

NE LINCS RETAIL AND THREE CENTRES STUDY

APPENDIX 2A - CONVENIENCE CAPACITY ASSESSMENT (OVERALL CATCHMENT)

TABLE 1 - SURVEY AREA POPULATION FORECASTS

SURVEY ZONE	POPULATION PROJECTIONS					
	2011	2012	2013	2018	2023	2030
ZONE 1 - GRIMSBY	44,447	45,168	45,365	46,504	47,487	48,935
ZONE 2 - NORTH WEST GRIMSBY	55,147	55,889	56,007	56,662	57,252	57,931
ZONE 3 - CLEETHORPES	32,740	33,081	32,858	32,174	31,594	30,809
ZONE 4 - IMMINGHAM	16,382	16,584	16,614	16,970	17,241	17,542
ZONE 5 - RURAL SOUTH	19,322	19,081	19,175	19,544	19,872	20,260
NORTH EAST LINCOLNSHIRE TOTAL	168,038	169,803	170,019	171,854	173,446	175,477
ZONE 6 - LOUTH	28,486	27,365	27,695	29,445	31,236	33,705
ZONE 7 - MARKET RASEN	18,475	18,351	18,549	19,457	20,352	21,295
ZONE 8 - BRIGG	21,866	22,469	22,629	23,265	23,751	24,245
ZONE 9 - BARTON-UPON-HUMBER	23,836	24,530	24,718	25,555	26,291	27,003
NON NE LINCOLNSHIRE TOTAL	92,663	92,715	93,591	97,722	101,630	106,248
OVERALL TOTAL	260,701	262,518	263,610	269,576	275,076	281,725

POPULATION GROWTH (%)			
2012 - 2013	2013-2018	2013-2023	2013-2030
0.4%	2.5%	4.7%	7.9%
0.2%	1.2%	2.2%	3.4%
-0.7%	-2.1%	-3.8%	-6.2%
0.2%	2.1%	3.8%	5.6%
0.5%	1.9%	3.6%	5.7%
0.1%	1.1%	2.0%	3.2%
1.2%	6.3%	12.8%	21.7%
1.1%	4.9%	9.7%	14.8%
0.7%	2.8%	5.0%	7.1%
0.8%	3.4%	6.4%	9.2%
0.9%	4.4%	8.6%	13.5%
0.4%	2.3%	4.3%	6.9%

Source: Experian Retail Planner Report (Summary Demographics - 2011 Base; based on ONS Mid Year Projections)

TABLE 2 - CONVENIENCE EXPENDITURE PER CAPITA FORECASTS, 2011 - 2026

SURVEY ZONE	2011		2012		2013		2018		2023		2030	
	(£)	Minus SFT (£)	(£)	Minus SFT (£)	(£)	Minus SFT (£)	(£)	Minus SFT (£)	(£)	Minus SFT (£)	(£)	Minus SFT (£)
ZONE 1 - GRIMSBY	£1,588	£1,559	£1,590	£1,558	£1,588	£1,551	£1,628	£1,573	£1,694	£1,623	£1,791	£1,705
ZONE 2 - NORTH WEST GRIMSBY	£1,689	£1,659	£1,691	£1,657	£1,689	£1,650	£1,732	£1,673	£1,802	£1,726	£1,905	£1,814
ZONE 3 - CLEETHORPES	£1,779	£1,747	£1,781	£1,745	£1,779	£1,738	£1,824	£1,762	£1,898	£1,818	£2,007	£1,911
ZONE 4 - IMMINGHAM	£1,760	£1,728	£1,762	£1,727	£1,760	£1,720	£1,804	£1,743	£1,878	£1,799	£1,985	£1,890
ZONE 5 - RURAL SOUTH	£1,929	£1,894	£1,931	£1,892	£1,929	£1,885	£1,978	£1,910	£2,058	£1,972	£2,176	£2,072
ZONE 6 - LOUTH	£2,029	£1,992	£2,031	£1,990	£2,029	£1,982	£2,080	£2,010	£2,165	£2,074	£2,289	£2,179
ZONE 7 - MARKET RASEN	£1,948	£1,913	£1,950	£1,911	£1,948	£1,903	£1,997	£1,929	£2,078	£1,991	£2,198	£2,092
ZONE 8 - BRIGG	£1,818	£1,785	£1,820	£1,783	£1,818	£1,776	£1,864	£1,801	£1,940	£1,858	£2,051	£1,952
ZONE 9 - BARTON-UPON-HUMBER	£1,792	£1,760	£1,794	£1,758	£1,792	£1,751	£1,837	£1,775	£1,912	£1,832	£2,022	£1,925

Notes

1. Expenditure per Capita Forecasts derived from Experian Retail Planner (Fine Expenditure) Report; All Expenditure Figures given in 2011 Prices
2. Growth in per capita retail expenditure for Convenience Goods (Source: - Experian Retail Planner Briefing Update 10.1 (September 2012) / GVA Grimley Research)

	2011-2012	2012-2013	2013 - 2018	2018-2030
Convenience Goods	0.1%	-0.1%	0.5%	0.8%

3. Deductions for Special Forms of Trading (SFT) (Source: - Experian Retail Planner Briefing Update 10.1 (September 2012) / GVA Grimley Research)

	2011	2012	2013	2018	2023	2030
Convenience Goods	1.8%	2.0%	2.3%	3.4%	4.2%	4.8%

TABLE 3 - Convenience Expenditure Growth, 2011 - 2030

SURVEY ZONE	2011	2012	2013	2018	2023	2030
	(£)	(£)	(£)	(£)	(£)	(£)
ZONE 1 - GRIMSBY	£69,311,363	£70,362,541	£70,382,638	£73,138,796	£77,076,729	£83,457,102
ZONE 2 - NORTH WEST GRIMSBY	£91,466,704	£92,601,099	£92,420,027	£94,782,585	£98,836,727	£105,083,344
ZONE 3 - CLEETHORPES	£57,196,060	£57,731,751	£57,109,874	£56,687,592	£57,448,488	£58,863,592
ZONE 4 - IMMINGHAM	£28,313,338	£28,632,687	£28,568,077	£29,580,228	£31,015,098	£33,157,745
ZONE 5 - RURAL SOUTH	£36,601,240	£36,107,175	£36,137,802	£37,338,140	£39,180,669	£41,972,504
NORTH EAST LINCOLNSHIRE TOTAL	£282,888,704	£285,435,253	£284,618,417	£291,527,341	£303,557,712	£322,534,286
ZONE 6 - LOUTH	£56,757,728	£54,467,526	£54,900,658	£59,169,869	£64,779,189	£73,446,243
ZONE 7 - MARKET RASEN	£35,341,493	£35,067,826	£35,302,347	£37,538,061	£40,522,300	£44,551,241
ZONE 8 - BRIGG	£39,036,845	£40,071,701	£40,193,273	£41,889,380	£44,134,054	£47,337,931
ZONE 9 - BARTON-UPON-HUMBER	£41,945,258	£43,121,683	£43,275,836	£45,354,553	£48,155,196	£51,968,865
NON NE LINCOLNSHIRE TOTAL	£173,081,324	£172,728,736	£173,672,113	£183,951,863	£197,590,739	£217,304,280
OVERALL TOTAL	£455,970,028	£458,163,990	£458,290,531	£475,479,204	£501,148,452	£539,838,566

EXPENDITURE GROWTH (£)			
2012 - 2013	2013 - 2018	2013-2023	2013-2030
£20,098	£2,756,158	£6,694,091	£13,074,463
-£181,073	£2,362,559	£6,416,701	£12,663,317
-£621,877	-£422,282	£338,614	£1,753,718
-£64,611	£1,012,151	£2,447,022	£4,589,668
£30,627	£1,200,339	£3,042,868	£5,834,702
-£816,836	£6,908,924	£18,939,295	£37,915,868
£433,131	£4,269,211	£9,878,531	£18,545,586
£234,521	£2,235,713	£5,219,953	£9,248,894
£121,572	£1,696,108	£3,940,781	£7,144,659
£154,152	£2,078,717	£4,879,360	£8,693,029
£943,377	£10,279,750	£23,918,626	£43,632,167
£126,541	£17,188,673	£42,857,921	£81,548,035

Notes

1. Expenditure Growth derived from Population Projections (Table 1) * Expenditure per Capita figures (less SFT deduction) (Table 2)

TABLE 4a - MAIN FOOD SHOPPING EXPENDITURE (75%)

SURVEY ZONE	2011	2012	2013	2018	2023	2030
	(£)	(£)	(£)	(£)	(£)	(£)
ZONE 1 - GRIMSBY	£51,983,522	£52,771,905	£52,786,979	£54,854,097	£57,807,547	£62,592,826
ZONE 2 - NORTH WEST GRIMSBY	£68,600,028	£69,450,824	£69,315,020	£71,086,939	£74,127,545	£78,812,508
ZONE 3 - CLEETHORPES	£42,897,045	£43,298,813	£42,832,406	£42,515,694	£43,086,366	£44,147,694
ZONE 4 - IMMINGHAM	£21,235,004	£21,474,515	£21,426,058	£22,185,171	£23,261,324	£24,868,308
ZONE 5 - RURAL SOUTH	£27,450,930	£27,080,381	£27,103,351	£28,003,605	£29,385,502	£31,479,378
NORTH EAST LINCOLNSHIRE TOTAL	£212,166,528	£214,076,440	£213,463,813	£218,645,506	£227,668,284	£241,900,714
ZONE 6 - LOUTH	£42,568,296	£40,850,645	£41,175,493	£44,377,402	£48,584,392	£55,084,682
ZONE 7 - MARKET RASEN	£26,506,119	£26,300,869	£26,476,760	£28,153,546	£30,391,725	£33,413,431
ZONE 8 - BRIGG	£29,277,634	£30,053,776	£30,144,955	£31,417,035	£33,100,541	£35,503,449
ZONE 9 - BARTON-UPON-HUMBER	£31,458,943	£32,341,263	£32,456,877	£34,015,915	£36,116,397	£38,976,649
NON NE LINCOLNSHIRE TOTAL	£129,810,993	£129,546,552	£130,254,085	£137,963,897	£148,193,054	£162,978,210
OVERALL TOTAL	£341,977,521	£343,622,992	£343,717,898	£356,609,403	£375,861,339	£404,878,924

EXPENDITURE GROWTH (£)			
2012 - 2013	2013 - 2018	2013-2023	2013-2030
£15,073	£2,067,119	£5,020,568	£9,805,848
-£135,804	£1,771,919	£4,812,525	£9,497,488
-£466,408	-£316,712	£253,961	£1,315,288
-£48,458	£759,113	£1,835,266	£3,442,251
£22,970	£900,254	£2,282,151	£4,376,027
-£612,627	£5,181,693	£14,204,471	£28,436,901
£324,848	£3,201,908	£7,408,898	£13,909,189
£175,891	£1,676,785	£3,914,965	£6,936,670
£91,179	£1,272,081	£2,955,586	£5,358,494
£115,614	£1,559,038	£3,659,520	£6,519,772
£707,533	£7,709,812	£17,938,969	£32,724,125
£94,906	£12,891,505	£32,143,441	£61,161,026

TABLE 4b - TOP-UP FOOD SHOPPING EXPENDITURE (25%)

SURVEY ZONE	2011	2012	2013	2018	2023	2030
	(£)	(£)	(£)	(£)	(£)	(£)
ZONE 1 - GRIMSBY	£17,327,841	£17,590,635	£17,595,660	£18,284,699	£19,269,182	£20,864,275
ZONE 2 - NORTH WEST GRIMSBY	£22,866,676	£23,150,275	£23,105,007	£23,695,646	£24,709,182	£26,270,836
ZONE 3 - CLEETHORPES	£14,299,015	£14,432,938	£14,277,469	£14,171,898	£14,362,122	£14,715,898
ZONE 4 - IMMINGHAM	£7,078,335	£7,158,172	£7,142,019	£7,395,057	£7,753,775	£8,289,436
ZONE 5 - RURAL SOUTH	£9,150,310	£9,026,794	£9,034,450	£9,334,535	£9,795,167	£10,493,126
NORTH EAST LINCOLNSHIRE TOTAL	£70,722,176	£71,358,813	£71,154,604	£72,881,835	£75,889,428	£80,633,571
ZONE 6 - LOUTH	£14,189,432	£13,616,882	£13,725,164	£14,792,467	£16,194,797	£18,361,561
ZONE 7 - MARKET RASEN	£8,835,373	£8,766,956	£8,825,587	£9,384,515	£10,130,575	£11,137,810
ZONE 8 - BRIGG	£9,759,211	£10,017,925	£10,048,318	£10,472,345	£11,033,514	£11,834,483
ZONE 9 - BARTON-UPON-HUMBER	£10,486,314	£10,780,421	£10,818,959	£11,338,638	£12,038,799	£12,992,216
NON NE LINCOLNSHIRE TOTAL	£43,270,331	£43,182,184	£43,418,028	£45,987,966	£49,397,685	£54,326,070
OVERALL TOTAL	£113,992,507	£114,540,997	£114,572,633	£118,869,801	£125,287,113	£134,959,641

EXPENDITURE GROWTH (£)			
2012 - 2013	2013 - 2018	2013-2023	2013-2030
£5,024	£689,040	£1,673,523	£3,268,616
-£45,268	£590,640	£1,604,175	£3,165,829
-£155,469	-£105,571	£84,654	£438,429
-£16,153	£253,038	£611,755	£1,147,417
£7,657	£300,085	£760,717	£1,458,676
-£204,209	£1,727,231	£4,734,824	£9,478,967
£108,283	£1,067,303	£2,469,633	£4,636,396
£58,630	£558,928	£1,304,988	£2,312,223
£30,393	£424,027	£985,195	£1,786,165
£38,538	£519,679	£1,219,840	£2,173,257
£235,844	£2,569,937	£5,979,656	£10,908,042
£31,635	£4,297,168	£10,714,480	£20,387,009