

CONVENIENCE TABLES

Table 1

Study Area Population

Year	ZONE 1	ZONE 2	ZONE 3	ZONE 4	Total
2010	36230	29212	18346	9195	92,983
2011	36742	29625	18605	9325	94,298
2012	37301	30076	18888	9467	95,732
2013	37906	30564	19195	9620	97,286
2014	38419	30977	19454	9750	98,600
2015	38978	31427	19737	9892	100,034
2016	39536	31878	20020	10034	101,469
2017	40095	32328	20303	10176	102,903
2018	40654	32779	20586	10318	104,337
2019	41166	33192	20846	10448	105,652
2020	41725	33643	21129	10590	107,086
2021	42237	34056	21388	10720	108,400
2022	42796	34506	21671	10861	109,835
2023	43308	34919	21930	10991	111,149
2024	43774	35295	22166	11110	112,344
2025	44240	35670	22402	11228	113,540
2026	44705	36046	22638	11346	114,735
2027	45125	36384	22850	11452	115,810
2028	45590	36759	23086	11571	117,006
2029	45963	37059	23274	11665	117,962
2030	46382	37397	23487	11771	119,037
2031	46754	37698	23675	11866	119,993
Increase 2011 - 2031	10,012	8,073	5,070	2,541	25,696

Source: Data: ONS Population Projections (2010 Base) estimate  
 Growth rates estimates using ONS 2010 based projections for Uttlesford District (local authority area)  
 0

Table 2

## Study Area Convenience Goods Expenditure per Head

Year	Growth Rate	ZONE 1 £	ZONE 2 £	ZONE 3 £	ZONE 4 £
2010		2149	2136	2163	2091
2011	-2.5%	2095	2083	2109	2039
2012	-0.6%	2083	2070	2096	2026
2013	-0.3%	2076	2064	2090	2020
2014	0.0%	2076	2064	2090	2020
2015	0.3%	2083	2070	2096	2026
2016	1.0%	2104	2091	2117	2047
2017	1.3%	2131	2118	2145	2073
2018	1.2%	2156	2143	2170	2098
2019	1.1%	2180	2167	2194	2121
2020	1.1%	2204	2191	2218	2145
2021	1.0%	2226	2213	2241	2166
2022	1.0%	2248	2235	2263	2188
2023	1.0%	2271	2257	2286	2210
2024	1.0%	2294	2280	2309	2232
2025	1.0%	2317	2303	2332	2254
2026	1.0%	2340	2326	2355	2277
2027	1.0%	2363	2349	2379	2299
2028	1.0%	2387	2372	2402	2322
2029	1.0%	2411	2396	2426	2346
2030	1.0%	2435	2420	2451	2369
2031	1.0%	2459	2444	2475	2393

Source: Pitney Bowes Business Insight & Oxford Economics  
2010 Consumer Retail Expenditure Estimates (2010 estimates on 2009 price base)

Notes: Expenditure per head assuming year on year growth 2011 - 2023 (Pitney Bowes Retail Exp Guide Spending Update Nov 2013) and 1.0% pa during 2024-2031

Table 3

## Study Area Total Expenditure on Convenience Goods

Year	ZONE 1 £m	ZONE 2 £m	ZONE 3 £m	ZONE 4 £m	Total £m
2010	77.86	62.40	39.68	19.23	199.16
2011	76.99	61.70	39.24	19.01	196.93
2012	77.69	62.26	39.60	19.18	198.73
2013	78.71	63.08	40.12	19.44	201.35
2014	79.77	63.93	40.66	19.70	204.07
2015	81.18	65.06	41.37	20.05	207.66
2016	83.17	66.65	42.39	20.54	212.74
2017	85.44	68.47	43.55	21.10	218.55
2018	87.67	70.26	44.68	21.65	224.26
2019	89.75	71.93	45.74	22.16	229.58
2020	91.97	73.70	46.87	22.71	235.26
2021	94.03	75.36	47.92	23.22	240.53
2022	96.22	77.12	49.04	23.76	246.14
2023	98.35	78.82	50.13	24.29	251.58
2024	100.40	80.46	51.17	24.79	256.83
2025	102.48	82.13	52.23	25.31	262.16
2026	104.60	83.83	53.31	25.83	267.57
2027	106.63	85.46	54.35	26.33	272.78
2028	108.81	87.20	55.46	26.87	278.35
2029	110.80	88.80	56.47	27.36	283.43
2030	112.93	90.50	57.56	27.89	288.87
2031	114.97	92.14	58.60	28.39	294.10

Notes: Derived from Tables 1 and 2

**Table 4**

**Study Area Total Convenience Goods Expenditure Growth**

	<b>ZONE 1 £m</b>	<b>ZONE 2 £m</b>	<b>ZONE 3 £m</b>	<b>ZONE 4 £m</b>	<b>Total £m</b>
<b>2011 - 2016</b>	6.18	4.95	3.15	1.53	15.81
<b>2017 - 2021</b>	8.59	6.88	4.38	2.12	21.97
<b>2022 - 2031</b>	18.75	15.03	9.56	4.63	47.96

**Notes:** Derived from Table 3

Table 5

## Main Food / Top Up Split

	ZONE 1		ZONE 2		ZONE 3		ZONE 4		Total	Total	Total
	Main £m	Top Up	Main £m	Top-Up	£m						
	89%	11%	89%	11%	89%	11%	89%	11%			
2010	69.29	8.56	55.53	6.86	35.32	4.37	17.11	2.11	177.26	21.91	199.16
2011	68.52	8.47	54.91	6.79	34.92	4.32	16.92	2.09	175.27	21.66	196.93
2012	69.14	8.55	55.41	6.85	35.24	4.36	17.07	2.11	176.87	21.86	198.73
2013	70.05	8.66	56.14	6.94	35.70	4.41	17.30	2.14	179.20	22.15	201.35
2014	71.00	8.78	56.90	7.03	36.19	4.47	17.53	2.17	181.62	22.45	204.07
2015	72.25	8.93	57.90	7.16	36.82	4.55	17.84	2.21	184.81	22.84	207.66
2016	74.02	9.15	59.32	7.33	37.72	4.66	18.28	2.26	189.34	23.40	212.74
2017	76.04	9.40	60.94	7.53	38.76	4.79	18.78	2.32	194.51	24.04	218.55
2018	78.02	9.64	62.53	7.73	39.77	4.92	19.27	2.38	199.59	24.67	224.26
2019	79.88	9.87	64.01	7.91	40.71	5.03	19.73	2.44	204.33	25.25	229.58
2020	81.85	10.12	65.60	8.11	41.72	5.16	20.21	2.50	209.38	25.88	235.26
2021	83.68	10.34	67.07	8.29	42.65	5.27	20.67	2.55	214.07	26.46	240.53
2022	85.64	10.58	68.63	8.48	43.65	5.39	21.15	2.61	219.07	27.08	246.14
2023	87.53	10.82	70.15	8.67	44.61	5.51	21.62	2.67	223.91	27.67	251.58
2024	89.36	11.04	71.61	8.85	45.54	5.63	22.07	2.73	228.58	28.25	256.83
2025	91.21	11.27	73.10	9.03	46.49	5.75	22.52	2.78	233.32	28.84	262.16
2026	93.09	11.51	74.61	9.22	47.45	5.86	22.99	2.84	238.13	29.43	267.57
2027	94.91	11.73	76.06	9.40	48.37	5.98	23.44	2.90	242.77	30.01	272.78
2028	96.84	11.97	77.61	9.59	49.36	6.10	23.92	2.96	247.73	30.62	278.35
2029	98.61	12.19	79.03	9.77	50.26	6.21	24.35	3.01	252.25	31.18	283.43
2030	100.51	12.42	80.55	9.96	51.23	6.33	24.82	3.07	257.10	31.78	288.87
2031	102.33	12.65	82.01	10.14	52.15	6.45	25.27	3.12	261.75	32.35	294.10

Notes: Derived from Table 3.  
Main food / top-up split derived from NEMS survey results and taken as the average of the 4 zones.

Table 6a

## Combined Main Food Destinations Market Share

	Zone 1	Zone 2	Zone 3	Zone 4
<b>Saffron Walden</b>				
Tesco, Radwinter Road, Saffron Walden	38.58%	2.91%	1.09%	8.49%
Waitrose, Hill Street, Saffron Walden	33.59%	4.04%	1.09%	8.17%
Saffron Walden Market	0.30%	0.00%	0.00%	0.00%
Local Shops within Zone 1	0.36%	0.00%	0.00%	0.00%
<b>Great Dunmow</b>				
Co-Op, White Street, Great Dunmow	0.30%	3.26%	0.00%	0.00%
Tesco, Stortford Road, Great Dunmow	0.72%	51.44%	4.75%	0.00%
Other Great Dunmow Stores	0.00%	0.78%	0.00%	0.00%
Local Shops within Zone 2	0.30%	1.21%	0.00%	0.00%
<b>Stansted Mountfitchet</b>	0.30%	0.00%	2.92%	0.00%
<b>Bishops Stortford</b>				
Marks & Spencer, South Street, Bishops Stortford	0.00%	0.43%	0.47%	0.00%
Waitrose, Birchanger Motorway Services, Bishops Stortford	0.30%	0.85%	2.78%	0.00%
Sainsbury's, Jackson Square, Bishops Stortford	1.75%	4.82%	17.17%	0.00%
Sainsbury's, The Thorley Centre, Bishops Stortford	0.66%	0.82%	6.99%	0.00%
Tesco, Lancaster Way, Bishops Stortford	1.44%	1.67%	30.42%	0.00%
Waitrose, Northgate End, Bishops Stortford	1.39%	4.43%	14.86%	0.00%
<b>Braintree</b>				
Sainsbury's, Tofts Walk, Braintree	0.00%	2.87%	0.00%	0.00%
Tesco, Great Notley, Braintree	0.00%	0.43%	0.00%	0.00%
Tesco, Market Place, Braintree	0.00%	0.85%	0.00%	0.00%
Other Braintree Stores	0.00%	0.43%	0.00%	0.00%

<b>Cambridge</b>				
Asda, Coldhams Lane, Cambridge	2.18%	0.00%	0.47%	1.36%
Sainsbury's, Brooks Road, Cambridge	1.27%	0.43%	0.00%	7.15%
Waitrose, Cambridge	0.36%	0.00%	0.00%	5.79%
Other Cambridge Stores	1.03%	0.00%	0.00%	15.93%
<b>Chelmsford</b>				
Sainsbury's, White Heart Lane, Chelmsford	0.00%	4.86%	0.00%	0.00%
Other Chelmsford Stores	0.00%	2.84%	0.00%	0.00%
<b>Harlow</b>				
Asda, Watergardens, Harlow	0.66%	0.82%	1.09%	0.00%
Sainsbury's, Fifth Avenue, Harlow	0.00%	0.39%	1.09%	0.00%
Tesco, Church Langley Centre, Harlow	0.00%	0.00%	2.92%	2.71%
Tesco, East Road / Edinburgh Way, Harlow	0.36%	0.82%	2.17%	0.00%
<b>Haverhill</b>				
Sainsbury's, Haycocks Road, Haverhill	4.89%	0.00%	0.00%	27.94%
Other Haverhill Stores	0.30%	0.00%	0.00%	0.00%
<b>Royston</b>				
Tesco Extra, Old North Road, Royston	1.69%	0.00%	0.00%	1.36%
<b>Sawston</b>				
Other (Outside survey area)	0.30%	1.63%	2.31%	3.08%
Other (Outside Zone 1)	1.69%	0.00%	0.00%	13.26%
Other (Outside Zone 2)	0.36%	1.60%	0.00%	0.00%
Other (Outside Zone 3)	0.72%	1.67%	3.87%	0.00%
Internet / Home Delivery	4.16%	3.72%	2.92%	1.36%
<b>Totals:</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Source: NEMS Household Survey Results

Notes:

The tables have not been adjusted to take account of increases in SFT on the basis that the uplift is offset by the reduction to take account of SFT serviced from supermarket shelves.

Table 6b

## Combined Main Food Destinations Expenditure (Sales)

	Zone 1	Zone 2	Zone 3	Zone 4
<b>Saffron Walden</b>				
Tesco, Radwinter Road, Saffron Walden	£26.43	£1.60	£0.38	£1.44
Waitrose, Hill Street, Saffron Walden	£23.02	£2.22	£0.38	£1.38
Saffron Walden Market	£0.21	£0.00	£0.00	£0.00
Local Shops within Zone 1	£0.25	£0.00	£0.00	£0.00
	<b>£49.91</b>	<b>£3.82</b>	<b>£0.76</b>	<b>£2.82</b>
<b>Great Dunmow</b>				
Co-Op, White Street, Great Dunmow	£0.21	£1.79	£0.00	£0.00
Tesco, Stortford Road, Great Dunmow	£0.50	£28.25	£1.66	£0.00
Other Great Dunmow Stores	£0.00	£0.43	£0.00	£0.00
Local Shops within Zone 2	£0.21	£0.66	£0.00	£0.00
	<b>£0.91</b>	<b>£31.13</b>	<b>£1.66</b>	<b>£0.00</b>
<b>Stansted</b>	£0.21	£0.00	£1.02	£0.00
<b>Bishops Stortford</b>				
Marks & Spencer, South Street, Bishops Stortford	£0.00	£0.23	£0.17	£0.00
Waitrose, Birchanger Motorway Services, Bishops Stortford	£0.21	£0.47	£0.97	£0.00
Sainsbury's, Jackson Square, Bishops Stortford	£1.20	£2.65	£6.00	£0.00
Sainsbury's, The Thorley Centre, Bishops Stortford	£0.46	£0.45	£2.44	£0.00
Tesco, Lancaster Way, Bishops Stortford	£0.99	£0.92	£10.62	£0.00
Waitrose, Northgate End, Bishops Stortford	£0.95	£2.43	£5.19	£0.00
	<b>£3.80</b>	<b>£7.15</b>	<b>£25.39</b>	<b>£0.00</b>
<b>Braintree</b>				
Sainsbury's, Tofts Walk, Braintree	£0.00	£1.58	£0.00	£0.00
Tesco, Great Notley, Braintree	£0.00	£0.23	£0.00	£0.00
Tesco, Market Place, Braintree	£0.00	£0.47	£0.00	£0.00
Other Braintree Stores	£0.00	£0.23	£0.00	£0.00
	<b>£0.00</b>	<b>£2.51</b>	<b>£0.00</b>	<b>£0.00</b>

<b>Cambridge</b>				
Asda, Coldhams Lane, Cambridge	£1.49	£0.00	£0.17	£0.23
Sainsbury's, Brooks Road, Cambridge	£0.87	£0.23	£0.00	£1.21
Waitrose, Cambridge	£0.25	£0.00	£0.00	£0.98
Other Cambridge Stores	£0.70	£0.00	£0.00	£2.70
	<b>£3.31</b>	<b>£0.23</b>	<b>£0.17</b>	<b>£5.11</b>
<b>Chelmsford</b>				
Sainsbury's, White Heart Lane, Chelmsford	£0.00	£2.67	£0.00	£0.00
Other Chelmsford Stores	£0.00	£1.56	£0.00	£0.00
	<b>£0.00</b>	<b>£4.23</b>	<b>£0.00</b>	<b>£0.00</b>
<b>Harlow</b>				
Asda, Watergardens, Harlow	£0.46	£0.45	£0.38	£0.00
Sainsbury's, Fifth Avenue, Harlow	£0.00	£0.21	£0.38	£0.00
Tesco, Church Langley Centre, Harlow	£0.00	£0.00	£1.02	£0.46
Tesco, East Road / Edinburgh Way, Harlow	£0.25	£0.45	£0.76	£0.00
	<b>£0.70</b>	<b>£1.11</b>	<b>£2.54</b>	<b>£0.46</b>
<b>Haverhill</b>				
Sainsbury's, Haycocks Road, Haverhill	£3.35	£0.00	£0.00	£4.73
Other Stores, Haverhill	£0.21	£0.00	£0.00	£0.00
	<b>£3.56</b>	<b>£0.00</b>	<b>£0.00</b>	<b>£4.73</b>
<b>Royston</b>				
Tesco Extra, Old North Road, Royston	<b>£1.16</b>	<b>£0.00</b>	<b>£0.00</b>	£0.23
<b>Sawston</b>	<b>£0.00</b>	<b>£0.00</b>	<b>£0.21</b>	£0.58
Other (Outside survey area)	£0.21	£0.90	£0.81	£0.52
Other (Outside Zone 1)	£1.16	£0.00	£0.00	£2.24
Other (Outside Zone 2)	£0.25	£0.88	£0.00	£0.00
Other (Outside Zone 3)	£0.50	£0.92	£1.35	£0.00
Internet / Home Delivery	£2.85	£2.05	£1.02	£0.23
<b>Totals:</b>	<b>£68.52</b>	<b>£54.91</b>	<b>£34.92</b>	<b>£16.92</b>

Note: Derived from Tables 5 & 6

Table 7a

## Top-Up Food Destinations Market Share

	Zone 1	Zone 2	Zone 3	Zone 4
<b>Saffron Walden</b>				
Tesco, Radwinter Road, Saffron Walden	14.17%	0.00%	1.33%	2.29%
Waitrose, Hill Street, Saffron Walden	35.43%	2.63%	1.33%	0.00%
Other Saffron Walden Stores	17.32%	0.88%	0.00%	0.00%
Local Shops within Zone 1	0.79%	19.30%	1.33%	0.00%
	<b>67.71%</b>	<b>22.81%</b>	<b>4.00%</b>	<b>2.29%</b>
<b>Great Dunmow</b>				
Co-Op, White Street, Great Dunmow	0.00%	26.32%	1.33%	0.00%
Tesco, Stortford Road, Great Dunmow	0.79%	24.56%	1.33%	0.00%
Great Dunmow Market	0.00%	0.88%	0.00%	0.00%
Other Great Dunmow Stores	7.09%	0.88%	1.33%	0.00%
Local Shops within Zone 2	0.79%	0.88%	9.33%	0.00%
	<b>8.67%</b>	<b>53.51%</b>	<b>13.33%</b>	<b>0.00%</b>
Stansted Mountfitchet	0.79%	0.88%	29.33%	0.00%
Local Shops within Zone 3	0.00%	2.63%	0.00%	0.00%
	<b>0.79%</b>	<b>3.51%</b>	<b>29.33%</b>	<b>0.00%</b>
<b>Bishops Stortford</b>				
Marks & Spencer, South Street, Bishops Stortford	0.00%	0.88%	1.33%	0.00%
Waitrose, Birchanger Motorway Services, Bishops Stortford	0.00%	0.88%	1.33%	0.00%
Sainsbury's, Jackson Square, Bishops Stortford	0.79%	1.75%	5.33%	0.00%
Sainsbury's, The Thorley Centre, Bishops Stortford	0.79%	0.00%	4.00%	0.00%
Tesco, Lancaster Way, Bishops Stortford	0.00%	0.00%	9.33%	0.00%
Waitrose, Northgate End, Bishops Stortford	0.79%	1.75%	12.00%	0.00%
	<b>2.37%</b>	<b>5.26%</b>	<b>33.33%</b>	<b>0.00%</b>
<b>Braintree</b>				
Sainsbury's, Tofts Walk, Braintree	0.00%	0.88%	0.00%	0.00%
	<b>0.00%</b>	<b>0.88%</b>	<b>0.00%</b>	<b>0.00%</b>

<b>Cambridge</b>				
Waitrose, Cambridge	0.00%	0.00%	0.00%	4.57%
Sainsbury's, Brooks Road, Cambridge	0.79%	0.00%	0.00%	0.00%
Other Cambridge Stores	1.57%	0.00%	0.00%	4.57%
	<b>2.36%</b>	<b>0.00%</b>	<b>0.00%</b>	<b>9.14%</b>
<b>Chelmsford</b>				
Sainsbury's, White Heart Lane, Chelmsford	0.00%	0.88%	0.00%	0.00%
Other Chelmsford Stores	0.00%	0.88%	0.00%	0.00%
	<b>0.00%</b>	<b>1.75%</b>	<b>0.00%</b>	<b>0.00%</b>
<b>Harlow</b>				
Asda, Watergardens, Harlow	0.00%	0.88%	0.00%	0.00%
Sainsbury's, Fifth Avenue, Harlow	0.00%	0.00%	1.33%	0.00%
Tesco, Church Langley Centre, Harlow	0.00%	0.00%	1.33%	2.29%
Tesco, East Road / Edinburgh Way, Harlow	0.00%	0.88%	1.33%	0.00%
	<b>0.00%</b>	<b>1.75%</b>	<b>4.00%</b>	<b>2.29%</b>
<b>Haverhill</b>				
Sainsbury's, Haycocks Road, Haverhill	0.00%	0.00%	0.00%	6.86%
Other Haverhill Stores	0.00%	0.00%	0.00%	4.57%
	<b>0.00%</b>	<b>0.00%</b>	<b>0.00%</b>	<b>11.43%</b>
Sawston	0.00%	0.00%	0.00%	13.14%
Other (Outside survey area)	5.51%	3.51%	0.00%	46.29%
Other (Outside Zone 1)	0.00%	0.88%	0.00%	0.00%
Other (Outside Zone 2)	0.79%	1.75%	14.67%	0.00%
Other (Outside Zone 3)	8.66%	4.39%	1.33%	0.00%
Internet / Home Delivery	3.15%	0.00%	0.00%	15.43%
<b>Total:</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Source: NEMS Household Survey Results

Notes:

The tables have not been adjusted to take account of increases in SFT on the basis that the uplift is offset by the reduction to take account of SFT serviced from supermarket shelves.

Table 7b

## Top-Up Food Destinations Expenditure (Sales)

	Zone 1	Zone 2	Zone 3	Zone 4
<b>Saffron Walden</b>				
Tesco, Radwinter Road, Saffron Walden	£1.20	£0.00	£0.06	£0.05
Waitrose, Hill Street, Saffron Walden	£3.00	£0.18	£0.06	£0.00
Other Saffron Walden Stores	£1.47	£0.06	£0.00	£0.00
Local Shops within Zone 1	£0.07	£1.31	£0.06	£0.00
	<b>£5.73</b>	<b>£1.55</b>	<b>£0.17</b>	<b>£0.05</b>
<b>Great Dunmow</b>				
Co-Op, White Street, Great Dunmow	£0.00	£1.79	£0.06	£0.00
Tesco, Stortford Road, Great Dunmow	£0.07	£1.67	£0.06	£0.00
Great Dunmow Market	£0.00	£0.06	£0.00	£0.00
Other Great Dunmow Stores	£0.60	£0.06	£0.06	£0.00
Local Shops within Zone 2	£0.07	£0.06	£0.40	£0.00
	<b>£0.73</b>	<b>£3.63</b>	<b>£0.58</b>	<b>£0.00</b>
Stansted Mountfitchet	£0.07	£0.06	£1.27	£0.00
Local Shops within Zone 3	£0.00	£0.18	£0.00	£0.00
	<b>£0.07</b>	<b>£0.24</b>	<b>£1.27</b>	<b>£0.00</b>
<b>Bishops Stortford</b>				
Marks & Spencer, South Street, Bishops Stortford	£0.00	£0.06	£0.06	£0.00
Waitrose, Birchanger Motorway Services, Bishops Stortford	£0.00	£0.06	£0.06	£0.00
Sainsbury's, Jackson Square, Bishops Stortford	£0.07	£0.12	£0.23	£0.00
Sainsbury's, The Thorley Centre, Bishops Stortford	£0.07	£0.00	£0.17	£0.00
Tesco, Lancaster Way, Bishops Stortford	£0.00	£0.00	£0.40	£0.00
Waitrose, Northgate End, Bishops Stortford	£0.07	£0.12	£0.52	£0.00
	<b>£0.20</b>	<b>£0.36</b>	<b>£1.44</b>	<b>£0.00</b>
<b>Braintree</b>				
Sainsbury's, Tofts Walk, Braintree	£0.00	£0.06	£0.00	£0.00
	<b>£0.00</b>	<b>£0.06</b>	<b>£0.00</b>	<b>£0.00</b>

<b>Cambridge</b>				
Waitrose, Cambridge	£0.00	£0.00	£0.00	£0.10
Sainsbury's, Brooks Road, Cambridge	£0.07	£0.00	£0.00	£0.00
Other Cambridge Stores	£0.13	£0.00	£0.00	£0.10
	<b>£0.20</b>	<b>£0.00</b>	<b>£0.00</b>	<b>£0.19</b>
<b>Chelmsford</b>				
Sainsbury's, White Heart Lane, Chelmsford	£0.00	£0.06	£0.00	£0.00
Other Chelmsford Stores	£0.00	£0.06	£0.00	£0.00
	<b>£0.00</b>	<b>£0.12</b>	<b>£0.00</b>	<b>£0.00</b>
<b>Harlow</b>				
Asda, Watergardens, Harlow	£0.00	£0.06	£0.00	£0.00
Sainsbury's, Fifth Avenue, Harlow	£0.00	£0.00	£0.06	£0.00
Tesco, Church Langley Centre, Harlow	£0.00	£0.00	£0.06	£0.05
Tesco, East Road / Edinburgh Way, Harlow	£0.00	£0.06	£0.06	£0.00
	<b>£0.00</b>	<b>£0.12</b>	<b>£0.17</b>	<b>£0.05</b>
<b>Haverhill</b>				
Sainsbury's, Haycocks Road, Haverhill	£0.00	£0.00	£0.00	£0.14
Other Haverhill Stores	£0.00	£0.00	£0.00	£0.10
	<b>£0.00</b>	<b>£0.00</b>	<b>£0.00</b>	<b>£0.24</b>
Sawston	£0.00	£0.00	£0.00	£0.27
Other (Outside survey area)	£0.47	£0.24	£0.00	£0.97
Other (Outside Zone 1)	£0.00	£0.06	£0.00	£0.00
Other (Outside Zone 2)	£0.07	£0.12	£0.63	£0.00
Other (Outside Zone 3)	£0.73	£0.30	£0.06	£0.00
Internet / Home Delivery	£0.27	£0.00	£0.00	£0.32
<b>Total</b>	<b>£8.47</b>	<b>£6.79</b>	<b>£4.32</b>	<b>£2.09</b>

Note: Derived from Tables 5 & 7

Table 8

## Saffron Walden Floorspace Requirement

Zone 1	2011			2016			2021			2026			2031		
	Benchmark Turnover £	Net Sales Area Sq m	£m	Benchmark Turnover £	Net Sales Area Sq m	£m									
Total Main Food Spend within Zone			£68.52			£74.02			£83.68			£93.09			£102.33
Total Top-Up Food Spend within Zone			£8.47			£9.15			£10.34			£11.51			£12.65
<b>Total Available Spend from Zone 1</b>			<b>£76.99</b>			<b>£83.17</b>			<b>£94.03</b>			<b>£104.60</b>			<b>£114.97</b>
Total Available Spend from Zones 2,3 and 4			£119.95			£129.57			£146.50			£162.97			£179.13
Total Main Food Expenditure From Zone 1 going into Zone 1 Supermarkets			£49.45			£53.42			£60.40			£67.19			£73.85
% of Available Spend			72.17%			72.17%			72.17%			72.17%			72.17%
Total Top-Up Food Expenditure From Zone 1 going into Zone 1 Supermarkets			£4.20			£4.54			£5.13			£5.71			£6.27
% of Available Spend			49.60%			49.60%			49.60%			49.60%			49.60%
Combined Zone 1 Supermarket Retention Rate			£53.65			£57.96			£65.53			£72.90			£80.13
Combined Zone 1 Supermarket Retention Rate (%)			69.69%			69.69%			69.69%			69.69%			69.69%
Main Food & Top-up Exp Inflow into Zone 1 Supermarkets from Zones 2, 3 & 4			£7.74			£8.36			£9.45			£10.51			£11.56
% of Available Spend of Zones 2,3 and 4			6.45%			6.45%			6.45%			6.45%			6.45%
<b>Adjustment *</b>			<b>-£1.24</b>			<b>-£1.26</b>			<b>-£1.29</b>			<b>-£1.33</b>			<b>-£1.34</b>
<b>Total Expenditure into Zone 1 Supermarkets</b>			<b>£60.15</b>			<b>£65.06</b>			<b>£73.69</b>			<b>£82.08</b>			<b>£90.34</b>
<b>Benchmark Turnover of Existing Supermarkets</b>															
Tesco Net Sales Area (90% Convenience)	£13,000	2051	£26.66	£13,266	2051	£27.21	£13,533	2051	£27.76	£13,806	2051	£28.32	£14,084	2051	£28.89
Waitrose Net sales Area (90% convenience)	£13,356	1374	£18.35	£13,625	1374	£18.72	£13,900	1374	£19.10	£14,180	1374	£19.48	£14,466	1374	£19.88
<i>Commitments (conv sq m net)</i>															
Tesco Extension (388 sq m net)				£13,266	388	£5.15	£13,533	388	£5.25	£13,806	388	£5.36	£14,084	388	£5.46
Waitrose Extension (650 sq m net)				£13,625	388	£5.29	£13,900	388	£5.39	£14,180	388	£5.50	£14,466	388	£5.61
Aldi, Thaxted Road (1,125 sq m net)				£7,651	1125	£8.61	£7,805	1125	£8.78	£7,963	1125	£8.96	£8,123	1125	£9.14
<b>Total</b>			<b>£45.01</b>			<b>£64.97</b>			<b>£66.28</b>			<b>£67.62</b>			<b>£68.98</b>
<b>Residual Expenditure</b>			<b>£15.14</b>			<b>£0.09</b>			<b>£7.41</b>			<b>£14.46</b>			<b>£21.36</b>
Net Supportable Floorspace Big 4 Retailer	£12,700		1192	£12,956		7	£13,217		561	£13,484		1073	£13,756		1553
Net Supportable Floorspace Discounter	£7,500		2018	£7,651		11	£7,805		949	£7,963		1816	£8,123		2630

Notes

Benchmark turnover increased by 0.4% pa to take account of increase in floorspace efficiency

Benchmark turnover derived from a combination of sources including Retail Rankings 2010, GL Hearn & Barton Wilmore applications and agreed figures for Sainsbury's Appeal.

Big 4 supportable floorspace benchmarks taken as average of Tesco, Asda, Sainsbury's & Morrisons (Retail Rankings 2010)

Discounter supportable floorspace based on Savills estimates

\*An adjustment of £1.24m has been made to the total turnover into main supermarkets to reflect the new Tesco Haverhill using the Dec 2011 Indigo Household Survey.

Table 9

## Great Dunmow Floorspace Requirement

Zone 2	2011		2016		2021		2026		2031						
	Benchmark Turnover £	Net Sales Area Sq m													
Total Main Food Spend within Zone			£54.91		£59.32		£67.07		£74.61		£82.01				
Total Top-Up Food Spend within Zone			£6.79		£7.33		£8.29		£9.22		£10.14				
<b>Total Available Spend from Zone 2</b>			<b>£61.70</b>		<b>£66.65</b>		<b>£75.36</b>		<b>£83.83</b>		<b>£92.14</b>				
Total Available Spend from Zones 1,3 and 4			£135.23		£146.09		£165.17		£191.14		£201.96				
Total Main Food Expenditure From Zone 2 going into Zone 2 Supermarkets % of Available Spend			£30.04 54.70%		£32.45 54.70%		£36.69 54.70%		£40.81 54.70%		£44.86 54.70%				
Total Top-Up Food Expenditure From Zone 2 going into Zone 2 Supermarkets % of Available Spend			£3.45 50.88%		£3.73 50.88%		£4.22 50.88%		£4.69 50.88%		£5.16 50.88%				
Combined Zone 2 Supermarket Retention Rate			£33.49		£36.18		£40.91		£45.50		£50.02				
Combined Zone 2 Supermarket Retention Rate (%)			54.28%		54.28%		54.28%		54.28%		54.28%				
Main Food & Top-up Exp Inflow into Zone 2 Supermarkets from Zones 1, 3 & 4 % of Available Spend of Zones 1,3 and 4			£2.54 1.88%		£2.75 1.88%		£3.11 1.88%		£3.60 1.88%		£3.80 1.88%				
<b>Adjustment *</b>			<b>-0.3</b>		<b>-0.31</b>		<b>-0.31</b>		<b>-0.32</b>		<b>-0.32</b>				
<b>Total Expenditure into Zone 2 Supermarkets</b>			<b>£35.74</b>		<b>£38.62</b>		<b>£43.70</b>		<b>£48.78</b>		<b>£54.14</b>				
<b>Benchmark Turnover of Existing Supermarkets</b>															
Co-Op (90% convenience sales area )	£7,000	724	£5.07	£7,141	724	£5.17	£7,285	724	£5.27	£7,432	724	£5.38	£7,582	724	£5.49
Tesco (90% convenience floorspace)	£13,000	2097	£27.26	£13,266	2097	£27.82	£13,533	2097	£28.38	£13,806	2097	£28.95	£14,622	2097	£30.66
<i>Commitments (conv sq m net)</i>															
Tesco Extension 471 sq m				£13,266	471	£6.25	£13,533	471	£6.37	£13,806	471	£6.50	£14,622	471	£6.89
<b>Total</b>			<b>£32.33</b>		<b>£39.24</b>		<b>£40.03</b>		<b>£40.83</b>		<b>£43.04</b>				
<b>Residual Expenditure</b>			<b>£3.41</b>		<b>-£0.62</b>		<b>£3.68</b>		<b>£7.95</b>		<b>£11.10</b>				
Net Supportable Floorspace Big 4 Retailer	£12,700	268		£12,956	-48		£13,217	278		£13,484	589		£13,756	807	
Net Supportable Floorspace Discounter	£7,500	454		£7,651	-81		£7,805	471		£7,963	998		£8,123	1366	

Notes

Benchmark turnover increased by 0.4% pa to take account of increase in floorspace efficiency

Benchmark turnover derived from a combination of sources including Retail Rankings 2010, GL Hearn & Barton Wilmore applications and agreed figures for Sainsbury's Appeal.

Big 4 supportable floorspace benchmarks taken as average of Tesco, Asda, Sainsbury's & Morrisons (Retail Rankings 2010)

Discounter supportable floorspace based on Savills estimates

\* An adjustment (£0.3m) has been made to the total turnover into main supermarkets to reflect the new Tesco Haverhill which did not register on the NEMS survey.

Table 10

## Zone 3 Expenditure Analysis

Zone 3	2011		2016		2021		2026		2031	
	Benchmark Turnover £	Net Sales Area Sq m								
Total Main Food Spend within Zone		£34.92		£37.72		£42.65		£47.45		£52.15
Total Top-Up Food Spend within Zone		£4.32		£4.66		£5.27		£5.86		£6.45
<b>Total Available Spend from Zone 3</b>		<b>£39.24</b>		<b>£42.39</b>		<b>£47.92</b>		<b>£53.31</b>		<b>£58.60</b>
Total Available Spend from Zones 1, 2 and 4		£157.69		£170.35		£192.60		£214.26		£235.51
Total Main Food Expenditure From Zone 3 going into Zone 3 Supermarkets % of Available Spend		£0.00 0.00%								
Total Top-Up Food Expenditure From Zone 3 going into Zone 3 Supermarkets % of Available Spend		£0.00 0.00%								
<b>Total Expenditure into Zone 3 Supermarkets</b>		<b>£0.00</b>								
Total Main Food Expenditure From Zone 3 going into Zone 3 Other Shops % of Available Spend		£1.02 2.92%		£1.10 2.92%		£1.25 2.92%		£1.39 2.92%		£1.52 2.92%
Total Top-Up Food Expenditure From Zone 3 going into Zone 3 Other Shops % of Available Spend		£1.27 29.33%		£1.37 29.33%		£1.55 29.33%		£1.72 29.33%		£1.89 29.33%
<b>Total Main &amp; Top-Up Expenditure into Zone 3 Other Shops</b>		<b>£2.29</b> 5.83%		<b>£2.47</b> 5.83%		<b>£2.79</b> 5.83%		<b>£3.11</b> 5.83%		<b>£3.41</b> 5.83%
Total Main Expenditure Leakage into Bishops Stortford & Harlow Supermarkets		£27.93 79.97%		£30.17 79.97%		£34.11 79.97%		£37.94 79.97%		£41.71 79.97%
Total Top Expenditure Leakage into Bishops Stortford & Harlow Supermarkets		£1.61 37.33%		£1.74 37.33%		£1.97 37.33%		£2.19 37.33%		£2.41 37.33%
<b>Total Main &amp; Top-Up Expenditure Leakage into Bishops Stortford &amp; Harlow</b>		<b>£29.54</b> 75.28%		<b>£31.91</b> 75.28%		<b>£36.08</b> 75.28%		<b>£40.13</b> 75.28%		<b>£44.11</b> 75.28%

Table 11

36.95

**Stansted Mountfitchet Supportable Floorspace 2011**

Stansted Mountfitchet Population	5900
Other Zone 3 Population	1100
Total	7000
Zone 3 Expenditure Per Person (Combined Main & Top Up)	£2,109
Available Spend £m	14.76
Available Spend (£m) Assuming 60% Retention	£8.86
Benchmark Turnover Big 4 Retailer	£12,700
Benchmark Turnover Discounter	£7,500
Supportable Floorspace Big 4 Retailer	697
Supportable Floorspace Discounter	1181

## Notes:

Expenditure Per Person derived from Table 2

Big 4 supportable floorspace benchmarks taken as average of Tesco, Asda, Sainsbury's &amp; Morrisons

Discounter supportable floorspace based on Savills estimates

Table 12

## Zones 1, 2 &amp; 3 Top-up Floorspace Requirement

Zone 1 Main & Top-up Expenditure into Other Shops	2011	2016	2021	2026	2031
Total Main Food Expenditure From Zone 1 going into other Zone 1 Shops % of Available Spend	£0.46 0.66%	£0.49 0.66%	£0.56 0.66%	£0.62 0.66%	£0.68 0.66%
Total Top-Up Food Expenditure From Zone 1 going into other Zone 1 Shops % of Available Spend	£1.53 18.11%	£1.66 18.11%	£1.87 18.11%	£2.08 18.11%	£2.29 18.11%
Total Main & Top-Up Food Exp Inflow into Other Shops from Zones 2, 3 and 4	£1.43 1.19%	£1.54 1.19%	£1.74 1.19%	£1.94 1.19%	£2.13 1.19%
<b>Total</b>	<b>£3.42</b>	<b>£3.69</b>	<b>£4.17</b>	<b>£4.64</b>	<b>£5.10</b>
Growth In Expenditure	£0.00	£0.27	£0.76	£1.23	£1.69
Benchmark Turnover	£2,500	£2,550	£2,602	£2,676	£2,708
<b>Supportable Floorspace</b>	<b>0</b>	<b>108</b>	<b>291</b>	<b>458</b>	<b>622</b>
Zone 2 Main & Top-up Expenditure into Other Shops	2011	2016	2021	2026	2031
Total Main Food Expenditure From Zone 2 going into other Zone 2 Shops % of Available Spend	£1.09 1.99%	£1.18 1.99%	£1.33 1.99%	£1.48 1.99%	£1.63 1.99%
Total Top-Up Food Expenditure From Zone 2 going into other Zone 2 Shops % of Available Spend	£0.18 2.63%	£0.19 2.63%	£0.22 2.63%	£0.24 2.63%	£0.27 2.63%
Total Main & Top-Up Food Expenditure Inflow into Other Shops from Zones 1, 3 and 4 % of Available Spend	£1.34 0.99%	£1.44 0.99%	£1.63 0.99%	£1.89 0.99%	£1.99 0.99%
<b>Total</b>	<b>£2.60</b>	<b>£2.81</b>	<b>£3.18</b>	<b>£3.61</b>	<b>£3.89</b>
Growth In Expenditure	£0.00	£0.21	£0.58	£1.01	£1.29
Benchmark Turnover	£2,500	£2,550	£2,602	£2,676	£2,708
<b>Supportable Floorspace</b>	<b>0</b>	<b>82</b>	<b>222</b>	<b>376</b>	<b>475</b>

<b>Zone 3 Main &amp; Top-up Expenditure into Other Shops</b>	<b>2011</b>	<b>2016</b>	<b>2021</b>	<b>2026</b>	<b>2031</b>
Total Main Food Expenditure From Zone 3 going into other Zone 3 Shops % of Available Spend	£1.02 2.92%	£1.10 2.92%	£1.25 2.92%	£1.39 2.92%	£1.52 2.92%
Total Top-Up Food Expenditure From Zone 3 going into other Zone 3 Shops % of Available Spend	£1.27 29.33%	£1.37 29.33%	£1.55 29.33%	£1.72 29.33%	£1.89 29.33%
Total Main & Top-Up Food Expenditure Inflow into Other Shops from Zones 1, 2 and 4 % of Available Spend	£0.51 0.33%	£0.55 0.33%	£0.63 0.33%	£0.70 0.33%	£0.77 0.33%
Total	£2.80	£3.02	£3.42	£3.80	£4.18
Growth In Expenditure	£0.00	£0.22	£0.62	£1.00	£1.38
Benchmark Turnover	£2,500	£2,550	£2,602	£2,676	£2,708
<b>Supportable Floorspace</b>	<b>0</b>	<b>88</b>	<b>238</b>	<b>375</b>	<b>510</b>

Zones 1, 2 & 3 Top-Up Expenditure Requirement

2011- 2016	278 sq m net
2011 - 2021	750 sq m net
2011 - 2026	1,209
2011 - 2031	1,607 sq m net