	3.5	45.9	14.3	0.0	0.0	0.0	98.3	3.8	0.0	0.0	25.1	5.3	0.0	0.0	0.0	0.0	196.2	0.0	196.2	
Zone 8 - Outer North West	0.0	4.2	76.2	0.0	1.3	0.0	3.6	179.1	0.0	1.7	0.0	0.0	0.0	0.0	0.0	0.0	495.5	0.0	495.5	
Zone 9 - Outer South	0.0	4.3	5.6	51.6	1.2	17.5	0.6	1.3	169.2	5.4	0.0	8.8	50.0	0.0	0.0	0.0	315.6	0.0	315.6	
Zone 10 - Outer West	0.0	0.0	2.1	0.0	2.1	1.7	2.8	16.3	0.0	65.2	0.0	0.0	0.0	0.0	0.0	17.5	131.0	0.0	131.0	
<b>SUB TOTAL</b>	<b>164.9</b>	<b>155.0</b>	<b>219.1</b>	<b>190.3</b>	<b>98.5</b>	<b>230.6</b>	<b>137.4</b>	<b>208.1</b>	<b>194.3</b>	<b>111.3</b>	<b>25.1</b>	<b>21.9</b>	<b>26.5</b>	<b>74.0</b>	<b>1.3</b>	<b>253.8</b>	<b>2112.0</b>	<b>0.0</b>	<b>2112.0</b>	
<b>OUTSIDE LEEDS DISTRICT</b>																				
All Centres / Stores	2.2	0.0	15.5	0.2	3.5	6.2	11.3	3.6	8.1	43.3	360.6	190.8	708.5	851.2	427.1	910.4	3542.4			
<b>SUB TOTAL</b>	<b>2.2</b>	<b>0.0</b>	<b>15.5</b>	<b>0.2</b>	<b>3.5</b>	<b>6.2</b>	<b>11.3</b>	<b>3.6</b>	<b>8.1</b>	<b>43.3</b>	<b>360.6</b>	<b>190.8</b>	<b>708.5</b>	<b>851.2</b>	<b>427.1</b>	<b>910.4</b>	<b>3542.4</b>			
<b>TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)</b>	<b>167.1</b>	<b>155.0</b>	<b>234.6</b>	<b>190.5</b>	<b>101.9</b>	<b>236.7</b>	<b>148.7</b>	<b>211.7</b>	<b>202.4</b>	<b>154.5</b>	<b>385.7</b>	<b>212.7</b>	<b>734.9</b>	<b>925.2</b>	<b>428.4</b>	<b>1164.2</b>	<b>5654.4</b>			

Notes:  
 For each cell, the monetary figure is derived by multiplying the 2026 available convenience goods expenditure in the zone (excl. SFT) (Table 4) by the unadjusted convenience goods market share of the convenience goods shopping provision in that zone (Table 7).  
 (1) Estimated by Colliers International (see Section 8 in main report).



**TABLE 15 - CALCULATION OF POTENTIAL CONVENIENCE GOODS HEADROOM EXPENDITURE, 2026 (£ MILLION)**

Centre	2010 Turnover	2026 Turnover Potential	Turnover Allocation for Existing Retailers 2010-2026	Residual Turnover Potential by 2026	Potential Headroom Expenditure by 2026
	A (Table 6, C)	B (Table 14, C)	C <sup>(1)</sup>	D = B - C	E = D - A
<b>INSIDE LEEDS DISTRICT</b>					
Zone 1 - Inner East	207.4	281.3	6.6	274.7	67.3
Zone 2 - Inner North East	92.4	113.6	5.2	108.4	16.0
Zone 3 - Inner North West	97.0	118.3	5.5	112.8	15.8
Zone 4 - Inner South (City Centre)	170.9	226.3	15.2	211.1	40.2
Zone 5 - Inner West	67.0	80.9	3.9	77.0	9.9
Zone 6 - Outer East	103.9	153.3	7.6	145.7	41.8
Zone 7 - Outer North East	162.4	196.2	5.4	190.8	28.4
Zone 8 - Outer North West	386.2	495.5	13.8	481.7	95.5
Zone 9 - Outer South	247.9	315.6	15.3	300.3	52.4
Zone 10 - Outer West	106.2	131.0	5.7	125.3	19.1
<b>TOTAL: LEEDS DISTRICT</b>	<b>1,641.3</b>	<b>2,112.0</b>	<b>84.2</b>	<b>2,027.8</b>	<b>386.5</b>

**Notes:**

(1) We assume that all existing convenience goods floorspace at the base year (2010) will achieve a real sales productivity gain over the long term. This assumption is based on research carried out by Experian (see Appendix 8)). The assumed sales productivity gains are applied to the estimated 2010 benchmark convenience goods turnovers of each centre as set out in Table 6 (Column G).

**TABLE 16 - RETAIL FLOORSPACE NEED AT 2026**

Centre	Potential Headroom Expenditure by 2026 (£m)	Adjustment for Over / Under Trading in Base Year (£m)	Adjusted Headroom Expenditure by 2026 (£m)	Reduction in Expenditure due to Convenience Goods FloorSpace Commitments (as at September 2010) <sup>(1)</sup>	Adjusted Residual Headroom Expenditure by 2026 (£m)	Assumed Sales Density in 2026 <sup>(2)</sup> (£ per sq.m net)	Estimated Retail FloorSpace Need in 2026 (sq.m net)
	A	B	C = A + B	D	E = C - D	F	G = E / F
<b>INSIDE LEEDS DISTRICT</b>							
Zone 1 - Inner East	67.3	100.4	167.7	41.7	126.0	10.617	11,868
Zone 2 - Inner North East	16.0	7.7	23.7	34.3	-10.6	10.617	-999
Zone 3 - Inner North West	15.8	8.1	24.0	3.7	20.3	10.617	1,911
Zone 4 - Inner South (City Centre)	40.2	-75.5	-35.2	66.4	-101.6	10.617	-9,571
Zone 5 - Inner West	9.9	3.0	13.0	42.0	-29.0	10.617	-2,734
Zone 6 - Outer East	41.8	-19.1	22.7	6.2	16.5	10.617	1,556
Zone 7 - Outer North East	28.4	75.4	103.8	0.0	103.8	10.617	9,780
Zone 8 - Outer North West	95.5	162.5	257.9	2.6	255.3	10.617	24,051
Zone 9 - Outer South	52.4	-0.4	52.1	8.8	43.3	10.617	4,074
Zone 10 - Outer West	19.1	13.7	32.8	16.0	16.8	10.617	1,579
<b>TOTAL: LEEDS DISTRICT</b>	<b>386.5</b>	<b>276.0</b>	<b>662.5</b>	<b>221.7</b>	<b>440.8</b>		<b>41,515</b>

**Notes:**

- (1) Details and estimated 2026 turnovers of convenience goods floorspace commitments and proposals are set out in Appendix 9C.
- (2) The derivation of our 2026 benchmark centre sales density estimates are set out in Section 8 in the main report.