

# 9A: COMPARISON TABLES SCENARIO 1 LOW

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

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**TABLE 1 - POPULATION CHANGE BY ZONE**

| Zone         | 2010 Population<br>(Base Year) | 2016 Population  | 2021 Population  | 2026 Population  | Total Increase<br>(2010-2026) | Percentage<br>Increase<br>(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%                                 |
| <b>TOTAL</b> | <b>3,222,966</b>               | <b>3,387,835</b> | <b>3,531,971</b> | <b>3,569,028</b> | <b>338,805</b>                | <b>10.5%</b>                          |

**Notes:**

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 COMPARISON GOODS PER HEAD OF POPULATION BY ZONE (INCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING)**

| Zone    | Expenditure Per Head (£) <sup>(1)</sup> |                  |       |       |       |       | Increase (£)<br>(2010-2026) | Increase %<br>(2010-2026) |
|---------|---|------------------|-------|-------|-------|-------|-----------------------------|---------------------------|
|         | 2008                                    | 2010 (Base Year) | 2016  | 2021  | 2026  |       |                             |                           |
| Zone 1  | 2,330                                   | 2,325            | 2,681 | 3,087 | 3,561 | 1,236 | 53.1%                       |                           |
| Zone 2  | 3,040                                   | 3,034            | 3,497 | 4,027 | 4,646 | 1,612 | 53.1%                       |                           |
| Zone 3  | 2,778                                   | 2,772            | 3,196 | 3,680 | 4,245 | 1,473 | 53.1%                       |                           |
| Zone 4  | 2,606                                   | 2,601            | 2,998 | 3,452 | 3,983 | 1,382 | 53.1%                       |                           |
| Zone 5  | 2,597                                   | 2,592            | 2,988 | 3,440 | 3,969 | 1,377 | 53.1%                       |                           |
| Zone 6  | 2,925                                   | 2,919            | 3,365 | 3,875 | 4,470 | 1,551 | 53.1%                       |                           |
| Zone 7  | 3,562                                   | 3,555            | 4,098 | 4,719 | 5,444 | 1,889 | 53.1%                       |                           |
| Zone 8  | 3,283                                   | 3,276            | 3,777 | 4,349 | 5,017 | 1,741 | 53.1%                       |                           |
| Zone 9  | 3,016                                   | 3,010            | 3,470 | 3,995 | 4,609 | 1,599 | 53.1%                       |                           |
| Zone 10 | 2,903                                   | 2,897            | 3,340 | 3,846 | 4,436 | 1,539 | 53.1%                       |                           |
| Zone 11 | 3,179                                   | 3,173            | 3,657 | 4,211 | 4,858 | 1,686 | 53.1%                       |                           |
| Zone 12 | 3,199                                   | 3,193            | 3,680 | 4,238 | 4,889 | 1,696 | 53.1%                       |                           |
| Zone 13 | 2,815                                   | 2,809            | 3,239 | 3,729 | 4,302 | 1,493 | 53.1%                       |                           |
| Zone 14 | 2,828                                   | 2,822            | 3,254 | 3,746 | 4,322 | 1,500 | 53.1%                       |                           |
| Zone 15 | 2,845                                   | 2,839            | 3,273 | 3,769 | 4,348 | 1,509 | 53.1%                       |                           |
| Zone 16 | 2,739                                   | 2,733            | 3,151 | 3,628 | 4,186 | 1,452 | 53.1%                       |                           |

**Notes:**

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

**TABLE 3 - EXPENDITURE ON COMPARISON 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) |
|---------|---|-------|-------|-------|--|-------|--------------------------|------------------------|
|         | 2010 (Base Year)                        | 2016  | 2021  | 2026  |  |       |                          |                        |
| Zone 1  | 2,121                                   | 2,402 | 2,772 | 3,205 |  | 1,084 | 51.1%                    |                        |
| Zone 2  | 2,767                                   | 3,134 | 3,616 | 4,181 |  | 1,414 | 51.1%                    |                        |
| Zone 3  | 2,528                                   | 2,864 | 3,305 | 3,821 |  | 1,292 | 51.1%                    |                        |
| Zone 4  | 2,372                                   | 2,686 | 3,100 | 3,584 |  | 1,212 | 51.1%                    |                        |
| Zone 5  | 2,364                                   | 2,677 | 3,089 | 3,572 |  | 1,208 | 51.1%                    |                        |
| Zone 6  | 2,662                                   | 3,015 | 3,479 | 4,023 |  | 1,361 | 51.1%                    |                        |
| Zone 7  | 3,242                                   | 3,672 | 4,237 | 4,899 |  | 1,657 | 51.1%                    |                        |
| Zone 8  | 2,988                                   | 3,384 | 3,905 | 4,515 |  | 1,527 | 51.1%                    |                        |
| Zone 9  | 2,745                                   | 3,109 | 3,588 | 4,148 |  | 1,403 | 51.1%                    |                        |
| Zone 10 | 2,642                                   | 2,993 | 3,453 | 3,993 |  | 1,351 | 51.1%                    |                        |
| Zone 11 | 2,893                                   | 3,277 | 3,782 | 4,372 |  | 1,479 | 51.1%                    |                        |
| Zone 12 | 2,912                                   | 3,298 | 3,805 | 4,400 |  | 1,488 | 51.1%                    |                        |
| Zone 13 | 2,562                                   | 2,902 | 3,349 | 3,872 |  | 1,310 | 51.1%                    |                        |
| Zone 14 | 2,574                                   | 2,915 | 3,364 | 3,890 |  | 1,316 | 51.1%                    |                        |
| Zone 15 | 2,589                                   | 2,933 | 3,384 | 3,913 |  | 1,324 | 51.1%                    |                        |
| Zone 16 | 2,493                                   | 2,823 | 3,258 | 3,767 |  | 1,274 | 51.1%                    |                        |

(1) Expenditure per head on comparison goods has been discounted by 8.8% (over the figures in Table 2) for the base year of 2010, to exclude non-store retail which includes e-tailing. At 2016, 2021 and 2026, discounts of 10.4%, 10.2% and 10.0% respectively have been assumed. The SFT percentages are derived from in-depth research carried out by Experian (see Appendix 8H).

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

| Zone         | Total Available Expenditure (£m) <sup>(1)</sup> |               |               |                |  |               | Increase (£) (2010-2026) | Increase % (2010-2026) |
|--------------|---|---------------|---------------|----------------|--|---------------|--------------------------|------------------------|
|              | 2010 (Base Year)                                | 2016          | 2021          | 2026           |  |               |                          |                        |
| Zone 1       | 167.5   | 210.1         | 254.2         | 300.1          |  | 132.6         | 79.1%                    |                        |
| Zone 2       | 192.3   | 223.3         | 259.9         | 303.3          |  | 111.0         | 57.7%                    |                        |
| Zone 3       | 256.7   | 306.0         | 361.1         | 418.0          |  | 161.3         | 62.8%                    |                        |
| Zone 4       | 183.3   | 226.0         | 279.4         | 338.2          |  | 154.9         | 84.5%                    |                        |
| Zone 5       | 116.4   | 137.6         | 160.1         | 185.5          |  | 69.1          | 59.4%                    |                        |
| Zone 6       | 222.7   | 263.8         | 344.1         | 457.6          |  | 234.9         | 105.5%                   |                        |
| Zone 7       | 198.2   | 228.3         | 269.1         | 316.2          |  | 118.0         | 59.5%                    |                        |
| Zone 8       | 256.3   | 305.5         | 363.6         | 428.7          |  | 172.4         | 67.3%                    |                        |
| Zone 9       | 243.8   | 282.4         | 336.1         | 400.7          |  | 156.8         | 64.3%                    |                        |
| Zone 10      | 184.0   | 217.4         | 255.0         | 298.7          |  | 114.6         | 62.3%                    |                        |
| Zone 11      | 456.0   | 535.8         | 641.4         | 768.7          |  | 312.7         | 68.6%                    |                        |
| Zone 12      | 242.0   | 291.5         | 355.8         | 432.1          |  | 190.1         | 78.6%                    |                        |
| Zone 13      | 834.5   | 977.3         | 1164.3        | 1386.9         |  | 552.4         | 66.2%                    |                        |
| Zone 14      | 1054.0  | 1248.9        | 1497.0        | 1793.5         |  | 739.5         | 70.2%                    |                        |
| Zone 15      | 525.6   | 624.4         | 751.3         | 902.4          |  | 376.7         | 71.7%                    |                        |
| Zone 16      | 1278.6  | 1549.5        | 1884.9        | 2282.2         |  | 1003.6        | 78.5%                    |                        |
| <b>TOTAL</b> | <b>6412.0</b>                                   | <b>7627.8</b> | <b>9177.3</b> | <b>11012.7</b> |  | <b>4600.7</b> | <b>71.8%</b>             |                        |

**Notes:**

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

**TABLE 5 - TOTAL AVAILABLE COMPARISON GOODS EXPENDITURE ZONE (EXCLUDING EXPENDITURE BY SPECIAL FORMS OF TRADING) DISAGGREGATED BETWEEN NON BULKY AND BULKY COMPARISON GOODS**

| Zone            | Non-Bulky Comparison Goods (£m) | Bulky Comparison Goods <sup>(1)</sup> (£m) | Total Comparison Goods <sup>(2)</sup> (£m) |
|-----------------|---------------------------------|--|--|
|                 | A                               | B  | C = A + B                                  |
| Zone 1          | 118.1                           | 49.5                                       | 167.5                                      |
| Zone 2          | 134.5                           | 57.8                                       | 192.3                                      |
| Zone 3          | 179.5                           | 77.3                                       | 256.7                                      |
| Zone 4          | 128.5                           | 54.8                                       | 183.3                                      |
| Zone 5          | 81.6                            | 34.8                                       | 116.4                                      |
| Zone 6          | 155.8                           | 66.9                                       | 222.7                                      |
| Zone 7          | 136.3                           | 61.9                                       | 198.2                                      |
| Zone 8          | 177.7                           | 78.6                                       | 256.3                                      |
| Zone 9          | 170.7                           | 73.2                                       | 243.8                                      |
| Zone 10         | 128.7                           | 55.3                                       | 184.0                                      |
| <b>SUBTOTAL</b> | <b>1411.2</b>                   | <b>610.1</b>                               | <b>2021.3</b>                              |
| Zone 11         | 317.3                           | 138.7                                      | 456.0                                      |
| Zone 12         | 168.2                           | 73.7                                       | 242.0                                      |
| Zone 13         | 583.1                           | 251.4                                      | 834.5                                      |
| Zone 14         | 736.5                           | 317.5                                      | 1054.0                                     |
| Zone 15         | 367.3                           | 158.3                                      | 525.6                                      |
| Zone 16         | 894.4                           | 384.2                                      | 1278.6                                     |
| <b>SUBTOTAL</b> | <b>3066.8</b>                   | <b>1323.9</b>                              | <b>4390.7</b>                              |
| <b>TOTAL</b>    | <b>4478.0</b>                   | <b>1934.0</b>                              | <b>6412.0</b>                              |

**Notes:**

(1) For each zone, the total available comparison goods expenditure (excl. SFT) has been disaggregated into available spend on non-bulky and bulky comparison goods. This allocation is based on the consumer expenditure per head data provided by Experian for each zone (see Appendix 8G).

(2) Total comparison goods expenditure figures derived from Table 4.

**TABLE 6a - ESTIMATED NON BULKY COMPARISON GOODS CENTRE 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>WITHIN LEEDS DISTRICT</b>             |  |              |              |              |              |              |              |              |              |              |              |              |              |              |              |              |
| Zone 1 - Inner East                      | 2.8  | 1.1          | 0.0          | 0.0          | 0.7          | 2.1          | 2.4          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          |
| Zone 2 - Inner North East                | 0.0  | 0.0          | 0.5          | 0.0          | 0.4          | 0.0          | 0.2          | 0.2          | 0.0          | 0.0          | 0.0          | 0.3          | 0.4          | 0.0          | 0.0          | 0.0          |
| Zone 3 - Inner North West                | 0.0  | 1.1          | 0.0          | 0.0          | 1.7          | 0.0          | 0.0          | 1.2          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          |
| Zone 4 - Inner South (City Centre)       | 78.4   | 83.9         | 78.9         | 48.0         | 37.7         | 46.3         | 40.8         | 46.4         | 30.1         | 51.2         | 9.1          | 13.0         | 10.1         | 9.2          | 17.5         | 34.4         |
| Zone 5 - Inner West                      | 0.0  | 0.0          | 0.0          | 1.0          | 3.9          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          |
| Zone 6 - Outer East                      | 9.9  | 0.0          | 0.0          | 0.0          | 0.5          | 24.3         | 1.2          | 0.2          | 0.0          | 0.0          | 0.0          | 1.0          | 0.6          | 0.0          | 0.0          | 0.0          |
| Zone 7 - Outer North East                | 0.0  | 0.0          | 1.0          | 0.0          | 0.0          | 0.0          | 5.9          | 0.0          | 0.0          | 0.0          | 0.8          | 0.1          | 0.0          | 0.0          | 0.0          | 0.0          |
| Zone 8 - Outer North West                | 0.0  | 0.0          | 1.0          | 0.0          | 0.5          | 0.0          | 0.0          | 10.9         | 0.0          | 0.0          | 0.0          | 0.6          | 0.0          | 0.0          | 0.0          | 1.2          |
| Zone 9 - Outer South (White Rose Centre) | 8.5  | 10.1         | 9.8          | 46.9         | 33.5         | 18.6         | 13.0         | 19.4         | 54.7         | 32.3         | 0.4          | 8.7          | 28.1         | 20.7         | 19.8         | 20.4         |
| Zone 10 - Outer West                     | 0.0  | 0.0          | 3.1          | 0.0          | 17.7         | 0.0          | 1.0          | 2.6          | 0.0          | 10.5         | 0.0          | 0.0          | 0.0          | 0.0          | 0.6          | 0.0          |
| <b>SUB TOTAL</b>                         | <b>99.6</b>  | <b>96.2</b>  | <b>94.3</b>  | <b>95.9</b>  | <b>96.6</b>  | <b>91.3</b>  | <b>64.5</b>  | <b>80.9</b>  | <b>84.8</b>  | <b>94.0</b>  | <b>10.3</b>  | <b>23.7</b>  | <b>39.2</b>  | <b>29.9</b>  | <b>37.9</b>  | <b>56.0</b>  |
| <b>OUTSIDE LEEDS DISTRICT</b>            |  |              |              |              |              |              |              |              |              |              |              |              |              |              |              |              |
| All Centres/Stores                       | 0.4  | 3.8          | 5.7          | 4.1          | 3.4          | 8.7          | 35.5         | 19.1         | 15.2         | 6.0          | 89.7         | 76.3         | 60.8         | 70.1         | 62.1         | 44.0         |
| <b>SUB TOTAL</b>                         | <b>0.4</b>   | <b>3.8</b>   | <b>5.7</b>   | <b>4.1</b>   | <b>3.4</b>   | <b>8.7</b>   | <b>35.5</b>  | <b>19.1</b>  | <b>15.2</b>  | <b>6.0</b>   | <b>89.7</b>  | <b>76.3</b>  | <b>60.8</b>  | <b>70.1</b>  | <b>62.1</b>  | <b>44.0</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> |

**Notes:**

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 6b - ESTIMATED BULKY COMPARISON GOODS CENTRE 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>WITHIN LEEDS DISTRICT</b>             |  |              |              |              |              |              |              |              |              |              |              |              |              |              |              |              |
| Zone 1 - Inner East                      | 12.2   | 2.4          | 0.0          | 1.0          | 0.0          | 14.2         | 25.9         | 1.8          | 0.0          | 1.4          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          |
| Zone 2 - Inner North East                | 4.8  | 7.1          | 3.6          | 0.0          | 0.0          | 1.7          | 6.3          | 2.3          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          |
| Zone 3 - Inner North West                | 2.4  | 2.4          | 4.8          | 0.0          | 4.7          | 1.2          | 0.7          | 1.0          | 0.0          | 0.0          | 0.3          | 0.0          | 0.0          | 0.7          | 0.0          | 0.0          |
| Zone 4 - Inner South (City Centre)       | 37.8   | 25.0         | 70.9         | 85.4         | 43.4         | 34.9         | 10.6         | 7.5          | 54.9         | 33.1         | 4.1          | 3.1          | 3.1          | 2.2          | 3.1          | 1.0          |
| Zone 5 - Inner West                      | 0.0  | 0.0          | 0.0          | 0.0          | 2.1          | 0.0          | 0.2          | 0.0          | 0.0          | 2.9          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          |
| Zone 6 - Outer East                      | 2.4  | 0.0          | 0.0          | 0.0          | 0.9          | 11.7         | 3.3          | 0.0          | 1.3          | 0.0          | 0.0          | 1.3          | 0.0          | 0.0          | 0.0          | 0.0          |
| Zone 7 - Outer North East                | 0.0  | 4.7          | 5.4          | 0.0          | 0.0          | 0.0          | 23.8         | 17.6         | 0.0          | 0.0          | 1.5          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          |
| Zone 8 - Outer North West                | 0.0  | 0.0          | 7.1          | 0.0          | 3.0          | 1.2          | 0.9          | 54.8         | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          | 5.9          |
| Zone 9 - Outer South (White Rose Centre) | 0.0  | 2.4          | 2.4          | 12.5         | 5.1          | 2.3          | 0.2          | 0.0          | 8.7          | 1.3          | 2.8          | 0.6          | 0.7          | 0.1          | 0.0          | 0.0          |
| Zone 10 - Outer West                     | 0.0  | 0.0          | 4.8          | 0.0          | 2.8          | 0.0          | 0.4          | 0.0          | 1.2          | 20.0         | 0.0          | 0.7          | 0.0          | 0.7          | 3.1          | 0.0          |
| <b>SUB TOTAL</b>                         | <b>59.6</b>  | <b>44.0</b>  | <b>99.0</b>  | <b>98.9</b>  | <b>62.0</b>  | <b>67.2</b>  | <b>72.3</b>  | <b>85.0</b>  | <b>66.1</b>  | <b>58.7</b>  | <b>8.7</b>   | <b>5.7</b>   | <b>3.8</b>   | <b>3.7</b>   | <b>6.2</b>   | <b>6.9</b>   |
| <b>OUTSIDE LEEDS DISTRICT</b>            |  |              |              |              |              |              |              |              |              |              |              |              |              |              |              |              |
| All Centres / Stores                     | 40.4   | 56.0         | 1.0          | 1.1          | 38.0         | 32.8         | 27.7         | 15.0         | 33.9         | 41.3         | 91.3         | 94.3         | 96.2         | 96.3         | 93.8         | 93.1         |
| <b>SUB TOTAL</b>                         | <b>40.4</b>  | <b>56.0</b>  | <b>1.0</b>   | <b>1.1</b>   | <b>38.0</b>  | <b>32.8</b>  | <b>27.7</b>  | <b>15.0</b>  | <b>33.9</b>  | <b>41.3</b>  | <b>91.3</b>  | <b>94.3</b>  | <b>96.2</b>  | <b>96.3</b>  | <b>93.8</b>  | <b>93.1</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> |

**Notes:**

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 7a - ESTIMATED NON BULKY COMPARISON GOODS EXPENDITURE PATTERN AND CENTRE TURNOVER ESTIMATES IN THE BASE YEAR, 2010 (£ 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 Comparison 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>WITHIN LEEDS DISTRICT</b>                                      |  |              |              |              |             |              |              |              |              |              |              |              |              |              |              |              |                             | A   | B   | C = A + B                       |
| Zone 1 - Inner East   | 3.3  | 1.5          | 0.0          | 0.0          | 0.6         | 3.3          | 3.3          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          | 11.9                        | 11.9  | 0.0   | 11.9                            |
| Zone 2 - Inner North East   | 0.0  | 0.0          | 0.9          | 0.0          | 0.3         | 0.0          | 0.3          | 0.4          | 0.0          | 0.0          | 0.0          | 0.5          | 0.0          | 0.0          | 0.0          | 0.0          | 4.7                         | 4.7   | 0.0   | 4.7                             |
| Zone 3 - Inner North West   | 0.0  | 1.5          | 0.0          | 0.0          | 1.4         | 0.0          | 0.0          | 2.1          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          | 5.0                         | 5.0   | 0.0   | 5.0                             |
| Zone 4 - Inner South (City Centre)                                | 92.6   | 112.8        | 141.6        | 61.7         | 30.8        | 72.1         | 55.6         | 82.4         | 51.4         | 65.9         | 28.9         | 21.9         | 58.9         | 67.8         | 64.3         | 307.7        | 1316.2                      | 1316.2  | 0.0   | 1316.2                          |
| Zone 5 - Inner West   | 0.0  | 0.0          | 0.0          | 1.3          | 3.2         | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          | 4.5                         | 4.5   | 0.0   | 4.5                             |
| Zone 6 - Outer East   | 11.7   | 0.0          | 0.0          | 0.0          | 0.4         | 37.9         | 1.6          | 0.4          | 0.0          | 0.0          | 0.0          | 1.7          | 3.5          | 0.0          | 0.0          | 0.0          | 57.1                        | 57.1  | 0.0   | 57.1                            |
| Zone 7 - Outer North East   | 0.0  | 0.0          | 1.8          | 0.0          | 0.0         | 0.0          | 8.0          | 0.0          | 0.0          | 0.0          | 2.5          | 0.2          | 0.0          | 0.0          | 0.0          | 0.0          | 12.5                        | 12.5  | 0.0   | 12.5                            |
| Zone 8 - Outer North West   | 0.0  | 0.0          | 1.8          | 0.0          | 0.4         | 0.0          | 0.0          | 19.4         | 0.0          | 0.0          | 0.0          | 1.0          | 0.0          | 0.0          | 0.0          | 10.7         | 33.3                        | 33.3  | 0.0   | 33.3                            |
| Zone 9 - Outer South (White Rose Centre)                          | 10.0   | 13.6         | 17.6         | 60.3         | 27.3        | 29.0         | 17.7         | 34.5         | 93.3         | 41.6         | 1.3          | 14.6         | 163.8        | 152.4        | 72.7         | 182.5        | 932.3                       | 932.3   | 0.0   | 932.3                           |
| Zone 10 - Outer West  | 0.0  | 0.0          | 5.6          | 0.0          | 14.4        | 0.0          | 1.4          | 4.6          | 0.0          | 13.5         | 0.0          | 0.0          | 0.0          | 0.0          | 2.2          | 0.0          | 41.7                        | 41.7  | 0.0   | 41.7                            |
| <b>SUB TOTAL</b>  | <b>117.6</b>                                       | <b>129.4</b> | <b>169.2</b> | <b>123.2</b> | <b>78.8</b> | <b>142.2</b> | <b>87.9</b>  | <b>143.7</b> | <b>144.7</b> | <b>121.0</b> | <b>32.7</b>  | <b>39.9</b>  | <b>228.6</b> | <b>220.2</b> | <b>139.2</b> | <b>500.9</b> | <b>2419.2</b>               | <b>2419.2</b>                                   | <b>0.0</b>                                  | <b>2419.2</b>                   |
| <b>OUTSIDE LEEDS DISTRICT</b>                                     |  |              |              |              |             |              |              |              |              |              |              |              |              |              |              |              |                             |   |   |                                 |
| All Centres / Stores  | 0.5  | 5.1          | 10.2         | 5.3          | 2.8         | 13.6         | 48.4         | 33.9         | 25.9         | 7.7          | 284.6        | 128.3        | 354.5        | 516.3        | 228.1        | 393.5        | 2058.8                      |   |   |                                 |
| <b>SUB TOTAL</b>  | <b>0.5</b>   | <b>5.1</b>   | <b>10.2</b>  | <b>5.3</b>   | <b>2.8</b>  | <b>13.6</b>  | <b>48.4</b>  | <b>33.9</b>  | <b>25.9</b>  | <b>7.7</b>   | <b>284.6</b> | <b>128.3</b> | <b>354.5</b> | <b>516.3</b> | <b>228.1</b> | <b>393.5</b> | <b>2058.8</b>               |   |   |                                 |
| <b>TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA)</b> | <b>118.1</b>                                       | <b>134.5</b> | <b>179.5</b> | <b>128.5</b> | <b>81.6</b> | <b>155.8</b> | <b>136.3</b> | <b>177.7</b> | <b>170.7</b> | <b>128.7</b> | <b>317.3</b> | <b>168.2</b> | <b>583.1</b> | <b>736.5</b> | <b>367.3</b> | <b>894.4</b> | <b>4478.0</b>               |   |   |                                 |

**Notes:**

For each cell, the monetary figure is derived by multiplying the 2010 available non-bulky comparison goods expenditure by Zone (excluding SFT) (Table 5) by the market share of the non-bulky comparison goods shopping provision in that zone (Table 6a).  
 (1) Estimated by Colliers International. (See Section 8 in main report).

**TABLE 7b - ESTIMATED BULKY COMPARISON GOODS EXPENDITURE PATTERN AND CENTRE TURNOVER ESTIMATES IN THE BASE YEAR, 2010 (£ 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 <sup>(1)</sup> Expenditure B | Total Comparison 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>WITHIN LEEDS DISTRICT</b>                                      |  |             |             |             |             |             |             |             |             |             |              |             |              |              |              |              |                             |   |   |   |
| Zone 1 - Inner East   | 6.0  | 1.4         | 0.0         | 0.5         | 0.0         | 0.0         | 16.0        | 1.4         | 0.0         | 0.8         | 0.0          | 0.0         | 0.0          | 0.0          | 0.0          | 0.0          | 35.7                        | 35.7  | 0.0   | 35.7                                      |
| Zone 2 - Inner North East   | 2.4  | 4.1         | 2.8         | 0.0         | 0.0         | 1.1         | 3.9         | 1.8         | 0.0         | 0.0         | 0.4          | 0.0         | 0.0          | 0.0          | 0.0          | 0.0          | 16.1                        | 16.1  | 0.0   | 16.1                                      |
| Zone 3 - Inner North West   | 1.2  | 1.4         | 3.7         | 0.0         | 1.6         | 0.8         | 0.4         | 0.8         | 0.0         | 0.0         | 0.0          | 0.0         | 2.2          | 0.0          | 0.0          | 0.0          | 12.6                        | 12.6  | 0.0   | 12.6                                      |
| Zone 4 - Inner South (City Centre)                                | 18.7   | 14.5        | 54.8        | 46.8        | 15.1        | 23.4        | 6.6         | 5.9         | 40.2        | 18.3        | 5.7          | 2.3         | 7.8          | 7.0          | 4.9          | 3.8          | 275.6                       | 275.6   | 0.0   | 275.6                                     |
| Zone 5 - Inner West   | 0.0  | 0.0         | 0.0         | 0.0         | 0.7         | 0.0         | 0.1         | 0.0         | 0.0         | 1.6         | 0.0          | 0.0         | 0.0          | 0.0          | 0.0          | 0.0          | 2.5                         | 2.5   | 0.0   | 2.5                                       |
| Zone 6 - Outer East   | 1.2  | 0.0         | 0.0         | 0.0         | 0.3         | 7.8         | 2.0         | 0.0         | 1.0         | 0.0         | 0.0          | 1.0         | 0.0          | 0.0          | 0.0          | 0.0          | 13.3                        | 13.3  | 0.0   | 13.3                                      |
| Zone 7 - Outer North East   | 0.0  | 2.7         | 4.2         | 0.0         | 0.0         | 0.0         | 14.7        | 13.8        | 0.0         | 0.0         | 2.1          | 0.0         | 0.0          | 0.0          | 0.0          | 0.0          | 37.5                        | 37.5  | 0.0   | 37.5                                      |
| Zone 8 - Outer North West   | 0.0  | 0.0         | 5.5         | 0.0         | 1.0         | 0.8         | 0.6         | 43.1        | 0.0         | 0.0         | 0.0          | 0.0         | 0.0          | 0.0          | 0.0          | 22.7         | 73.6                        | 73.6  | 0.0   | 73.6                                      |
| Zone 9 - Outer South (White Rose Centre)                          | 0.0  | 1.4         | 1.9         | 6.8         | 1.8         | 1.5         | 0.1         | 0.0         | 6.4         | 0.7         | 3.9          | 0.4         | 1.8          | 0.3          | 0.0          | 0.0          | 27.0                        | 27.0  | 0.0   | 27.0                                      |
| Zone 10 - Outer West  | 0.0  | 0.0         | 3.7         | 0.0         | 1.0         | 0.0         | 0.2         | 0.0         | 0.9         | 11.1        | 0.0          | 0.5         | 0.0          | 2.2          | 4.9          | 0.0          | 24.5                        | 24.5  | 0.0   | 24.5                                      |
| <b>SUB TOTAL</b>  | <b>29.5</b>  | <b>28.4</b> | <b>76.5</b> | <b>54.2</b> | <b>21.6</b> | <b>45.0</b> | <b>44.8</b> | <b>66.8</b> | <b>48.4</b> | <b>32.5</b> | <b>12.1</b>  | <b>4.2</b>  | <b>9.6</b>   | <b>11.7</b>  | <b>9.8</b>   | <b>26.5</b>  | <b>518.5</b>                | <b>518.5</b>                                      | <b>0.0</b>                                    | <b>518.5</b>                              |
| <b>OUTSIDE LEEDS DISTRICT</b>                                     |  |             |             |             |             |             |             |             |             |             |              |             |              |              |              |              |                             |   |   |   |
| All Centres / Stores  | 20.0   | 32.4        | 0.8         | 0.6         | 13.2        | 22.0        | 17.2        | 11.8        | 24.8        | 22.9        | 126.6        | 69.5        | 241.8        | 305.8        | 148.5        | 357.7        | 1415.5                      |   |   | 1415.5                                    |
| <b>SUB TOTAL</b>  | <b>20.0</b>  | <b>32.4</b> | <b>0.8</b>  | <b>0.6</b>  | <b>13.2</b> | <b>22.0</b> | <b>17.2</b> | <b>11.8</b> | <b>24.8</b> | <b>22.9</b> | <b>126.6</b> | <b>69.5</b> | <b>241.8</b> | <b>305.8</b> | <b>148.5</b> | <b>357.7</b> | <b>1415.5</b>               |   |   | <b>1415.5</b>                             |
| <b>TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA)</b> | <b>49.5</b>  | <b>57.8</b> | <b>77.3</b> | <b>54.8</b> | <b>34.8</b> | <b>66.9</b> | <b>61.9</b> | <b>78.6</b> | <b>73.2</b> | <b>55.3</b> | <b>138.7</b> | <b>73.7</b> | <b>251.4</b> | <b>317.5</b> | <b>158.3</b> | <b>384.2</b> | <b>1934.0</b>               |   |   | <b>1934.0</b>                             |

**Notes:**  
 For each cell, the monetary figure is derived by multiplying the 2010 available bulky comparison goods expenditure by Zone (excluding SFT) (Table 5) by the market share of the bulky comparison goods shopping provision in that zone (Table 6b).  
 (1) Estimated by Colliers International (See Section 8 in main report).

TABLE 8 - ESTIMATED ALL COMPARISON GOODS EXPENDITURE PATTERN AND CENTRE TURNOVER ESTIMATES IN THE BASE YEAR, 2010 (£ 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 Comparison Goods Turnover C = A + B | Comparison Goods Floorspace (sqm. net) (2) | Average Sales Density (£ per sqm. net) | Benchmark Average Sales Density (£ per sqm. net) <sup>(3)</sup> | Benchmark Comparison Goods Turnover (£m) | Extent of Any Over/Under Trading (£m) |  |  |  |
|---|--|--------|--------|--------|--------|--------|--------|--------|--------|---------|---------|---------|---------|---------|---------|---------|-----------------------------|---|---|---|--|--|---|--|---------------------------------------|--|--|--|
|   | 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>WITHIN LEEDS DISTRICT</b>                                      | 9.3  | 2.9    | 0.0    | 0.5    | 0.6    | 12.8   | 19.3   | 1.4    | 0.0    | 0.8     | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     | 47.6                        | 47.6  | 0.0   | 47.6                                      | 15,203                                     | 31.51                                  | 3,953   | 60.1                                     | -12.5                                 |  |  |  |
| Zone 1 - Inner East   | 2.4  | 4.1    | 3.7    | 0.0    | 0.3    | 1.1    | 4.2    | 2.2    | 0.0    | 0.0     | 0.5     | 2.3     | 0.0     | 0.0     | 0.0     | 0.0     | 20.8                        | 20.8  | 0.0   | 17.6                                      | 10,121                                     | 20.55                                  | 2,421   | 24.5                                     | -3.7                                  |  |  |  |
| Zone 2 - Inner North East   | 1.2  | 2.9    | 3.7    | 0.0    | 3.0    | 0.8    | 0.4    | 2.9    | 0.0    | 0.0     | 0.4     | 0.0     | 2.2     | 0.0     | 0.0     | 0.0     | 17.6                        | 17.6  | 0.0   | 1591.8                                    | 15,805                                     | 11.12                                  | 3,182   | 50.3                                     | -32.7                                 |  |  |  |
| Zone 3 - Inner North West   | 111.3  | 127.3  | 186.4  | 108.5  | 45.9   | 62.2   | 88.3   | 91.5   | 84.2   | 34.6    | 24.2    | 66.7    | 74.7    | 89.2    | 311.5   | 1591.8  | 1591.8                      | 1591.8  | 0.0   | 1591.8                                    | 145,125                                    | 10.969                                 | 5,992   | 859.6                                    | 722.2                                 |  |  |  |
| Zone 4 - Inner South (City Centre)                                | 0.0  | 0.0    | 0.0    | 1.3    | 3.9    | 0.0    | 0.1    | 0.0    | 0.0    | 1.6     | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     | 6.9                         | 6.9   | 0.0   | 6.9                                       | 5,414                                      | 12.80                                  | 3,011   | 16.3                                     | -9.4                                  |  |  |  |
| Zone 5 - Inner West   | 12.9   | 0.0    | 0.0    | 0.0    | 0.7    | 45.7   | 3.1    | 0.4    | 1.0    | 0.0     | 2.6     | 3.5     | 0.0     | 0.0     | 0.0     | 0.0     | 70.4                        | 70.4  | 0.0   | 70.4                                      | 16,501                                     | 41.66                                  | 3,615   | 61.1                                     | 9.3                                   |  |  |  |
| Zone 6 - Outer East   | 0.0  | 2.7    | 6.0    | 0.0    | 0.0    | 0.0    | 22.8   | 13.8   | 0.0    | 4.6     | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     | 0.0     | 50.1                        | 50.1  | 0.0   | 106.9                                     | 10,059                                     | 4.960                                  | 3,317   | 33.5                                     | 16.6                                  |  |  |  |
| Zone 7 - Outer North East   | 0.0  | 0.0    | 7.3    | 0.0    | 1.5    | 0.8    | 0.6    | 62.4   | 0.0    | 0.0     | 1.0     | 0.2     | 0.0     | 0.0     | 0.0     | 0.0     | 106.9                       | 106.9   | 0.0   | 106.9                                     | 28,685                                     | 37.28                                  | 3,197   | 91.7                                     | 15.2                                  |  |  |  |
| Zone 8 - Outer North West   | 10.0   | 15.0   | 19.4   | 67.1   | 29.1   | 30.5   | 17.8   | 34.5   | 99.7   | 42.3    | 5.2     | 15.1    | 165.6   | 152.8   | 72.7    | 182.5   | 959.3                       | 959.3   | 0.0   | 959.3                                     | 50,459                                     | 19.007                                 | 6,188   | 312.3                                    | 647.0                                 |  |  |  |
| Zone 9 - Outer South (White Rose Centre)                          | 0.0  | 0.0    | 9.3    | 0.0    | 15.4   | 0.0    | 1.6    | 4.6    | 0.9    | 24.6    | 0.0     | 0.5     | 0.0     | 2.2     | 7.1     | 66.2    | 66.2                        | 0.0   | 66.2  | 20,059                                    | 32.95                                      | 4,219                                  | 3.5   | 62.7                                     |                                       |  |  |  |
| Zone 10 - Outer West  | 147.1  | 154.8  | 245.7  | 177.4  | 100.4  | 187.2  | 132.7  | 210.6  | 193.1  | 153.5   | 44.7    | 44.1    | 238.1   | 232.0   | 149.0   | 527.4   | 2937.7                      | 2937.7  | 0.0   | 2937.7                                    | 317,925                                    | -                                      | -   | 1522.9                                   | 1414.8                                |  |  |  |
| <b>OUTSIDE LEEDS DISTRICT</b>                                     |  |        |        |        |        |        |        |        |        |         |         |         |         |         |         |         |                             |   |   |   |  |  |   |  |                                       |  |  |  |
| All Centres / Stores  | 20.5   | 37.5   | 11.0   | 5.9    | 16.0   | 35.5   | 65.5   | 45.7   | 50.7   | 30.6    | 411.2   | 197.9   | 596.3   | 822.1   | 376.6   | 751.2   | 3474.3                      | 3474.3  |   |   |  |  |   |  |                                       |  |  |  |
| <b>SUB TOTAL</b>  | 20.5   | 37.5   | 11.0   | 5.9    | 16.0   | 35.5   | 65.5   | 45.7   | 50.7   | 30.6    | 411.2   | 197.9   | 596.3   | 822.1   | 376.6   | 751.2   | 3474.3                      | 3474.3  |   |   |  |  |   |  |                                       |  |  |  |
| <b>TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA)</b> | 167.5  | 192.3  | 256.7  | 183.3  | 116.4  | 222.7  | 198.2  | 256.3  | 243.8  | 184.0   | 456.0   | 242.0   | 834.5   | 1,054.0 | 525.6   | 1,278.6 | 6412.0                      | 6412.0  |   |   |  |  |   |  |                                       |  |  |  |

Notes:  
 (1) Sum of inflow expenditures at Tables 7a and 7b.  
 (2) Retail floorspace stock totals based largely on data provided by Leeds City Council.  
 (3) Benchmark sales densities estimated by Colliers International (see Appendix 8J for full details).

**TABLE 9a - ALL COMPARISON GOODS CENTRE MARKET SHARES BY ZONE AT 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>WITHIN LEEDS DISTRICT</b>             |  |              |              |              |              |              |              |              |              |              |              |              |              |              |              |         |
| Zone 1 - Inner East                      | 5.6  | 1.5          | 0.0          | 0.3          | 0.5          | 5.7          | 9.7          | 0.6          | 0.0          | 0.4          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          |         |
| Zone 2 - Inner North East                | 1.4  | 2.1          | 1.4          | 0.0          | 0.3          | 0.5          | 2.1          | 0.8          | 0.0          | 0.0          | 0.0          | 0.2          | 0.3          | 0.0          | 0.0          |         |
| Zone 3 - Inner North West                | 0.7  | 1.5          | 1.4          | 0.0          | 2.6          | 0.4          | 0.2          | 1.1          | 0.0          | 0.0          | 0.1          | 0.0          | 0.0          | 0.2          | 0.0          |         |
| Zone 4 - Inner South (City Centre)       | 66.4   | 66.2         | 76.5         | 59.2         | 39.4         | 42.9         | 31.4         | 34.5         | 37.5         | 45.8         | 7.6          | 10.0         | 8.0          | 7.1          | 13.2         |         |
| Zone 5 - Inner West                      | 0.0  | 0.0          | 0.0          | 0.7          | 3.4          | 0.0          | 0.1          | 0.0          | 0.0          | 0.9          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          |         |
| Zone 6 - Outer East                      | 7.7  | 0.0          | 0.0          | 0.0          | 0.6          | 20.5         | 1.9          | 0.1          | 0.4          | 0.0          | 0.0          | 1.1          | 0.4          | 0.0          | 0.0          |         |
| Zone 7 - Outer North East                | 0.0  | 1.4          | 2.3          | 0.0          | 0.0          | 0.0          | 11.5         | 5.4          | 0.0          | 0.0          | 1.0          | 0.1          | 0.0          | 0.0          | 0.0          |         |
| Zone 8 - Outer North West                | 0.0  | 0.0          | 2.8          | 0.0          | 1.2          | 0.4          | 0.3          | 24.4         | 0.0          | 0.0          | 0.0          | 0.4          | 0.0          | 0.0          | 2.6          |         |
| Zone 9 - Outer South (White Rose Centre) | 6.0  | 7.8          | 7.6          | 36.6         | 25.0         | 13.7         | 9.0          | 13.4         | 40.9         | 23.0         | 1.1          | 6.2          | 19.8         | 14.5         | 13.8         |         |
| Zone 10 - Outer West                     | 0.0  | 0.0          | 3.6          | 0.0          | 13.2         | 0.0          | 0.8          | 1.8          | 0.4          | 13.4         | 0.0          | 0.2          | 0.0          | 0.2          | 1.4          |         |
| <b>SUB TOTAL</b>                         | <b>87.8</b>  | <b>80.5</b>  | <b>95.7</b>  | <b>96.8</b>  | <b>86.3</b>  | <b>84.1</b>  | <b>66.9</b>  | <b>82.2</b>  | <b>79.2</b>  | <b>83.4</b>  | <b>9.8</b>   | <b>18.2</b>  | <b>28.5</b>  | <b>22.0</b>  | <b>28.4</b>  |         |
| <b>OUTSIDE LEEDS DISTRICT</b>            |  |              |              |              |              |              |              |              |              |              |              |              |              |              |              |         |
| All Centres / Stores                     | 12.2   | 19.5         | 4.3          | 3.2          | 13.7         | 15.9         | 33.1         | 17.8         | 20.8         | 16.6         | 90.2         | 81.8         | 71.5         | 78.0         | 71.6         |         |
| <b>SUB TOTAL</b>                         | <b>12.2</b>  | <b>19.5</b>  | <b>4.3</b>   | <b>3.2</b>   | <b>13.7</b>  | <b>15.9</b>  | <b>33.1</b>  | <b>17.8</b>  | <b>20.8</b>  | <b>16.6</b>  | <b>90.2</b>  | <b>81.8</b>  | <b>71.5</b>  | <b>78.0</b>  | <b>71.6</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> |         |

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

**TABLE 9b - UNADJUSTED ALL COMPARISON GOODS CENTRE MARKET SHARES BY ZONE AT THE DESIGN YEARS (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>WITHIN LEEDS DISTRICT</b>             |  |              |              |              |              |              |              |              |              |              |              |              |              |              |              |         |
| Zone 1 - Inner East                      | 5.6  | 1.5          | 0.0          | 0.3          | 0.5          | 5.7          | 9.7          | 0.6          | 0.0          | 0.4          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          |         |
| Zone 2 - Inner North East                | 1.4  | 2.1          | 1.4          | 0.0          | 0.3          | 0.5          | 2.1          | 0.8          | 0.0          | 0.0          | 0.0          | 0.2          | 0.3          | 0.0          | 0.0          |         |
| Zone 3 - Inner North West                | 0.7  | 1.5          | 1.4          | 0.0          | 2.6          | 0.4          | 0.2          | 1.1          | 0.0          | 0.0          | 0.1          | 0.0          | 0.0          | 0.2          | 0.0          |         |
| Zone 4 - Inner South (City Centre)       | 66.4   | 66.2         | 76.5         | 59.2         | 39.4         | 42.9         | 31.4         | 34.5         | 37.5         | 45.8         | 7.6          | 10.0         | 8.0          | 7.1          | 13.2         |         |
| Zone 5 - Inner West                      | 0.0  | 0.0          | 0.0          | 0.7          | 3.4          | 0.0          | 0.1          | 0.0          | 0.0          | 0.9          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0          |         |
| Zone 6 - Outer East                      | 7.7  | 0.0          | 0.0          | 0.0          | 0.6          | 20.5         | 1.9          | 0.1          | 0.4          | 0.0          | 0.0          | 1.1          | 0.4          | 0.0          | 0.0          |         |
| Zone 7 - Outer North East                | 0.0  | 1.4          | 2.3          | 0.0          | 0.0          | 0.0          | 11.5         | 5.4          | 0.0          | 0.0          | 1.0          | 0.1          | 0.0          | 0.0          | 0.0          |         |
| Zone 8 - Outer North West                | 0.0  | 0.0          | 2.8          | 0.0          | 1.2          | 0.4          | 0.3          | 24.4         | 0.0          | 0.0          | 0.0          | 0.4          | 0.0          | 0.0          | 2.6          |         |
| Zone 9 - Outer South (White Rose Centre) | 6.0  | 7.8          | 7.6          | 36.6         | 25.0         | 13.7         | 9.0          | 13.4         | 40.9         | 23.0         | 1.1          | 6.2          | 19.8         | 14.5         | 13.8         |         |
| Zone 10 - Outer West                     | 0.0  | 0.0          | 3.6          | 0.0          | 13.2         | 0.0          | 0.8          | 1.8          | 0.4          | 13.4         | 0.0          | 0.2          | 0.0          | 0.2          | 1.4          |         |
| <b>SUB TOTAL</b>                         | <b>87.8</b>  | <b>80.5</b>  | <b>95.7</b>  | <b>96.8</b>  | <b>86.3</b>  | <b>84.1</b>  | <b>66.9</b>  | <b>82.2</b>  | <b>79.2</b>  | <b>83.4</b>  | <b>9.8</b>   | <b>18.2</b>  | <b>28.5</b>  | <b>22.0</b>  | <b>28.4</b>  |         |
| <b>OUTSIDE LEEDS DISTRICT</b>            |  |              |              |              |              |              |              |              |              |              |              |              |              |              |              |         |
| All Centres / Stores                     | 12.2   | 19.5         | 4.3          | 3.2          | 13.7         | 15.9         | 33.1         | 17.8         | 20.8         | 16.6         | 90.2         | 81.8         | 71.5         | 78.0         | 71.6         |         |
| <b>SUB TOTAL</b>                         | <b>12.2</b>  | <b>19.5</b>  | <b>4.3</b>   | <b>3.2</b>   | <b>13.7</b>  | <b>15.9</b>  | <b>33.1</b>  | <b>17.8</b>  | <b>20.8</b>  | <b>16.6</b>  | <b>90.2</b>  | <b>81.8</b>  | <b>71.5</b>  | <b>78.0</b>  | <b>71.6</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> |         |

**Notes:**  
The market shares are the same as those set out in Table 9a. We adopt the traditional 'constant market shares' approach.

**TABLE 10 - ALL COMPARISON GOODS EXPENDITURE PATTERN AND CENTRE TURNOVER ESTIMATES, 2016 (£ MILLION)**

| Retail Supply: Where the Money is Spent  | Consumer Demand: Where the Money Comes From (Zone) |              |              |              |              |              |              |              |              |              |              |              |              |               |              |               | TOTAL HOUSEHOLD SURVEY AREA | Expenditure Drawn From Survey Area (Zones 1-16) | Estimated Inflow Expenditure <sup>(1)</sup> | Total Comparison 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>WITHIN LEEDS DISTRICT</b>   |  |              |              |              |              |              |              |              |              |              |              |              |              |               |              |               |                             |   |   |                                 |
| Zone 1 - Inner East  | 11.7   | 3.3          | 0.0          | 0.7          | 0.7          | 15.1         | 22.2         | 1.7          | 0.0          | 0.9          | 0.0          | 0.0          | 0.0          | 0.0           | 0.0          | 0.0           | 56.4                        | 56.4  | 0.0   | 56.4                            |
| Zone 2 - Inner North East  | 3.0  | 4.8          | 4.4          | 0.0          | 0.4          | 1.3          | 4.8          | 2.6          | 0.0          | 0.0          | 0.0          | 0.6          | 2.7          | 0.0           | 0.0          | 0.0           | 24.6                        | 24.6  | 0.0   | 24.6                            |
| Zone 3 - Inner North West  | 1.5  | 3.3          | 4.4          | 0.0          | 3.6          | 1.0          | 0.5          | 3.5          | 0.0          | 0.0          | 0.5          | 0.0          | 0.0          | 2.6           | 0.0          | 0.0           | 20.9                        | 20.9  | 0.0   | 20.9                            |
| Zone 4 - Inner South (City Centre)   | 139.5  | 147.8        | 234.1        | 133.8        | 54.2         | 113.1        | 71.6         | 105.3        | 106.0        | 99.5         | 40.6         | 29.1         | 78.1         | 88.6          | 82.2         | 377.5         | 1900.9                      | 1900.9  | 0.0   | 1900.9                          |
| Zone 5 - Inner West  | 0.0  | 0.0          | 0.0          | 1.6          | 4.6          | 0.0          | 0.1          | 0.0          | 0.0          | 1.9          | 0.0          | 0.0          | 0.0          | 0.0           | 0.0          | 0.0           | 8.2                         | 8.2   | 0.0   | 8.2                             |
| Zone 6 - Outer East  | 16.1   | 0.0          | 0.0          | 0.0          | 0.9          | 54.1         | 4.2          | 0.4          | 1.1          | 0.0          | 0.0          | 3.2          | 4.1          | 0.0           | 0.0          | 0.0           | 84.2                        | 84.2  | 0.0   | 84.2                            |
| Zone 7 - Outer North East  | 0.0  | 3.2          | 7.1          | 0.0          | 0.0          | 0.0          | 26.2         | 16.5         | 0.0          | 0.0          | 5.4          | 0.2          | 0.0          | 0.0           | 0.0          | 0.0           | 58.6                        | 58.6  | 0.0   | 58.6                            |
| Zone 8 - Outer North West  | 0.0  | 0.0          | 8.7          | 0.0          | 1.7          | 1.0          | 0.6          | 74.4         | 0.0          | 0.0          | 0.0          | 1.2          | 0.0          | 0.0           | 0.0          | 40.5          | 128.1                       | 128.1   | 0.0   | 128.1                           |
| Zone 9 - Outer South (White Rose Centre)   | 12.6   | 17.4         | 23.2         | 82.8         | 34.4         | 36.1         | 20.5         | 41.1         | 115.5        | 49.9         | 6.1          | 18.2         | 194.0        | 181.0         | 86.4         | 221.1         | 1140.2                      | 1140.2  | 0.0   | 1140.2                          |
| Zone 10 - Outer West   | 0.0  | 0.0          | 11.1         | 0.0          | 18.2         | 0.0          | 1.9          | 5.5          | 1.0          | 29.0         | 0.0          | 0.6          | 0.0          | 2.6           | 8.4          | 0.0           | 78.4                        | 78.4  | 0.0   | 78.4                            |
| <b>SUB TOTAL</b>   | <b>184.4</b>                                       | <b>179.8</b> | <b>292.9</b> | <b>218.8</b> | <b>118.7</b> | <b>221.7</b> | <b>162.8</b> | <b>251.0</b> | <b>223.6</b> | <b>181.3</b> | <b>52.6</b>  | <b>53.1</b>  | <b>278.9</b> | <b>274.8</b>  | <b>177.0</b> | <b>639.1</b>  | <b>3500.5</b>               | <b>3500.5</b>                                   | <b>0.0</b>                                  | <b>3500.5</b>                   |
| <b>OUTSIDE LEEDS DISTRICT</b>  |  |              |              |              |              |              |              |              |              |              |              |              |              |               |              |               |                             |   |   |                                 |
| All Centres / Stores   | 25.7   | 43.5         | 13.1         | 7.2          | 18.9         | 42.1         | 75.5         | 54.5         | 58.8         | 36.1         | 483.2        | 238.4        | 698.4        | 974.0         | 447.4        | 910.4         | 4127.2                      |   |   |                                 |
| <b>SUB TOTAL</b>   | <b>25.7</b>  | <b>43.5</b>  | <b>13.1</b>  | <b>7.2</b>   | <b>18.9</b>  | <b>42.1</b>  | <b>75.5</b>  | <b>54.5</b>  | <b>58.8</b>  | <b>36.1</b>  | <b>483.2</b> | <b>238.4</b> | <b>698.4</b> | <b>974.0</b>  | <b>447.4</b> | <b>910.4</b>  | <b>4127.2</b>               |   |   |                                 |
| <b>TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)</b> | <b>210.1</b>                                       | <b>223.3</b> | <b>306.0</b> | <b>226.0</b> | <b>137.6</b> | <b>263.8</b> | <b>228.3</b> | <b>305.5</b> | <b>282.4</b> | <b>217.4</b> | <b>535.8</b> | <b>291.5</b> | <b>977.3</b> | <b>1248.9</b> | <b>624.4</b> | <b>1549.5</b> | <b>7627.8</b>               |   |   |                                 |

**Notes:**  
 For each cell, the monetary figure is derived by multiplying the 2016 available comparison goods expenditure in the zone (excl. SFT) (Table 4) by the unadjusted market share of the comparison goods shopping provision in that zone (Table 9b).  
 (1) Estimated by Colliers International. (See Section 8 in main report.)

**TABLE 11 - CALCULATION OF POTENTIAL ALL COMPARISON 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<br>(Table 8, C) | B<br>(Table 10, C)      | C <sup>(1)</sup>                                     | D = B - C                           | E = D - A                              |
| Zone 1 - Inner East                      | 47.6              | 56.4                    | 7.6  | 48.7                                | 1.1                                    |
| Zone 2 - Inner North East                | 20.8              | 24.6                    | 3.1  | 21.5                                | 0.7                                    |
| Zone 3 - Inner North West                | 17.6              | 20.9                    | 6.4  | 14.5                                | -3.1                                   |
| Zone 4 - Inner South (City Centre)       | 1,591.8           | 1,900.9                 | 110.6  | 1,790.3                             | 198.5                                  |
| Zone 5 - Inner West                      | 6.9               | 8.2                     | 2.1  | 6.2                                 | -0.8                                   |
| Zone 6 - Outer East                      | 70.4              | 84.2                    | 7.8  | 76.4                                | 6.0                                    |
| Zone 7 - Outer North East                | 50.1              | 58.6                    | 4.3  | 54.4                                | 4.3                                    |
| Zone 8 - Outer North West                | 106.9             | 128.1                   | 11.7   | 116.4                               | 9.5                                    |
| Zone 9 - Outer South (White Rose Centre) | 959.3             | 1,140.2                 | 39.7   | 1,100.5                             | 141.2                                  |
| Zone 10 - Outer West                     | 66.2              | 78.4                    | 0.4  | 78.0                                | 11.7                                   |
| <b>TOTAL: LEEDS DISTRICT</b>             | <b>2,937.7</b>    | <b>3,500.5</b>          | <b>193.7</b>   | <b>3,306.8</b>                      | <b>369.1</b>                           |

**Notes:**

(1) We assume that all existing comparison 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 comparison goods turnovers of each centre as set out in Table 8 (Column G).



**TABLE 12 - 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 Comparison Goods Floorpace Commitments (as at May 2010) (1) | Adjusted Residual Headroom Expenditure by 2016 (£m) | Assumed Sales Density in 2016 (2) (£ per sq.m net) | Estimated Retail Floorpace Need in 2016 (sq.m net) |
|--|---|---|--|---|---|--|--|
|  | A   | B   | C = A + B                                  | D   | E = C - D   | F  | G = E / F  |
| Zone 1 - Inner East                      | 1.1   | -12.5   | -11.4                                      | 0.0   | -11.4   | 5,636  | -2,018   |
| Zone 2 - Inner North East                | 0.7   | -3.7  | -3.0                                       | 1.0   | -4.0  | 5,636  | -715   |
| Zone 3 - Inner North West                | -3.1  | -32.7   | -35.8                                      | 10.9  | -46.7   | 5,636  | -8,293   |
| Zone 4 - Inner South (City Centre)       | 198.5                                       | 722.2   | 920.7                                      | 788.0   | 192.7   | 7,890  | 24,424   |
| Zone 5 - Inner West                      | -0.8  | -9.4  | -10.1                                      | 11.0  | -21.1   | 5,636  | -3,748   |
| Zone 6 - Outer East                      | 6.0   | 9.3   | 15.3                                       | 7.9   | 7.4   | 5,636  | 1,310  |
| Zone 7 - Outer North East                | 4.3   | 16.6  | 20.9                                       | 0.0   | 20.9  | 5,636  | 3,702  |
| Zone 8 - Outer North West                | 9.5   | 15.2  | 24.7                                       | 3.7   | 21.0  | 5,636  | 3,733  |
| Zone 9 - Outer South (White Rose Centre) | 141.2                                       | 647.0   | 788.2                                      | 1.5   | 786.7   | 7,890  | 99,709   |
| Zone 10 - Outer West                     | 11.7  | 62.7  | 74.5                                       | 0.0   | 74.5  | 5,636  | 13,210   |
| <b>TOTAL: LEEDS DISTRICT</b>             | <b>369.1</b>                                | <b>1,414.8</b>  | <b>1,783.9</b>                             | <b>764.0</b>  | <b>1,019.9</b>                                      |  | <b>131,315</b>                                     |

**Notes:**

- (1) Details and estimated 2016 turnovers of comparison goods floorpace commitments and proposals are set out in Appendix 9C.
- (2) The derivation of our 2016 benchmark centre sales density estimates are set out in Section 8 in the main report.

**TABLE 13 - ALL COMPARISON GOODS EXPENDITURE PATTERN AND CENTRE TURNOVER ESTIMATES, 2021 (£ MILLION)**

| Retail Supply: Where the Money is Spent  | Consumer Demand: Where the Money Comes From (Zone) |              |              |              |              |              |              |              |              |              |              |              |               |               |              |               | TOTAL HOUSEHOLD SURVEY AREA | Expenditure Drawn From Survey Area (Zones 1-16) A | Estimated Inflow/ Expenditure <sup>(1)</sup> B | Total Comparison 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>WITHIN LEEDS DISTRICT</b>   |  |              |              |              |              |              |              |              |              |              |              |              |               |               |              |               |                             |   |  |   |
| Zone 1 - Inner East  | 14.2   | 3.9          | 0.0          | 0.8          | 0.8          | 19.7         | 26.2         | 2.0          | 0.0          | 1.1          | 0.0          | 0.0          | 0.0           | 0.0           | 0.0          | 0.0           | 68.7                        | 68.7  | 0.0  | 68.7                                      |
| Zone 2 - Inner North East  | 3.6  | 5.5          | 5.2          | 0.0          | 0.4          | 1.8          | 5.7          | 3.1          | 0.0          | 0.0          | 0.0          | 0.7          | 3.3           | 0.0           | 0.0          | 0.0           | 29.3                        | 29.3  | 0.0  | 29.3                                      |
| Zone 3 - Inner North West  | 1.8  | 3.9          | 5.2          | 0.0          | 4.2          | 1.2          | 0.6          | 4.1          | 0.0          | 0.0          | 0.6          | 0.0          | 0.0           | 3.2           | 0.0          | 0.0           | 24.8                        | 24.8  | 0.0  | 24.8                                      |
| Zone 4 - Inner South (City Centre)   | 168.8  | 172.0        | 276.2        | 165.4        | 63.1         | 147.5        | 84.4         | 125.3        | 126.2        | 116.7        | 48.6         | 35.5         | 93.0          | 106.2         | 98.9         | 459.2         | 2287.1                      | 2287.1  | 0.0  | 2287.1                                    |
| Zone 5 - Inner West  | 0.0  | 0.0          | 0.0          | 2.0          | 5.4          | 0.0          | 0.2          | 0.0          | 2.2          | 0.0          | 0.0          | 0.0          | 0.0           | 0.0           | 0.0          | 0.0           | 9.7                         | 9.7   | 0.0  | 9.7                                       |
| Zone 6 - Outer East  | 19.5   | 0.0          | 0.0          | 0.0          | 1.0          | 70.6         | 5.0          | 0.5          | 1.3          | 0.0          | 0.0          | 3.9          | 4.9           | 0.0           | 0.0          | 0.0           | 106.7                       | 106.7   | 0.0  | 106.7                                     |
| Zone 7 - Outer North East  | 0.0  | 3.7          | 8.4          | 0.0          | 0.0          | 0.0          | 30.9         | 19.6         | 0.0          | 0.0          | 6.5          | 0.2          | 0.0           | 0.0           | 0.0          | 0.0           | 69.4                        | 69.4  | 0.0  | 69.4                                      |
| Zone 8 - Outer North West  | 0.0  | 0.0          | 10.2         | 0.0          | 2.0          | 1.2          | 0.8          | 88.6         | 0.0          | 0.0          | 0.0          | 1.5          | 0.0           | 0.0           | 0.0          | 49.2          | 153.5                       | 153.5   | 0.0  | 153.5                                     |
| Zone 9 - Outer South (White Rose Centre)   | 15.2   | 20.2         | 27.3         | 102.3        | 40.1         | 47.1         | 24.2         | 48.9         | 137.4        | 58.6         | 7.2          | 22.2         | 231.1         | 217.0         | 104.0        | 269.0         | 1371.9                      | 1371.9  | 0.0  | 1371.9                                    |
| Zone 10 - Outer West   | 0.0  | 0.0          | 13.0         | 0.0          | 21.2         | 0.0          | 2.2          | 6.6          | 1.2          | 34.1         | 0.0          | 0.8          | 0.0           | 3.2           | 10.2         | 0.0           | 92.3                        | 92.3  | 0.0  | 92.3                                      |
| <b>SUB TOTAL</b>   | <b>223.2</b>                                       | <b>209.2</b> | <b>345.6</b> | <b>270.5</b> | <b>138.1</b> | <b>289.2</b> | <b>180.1</b> | <b>298.7</b> | <b>266.1</b> | <b>212.6</b> | <b>62.9</b>  | <b>64.8</b>  | <b>332.3</b>  | <b>329.4</b>  | <b>213.0</b> | <b>777.5</b>  | <b>4213.4</b>               | <b>4213.4</b>                                     | <b>0.0</b>                                     | <b>4213.4</b>                             |
| <b>OUTSIDE LEEDS DISTRICT</b>  |  |              |              |              |              |              |              |              |              |              |              |              |               |               |              |               |                             |   |  |   |
| All Centres / Stores   | 31.0   | 50.7         | 15.5         | 9.0          | 22.0         | 54.9         | 89.0         | 64.9         | 69.9         | 42.4         | 578.4        | 291.0        | 832.1         | 1167.6        | 538.3        | 1107.4        | 4964.0                      |   |  | 4964.0                                    |
| <b>SUB TOTAL</b>   | <b>31.0</b>  | <b>50.7</b>  | <b>15.5</b>  | <b>9.0</b>   | <b>22.0</b>  | <b>54.9</b>  | <b>89.0</b>  | <b>64.9</b>  | <b>69.9</b>  | <b>42.4</b>  | <b>578.4</b> | <b>291.0</b> | <b>832.1</b>  | <b>1167.6</b> | <b>538.3</b> | <b>1107.4</b> | <b>4964.0</b>               |   |  | <b>4964.0</b>                             |
| <b>TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)</b> | <b>254.2</b>                                       | <b>259.9</b> | <b>361.1</b> | <b>279.4</b> | <b>160.1</b> | <b>344.1</b> | <b>269.1</b> | <b>363.6</b> | <b>336.1</b> | <b>255.0</b> | <b>641.4</b> | <b>355.8</b> | <b>1164.3</b> | <b>1497.0</b> | <b>751.3</b> | <b>1884.9</b> | <b>9177.3</b>               |   |  | <b>9177.3</b>                             |

**Notes:**  
 For each cell, the monetary figure is derived by multiplying the 2021 available comparison goods expenditure in the zone (excl. SFT) (Table 4) by the unadjusted market share of the comparison goods shopping provision in that zone (Table 9b).  
 (1) Estimated by Colliers International. (See Section 8 in main report).

**TABLE 14 - CALCULATION OF POTENTIAL ALL COMPARISON 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<br>(Table 8, C) | B<br>(Table 13, C)      | C <sup>(1)</sup>                                     | D = B - C                           | E = D - A                              |
| Zone 1 - Inner East                      | 47.6              | 68.7                    | 16.9   | 51.8                                | 4.2                                    |
| Zone 2 - Inner North East                | 20.8              | 29.3                    | 6.9  | 22.4                                | 1.6                                    |
| Zone 3 - Inner North West                | 17.6              | 24.8                    | 14.2   | 10.6                                | -7.0                                   |
| Zone 4 - Inner South (City Centre)       | 1,591.8           | 2,287.1                 | 244.9  | 2,042.2                             | 450.4                                  |
| Zone 5 - Inner West                      | 6.9               | 9.7                     | 4.6  | 5.1                                 | -1.8                                   |
| Zone 6 - Outer East                      | 70.4              | 106.7                   | 17.2   | 89.5                                | 19.1                                   |
| Zone 7 - Outer North East                | 50.1              | 69.4                    | 9.4  | 59.9                                | 9.8                                    |
| Zone 8 - Outer North West                | 106.9             | 153.5                   | 25.8   | 127.7                               | 20.8                                   |
| Zone 9 - Outer South (White Rose Centre) | 959.3             | 1,371.9                 | 87.9   | 1,283.9                             | 324.7                                  |
| Zone 10 - Outer West                     | 66.2              | 92.3                    | 1.0  | 91.4                                | 25.1                                   |
| <b>TOTAL: LEEDS DISTRICT</b>             | <b>2,937.7</b>    | <b>4,213.4</b>          | <b>428.8</b>   | <b>3,784.6</b>                      | <b>846.9</b>                           |

**Notes:**

(1) We assume that all existing comparison 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 comparison goods turnovers of each centre as set out in Table 8 (Column G).

**TABLE 15 - 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 Comparison Goods Floorspace Commitments (as at May 2010) (1) | Adjusted Residual Headroom Expenditure by 2021 (£m) | Assumed Sales Density in 2021 (2) (£ per sq.m net) | Estimated Retail Floorspace Need in 2021 (sq.m net) |
|--|---|---|--|--|---|--|---|
|  | A   | B   | C = A + B                                  | D  | E = C - D   | F  | G = E / F   |
| Zone 1 - Inner East                      | 4.2   | -12.5   | -8.3                                       | 0.0  | -8.3  | 6,408  | -1,297  |
| Zone 2 - Inner North East                | 1.6   | -3.7  | -2.1                                       | 1.2  | -3.3  | 6,408  | -521  |
| Zone 3 - Inner North West                | -7.0  | -32.7   | -39.7                                      | 12.2   | -51.9   | 6,408  | -8,100  |
| Zone 4 - Inner South (City Centre)       | 450.4                                       | 722.2   | 1,172.6                                    | 820.6  | 352.0   | 8,971  | 39,241  |
| Zone 5 - Inner West                      | -1.8  | -9.4  | -11.2                                      | 12.4   | -23.6   | 6,408  | -3,676  |
| Zone 6 - Outer East                      | 19.1  | 9.3   | 28.4                                       | 8.9  | 19.5  | 6,408  | 3,041   |
| Zone 7 - Outer North East                | 9.8   | 16.6  | 26.4                                       | 0.0  | 26.4  | 6,408  | 4,125   |
| Zone 8 - Outer North West                | 20.8  | 15.2  | 36.0                                       | 4.2  | 31.8  | 6,408  | 4,964   |
| Zone 9 - Outer South (White Rose Centre) | 324.7                                       | 647.0   | 971.6                                      | 1.7  | 969.9   | 8,971  | 108,120   |
| Zone 10 - Outer West                     | 25.1  | 62.7  | 87.9                                       | 0.0  | 87.9  | 6,408  | 13,711  |
| <b>TOTAL: LEEDS DISTRICT</b>             | <b>846.9</b>                                | <b>1,414.8</b>  | <b>2,261.7</b>                             | <b>861.2</b>   | <b>1,400.5</b>                                      |  | <b>159,608.8</b>                                    |

**Notes:**

- (1) Details and estimated 2021 turnovers of comparison 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 16 - ALL COMPARISON 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) A | Estimated Inflow/ Expenditure <sup>(1)</sup> B | Total Comparison 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>WITHIN LEEDS DISTRICT</b>   |  |              |              |              |              |              |              |              |              |              |              |              |               |               |              |               |                             |   |  |   |
| Zone 1 - Inner East  | 16.7   | 4.5          | 0.0          | 1.0          | 0.9          | 26.2         | 30.8         | 2.4          | 0.0          | 1.3          | 0.0          | 0.0          | 0.0           | 0.0           | 0.0          | 0.0           | 83.9                        | 83.9  | 0.0  | 83.9                                      |
| Zone 2 - Inner North East  | 4.3  | 6.5          | 6.0          | 0.0          | 0.5          | 2.3          | 6.7          | 3.6          | 0.0          | 0.0          | 0.0          | 0.9          | 0.0           | 0.0           | 0.0          | 0.0           | 34.6                        | 34.6  | 0.0  | 34.6                                      |
| Zone 3 - Inner North West  | 2.1  | 4.5          | 6.0          | 0.0          | 4.8          | 1.7          | 0.7          | 4.9          | 0.0          | 0.0          | 0.7          | 0.0          | 0.0           | 3.8           | 0.0          | 0.0           | 29.2                        | 29.2  | 0.0  | 29.2                                      |
| Zone 4 - Inner South (City Centre)   | 199.3  | 200.7        | 319.7        | 200.1        | 73.1         | 196.2        | 99.2         | 147.8        | 150.4        | 136.7        | 58.3         | 43.1         | 110.8         | 127.2         | 118.8        | 556.0         | 2737.5                      | 2737.5  | 0.0  | 2737.5                                    |
| Zone 5 - Inner West  | 0.0  | 0.0          | 0.0          | 2.4          | 6.2          | 0.0          | 0.2          | 0.0          | 0.0          | 2.6          | 0.0          | 0.0          | 0.0           | 0.0           | 0.0          | 0.0           | 11.4                        | 11.4  | 0.0  | 11.4                                      |
| Zone 6 - Outer East  | 23.1   | 0.0          | 0.0          | 0.0          | 1.1          | 93.9         | 5.9          | 0.6          | 1.6          | 0.0          | 0.0          | 4.7          | 5.8           | 0.0           | 0.0          | 0.0           | 136.6                       | 136.6   | 0.0  | 136.6                                     |
| Zone 7 - Outer North East  | 0.0  | 4.3          | 9.7          | 0.0          | 0.0          | 0.0          | 36.3         | 23.1         | 0.0          | 0.0          | 7.8          | 0.3          | 0.0           | 0.0           | 0.0          | 0.0           | 81.6                        | 81.6  | 0.0  | 81.6                                      |
| Zone 8 - Outer North West  | 0.0  | 0.0          | 11.9         | 0.0          | 2.3          | 1.7          | 0.9          | 104.5        | 0.0          | 0.0          | 0.0          | 1.8          | 0.0           | 0.0           | 0.0          | 59.6          | 182.6                       | 182.6   | 0.0  | 182.6                                     |
| Zone 9 - Outer South (White Rose Centre)   | 18.0   | 23.6         | 31.7         | 123.8        | 46.4         | 62.7         | 28.5         | 57.7         | 163.9        | 68.6         | 8.7          | 26.9         | 275.2         | 259.9         | 124.8        | 325.7         | 1646.1                      | 1646.1  | 0.0  | 1646.1                                    |
| Zone 10 - Outer West   | 0.0  | 0.0          | 15.1         | 0.0          | 24.6         | 0.0          | 2.6          | 7.7          | 1.4          | 39.9         | 0.0          | 0.9          | 0.0           | 3.8           | 12.2         | 0.0           | 108.2                       | 108.2   | 0.0  | 108.2                                     |
| <b>SUB TOTAL</b>   | <b>263.5</b>                                       | <b>244.1</b> | <b>400.1</b> | <b>327.4</b> | <b>160.1</b> | <b>384.6</b> | <b>211.7</b> | <b>352.2</b> | <b>317.3</b> | <b>249.0</b> | <b>75.4</b>  | <b>78.7</b>  | <b>395.8</b>  | <b>394.7</b>  | <b>255.8</b> | <b>941.3</b>  | <b>5051.7</b>               | <b>5051.7</b>                                     | <b>0.0</b>                                     | <b>5051.7</b>                             |
| <b>OUTSIDE LEEDS DISTRICT</b>  |  |              |              |              |              |              |              |              |              |              |              |              |               |               |              |               |                             |   |  |   |
| All Centres / Stores   | 36.6   | 59.1         | 17.9         | 10.8         | 25.5         | 72.9         | 104.6        | 76.5         | 83.4         | 49.6         | 693.2        | 353.4        | 991.1         | 1398.8        | 646.5        | 1340.9        | 5961.0                      |   |  |   |
| <b>SUB TOTAL</b>   | <b>36.6</b>  | <b>59.1</b>  | <b>17.9</b>  | <b>10.8</b>  | <b>25.5</b>  | <b>72.9</b>  | <b>104.6</b> | <b>76.5</b>  | <b>83.4</b>  | <b>49.6</b>  | <b>693.2</b> | <b>353.4</b> | <b>991.1</b>  | <b>1398.8</b> | <b>646.5</b> | <b>1340.9</b> | <b>5961.0</b>               |   |  |   |
| <b>TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)</b> | <b>300.1</b>                                       | <b>303.3</b> | <b>418.0</b> | <b>338.2</b> | <b>185.5</b> | <b>457.6</b> | <b>316.2</b> | <b>428.7</b> | <b>400.7</b> | <b>298.7</b> | <b>768.7</b> | <b>432.1</b> | <b>1386.9</b> | <b>1793.5</b> | <b>902.4</b> | <b>2282.2</b> | <b>11012.7</b>              |   |  |   |

**Notes:**  
 For each cell, the monetary figure is derived by multiplying the 2026 available comparison goods expenditure in the zone (excl. SFT) (Table 4) by the unadjusted market share of the comparison goods shopping provision in that zone (Table 9b).  
 (1) Estimated by Colliers International. (See Section 8 in main report).

**TABLE 17 - CALCULATION OF POTENTIAL ALL COMPARISON GOODS HEADROOM EXPENDITURE, 2026 (£ MILLION)**

| Zone                                     | 2010 Turnover     | 2026 Turnover Potential | Turnover Allocation for Existing Retailers 2010-2026 | Residual Turnover Potential by 2026 | Potential Headroom Expenditure by 2026 |
|--|-------------------|-------------------------|--|-------------------------------------|--|
|  | A<br>(Table 8, C) | B<br>(Table 16, C)      | C <sup>(1)</sup>                                     | D = B - C                           | E = D - A                              |
| Zone 1 - Inner East                      | 47.6              | 83.9                    | 27.5   | 56.4                                | 8.8                                    |
| Zone 2 - Inner North East                | 20.8              | 34.6                    | 11.2   | 23.4                                | 2.6                                    |
| Zone 3 - Inner North West                | 17.6              | 29.2                    | 23.0   | 6.2                                 | -11.4                                  |
| Zone 4 - Inner South (City Centre)       | 1,591.8           | 2,737.5                 | 397.5  | 2,340.0                             | 748.2                                  |
| Zone 5 - Inner West                      | 6.9               | 11.4                    | 7.5  | 4.0                                 | -3.0                                   |
| Zone 6 - Outer East                      | 70.4              | 136.6                   | 27.9   | 108.7                               | 38.3                                   |
| Zone 7 - Outer North East                | 50.1              | 81.6                    | 15.3   | 66.3                                | 16.2                                   |
| Zone 8 - Outer North West                | 106.9             | 182.6                   | 41.9   | 140.7                               | 33.7                                   |
| Zone 9 - Outer South (White Rose Centre) | 959.3             | 1,646.1                 | 142.7  | 1,503.4                             | 544.1                                  |
| Zone 10 - Outer West                     | 66.2              | 108.2                   | 1.6  | 106.6                               | 40.4                                   |
| <b>TOTAL: LEEDS DISTRICT</b>             | <b>2,937.7</b>    | <b>5,051.7</b>          | <b>696.1</b>   | <b>4,355.6</b>                      | <b>1,418.0</b>                         |

**Notes:**

(1) We assume that all existing comparison 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 comparison goods turnovers of each centre as set out in Table 8 (Column G).

**TABLE 18 - RETAIL FLOORSPACE NEED AT 2026**

| Zone                                     | 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 Comparison Goods FloorSpace Commitments (as at May 2010) (1) | Adjusted Residual Headroom Expenditure by 2026 (£m) | Assumed Sales Density in 2026 (2) (£ per sq.m net) | Estimated Retail FloorSpace Need in 2026 (sq.m net) |
|--|---|---|--|--|---|--|---|
|  | A<br>(Table 17, E)                          | B<br>(Table 8, H)                                     | C = A + B                                  | D  | E = C - D   | F  | G = E / F   |
| Zone 1 - Inner East                      | 8.8   | -12.5   | -3.7                                       | 0.0  | -3.7  | 7,285  | -509  |
| Zone 2 - Inner North East                | 2.6   | -3.7  | -1.1                                       | 1.6  | -2.7  | 7,285  | -367  |
| Zone 3 - Inner North West                | -11.4                                       | -32.7   | -44.1                                      | 15.8   | -59.9   | 7,285  | -8,220  |
| Zone 4 - Inner South (City Centre)       | 748.2                                       | 722.2   | 1,470.4                                    | 1,060.7  | 409.7   | 10,200   | 40,168  |
| Zone 5 - Inner West                      | -3.0  | -9.4  | -12.3                                      | 16.0   | -28.3   | 7,285  | -3,890  |
| Zone 6 - Outer East                      | 38.3  | 9.3   | 47.6                                       | 11.5   | 36.1  | 7,285  | 4,957   |
| Zone 7 - Outer North East                | 16.2  | 16.6  | 32.8                                       | 0.0  | 32.8  | 7,285  | 4,498   |
| Zone 8 - Outer North West                | 33.7  | 15.2  | 49.0                                       | 5.4  | 43.6  | 7,285  | 5,979   |
| Zone 9 - Outer South (White Rose Centre) | 544.1                                       | 647.0   | 1,191.1                                    | 2.1  | 1,189.0   | 10,200   | 116,565   |
| Zone 10 - Outer West                     | 40.4  | 62.7  | 103.1                                      | 0.0  | 103.1   | 7,285  | 14,156  |
| <b>TOTAL: LEEDS DISTRICT</b>             | <b>1,418.0</b>                              | <b>1,414.8</b>  | <b>2,832.7</b>                             | <b>1,113.1</b>   | <b>1,719.6</b>                                      |  | <b>173,337.4</b>                                    |

**Notes:**

(1) Details and estimated 2026 turnovers of comparison 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.