



# 10A: COMPARISON TABLES SCENARIO 2 HIGH

**RETAIL FLOORSPACE NEED ASSESSMENT: COMPARISON GOODS: SCENARIO 2: HIGH 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 (Base Year)	2016 Population	2021 Population	2026 Population	Total Increase (2010-2026)	Percentage Increase (2010-2026)
Zone 1	82,796	96,088	99,849	102,120	19,325	23.3%
Zone 2	71,375	74,002	74,690	75,350	3,976	5.6%
Zone 3	107,571	115,135	117,174	117,761	10,190	9.5%
Zone 4	80,390	97,945	109,296	118,662	38,272	47.6%
Zone 5	50,998	54,413	55,050	55,177	4,179	8.2%
Zone 6	86,198	91,873	104,332	124,911	38,713	44.9%
Zone 7	62,574	63,471	65,688	67,307	4,733	7.6%
Zone 8	87,975	94,589	98,748	101,281	13,306	15.1%
Zone 9	92,674	96,103	101,548	107,770	15,096	16.3%
Zone 10	72,452	76,782	78,326	78,661	6,209	8.6%
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>3,281,800</b>	<b>3,499,600</b>	<b>3,665,700</b>	<b>3,827,700</b>	<b>391,900</b>	<b>11.9%</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 (£) (2010-2026)	Increase % (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	175.6	230.8	276.8	327.3	151.7	86.4%		
Zone 2	197.5	231.9	270.1	315.1	117.6	59.5%		
Zone 3	272.0	329.7	387.2	450.0	178.0	65.4%		
Zone 4	190.7	263.1	338.8	425.3	234.7	123.1%		
Zone 5	120.5	145.7	170.1	197.1	76.5	63.5%		
Zone 6	229.5	277.0	363.0	502.5	273.1	119.0%		
Zone 7	202.9	233.1	278.3	329.8	126.9	62.5%		
Zone 8	262.9	320.1	385.6	457.3	194.5	74.0%		
Zone 9	254.4	298.8	364.3	447.1	192.7	75.7%		
Zone 10	191.4	229.8	270.5	314.1	122.7	64.1%		
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>6488.0</b>	<b>7787.3</b>	<b>9399.5</b>	<b>11331.2</b>	<b>4843.2</b>	<b>74.6%</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) A	Bulky Comparison Goods <sup>(1)</sup> (£m) B	Total Comparison Goods <sup>(2)</sup> (£m) C = A + B
Zone 1	123.7	51.8	175.6
Zone 2	138.1	59.4	197.5
Zone 3	190.1	81.8	272.0
Zone 4	133.7	57.0	190.7
Zone 5	84.5	36.0	120.5
Zone 6	160.5	69.0	229.5
Zone 7	139.5	63.4	202.9
Zone 8	182.2	80.6	262.9
Zone 9	178.1	76.3	254.4
Zone 10	133.9	57.6	191.4
<b>SUBTOTAL</b>	<b>1464.3</b>	<b>633.0</b>	<b>2097.3</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>4531.1</b>	<b>1956.9</b>	<b>6488.0</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	0.0	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>																				
Zone 1 - Inner East	3.5	1.5	0.0	0.0	0.6	3.4	3.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	12.3	12.3	0.0	12.3
Zone 2 - Inner North East	0.0	0.0	1.0	0.0	0.0	0.0	0.3	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	4.8	4.8	0.0	4.8
Zone 3 - Inner North West	0.0	1.5	0.0	0.0	1.4	0.0	0.0	2.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.1	5.1	0.0	5.1
Zone 4 - Inner South (City Centre)	97.0	115.9	150.0	64.2	31.9	74.3	56.9	84.6	53.6	68.5	28.9	21.9	58.9	67.8	64.3	307.7	1346.2	1346.2	0.0	1346.2
Zone 5 - Inner West	0.0	0.0	0.0	0.0	1.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.6	4.6	0.0	4.6
Zone 6 - Outer East	12.2	0.0	0.0	0.0	0.0	0.4	39.0	1.7	0.4	0.0	0.0	0.0	1.7	3.5	0.0	0.0	58.9	58.9	0.0	58.9
Zone 7 - Outer North East	0.0	0.0	1.9	0.0	0.0	0.0	8.2	0.0	0.0	0.0	2.5	0.2	0.0	0.0	0.0	0.0	12.8	12.8	0.0	12.8
Zone 8 - Outer North West	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	33.9	33.9	0.0	33.9
Zone 9 - Outer South (White Rose Centre)	10.5	13.9	18.6	62.7	28.3	29.9	18.1	35.4	97.4	43.2	1.3	14.6	163.8	152.4	72.7	182.5	945.5	945.5	0.0	945.5
Zone 10 - Outer West	0.0	0.0	5.9	0.0	15.0	0.0	1.4	4.7	0.0	14.1	0.0	0.0	0.0	0.0	2.2	0.0	43.2	43.2	0.0	43.2
<b>SUB TOTAL</b>	<b>123.2</b>	<b>132.9</b>	<b>179.3</b>	<b>128.2</b>	<b>81.6</b>	<b>146.6</b>	<b>90.0</b>	<b>147.4</b>	<b>151.0</b>	<b>135.8</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>2467.4</b>	<b>2467.4</b>	<b>0.0</b>	<b>2467.4</b>
<b>OUTSIDE LEEDS DISTRICT</b>																				
All Centres / Stores	0.5	5.2	10.8	5.5	2.9	14.0	49.5	34.8	27.1	8.0	284.6	128.3	354.5	516.3	228.1	393.5	2063.7			
<b>SUB TOTAL</b>	<b>0.5</b>	<b>5.2</b>	<b>10.8</b>	<b>5.5</b>	<b>2.9</b>	<b>14.0</b>	<b>49.5</b>	<b>34.8</b>	<b>27.1</b>	<b>8.0</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>2063.7</b>			
<b>TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA)</b>	<b>123.7</b>	<b>138.1</b>	<b>190.1</b>	<b>133.7</b>	<b>84.5</b>	<b>160.5</b>	<b>139.5</b>	<b>182.2</b>	<b>178.1</b>	<b>133.9</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>4531.1</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	6.3	1.4	0.0	0.6	0.0	9.8	16.4	1.5	0.0	0.8	0.0	0.0	0.0	0.0	0.0	36.8	36.8	0.0	36.8	
Zone 2 - Inner North East	2.5	4.2	2.9	0.0	0.0	1.2	4.0	1.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	16.7	16.7	0.0	16.7	
Zone 3 - Inner North West	1.2	1.4	3.9	0.0	1.7	0.8	0.4	0.8	0.0	0.4	0.0	0.0	2.2	0.0	0.0	13.0	13.0	0.0	13.0	
Zone 4 - Inner South (City Centre)	19.6	14.8	58.0	48.7	15.6	24.1	6.7	6.0	41.9	19.1	5.7	2.3	7.8	7.0	4.9	286.1	286.1	0.0	286.1	
Zone 5 - Inner West	0.0	0.0	0.0	0.0	0.8	0.0	0.1	0.0	0.0	1.7	0.0	0.0	0.0	0.0	0.0	2.6	2.6	0.0	2.6	
Zone 6 - Outer East	1.2	0.0	0.0	0.0	0.3	8.1	2.1	0.0	1.0	0.0	0.0	1.0	0.0	0.0	0.0	13.7	13.7	0.0	13.7	
Zone 7 - Outer North East	0.0	2.8	4.4	0.0	0.0	0.0	15.1	14.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	38.6	38.6	0.0	38.6	
Zone 8 - Outer North West	0.0	0.0	5.8	0.0	1.1	0.8	0.6	44.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	75.1	75.1	0.0	75.1	
Zone 9 - Outer South (White Rose Centre)	0.0	1.4	2.0	7.1	1.8	1.6	0.1	0.0	6.6	0.7	3.9	0.4	1.8	0.3	0.0	27.9	27.9	0.0	27.9	
Zone 10 - Outer West	0.0	0.0	3.9	0.0	1.0	0.0	0.3	0.0	0.9	11.5	0.0	0.5	0.0	2.2	4.9	25.3	25.3	0.0	25.3	
<b>SUB TOTAL</b>	<b>30.9</b>	<b>26.1</b>	<b>81.0</b>	<b>56.4</b>	<b>22.3</b>	<b>46.3</b>	<b>45.8</b>	<b>68.5</b>	<b>50.5</b>	<b>33.8</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>535.6</b>	<b>0.0</b>	<b>535.6</b>	
<b>OUTSIDE LEEDS DISTRICT</b>																				
All Centres / Stores	20.9	33.3	0.8	0.6	13.7	22.6	17.6	12.1	25.9	23.8	126.6	69.5	241.8	305.8	148.5	1421.3			1421.3	
<b>SUB TOTAL</b>	<b>20.9</b>	<b>33.3</b>	<b>0.8</b>	<b>0.6</b>	<b>13.7</b>	<b>22.6</b>	<b>17.6</b>	<b>12.1</b>	<b>25.9</b>	<b>23.8</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>1421.3</b>	<b>0.0</b>	<b>1421.3</b>	
<b>TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA)</b>	<b>51.8</b>	<b>59.4</b>	<b>81.8</b>	<b>57.0</b>	<b>36.0</b>	<b>69.0</b>	<b>63.4</b>	<b>80.6</b>	<b>76.3</b>	<b>57.6</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>1956.9</b>	<b>0.0</b>	<b>1956.9</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 (1)	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) (3)	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>	9.8	2.9	0.0	0.6	0.6	13.2	19.8	1.5	0.0	0.8	0.0	0.0	0.0	0.0	0.0	0.0	49.1	21.4	0.0	49.1	15,203	3228	3,953	60.1	-11.0	
Zone 1 - Inner East	2.5	4.2	3.9	0.0	0.3	1.2	4.3	2.2	0.0	0.0	0.5	2.3	0.0	0.0	0.0	0.0	21.4	21.4	0.0	21.4	10,121	2118	2,421	24.5	-3.1	
Zone 2 - Inner North East	1.2	2.9	3.9	0.0	3.1	0.8	0.4	3.0	0.0	0.0	0.4	0.0	2.2	0.0	0.0	0.0	18.2	18.2	0.0	18.2	15,605	1148	3,182	50.3	-32.2	
Zone 3 - Inner North West	116.6	130.7	208.0	112.8	47.5	98.4	63.6	90.6	98.5	87.6	34.6	24.2	66.7	74.7	89.2	311.5	1632.3	1632.3	0.0	1632.3	145,125	11247	5,992	859.6	762.7	
Zone 4 - Inner South (City Centre)	0.0	0.0	0.0	1.3	4.1	0.0	0.1	0.0	0.0	1.7	0.0	0.0	0.0	0.0	0.0	0.0	7.2	7.2	0.0	7.2	5,414	1327	3,011	18.3	-9.1	
Zone 5 - Inner West	13.3	0.0	0.0	0.0	0.0	47.1	3.8	0.4	1.0	0.0	0.0	2.6	3.5	0.0	0.0	0.0	7.6	7.6	0.0	7.6	16,501	4294	3,615	61.1	11.5	
Zone 6 - Outer East	0.0	2.8	6.3	0.0	0.0	0.0	23.3	14.2	0.0	0.0	4.6	0.0	0.0	0.0	0.0	0.0	51.4	109.1	0.0	109.1	10,099	5090	3,317	33.5	17.9	
Zone 7 - Outer North East	0.0	0.0	7.7	0.0	1.5	0.8	0.6	64.0	0.0	0.0	1.0	0.2	0.0	0.0	0.0	0.0	109.1	109.1	0.0	109.1	28,686	3802	3,197	91.7	17.9	
Zone 8 - Outer North West	10.5	15.4	20.6	69.8	30.2	31.4	18.3	35.4	104.0	44.0	5.2	15.1	165.6	152.8	72.7	182.5	973.3	973.3	0.0	973.3	50,499	19286	6,188	312.3	661.0	
Zone 9 - Outer South (White Rose Centre)	0.0	0.0	9.8	0.0	16.0	0.0	1.6	4.7	0.9	25.6	0.0	0.5	0.0	2.2	7.1	0.0	68.5	68.5	0.0	68.5	20,099	3409	4,219	3.5	65.0	
Zone 10 - Outer West	154.1	159.0	260.3	184.6	104.0	192.9	135.8	216.0	201.5	159.6	44.7	44.1	238.1	232.0	149.0	527.4	3003.0	3003.0	0.0	3003.0	317,925	-	-	1522.9	1480.1	
<b>OUTSIDE LEEDS DISTRICT</b>																										
All Centres / Stores	21.4	38.5	11.7	6.1	16.6	36.6	67.1	46.9	52.9	31.8	411.2	197.9	596.3	822.1	376.6	751.2	3485.0	3485.0								
<b>SUB TOTAL</b>	21.4	38.5	11.7	6.1	16.6	36.6	67.1	46.9	52.9	31.8	411.2	197.9	596.3	822.1	376.6	751.2	3485.0	3485.0								
<b>TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA)</b>	175.6	197.5	272.0	190.7	120.5	229.5	202.9	262.9	254.4	191.4	456.0	242.0	834.5	1,054.0	525.6	1,278.6	6488.0	6488.0								

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 9) 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	0.0	
<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	12.9	3.5	0.0	0.8	0.7	15.9	22.7	1.8	0.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0	59.2	59.2	0.0	59.2
Zone 2 - Inner North East	3.3	5.0	4.7	0.0	0.4	1.4	4.9	2.7	0.0	0.0	0.0	0.6	2.7	0.0	0.0	0.0	25.7	25.7	0.0	25.7
Zone 3 - Inner North West	1.6	3.5	4.8	0.0	3.8	1.0	0.5	3.6	0.0	0.0	0.0	0.0	0.0	2.6	0.0	0.0	21.9	21.9	0.0	21.9
Zone 4 - Inner South (City Centre)	153.3	153.5	252.2	155.7	57.4	118.8	73.1	110.3	112.2	105.1	40.6	29.1	78.1	88.6	82.2	377.5	1987.7	1987.7	0.0	1987.7
Zone 5 - Inner West	0.0	0.0	0.0	1.8	4.9	0.0	0.1	0.0	0.0	2.0	0.0	0.0	0.0	0.0	0.0	0.0	8.9	8.9	0.0	8.9
Zone 6 - Outer East	17.7	0.0	0.0	0.0	0.9	56.8	4.3	0.4	1.2	0.0	0.0	3.2	4.1	0.0	0.0	0.0	88.7	88.7	0.0	88.7
Zone 7 - Outer North East	0.0	3.3	7.7	0.0	0.0	0.0	26.8	17.3	0.0	5.4	0.2	0.0	0.0	0.0	0.0	0.0	60.6	60.6	0.0	60.6
Zone 8 - Outer North West	0.0	0.0	9.3	0.0	1.8	1.0	0.7	78.0	0.0	0.0	0.0	1.2	0.0	0.0	0.0	40.5	132.5	132.5	0.0	132.5
Zone 9 - Outer South (White Rose Centre)	13.8	18.1	25.0	96.3	36.4	38.0	21.0	43.1	122.2	52.8	6.1	18.2	194.0	181.0	86.4	221.1	1173.3	1173.3	0.0	1173.3
Zone 10 - Outer West	0.0	0.0	11.9	0.0	19.3	0.0	1.9	5.8	1.1	30.7	0.0	0.6	0.0	2.6	8.4	0.0	82.3	82.3	0.0	82.3
<b>SUB TOTAL</b>	<b>202.6</b>	<b>186.7</b>	<b>315.6</b>	<b>254.7</b>	<b>125.7</b>	<b>232.9</b>	<b>156.0</b>	<b>263.0</b>	<b>236.6</b>	<b>191.6</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>3640.8</b>	<b>3640.8</b>	<b>0.0</b>	<b>3640.8</b>
<b>OUTSIDE LEEDS DISTRICT</b>																				
All Centres / Stores	28.2	45.2	14.1	8.4	20.0	44.2	77.1	57.1	62.2	38.2	483.2	238.4	698.4	974.0	447.4	910.4	4146.5			4146.5
<b>SUB TOTAL</b>	<b>28.2</b>	<b>45.2</b>	<b>14.1</b>	<b>8.4</b>	<b>20.0</b>	<b>44.2</b>	<b>77.1</b>	<b>57.1</b>	<b>62.2</b>	<b>38.2</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>4146.5</b>			<b>4146.5</b>
<b>TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)</b>	<b>230.8</b>	<b>231.9</b>	<b>329.7</b>	<b>263.1</b>	<b>145.7</b>	<b>277.0</b>	<b>233.1</b>	<b>320.1</b>	<b>298.8</b>	<b>229.8</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>7787.3</b>			<b>7787.3</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 2016	Residual Turnover Potential by 2016	Potential Headroom Expenditure by 2016
	A (Table 8, C)	B (Table 10, C)	C <sup>(1)</sup>	D = B - C	E = D - A
Zone 1 - Inner East	49.1	59.2	7.6	51.5	2.4
Zone 2 - Inner North East	21.4	25.7	3.1	22.6	1.2
Zone 3 - Inner North West	18.2	21.9	6.4	15.5	-2.6
Zone 4 - Inner South (City Centre)	1,632.3	1,987.7	110.6	1,877.0	244.8
Zone 5 - Inner West	7.2	8.9	2.1	6.8	-0.4
Zone 6 - Outer East	72.6	88.7	7.8	80.9	8.3
Zone 7 - Outer North East	51.4	60.6	4.3	56.4	5.0
Zone 8 - Outer North West	109.1	132.5	11.7	120.8	11.8
Zone 9 - Outer South (White Rose Centre)	973.3	1,173.3	39.7	1,133.6	160.2
Zone 10 - Outer West	68.5	82.3	0.4	81.9	13.4
<b>TOTAL: LEEDS DISTRICT</b>	<b>3,003.0</b>	<b>3,640.8</b>	<b>193.7</b>	<b>3,447.1</b>	<b>444.0</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 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 FloorSpace 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 FloorSpace Need in 2016 (sq.m net)
	A	B	C = A + B	D	E = C - D	F	G = E / F
Zone 1 - Inner East	2.4	-11.0	-8.6	0.0	-8.6	5,636	-1,523
Zone 2 - Inner North East	1.2	-3.1	-1.9	1.0	-2.9	5,636	-515
Zone 3 - Inner North West	-2.6	-32.2	-34.8	10.9	-45.7	5,636	-8,106
Zone 4 - Inner South (City Centre)	244.8	762.7	1,007.4	728.0	279.4	7,890	35,418
Zone 5 - Inner West	-0.4	-9.1	-9.5	11.0	-20.5	5,636	-3,634
Zone 6 - Outer East	8.3	11.5	19.8	7.9	11.9	5,636	2,113
Zone 7 - Outer North East	5.0	17.9	22.9	0.0	22.9	5,636	4,059
Zone 8 - Outer North West	11.8	17.4	29.1	3.7	25.4	5,636	4,513
Zone 9 - Outer South (White Rose Centre)	160.2	661.0	821.3	1.5	819.8	7,890	103,900
Zone 10 - Outer West	13.4	65.0	78.4	0.0	78.4	5,636	13,910
<b>TOTAL: LEEDS DISTRICT</b>	<b>444.0</b>	<b>1,480.1</b>	<b>1,924.2</b>	<b>764.0</b>	<b>1,160.2</b>		<b>150,134</b>

**Notes:**

(1) Details and estimated 2016 turnovers of comparison goods floorspace 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	15.4	4.0	0.0	1.0	0.8	20.8	27.1	2.1	0.0	1.1	0.0	0.0	0.0	0.0	0.0	0.0	72.5	72.5	0.0	72.5
Zone 2 - Inner North East	3.9	5.8	5.5	0.0	0.5	1.9	5.9	3.3	0.0	0.0	0.0	0.7	3.3	0.0	0.0	0.0	30.7	30.7	0.0	30.7
Zone 3 - Inner North West	2.0	4.0	5.6	0.0	4.4	1.3	0.6	4.4	0.0	0.0	0.6	0.0	0.0	0.0	0.0	0.0	26.0	26.0	0.0	26.0
Zone 4 - Inner South (City Centre)	183.8	178.8	296.2	200.5	67.0	155.6	87.3	132.9	136.8	123.8	48.6	35.5	93.0	106.2	98.9	459.2	2404.2	2404.2	0.0	2404.2
Zone 5 - Inner West	0.0	0.0	0.0	2.4	5.7	0.0	0.2	0.0	0.0	2.4	0.0	0.0	0.0	0.0	0.0	0.0	10.6	10.6	0.0	10.6
Zone 6 - Outer East	21.3	0.0	0.0	0.0	1.1	74.5	5.2	0.5	1.4	0.0	0.0	3.9	4.9	0.0	0.0	0.0	112.7	112.7	0.0	112.7
Zone 7 - Outer North East	0.0	3.8	9.0	0.0	0.0	0.0	32.0	20.8	0.0	0.0	6.5	0.2	0.0	0.0	0.0	0.0	72.4	72.4	0.0	72.4
Zone 8 - Outer North West	0.0	0.0	11.0	0.0	2.1	1.3	0.8	94.0	0.0	0.0	0.0	1.5	0.0	0.0	0.0	49.2	159.9	159.9	0.0	159.9
Zone 9 - Outer South (White Rose Centre)	16.6	21.0	29.3	124.1	42.5	49.7	26.1	51.9	149.0	62.2	7.2	22.2	231.1	217.0	104.0	269.0	1421.7	1421.7	0.0	1421.7
Zone 10 - Outer West	0.0	0.0	14.0	0.0	22.5	0.0	2.3	7.0	1.3	36.1	0.0	0.8	0.0	3.2	10.2	0.0	97.2	97.2	0.0	97.2
<b>SUB TOTAL</b>	<b>243.0</b>	<b>217.4</b>	<b>370.6</b>	<b>328.0</b>	<b>146.7</b>	<b>305.1</b>	<b>186.3</b>	<b>316.8</b>	<b>288.5</b>	<b>225.5</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>4407.9</b>	<b>4407.9</b>	<b>0.0</b>	<b>4407.9</b>
<b>OUTSIDE LEEDS DISTRICT</b>																				
All Centres / Stores	33.8	52.7	16.6	10.9	23.4	57.9	92.0	68.8	75.8	44.9	578.4	291.0	832.1	1167.6	538.3	1107.4	4991.6			
<b>SUB TOTAL</b>	<b>33.8</b>	<b>52.7</b>	<b>16.6</b>	<b>10.9</b>	<b>23.4</b>	<b>57.9</b>	<b>92.0</b>	<b>68.8</b>	<b>75.8</b>	<b>44.9</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>4991.6</b>			
<b>TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)</b>	<b>276.8</b>	<b>270.1</b>	<b>387.2</b>	<b>338.8</b>	<b>170.1</b>	<b>363.0</b>	<b>278.3</b>	<b>385.6</b>	<b>364.3</b>	<b>270.5</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>9399.5</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 (Table 8, C)	B (Table 13, C)	C <sup>(1)</sup>	D = B - C	E = D - A
Zone 1 - Inner East	49.1	72.5	16.9	55.6	6.5
Zone 2 - Inner North East	21.4	30.7	6.9	23.8	2.3
Zone 3 - Inner North West	18.2	26.0	14.2	11.9	-6.3
Zone 4 - Inner South (City Centre)	1,632.3	2,404.2	244.9	2,159.3	527.0
Zone 5 - Inner West	7.2	10.6	4.6	6.0	-1.1
Zone 6 - Outer East	72.6	112.7	17.2	95.5	22.9
Zone 7 - Outer North East	51.4	72.4	9.4	62.9	11.5
Zone 8 - Outer North West	109.1	159.9	25.8	134.1	25.0
Zone 9 - Outer South (White Rose Centre)	973.3	1,421.7	87.9	1,333.8	360.5
Zone 10 - Outer West	68.5	97.2	1.0	96.3	27.7
<b>TOTAL: LEEDS DISTRICT</b>	<b>3,003.0</b>	<b>4,407.9</b>	<b>428.8</b>	<b>3,979.1</b>	<b>976.1</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 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 Floorpace 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 Floorpace Need in 2021 (sq.m net)
	A	B	C = A + B	D	E = C - D	F	G = E / F
Zone 1 - Inner East	6.5	-11.0	-4.5	0.0	-4.5	6,408	-703
Zone 2 - Inner North East	2.3	-3.1	-0.7	1.2	-1.9	6,408	-300
Zone 3 - Inner North West	-6.3	-32.2	-38.4	12.2	-50.6	6,408	-7,899
Zone 4 - Inner South (City Centre)	527.0	762.7	1,289.7	820.6	469.1	8,971	52,293
Zone 5 - Inner West	-1.1	-9.1	-10.3	12.4	-22.7	6,408	-3,537
Zone 6 - Outer East	22.9	11.5	34.4	8.9	25.5	6,408	3,976
Zone 7 - Outer North East	11.5	17.9	29.4	0.0	29.4	6,408	4,594
Zone 8 - Outer North West	25.0	17.4	42.3	4.2	38.1	6,408	5,953
Zone 9 - Outer South (White Rose Centre)	360.5	661.0	1,021.5	1.7	1,019.8	8,971	113,678
Zone 10 - Outer West	27.7	65.0	92.8	0.0	92.8	6,408	14,476
<b>TOTAL: LEEDS DISTRICT</b>	<b>976.1</b>	<b>1,480.1</b>	<b>2,456.2</b>	<b>861.2</b>	<b>1,595.0</b>		<b>182,531.3</b>

**Notes:**

(1) Details and estimated 2021 turnovers of comparison goods floorpace 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	18.2	4.7	0.0	1.3	1.0	28.8	32.1	2.5	0.0	1.3	0.0	0.0	0.0	0.0	0.0	0.0	90.0	90.0	0.0	90.0
Zone 2 - Inner North East	4.6	6.7	6.4	0.0	0.6	2.6	6.9	3.9	0.0	0.0	0.0	0.9	3.9	0.0	0.0	0.0	36.5	36.5	0.0	36.5
Zone 3 - Inner North West	2.3	4.7	6.5	0.0	5.1	1.8	0.7	5.2	0.0	0.0	0.7	0.0	0.0	3.8	0.0	0.0	30.9	30.9	0.0	30.9
Zone 4 - Inner South (City Centre)	217.3	208.5	344.2	251.7	77.7	215.5	103.4	157.6	167.8	143.7	58.3	43.1	110.8	127.2	118.8	556.0	2901.7	2901.7	0.0	2901.7
Zone 5 - Inner West	0.0	0.0	0.0	3.0	6.6	0.0	0.2	0.0	0.0	2.7	0.0	0.0	0.0	0.0	0.0	0.0	12.6	12.6	0.0	12.6
Zone 6 - Outer East	25.2	0.0	0.0	0.0	1.2	103.1	6.1	0.6	1.7	0.0	0.0	7.8	5.8	0.0	0.0	0.0	148.5	148.5	0.0	148.5
Zone 7 - Outer North East	0.0	4.5	10.5	0.0	0.0	0.0	37.9	24.7	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	85.6	85.6	0.0	85.6
Zone 8 - Outer North West	0.0	0.0	12.8	0.0	2.5	1.8	0.9	111.4	0.0	0.0	0.0	1.8	0.0	0.0	0.0	59.6	190.8	190.8	0.0	190.8
Zone 9 - Outer South (White Rose Centre)	19.6	24.5	34.1	155.7	49.3	68.9	29.7	61.5	182.8	72.2	8.7	26.9	275.2	259.9	124.8	325.7	1719.6	1719.6	0.0	1719.6
Zone 10 - Outer West	0.0	0.0	16.3	0.0	26.1	0.0	2.7	8.2	1.6	42.0	0.0	0.9	0.0	3.8	12.2	0.0	113.8	113.8	0.0	113.8
<b>SUB TOTAL</b>	<b>287.3</b>	<b>253.6</b>	<b>430.7</b>	<b>411.7</b>	<b>170.0</b>	<b>422.4</b>	<b>220.7</b>	<b>375.7</b>	<b>354.0</b>	<b>261.9</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>5329.9</b>	<b>5329.9</b>	<b>0.0</b>	<b>5329.9</b>
<b>OUTSIDE LEEDS DISTRICT</b>																				
All Centres / Stores	40.0	61.4	19.3	13.6	27.1	80.1	109.0	81.6	93.0	52.2	693.2	353.4	991.1	1398.8	646.5	1340.9	6001.3			
<b>SUB TOTAL</b>	<b>40.0</b>	<b>61.4</b>	<b>19.3</b>	<b>13.6</b>	<b>27.1</b>	<b>80.1</b>	<b>109.0</b>	<b>81.6</b>	<b>93.0</b>	<b>52.2</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>6001.3</b>			
<b>TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)</b>	<b>327.3</b>	<b>315.1</b>	<b>450.0</b>	<b>425.3</b>	<b>197.1</b>	<b>502.5</b>	<b>329.8</b>	<b>457.3</b>	<b>447.1</b>	<b>314.1</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>11331.2</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 (Table 8, C)	B (Table 16, C)	C <sup>(1)</sup>	D = B - C	E = D - A
Zone 1 - Inner East	49.1	90.0	27.5	62.5	13.4
Zone 2 - Inner North East	21.4	36.5	11.2	25.3	3.9
Zone 3 - Inner North West	18.2	30.9	23.0	7.9	-10.3
Zone 4 - Inner South (City Centre)	1,632.3	2,901.7	397.5	2,504.2	872.0
Zone 5 - Inner West	7.2	12.6	7.5	5.1	-2.1
Zone 6 - Outer East	72.6	148.5	27.9	120.6	48.0
Zone 7 - Outer North East	51.4	85.6	15.3	70.3	18.9
Zone 8 - Outer North West	109.1	190.8	41.9	148.9	39.8
Zone 9 - Outer South (White Rose Centre)	973.3	1,719.6	142.7	1,576.9	603.5
Zone 10 - Outer West	68.5	113.8	1.6	112.2	43.6
<b>TOTAL: LEEDS DISTRICT</b>	<b>3,003.0</b>	<b>5,329.9</b>	<b>696.1</b>	<b>4,633.8</b>	<b>1,630.8</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 (Table 17, E)	B (Table 8, H)	C = A + B	D	E = C - D	F	G = E / F
Zone 1 - Inner East	13.4	-11.0	2.4	0.0	2.4	7,285	332
Zone 2 - Inner North East	3.9	-3.1	0.8	1.6	-0.8	7,285	-108
Zone 3 - Inner North West	-10.3	-32.2	-42.4	15.8	-58.2	7,285	-7,994
Zone 4 - Inner South (City Centre)	872.0	762.7	1,634.6	1,060.7	573.9	10,200	56,270
Zone 5 - Inner West	-2.1	-9.1	-11.2	16.0	-27.2	7,285	-3,734
Zone 6 - Outer East	48.0	11.5	59.5	11.5	48.0	7,285	6,584
Zone 7 - Outer North East	18.9	17.9	36.8	0.0	36.8	7,285	5,048
Zone 8 - Outer North West	39.8	17.4	57.2	5.4	51.8	7,285	7,108
Zone 9 - Outer South (White Rose Centre)	603.5	661.0	1,264.6	2.1	1,262.5	10,200	123,771
Zone 10 - Outer West	43.6	65.0	108.7	0.0	108.7	7,285	14,915
<b>TOTAL: LEEDS DISTRICT</b>	<b>1,630.8</b>	<b>1,480.1</b>	<b>3,110.9</b>	<b>1,113.1</b>	<b>1,997.8</b>		<b>202,192.4</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.