

Table 10a - GRIMSBY (TOP TOWN) TOWN CENTRE CONVENIENCE CAPACITY

CONVENIENCE GOODS				
	2013	2018	2023	2030
(TOP TOWN) TOWN CENTRE SURVEY TURNOVER	£3,993,711	£4,094,557	£4,260,981	£4,505,399
EXISTING NET TOWN CENTRE FLOORSPACE	2,337	2,337	2,337	2,337
SALES PER SQM NET	£1,709	£1,718	£1,735	£1,759
SALES FROM EXISTING FLOORSPACE	£3,993,711	£4,013,719	£4,054,017	£4,111,115
RESIDUAL CAPACITY	£0	£80,838	£206,963	£394,284
SALES DENSITY (MAINSTREAM OPERATOR)	£12,000	£12,060	£12,181	£12,353
CAPACITY FOR NEW FLOORSPACE (SQM NET)	0	7	17	32
CAPACITY FOR NEW FLOORSPACE (SQM GROSS)	0	10	24	46

Notes

1. Expenditure Growth: 0.5% p.a. (2013-2018); 0.8% p.a. (2018-2030). Source: Experian Retail Planner 10.1 (Sept 2012) / GVA Research
2. Growth in Sales (Floorpace Efficiency - £ per sq. m); 0.1% p.a. (2013-2018); 0.2% p.a. (2018-2030)
3. Gross to Net ratio for new floorpace capacity is 70% for Large Format

Table 10b - GRIMSBY (FREEMAN STREET) CONVENIENCE CAPACITY

CONVENIENCE GOODS				
	2013	2018	2023	2030
FREEMAN STREET SURVEY TURNOVER	£63,047,843	£64,639,880	£67,267,177	£71,125,761
EXISTING NET TOWN CENTRE FLOORSPACE	7,858	7,858	7,858	7,858
SALES PER SQM NET	£8,023	£8,063	£8,144	£8,259
SALES FROM EXISTING FLOORSPACE	£63,047,843	£63,363,713	£63,999,890	£64,901,283
RESIDUAL CAPACITY	£0	£1,276,167	£3,267,287	£6,224,479
SALES DENSITY (MAINSTREAM OPERATOR)	£12,000	£12,060	£12,181	£12,353
CAPACITY FOR NEW FLOORSPACE (SQM NET)	0	106	268	504
CAPACITY FOR NEW FLOORSPACE (SQM GROSS)	0	151	383	720

Notes

1. Projections as above
2. Freeman Street includes Asda turnover

Table 10c - GRIMSBY OVERALL CONVENIENCE CAPACITY

CONVENIENCE GOODS				
	2013	2018	2023	2030
TOWN-WIDE SURVEY TURNOVER	£190,619,618	£195,433,002	£203,376,404	£215,042,494
EXISTING NET TOWN CENTRE FLOORSPACE	20,913	20,913	20,913	20,913
SALES PER SQM NET	£9,115	£9,161	£9,253	£9,383
SALES FROM EXISTING FLOORSPACE	£190,619,618	£191,574,624	£193,498,049	£196,223,330
RESIDUAL CAPACITY	£0	£3,858,378	£9,878,355	£18,819,165
SALES DENSITY (MAINSTREAM OPERATOR)	£12,000	£12,060	£12,181	£12,353
CAPACITY FOR NEW FLOORSPACE (SQM NET)	0	320	811	1,523
CAPACITY FOR NEW FLOORSPACE (SQM GROSS)	0	457	1,159	2,176

Notes

1. Growth and Sales Efficiency projections as per Table 10a

Table 10d - GRIMSBY OVERALL CONVENIENCE CAPACITY [INCLUDING TOURIST INFLOW]

CONVENIENCE GOODS				
	2013	2018	2023	2030
TOWN-WIDE SURVEY TURNOVER	£190,619,618	£195,433,002	£203,376,404	£215,042,494
TOURIST INFLOW	£21,558,398	£22,102,775	£23,001,145	£23,936,030
EXISTING NET FLOORSPACE	20,913	20,913	20,913	20,913
SALES PER SQM NET	£10,146	£10,197	£10,299	£10,444
SALES FROM EXISTING FLOORSPACE	£212,178,016	£213,241,030	£215,381,987	£218,415,488
RESIDUAL CAPACITY	£0	£4,294,747	£10,995,562	£20,563,037
SALES DENSITY (MAINSTREAM OPERATOR)	£12,000	£12,060	£12,181	£12,353
CAPACITY FOR NEW FLOORSPACE (SQM NET)	0	356	903	1,665
CAPACITY FOR NEW FLOORSPACE (SQM GROSS)	0	509	1,290	2,378

Notes

1. Growth projections as above
2. Tourist inflow derived from Table 9 (as based on 2011 STEAM Data)

Table 10e - GRIMSBY OVERALL CONVENIENCE CAPACITY [POST IMMINGHAM COMMITMENT]

CONVENIENCE GOODS				
	2013	2018	2023	2030
TOWN-WIDE SURVEY TURNOVER	£190,619,618	£195,433,002	£203,376,404	£215,042,494
TOURIST INFLOW	£21,558,398	£22,102,775	£23,001,145	£23,936,030
EXISTING NET FLOORSPACE	20,913	20,913	20,913	20,913
SALES PER SQM NET	£10,146	£10,197	£10,299	£10,444
SALES FROM EXISTING FLOORSPACE	£212,178,016	£213,241,030	£215,381,987	£218,415,488
RESIDUAL CAPACITY	£0	£4,294,747	£10,995,562	£20,563,037
IMMINGHAM FOODSTORE DIVERSION	£16,042,226	£16,122,598	£16,284,470	£16,513,825
POST COMMITMENT CAPACITY	-£16,042,226	-£11,827,851	-£5,288,908	£4,049,211
SALES DENSITY (MAINSTREAM OPERATOR)	£12,000	£12,060	£12,181	£12,353
CAPACITY FOR NEW FLOORSPACE (SQM NET)	-1,337	-981	-434	328
CAPACITY FOR NEW FLOORSPACE (SQM GROSS)	-1,910	-1,401	-620	468

Notes

1. Growth projections as above
2. Immingham Foodstore Diversion based on trade draw from Grimsby foodstores (as per Table 12d)

Table 11a - CLEETHORPES TOWN CENTRE CONVENIENCE CAPACITY

CONVENIENCE GOODS				
	2013	2018	2023	2030
TOWN CENTRE SURVEY TURNOVER	£8,754,979	£8,976,053	£9,340,886	£9,876,699
EXISTING NET TOWN CENTRE FLOORSPACE	1,726	1,726	1,726	1,726
SALES PER SQM NET	£5,072	£5,098	£5,149	£5,222
SALES FROM EXISTING FLOORSPACE	£8,754,979	£8,798,842	£8,887,183	£9,012,352
RESIDUAL CAPACITY	£0	£177,212	£453,704	£864,346
SALES DENSITY (MAINSTREAM OPERATOR)	£12,000	£12,060	£12,181	£12,353
CAPACITY FOR NEW FLOORSPACE (SQM NET)	0	15	37	70
CAPACITY FOR NEW FLOORSPACE (SQM GROSS)	0	21	53	100

Notes

1. Expenditure Growth; 0.5% p.a. (2013-2018); 0.8% p.a. (2018-2030). Source: Experian Retail Planner 10.1 (Sept 2012) / GVA Research
2. Growth in Sales (FloorSpace Efficiency - £ per sq. m); 0.1% p.a. (2013-2018); 0.2% p.a. (2018-2030)
3. Gross to Net ratio for new floorspace capacity is 70% for Large Format

Table 11b - CLEETHORPES OVERALL CONVENIENCE CAPACITY

CONVENIENCE GOODS				
	2013	2018	2023	2030
TOWN-WIDE SURVEY TURNOVER	£63,732,159	£65,341,476	£67,997,289	£71,897,754
EXISTING NET TOWN CENTRE FLOORSPACE	6,463	6,463	6,463	6,463
SALES PER SQM NET	£9,861	£9,910	£10,010	£10,151
SALES FROM EXISTING FLOORSPACE	£63,732,159	£64,051,457	£64,694,539	£65,605,715
RESIDUAL CAPACITY	£0	£1,290,018	£3,302,750	£6,292,039
SALES DENSITY (MAINSTREAM OPERATOR)	£12,000	£12,060	£12,181	£12,353
CAPACITY FOR NEW FLOORSPACE (SQM NET)	0	107	271	509
CAPACITY FOR NEW FLOORSPACE (SQM GROSS)	0	153	387	728

Notes

1. Projections as above
2. Freeman Street includes Tesco Extra (Hewitt's Circus) turnover

Table 11c - CLEETHORPES OVERALL CONVENIENCE CAPACITY [INCLUDING TOURIST INFLOW]

CONVENIENCE GOODS				
	2013	2018	2023	2030
TOWN-WIDE SURVEY TURNOVER	£63,732,159	£65,341,476	£67,997,289	£71,897,754
TOURIST INFLOW	£16,263,704	£16,674,383	£17,352,115	£18,347,468
EXISTING NET TOWN CENTRE FLOORSPACE	6,463	6,463	6,463	6,463
SALES PER SQM NET	£12,378	£12,440	£12,564	£12,741
SALES FROM EXISTING FLOORSPACE	£79,995,862	£80,396,643	£81,203,831	£82,347,529
RESIDUAL CAPACITY	£0	£1,619,216	£4,145,573	£7,897,694
SALES DENSITY (MAINSTREAM OPERATOR)	£12,000	£12,060	£12,181	£12,353
CAPACITY FOR NEW FLOORSPACE (SQM NET)	0	134	340	639
CAPACITY FOR NEW FLOORSPACE (SQM GROSS)	0	192	486	913

Notes

1. Projections as above
2. Tourist inflow derived from Table 9 (as based on 2011 STEAM Data)

Table 11d - CLEETHORPES MARKET SHARE INCREASE SCENARIO (2013)

Catchment	Current Main Food M/S	Main Food M/S Increase	Difference
ZONE 3 - CLEETHORPES	67.2%	75.0%	7.8%
	£28,783,377	£32,124,304	£3,340,928
ZONE 5 - RURAL SOUTH	36.3%	40.0%	3.7%
	£9,838,516	£10,841,340	£1,002,824
TOTAL			£4,343,752

Table 11e - CLEETHORPES MARKET SHARE INCREASE SCENARIO [CAPACITY]

CONVENIENCE GOODS					
	2013	2013	2018	2023	2026
	EXISTING	ENHANCED			
TOWN-WIDE SURVEY TURNOVER	£63,732,159	£68,075,910	£69,794,912	£72,631,736	£74,388,881
TOURIST INFLOW	£16,263,704	£16,263,704	£16,674,383	£17,352,115	£17,771,907
NET FLOORSPACE	6,463	6,463	6,463	6,463	6,463
SALES PER SQM NET	£12,378	£12,378	£12,440	£12,564	£12,640
SALES FROM EXISTING FLOORSPACE	£79,995,862	£79,995,862	£80,396,643	£81,203,831	£81,692,029
RESIDUAL CAPACITY	£0	£4,343,752	£6,072,653	£8,780,020	£10,468,758
SALES DENSITY (MAINSTREAM OPERATOR)	£12,000	£12,000	£12,060	£12,181	£12,254
CAPACITY FOR NEW FLOORSPACE (SQM NET)	0	362	504	721	854
CAPACITY FOR NEW FLOORSPACE (SQM GROSS)	0	517	719	1,030	1,220

Notes

1. Expenditure Growth and Floorspace Efficiency as per Table 11a

Table 12a - IMMINGHAM TOWN CENTRE CONVENIENCE CAPACITY

CONVENIENCE GOODS				
	2013	2018	2023	2030
TOWN CENTRE SURVEY TURNOVER	£7,686,343	£7,880,433	£8,200,734	£8,671,145
EXISTING NET TOWN CENTRE FLOORSPACE	1,952	1,952	1,952	1,952
SALES PER SQM NET	£3,938	£3,958	£3,998	£4,054
SALES FROM EXISTING FLOORSPACE	£7,686,343	£7,724,851	£7,802,410	£7,912,301
RESIDUAL CAPACITY	£0	£155,581	£398,324	£758,844
SALES DENSITY (MAINSTREAM OPERATOR)	£12,000	£12,060	£12,181	£12,353
CAPACITY FOR NEW FLOORSPACE (SQM NET)	0	13	33	61
CAPACITY FOR NEW FLOORSPACE (SQM GROSS)	0	18	47	88

Notes

1. Expenditure Growth: 0.5% p.a. (2013-2018); 0.8% p.a. (2018-2030). Source: Experian Retail Planner 10.1 (Sept 2012) / GVA Research
2. Growth in Sales (Floorspace Efficiency - £ per sq. m); 0.1% p.a. (2013-2018); 0.2% p.a. (2018-2030)
3. Gross to Net ratio for new floorspace capacity is 70% for Large Format

Table 12b - IMMINGHAM FOODSTORE COMMITMENT

Store	Net Convenience	Benchmark (£)	Potential Turnover (£)
Proposed TESCO, Immingham Town Centre	2,082	£12,842	£26,737,044

Notes

1. Net Convenience Floorspace based on 70-30 convenience to comparison ratio assumption (Applicant's RIA states 2,975 sqm net)

Table 12c - IMMINGHAM FOODSTORE COMMITMENT - ZONAL TRADE COMPOSITION

Foodstore Turnover (2013)	% Turnover	£
ZONE 2 - NW GRIMSBY	5.0%	£1,336,852
ZONE 4 - IMMINGHAM	75.0%	£20,052,783
ZONE 9 - BARTON	15.0%	£4,010,557
OTHER (INCL. INFLOW)	5.0%	£1,336,852
TOTAL	100.0%	£26,737,044

Notes

1. Turnover / Trade Composition based on GVA Professional Judgement

Table 12d - IMMINGHAM FOODSTORE COMMITMENT - POTENTIAL TRADE DRAW

Store	SURVEY TURNOVER 2013	TRADE DRAW (%)	TRADE DRAW (£)	FINAL 2013 TURNOVER
IMMINGHAM	£7,686,343	25.00%	£6,684,261	£1,002,082
IMMINGHAM TOTAL		25.00%	£6,684,261	
ASDA (Holles Street, Grimsby)	£57,894,816	10.00%	£2,673,704	£55,221,111
SAINSBURY'S (Corporation Street, Grimsby)	£24,970,309	10.00%	£2,673,704	£22,296,605
TESCO EXTRA (Victoria Street, Grimsby)	£24,973,424	10.00%	£2,673,704	£22,299,719
MORRISON'S (Hilmore Road, Laceby)	£51,646,485	30.00%	£8,021,113	£43,625,372
OTHER	-	15.00%	£4,010,557	-
OTHER TOTAL		75.00%	£20,052,783	
OVERALL TOTAL		100.00%	£26,737,044	

Notes

1. Trade draw based on GVA Professional Judgement