

NE Lincs Retail and Three Centres Study

APPENDIX 3A - COMPARISON 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 - EXPENDITURE BREAKDOWN

Comparison Goods by Sector		Clothing / Fashion Goods	Small Domestic Apps.	Medical / Therapeutic	Personal Goods	Books and Stationary	CDs / DVDs	Glassware / Tableware	Recreational Goods	Furniture & Household Textiles	DIY Goods & Decorating Supplies	Major Household Apps.	Large Electrical Goods	Gardening and Pets	Total Comparison Spend (£)
ZONE 1 - GRIMSBY	Expenditure (£)	£588	£194	£84	£85	£70	£64	£59	£268	£232	£121	£92	£197	£56	£2,110
	Weighting	27.9%	9.2%	4.0%	4.0%	3.3%	3.0%	2.8%	12.7%	11.0%	5.7%	4.4%	9.3%	2.7%	
ZONE 2 - NW GRIMSBY	Expenditure (£)	£641	£226	£108	£99	£81	£74	£63	£298	£262	£128	£121	£246	£71	£2,418
	Weighting	26.5%	9.3%	4.5%	4.1%	3.3%	3.1%	2.6%	12.3%	10.8%	5.3%	5.0%	10.2%	2.9%	
ZONE 3 - CLEETHORPES	Expenditure (£)	£693	£249	£143	£116	£92	£80	£75	£288	£326	£144	£157	£280	£84	£2,727
	Weighting	25.4%	9.1%	5.2%	4.3%	3.4%	2.9%	2.8%	10.6%	12.0%	5.3%	5.8%	10.3%	3.1%	
ZONE 4 - IMMINGHAM	Expenditure (£)	£668	£246	£126	£121	£92	£77	£71	£304	£290	£140	£111	£267	£93	£2,606
	Weighting	25.6%	9.4%	4.8%	4.6%	3.5%	3.0%	2.7%	11.7%	11.1%	5.4%	4.3%	10.2%	3.6%	
ZONE 5 - RURAL SOUTH	Expenditure (£)	£723	£273	£166	£136	£118	£76	£79	£338	£349	£167	£113	£274	£135	£2,947
	Weighting	24.5%	9.3%	5.6%	4.6%	4.0%	2.6%	2.7%	11.5%	11.8%	5.7%	3.8%	9.3%	4.6%	
ZONE 6 - LOUTH	Expenditure (£)	£669	£255	£150	£138	£117	£64	£64	£335	£291	£174	£51	£225	£158	£2,691
	Weighting	24.9%	9.5%	5.6%	5.1%	4.3%	2.4%	2.4%	12.4%	10.8%	6.5%	1.9%	8.4%	5.9%	
ZONE 7 - MARKET RASEN	Expenditure (£)	£613	£246	£141	£135	£119	£61	£64	£316	£281	£173	£46	£222	£161	£2,578
	Weighting	23.8%	9.5%	5.5%	5.2%	4.6%	2.4%	2.5%	12.3%	10.9%	6.7%	1.8%	8.6%	6.2%	
ZONE 8 - BRIGG	Expenditure (£)	£707	£267	£143	£122	£104	£84	£78	£318	£345	£153	£144	£284	£100	£2,849
	Weighting	24.8%	9.4%	5.0%	4.3%	3.7%	2.9%	2.7%	11.2%	12.1%	5.4%	5.1%	10.0%	3.5%	
ZONE 9 - BARTON	Expenditure (£)	£681	£256	£121	£114	£97	£88	£71	£308	£319	£145	£129	£284	£95	£2,708
	Weighting	25.1%	9.5%	4.5%	4.2%	3.6%	3.2%	2.6%	11.4%	11.8%	5.4%	4.8%	10.5%	3.5%	
TOTAL	Expenditure Average	£665	£246	£131	£118	£99	£74	£69	£308	£299	£149	£107	£253	£106	£2,626

Notes

1. Expenditure Weighting derived from Experian Retail Planner Report (Fine Expenditure)

TABLE 3 - COMPARISON EXPENDITURE FORECASTS, 2011 - 2030

SURVEY AREA	2011	2011	2012	2012	2013	2013	2018	2018	2023	2023	2030	2030
	(£)	Minus SFT (£)	(£)	Minus SFT (£)	(£)	Minus SFT (£)	(£)	Minus SFT (£)	(£)	Minus SFT (£)	(£)	Minus SFT (£)
ZONE 1 - GRIMSBY	£2,109	£1,921	£2,139	£1,927	£2,177	£1,944	£2,499	£2,177	£2,883	£2,434	£3,522	£2,955
ZONE 2 - NORTH WEST GRIMSBY	£2,418	£2,203	£2,452	£2,209	£2,496	£2,229	£2,866	£2,496	£3,306	£2,790	£4,038	£3,388
ZONE 3 - CLEETHORPES	£2,727	£2,484	£2,765	£2,491	£2,815	£2,514	£3,232	£2,815	£3,728	£3,147	£4,554	£3,821
ZONE 4 - IMMINGHAM	£2,606	£2,374	£2,642	£2,381	£2,690	£2,402	£3,088	£2,690	£3,563	£3,007	£4,352	£3,652
ZONE 5 - RURAL SOUTH	£2,947	£2,685	£2,988	£2,692	£3,042	£2,717	£3,492	£3,042	£4,029	£3,401	£4,922	£4,129
ZONE 6 - LOUTH	£2,691	£2,452	£2,729	£2,459	£2,778	£2,481	£3,189	£2,778	£3,679	£3,105	£4,494	£3,771
ZONE 7 - MARKET RASEN	£2,578	£2,349	£2,614	£2,355	£2,661	£2,376	£3,055	£2,661	£3,525	£2,975	£4,305	£3,612
ZONE 8 - BRIGG	£2,849	£2,595	£2,889	£2,603	£2,941	£2,626	£3,376	£2,941	£3,895	£3,287	£4,758	£3,992
ZONE 9 - BARTON-UPON-HUMBER	£2,708	£2,467	£2,746	£2,474	£2,795	£2,496	£3,209	£2,795	£3,702	£3,125	£4,523	£3,794

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 Non-Bulky Comparison Goods: (Source: - Experian Retail Planner Briefing Note 10.1 (September 2012) and GVA Research)

	2012	2013	2013 - 2018	2018 - 2023	2023 - 2030
Comparison Goods	1.4%	1.8%	2.8%	2.9%	2.9%

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

	2011	2012	2013	2018	2023	2030
Comparison Goods	8.9%	9.9%	10.7%	12.9%	15.6%	16.1%

TABLE 4a - TOTAL COMPARISON SPEND (2013)

COMPARISON GOODS	ZONE 1 - GIBBSBY	ZONE 2 - NW GIBBSBY	ZONE 3 - CLEETHORPES	ZONE 4 - BIRMINGHAM	ZONE 5 - RURAL SOUTH	ZONE 6 - LOUTH	ZONE 7 - MARKET BASIN	ZONE 8 - BRIGG	ZONE 9 - BARTON	TOTAL GOODS SPEND
CLOTHING	124,577,029	133,093,106	120,989,957	110,280,288	112,779,412	137,029,088	110,481,273	114,747,401	115,516,438	1,159,494,529
SMALL DOMESTIC	18,108,751	17,667,732	17,541,346	13,767,441	14,826,421	16,509,946	14,266,228	15,569,469	15,822,880	138,029,875
MEDICAL / THERAPEUTIC	13,511,006	15,575,750	14,331,261	11,929,665	12,934,139	13,829,392	12,410,887	12,982,899	12,756,994	130,241,992
PERSONAL	13,552,803	15,111,104	13,513,470	11,803,991	12,403,873	13,323,041	12,308,296	12,544,851	12,999,499	127,458,028
BOOKS & STATIONARY	12,925,838	14,181,812	12,786,546	11,408,962	12,085,713	12,988,926	12,034,720	12,169,381	12,210,153	122,790,050
CDs / DVDs	12,675,052	13,820,421	12,423,083	11,179,240	11,343,341	11,833,874	11,043,088	11,752,193	12,005,087	117,876,297
GLASSWARE / TABLEWARE	12,466,063	13,252,521	12,271,640	11,087,351	11,396,367	11,833,874	11,094,303	11,627,036	11,617,741	116,446,896
RECREATIONAL GOODS	11,201,780	115,384,939	18,723,099	14,655,700	15,974,331	18,552,300	15,403,122	16,633,301	17,017,804	173,546,383
FURNITURE / TEXTILES	19,697,063	13,526,355	19,674,064	14,441,293	16,168,762	17,429,020	14,804,675	17,196,505	17,268,440	170,406,177
DIY & DECORATING	15,057,520	16,608,296	14,361,550	12,144,072	12,951,814	14,442,095	12,958,038	13,191,494	13,303,836	135,018,715
MAJOR HOUSEHOLD APPLIANCES	13,845,387	16,246,905	14,755,301	11,699,943	11,991,335	11,301,993	17,866,530	13,803,759	12,929,275	126,576,428
LARGE ELECTRICAL GOODS	18,234,144	132,700,318	18,480,791	14,089,052	14,843,097	15,744,088	13,795,864	15,924,080	16,470,962	160,282,336
GARDENING AND PETS	12,340,670	13,665,539	12,544,237	11,424,277	12,386,197	14,033,626	12,752,850	12,885,944	12,164,582	123,397,927
TOTAL COMPARISON SPEND	188,193,116	114,634,837	182,996,844	139,910,375	152,089,801	168,699,292	144,079,901	159,432,532	161,701,991	

TABLE 4b - TOTAL COMPARISON SPEND (2018)

COMPARISON GOODS	ZONE 1 - GIBBSBY	ZONE 2 - NW GIBBSBY	ZONE 3 - CLEETHORPES	ZONE 4 - BIRMINGHAM	ZONE 5 - RURAL SOUTH	ZONE 6 - LOUTH	ZONE 7 - MARKET BASIN	ZONE 8 - BRIGG	ZONE 9 - BARTON	TOTAL GOODS SPEND	SECTORAL GROWTH 2013-2018
CLOTHING	128,211,828	137,490,341	123,014,829	111,701,129	114,585,496	120,333,266	112,311,354	116,978,211	117,963,562	1,182,390,016	123,995,494
SMALL DOMESTIC	19,307,984	13,218,123	18,249,397	14,309,098	15,507,387	17,750,348	14,940,649	16,411,856	16,752,822	146,447,625	18,437,750
MEDICAL / THERAPEUTIC	14,030,261	16,316,625	14,749,092	12,207,099	13,348,814	14,559,028	12,831,812	13,434,065	13,191,764	134,668,560	14,406,548
PERSONAL	14,078,240	15,790,240	13,852,410	12,119,516	12,743,607	14,194,306	12,711,310	12,929,742	13,007,116	131,426,506	14,018,479
BOOKS & STATIONARY	13,558,551	14,737,469	13,055,360	11,611,533	12,380,482	13,556,042	12,389,969	12,497,502	12,558,687	126,145,994	13,355,544
CDs / DVDs	13,070,675	14,328,058	12,656,835	11,348,763	11,533,192	11,945,185	11,225,110	12,017,213	12,323,363	120,446,334	12,571,036
GLASSWARE / TABLEWARE	12,830,779	13,684,698	12,490,782	11,243,683	11,593,713	11,945,185	11,285,362	11,873,127	11,872,853	118,820,181	12,373,285
RECREATIONAL GOODS	112,858,452	117,492,207	19,564,604	15,325,065	16,818,669	19,181,839	16,346,473	17,636,593	18,124,489	184,263,381	110,738,998
FURNITURE / TEXTILES	11,131,197	115,322,665	110,826,601	15,079,831	17,040,578	18,844,515	15,643,541	18,284,983	18,414,649	180,589,561	110,183,384
DIY & DECORATING	15,805,495	17,486,371	14,782,302	12,452,332	13,368,987	15,288,473	13,474,493	13,674,210	13,824,841	140,157,504	15,138,789
MAJOR HOUSEHOLD APPLIANCES	14,414,095	17,076,960	15,214,038	11,944,349	12,279,614	11,550,070	19,233,854	13,458,088	11,402,789	130,243,849	13,687,421
LARGE ELECTRICAL GOODS	19,611,922	174,387,869	19,298,931	14,674,948	15,527,560	16,838,542	14,558,568	16,820,102	17,491,412	168,951,874	18,649,478
GARDENING AND PETS	12,468,841	14,152,596	12,789,636	11,629,049	12,723,433	14,882,736	13,233,488	12,401,444	12,595,926	126,934,636	13,526,706
TOTAL COMPARISON SPEND	1,101,236,200	1,141,422,233	1,190,564,843	1,045,448,416	1,098,675,523	1,211,788,966	1,117,776,971	1,148,417,148	1,171,423,197		
EXPEND GROWTH (CATCHMENT) 2013 - 2018	13,043,204	16,587,380	17,948,002	15,738,041	17,345,721	18,089,674	17,676,021	18,988,476	19,730,206		

TABLE 4c - TOTAL COMPARISON SPEND (2023)

COMPARISON GOODS	ZONE 1 - GIBBSBY	ZONE 2 - NW GIBBSBY	ZONE 3 - CLEETHORPES	ZONE 4 - BIRMINGHAM	ZONE 5 - RURAL SOUTH	ZONE 6 - LOUTH	ZONE 7 - MARKET BASIN	ZONE 8 - BRIGG	ZONE 9 - BARTON	TOTAL GOODS SPEND	SECTORAL GROWTH 2013-2023
CLOTHING	132,204,519	142,346,675	125,264,210	113,289,528	116,578,701	124,113,051	114,295,879	119,376,349	120,699,740	1,208,238,811	148,734,289
SMALL DOMESTIC	19,625,300	14,936,341	19,077,674	14,894,648	16,260,007	19,191,073	15,771,159	17,317,518	17,766,363	175,236,464	17,809,589
MEDICAL / THERAPEUTIC	14,600,646	17,134,853	15,213,283	12,506,707	13,806,451	15,406,514	13,311,287	13,919,120	13,670,820	139,649,681	19,207,689
PERSONAL	14,655,415	16,540,282	14,228,917	12,407,235	13,118,539	14,973,993	13,170,381	13,343,585	13,458,459	135,996,844	18,488,817
BOOKS & STATIONARY	13,833,871	15,351,140	13,354,000	11,830,294	12,755,791	14,217,081	12,794,462	12,850,249	12,942,724	129,179,802	17,089,752
CDs / DVDs	13,305,254	14,888,696	12,916,522	11,533,877	11,742,713	12,306,779	11,432,542	12,302,140	12,469,687	123,276,210	15,420,913
GLASSWARE / TABLEWARE	13,231,406	14,161,998	12,734,239	11,412,510	11,811,504	12,306,779	11,502,996	12,137,702	12,153,952	121,453,085	15,006,189
RECREATIONAL GOODS	114,678,250	119,686,910	110,499,478	16,047,929	17,750,485	19,074,547	17,421,041	18,715,246	19,343,906	196,217,792	122,671,408
FURNITURE / TEXTILES	112,706,545	117,388,625	111,884,826	15,769,406	18,002,720	19,488,636	16,599,090	19,655,220	19,677,617	191,892,685	121,486,508
DIY & DECORATING	16,627,120	18,454,122	15,249,739	12,785,230	13,829,382	16,271,556	14,062,785	14,193,184	14,398,917	145,874,036	18,855,321
MAJOR HOUSEHOLD APPLIANCES	15,038,802	17,993,678	15,723,674	12,208,290	12,591,139	11,838,215	11,080,278	14,944,526	13,913,519	134,334,121	17,757,893
LARGE ELECTRICAL GOODS	19,789,649	116,251,610	110,207,826	15,311,832	16,282,938	18,109,720	15,213,516	17,783,427	18,615,809	178,546,338	18,283,942
GARDENING AND PETS	13,067,097	14,690,550	13,062,348	11,850,189	12,095,608	15,694,861	13,780,973	12,740,443	12,882,049	130,864,273	17,466,344
TOTAL COMPARISON SPEND	1,115,543,834	1,199,741,637	1,199,416,937	1,018,845,073	1,075,978,978	1,166,952,854	1,040,542,539	1,108,000,980	1,102,153,541		
EXPEND GROWTH (CATCHMENT) 2013 - 2023	127,370,718	134,906,680	116,830,893	111,934,698	115,488,177	128,293,582	116,462,639	118,632,398	120,451,570		

TABLE 4d - TOTAL COMPARISON SPEND (2030)

COMPARISON GOODS	ZONE 1 - GIBBSBY	ZONE 2 - NW GIBBSBY	ZONE 3 - CLEETHORPES	ZONE 4 - BIRMINGHAM	ZONE 5 - RURAL SOUTH	ZONE 6 - LOUTH	ZONE 7 - MARKET BASIN	ZONE 8 - BRIGG	ZONE 9 - BARTON	TOTAL GOODS SPEND	SECTORAL GROWTH 2013-2030
CLOTHING	140,298,493	152,031,557	129,916,350	116,419,201	120,524,638	131,594,989	118,290,934	124,018,140	125,746,587	1,258,860,938	199,366,416
SMALL DOMESTIC	213,285,761	170,344,939	170,740,145	16,046,610	17,749,967	21,242,933	17,340,244	19,070,500	19,686,116	194,326,278	136,796,402
MEDICAL / THERAPEUTIC	15,766,768	18,764,627	16,373,215	13,097,044	14,712,434	17,084,076	14,207,213	14,857,983	14,578,204	149,243,727	118,917,335
PERSONAL	15,825,462	18,009,076	15,087,463	12,974,146	13,960,789	16,517,252	14,028,182	14,144,572	14,313,249	144,707,271	117,399,545
BOOKS & STATIONARY	14,797,440	16,573,470	13,971,270	12,261,234	13,349,803	15,525,591	13,550,760	13,523,078	13,678,121	137,334,686	114,444,634
CDs / DVDs	14,388,231	16,080,763	13,853,547	11,892,638	12,157,580	13,022,540	11,820,142	12,853,646	13,329,603	128,922,604	111,047,307
GLASSWARE / TABLEWARE	14,043,556	15,113,884	13,237,780	11,745,160	12,242,684	13,022,540	11,909,657	12,649,809	12,686,384	126,651,337	110,204,441
RECREATIONAL GOODS	118,367,340	124,189,398	112,432,769	17,472,234	19,596,197	19,821,108	19,428,952	19,803,567	19,163,610	199,763,658	146,217,272
FURNITURE / TEXTILES	115,900,086	121,267,189	114,073,203	17,128,118	19,907,467	13,743,112	18,384,888	19,720,309	19,069,811	194,193,882	143,787,705
DIY & DECORATING	18,292,717	19,390,077	16,216,384	13,441,160	14,740,822	18,217,531	15,262,042	15,197,702	15,498,278	157,144,713	122,125,998
MAJOR HOUSEHOLD APPLIANCES	16,305,206	19,621,870	16,777,586	12,728,349	13,207,862	12,408,587	11,372,566	14,891,955	14,880,895	142,344,875	115,818,447
LARGE ELECTRICAL GOODS	13,501,366	119,268,429	112,087,414	16,562,784	17,778,355	19,628,117	16,624,123	19,648,022	19,745,537	197,542,148	139,297,752
GARDENING AND PETS	13,837,952	15,763,246	13,626,224	12,285,914	13,832,401	17,481,896	14,803,901	13,297,191	13,594,458	138,603,262	115,205,313
TOTAL COMPARISON SPEND	1,144,668,538	1,196,278,045	1,177,732,779</								