

Convenience Goods Capacity Refresh

TABLE 1: BASE YEAR POPULATION & PROJECTIONS (2012 - 2031)

ZONE:	2012	2017	2022	2027	2029	2031	2012 - 31
Zone 1:	35,397	36,976	38,514	39,982	40,575	41,094	16.1%
Zone 2:	31,291	32,984	34,469	36,038	36,603	37,232	19.0%
Zone 3:	30,718	33,604	35,994	38,316	39,188	40,014	30.3%
Zone 4:	28,314	30,019	31,539	32,947	33,469	33,955	19.9%
Zone 5:	27,072	28,786	30,316	31,744	32,271	32,788	21.1%
Zone 6:	41,272	43,134	44,918	46,681	47,359	48,022	16.4%
Zone 7:	24,632	25,022	25,508	26,127	26,391	26,557	7.8%
Zone 8:	27,389	27,946	28,553	29,121	29,315	29,522	7.8%
Zone 9:	33,332	34,969	36,621	38,207	38,759	39,200	17.6%
Zone 10:	20,784	21,916	22,937	23,816	24,169	24,481	17.8%
TOTAL:	300,201	315,356	329,369	342,979	348,099	352,865	17.5%

CORE EAST (LEAMINGTON) - Zones 1 & 3	66,115	70,580	74,508	78,298	79,763	81,108	22.7%
CORE WEST (WARWICK) - Zones 2	31,291	32,984	34,469	36,038	36,603	37,232	19.0%
KENILWORTH - Zone 7	24,632	25,022	25,508	26,127	26,391	26,557	7.8%
SUB TOTAL:	122,038	128,586	134,485	140,463	142,757	144,897	18.7%

Source: Experian Business Strategies 'Retail Area Planner' Report for each study zone.

Notes: Base year population derived from mid-year ONS population estimates.

Projections are based on Experian's revised 'demographic component model'. This takes into account 2011 mid-year age and gender estimates and projects the population forward year-on-year based on Government population projections for local authority areas and London Boroughs. The yearly components of population change that are taken into account are the birth rate (0-4 age band); ageing; net migration; and death rate.

TABLE 2: EXPENDITURE PER CAPITA FORECASTS (2011 prices)

ZONE:	2012	2017	2022	2027	2029	2031	2012 - 31
Zone 1:	£1,887	£1,898	£1,947	£2,011	£2,035	£2,057	9.0%
Zone 2:	£1,969	£1,980	£2,031	£2,098	£2,123	£2,146	9.0%
Zone 3:	£1,813	£1,823	£1,870	£1,932	£1,955	£1,976	9.0%
Zone 4:	£1,934	£1,945	£1,996	£2,062	£2,086	£2,108	9.0%
Zone 5:	£1,802	£1,812	£1,859	£1,920	£1,943	£1,964	9.0%
Zone 6:	£1,719	£1,728	£1,773	£1,832	£1,853	£1,873	9.0%
Zone 7:	£2,078	£2,090	£2,144	£2,214	£2,241	£2,265	9.0%
Zone 8:	£2,202	£2,215	£2,272	£2,347	£2,374	£2,400	9.0%
Zone 9:	£2,117	£2,129	£2,184	£2,256	£2,283	£2,307	9.0%
Zone 10:	£2,239	£2,252	£2,310	£2,386	£2,414	£2,440	9.0%

Source: Average spend per capita estimates for each zone are derived from Experian 'Retail Area Planner' Reports.

Notes: Annual expenditure growth forecasts for convenience goods based on Experian Retail Planner Briefing Note 10.1 (September 2012).

An allowance has been made for the market share of retail expenditure per capita on non-store sales (SFT - including mail order and Internet shopping) at the base year and over the forecast period based on the research and forecasts published by Experian Business Strategies in the most recent Retail Planning Briefing Note.

TABLE 3: TOTAL FORECAST GROWTH IN CONVENIENCE GOODS EXPENDITURE, 2012 - 2031 (£ million)

ZONE:	2012	2017	2022	2027	2029	2031	2012 - 31
Zone 1:	£66.8	£70.2	£75.0	£80.4	£82.6	£84.5	26.5%
Zone 2:	£61.6	£65.3	£70.0	£75.6	£77.7	£79.9	29.7%
Zone 3:	£55.7	£61.3	£67.3	£74.0	£76.6	£79.1	42.0%
Zone 4:	£54.8	£58.4	£62.9	£67.9	£69.8	£71.6	30.7%
Zone 5:	£48.8	£52.2	£56.4	£61.0	£62.7	£64.4	32.0%
Zone 6:	£70.9	£74.5	£79.6	£85.5	£87.8	£89.9	26.8%
Zone 7:	£51.2	£52.3	£54.7	£57.9	£59.1	£60.1	17.5%
Zone 8:	£60.3	£61.9	£64.9	£68.3	£69.6	£70.8	17.5%
Zone 9:	£70.6	£74.5	£80.0	£86.2	£88.5	£90.5	28.2%
Zone 10:	£46.5	£49.3	£53.0	£56.8	£58.3	£59.7	28.4%
TOTAL:	£587.2	£619.8	£663.8	£713.7	£732.7	£750.6	27.8%

CORE EAST (LEAMINGTON) - Zones 1 & 3	£122.5	£131.4	£142.3	£154.4	£159.2	£163.6	33.5%
CORE WEST (WARWICK) - Zones 2	£61.6	£65.3	£70.0	£75.6	£77.7	£79.9	29.7%
KENILWORTH - Zone 7	£51.2	£52.3	£54.7	£57.9	£59.1	£60.1	17.5%
SUB TOTAL:	£235.3	£249.0	£267.0	£287.9	£296.0	£303.6	29.0%

Source: Expenditure calculated by multiplying population (Table 1) and expenditure per capita levels (Table 2) for each zone.

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TABLE 4: MARKET SHARE ANALYSIS (%)

	CORE EAST	CORE WEST	KENILWORTH	NORTH	EAST	WEST	ALL ZONES
	Zones 1 & 3	Zone 2	Zone 7	Zone 5 & 6	Zones 4 & 10	Zones 8 & 9	Zones 1-10
LEAMINGTON SPA							
Tesco (Parade)	18.9%	1.6%	0.0%	0.7%	4.9%	0.0%	4.9%
Mark and Spencer (Parade)	3.1%	1.5%	1.6%	0.7%	1.0%	0.9%	1.4%
Iceland (Bath Street)	0.5%	0.0%	0.0%	0.0%	0.2%	0.0%	0.1%
Co-Op (Clemens Street)	1.2%	0.4%	0.0%	0.0%	0.4%	0.0%	0.3%
Cost Cutter (High Street)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Convenience Floorspace	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
SUB TOTAL:	23.7%	3.5%	1.6%	1.4%	6.4%	0.9%	6.8%
WARWICK							
Marks and Spencer (Market Street)	0.0%	1.1%	0.0%	0.0%	0.4%	0.2%	0.2%
Sainsburys (Saltisford)	0.4%	25.5%	3.4%	1.0%	0.8%	6.1%	4.6%
Other convenience floorspace	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
SUB TOTAL:	0.4%	26.6%	3.4%	1.0%	1.3%	6.3%	4.8%
KENILWORTH							
Waitrose (Bertie Road)	0.4%	0.8%	7.5%	0.8%	0.0%	0.7%	1.2%
Somerfield (The Square)	0.0%	0.0%	15.9%	0.0%	0.0%	0.0%	1.7%
Iceland (Warwick Road)	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%
Sainsburys (Warwick Road)	0.7%	0.4%	38.4%	0.8%	0.0%	0.9%	4.6%
Other convenience floorspace	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.1%
SUB TOTAL:	1.1%	1.2%	61.8%	1.7%	0.3%	1.5%	7.7%
OUT OF TOWN STORES							
Sainsburys (The Shires, Leamington Spa)	18.4%	10.4%	1.3%	0.4%	10.6%	1.1%	7.1%
Asda (Chesterton Drive, Sydenham)	27.0%	4.4%	3.5%	2.9%	10.0%	1.1%	8.7%
Sainsburys Local (Coten End, Warwick)	0.7%	13.1%	1.3%	0.6%	1.7%	6.0%	3.3%
Tesco (Emscote Road, Warwick)	16.9%	30.9%	9.0%	0.6%	4.7%	3.2%	9.0%
One Stop (Tournament Square, Warwick)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl (Myton Road, Warwick)	0.4%	0.4%	0.9%	0.0%	0.0%	0.4%	0.3%
SUB TOTAL:	63.4%	59.2%	15.8%	4.6%	27.1%	12.0%	28.4%
ALL OTHER SHOPS AND STORES IN DISTRICT							
	9.1%	5.2%	8.6%	0.9%	3.6%	3.3%	4.8%
INSIDE DISTRICT (RETENTION) SUBTOTAL	97.7%	95.7%	91.2%	9.5%	38.6%	24.0%	52.5%
OTHER CENTRES AND STORES OUTSIDE THE DISTRICT							
Banbury	0.0%	0.0%	0.0%	0.0%	3.3%	0.0%	0.7%
Birmingham	0.0%	0.0%	0.0%	0.0%	0.6%	0.9%	0.3%
Coventry	0.0%	1.6%	5.6%	67.6%	2.3%	0.4%	14.2%
Rugby	0.0%	0.8%	0.0%	10.8%	8.0%	0.0%	3.8%
Shirley	0.0%	0.0%	0.0%	0.0%	0.6%	1.5%	0.4%
Solihull	0.7%	0.0%	0.0%	0.0%	1.0%	23.6%	5.3%
Stratford-upon-Avon	0.0%	0.0%	0.9%	0.0%	20.1%	30.3%	10.5%
Other	1.6%	1.8%	2.3%	12.1%	25.6%	19.4%	12.3%
OUTSIDE DISTRICT (LEAKAGE) SUBTOTAL	2.3%	4.3%	8.8%	90.5%	61.4%	76.0%	47.5%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Results of 2009 Household Telephone Interview Survey commissioned by Strategic Perspectives. Includes both main food and top-up shopping.

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TABLE 5: POTENTIAL' CONVENIENCE GOODS TURNOVER IN 2012 (£m)

	CORE EAST	CORE WEST	KENILWORTH	NORTH	EAST	WEST	ALL ZONES
	Zones 1 & 3	Zone 2	Zone 7	Zone 5 & 6	Zones 4 & 10	Zones 8 & 9	Zones 1-10
LEAMINGTON SPA							
Tesco (Parade)	£23.1	£1.0	£0.0	£0.8	£5.0	£0.0	£29.9
Mark and Spencer (Parade)	£3.8	£0.9	£0.8	£0.9	£1.0	£1.1	£8.5
Iceland (Bath Street)	£0.6	£0.0	£0.0	£0.0	£0.2	£0.0	£0.8
Co-Op (Clemens Street)	£1.5	£0.2	£0.0	£0.0	£0.4	£0.0	£2.1
Cost Cutter (High Street)	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other Convenience Floorspace	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
WARWICK							
Marks and Spencer (Market Street)	£0.0	£0.7	£0.0	£0.0	£0.4	£0.2	£1.3
Sainsburys (Saltisford)	£0.4	£15.7	£1.7	£1.2	£0.8	£8.0	£27.9
Other convenience floorspace	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
KENILWORTH							
Waitrose (Bertie Road)	£0.4	£0.5	£3.8	£0.9	£0.0	£0.9	£6.6
Somerfield (The Square)	£0.0	£0.0	£8.1	£0.0	£0.0	£0.0	£8.1
Iceland (Warwick Road)	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.1
Sainsburys (Warwick Road)	£0.9	£0.2	£19.7	£0.9	£0.0	£1.1	£22.8
Other convenience floorspace	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.3
OUT OF TOWN STORES							
Sainsburys (The Shires, Leamington Spa)	£22.6	£6.4	£0.6	£0.5	£10.8	£1.5	£42.4
Asda (Chesterton Drive, Sydenham)	£33.1	£2.7	£1.8	£3.5	£10.2	£1.5	£52.8
Sainsburys Local (Coten End, Warwick)	£0.9	£8.1	£0.6	£0.8	£1.8	£7.9	£20.0
Tesco (Emscote Road, Warwick)	£20.7	£19.0	£4.6	£0.8	£4.7	£4.2	£54.0
One Stop (Tournament Square, Warwick)	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Lidl (Myton Road, Warwick)	£0.4	£0.2	£0.4	£0.0	£0.0	£0.6	£1.7
ALL OTHER SHOPS AND STORES IN DISTRICT	£11.2	£3.2	£4.4	£1.0	£3.6	£4.3	£27.8
INSIDE DISTRICT (RETENTION) SUBTOTAL	£119.6	£59.0	£46.7	£11.4	£39.1	£31.4	£307.2
OTHER CENTRES AND STORES OUTSIDE THE DISTRICT							
Banbury	£0.0	£0.0	£0.0	£0.0	£3.3	£0.0	£3.3
Birmingham	£0.0	£0.0	£0.0	£0.0	£0.6	£1.1	£1.7
Coventry	£0.0	£1.0	£2.9	£80.9	£2.3	£0.5	£87.5
Rugby	£0.0	£0.5	£0.0	£12.9	£8.1	£0.0	£21.5
Shirley	£0.0	£0.0	£0.0	£0.0	£0.6	£2.0	£2.6
Solihull	£0.9	£0.0	£0.0	£0.0	£1.0	£30.9	£32.8
Stratford-upon-Avon	£0.0	£0.0	£0.4	£0.0	£20.4	£39.6	£60.5
Other	£2.0	£1.1	£1.2	£14.5	£25.9	£25.3	£70.0
OUTSIDE DISTRICT (LEAKAGE) SUBTOTAL	£2.8	£2.6	£4.5	£108.3	£62.2	£99.5	£280.0
TOTAL	£122.5	£61.6	£51.2	£119.7	£101.3	£130.9	£587.2

Source: Expenditure allocated to centres/stores based on the baseline market shares derived from 2008 HTIS (Table 7) applied to available expenditure (Table 3) in each study zone.

TABLE 6: POTENTIAL' CONVENIENCE GOODS TURNOVER IN 2017 (£m)

	CORE EAST	CORE WEST	KENILWORTH	NORTH	EAST	WEST	ALL ZONES
	Zones 1 & 3	Zone 2	Zone 7	Zone 5 & 6	Zones 4 & 10	Zones 8 & 9	Zones 1-10
LEAMINGTON SPA							
Tesco (Parade)	£24.8	£1.1	£0.0	£0.9	£5.3	£0.0	£32.1
Mark and Spencer (Parade)	£4.1	£1.0	£0.9	£0.9	£1.0	£1.2	£9.0
Iceland (Bath Street)	£0.7	£0.0	£0.0	£0.0	£0.2	£0.0	£0.9
Co-Op (Clemens Street)	£1.6	£0.2	£0.0	£0.0	£0.4	£0.0	£2.3
Cost Cutter (High Street)	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other Convenience Floorspace	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
WARWICK							
Marks and Spencer (Market Street)	£0.0	£0.7	£0.0	£0.0	£0.4	£0.2	£1.4
Sainsburys (Saltisford)	£0.5	£16.7	£1.8	£1.3	£0.9	£8.3	£29.4
Other convenience floorspace	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
KENILWORTH							
Waitrose (Bertie Road)	£0.5	£0.5	£3.9	£1.0	£0.0	£0.9	£6.8
Somerfield (The Square)	£0.0	£0.0	£8.3	£0.0	£0.0	£0.0	£8.3
Iceland (Warwick Road)	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.2
Sainsburys (Warwick Road)	£0.9	£0.2	£20.1	£1.0	£0.0	£1.2	£23.5
Other convenience floorspace	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.3
OUT OF TOWN STORES							
Sainsburys (The Shires, Leamington Spa)	£24.2	£6.8	£0.7	£0.5	£11.5	£1.6	£45.2
Asda (Chesterton Drive, Sydenham)	£35.5	£2.9	£1.8	£3.7	£10.8	£1.6	£56.3
Sainsburys Local (Coten End, Warwick)	£0.9	£8.5	£0.7	£0.8	£1.9	£8.2	£21.1
Tesco (Emscote Road, Warwick)	£22.2	£20.2	£4.7	£0.8	£5.0	£4.4	£57.2
One Stop (Tournament Square, Warwick)	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Lidl (Myton Road, Warwick)	£0.5	£0.2	£0.5	£0.0	£0.0	£0.6	£1.8
ALL OTHER SHOPS AND STORES IN DISTRICT	£12.0	£3.4	£4.5	£1.1	£3.8	£4.5	£29.4
INSIDE DISTRICT (RETENTION) SUBTOTAL	£128.4	£62.5	£47.7	£12.1	£41.6	£32.7	£325.0
OTHER CENTRES AND STORES OUTSIDE THE DISTRICT							
Banbury	£0.0	£0.0	£0.0	£0.0	£3.5	£0.0	£3.5
Birmingham	£0.0	£0.0	£0.0	£0.0	£0.6	£1.2	£1.8
Coventry	£0.0	£1.1	£2.9	£85.6	£2.4	£0.5	£92.5
Rugby	£0.0	£0.5	£0.0	£13.7	£8.6	£0.0	£22.8
Shirley	£0.0	£0.0	£0.0	£0.0	£0.6	£2.1	£2.7
Solihull	£0.9	£0.0	£0.0	£0.0	£1.0	£32.2	£34.2
Stratford-upon-Avon	£0.0	£0.0	£0.5	£0.0	£21.7	£41.3	£63.5
Other	£2.1	£1.2	£1.2	£15.3	£27.6	£26.4	£73.8
OUTSIDE DISTRICT (LEAKAGE) SUBTOTAL	£3.1	£2.8	£4.6	£114.6	£66.2	£103.7	£294.9
TOTAL	£131.4	£65.3	£52.3	£126.7	£107.7	£136.3	£619.8

Source: Expenditure allocated to centres/stores based on the baseline market shares derived from 2008 HTIS (Table 7) applied to available expenditure (Table 3) in each study zone.

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TABLE 7: POTENTIAL' CONVENIENCE GOODS TURNOVER IN 2022 (£m)

	CORE EAST	CORE WEST	KENILWORTH	NORTH	EAST	WEST	ALL ZONES
	Zones 1 & 3	Zone 2	Zone 7	Zone 5 & 6	Zones 4 & 10	Zones 8 & 9	Zones 1-10
LEAMINGTON SPA							
Tesco (Parade)	£26.9	£1.1	£0.0	£0.9	£5.7	£0.0	£34.6
Mark and Spencer (Parade)	£4.4	£1.0	£0.9	£1.0	£1.1	£1.3	£9.7
Iceland (Bath Street)	£0.8	£0.0	£0.0	£0.0	£0.2	£0.0	£0.9
Co-Op (Clemens Street)	£1.7	£0.3	£0.0	£0.0	£0.4	£0.0	£2.4
Cost Cutter (High Street)	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other Convenience Floorspace	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
WARWICK							
Marks and Spencer (Market Street)	£0.0	£0.8	£0.0	£0.0	£0.5	£0.2	£1.5
Sainsburys (Saltisford)	£0.5	£17.9	£1.8	£1.4	£1.0	£8.8	£31.4
Other convenience floorspace	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
KENILWORTH							
Waitrose (Bertie Road)	£0.5	£0.6	£4.1	£1.1	£0.0	£1.0	£7.2
Somerfield (The Square)	£0.0	£0.0	£8.7	£0.0	£0.0	£0.0	£8.7
Iceland (Warwick Road)	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.2
Sainsburys (Warwick Road)	£1.0	£0.3	£21.0	£1.1	£0.0	£1.3	£24.6
Other convenience floorspace	£0.0	£0.0	£0.0	£0.0	£0.4	£0.0	£0.4
OUT OF TOWN STORES							
Sainsburys (The Shires, Leamington Spa)	£26.2	£7.3	£0.7	£0.5	£12.3	£1.6	£48.7
Asda (Chesterton Drive, Sydenham)	£38.5	£3.1	£1.9	£4.0	£11.6	£1.6	£60.7
Sainsburys Local (Coten End, Warwick)	£1.0	£9.2	£0.7	£0.9	£2.0	£8.8	£22.5
Tesco (Emscote Road, Warwick)	£24.0	£21.6	£4.9	£0.9	£5.4	£4.7	£61.4
One Stop (Tournament Square, Warwick)	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Lidl (Myton Road, Warwick)	£0.5	£0.3	£0.5	£0.0	£0.0	£0.6	£1.9
ALL OTHER SHOPS AND STORES IN DISTRICT	£13.0	£3.7	£4.7	£1.2	£4.1	£4.8	£31.4
INSIDE DISTRICT (RETENTION) SUBTOTAL	£139.0	£67.0	£49.9	£13.0	£44.7	£34.7	£348.3
OTHER CENTRES AND STORES OUTSIDE THE DISTRICT							
Banbury	£0.0	£0.0	£0.0	£0.0	£3.8	£0.0	£3.8
Birmingham	£0.0	£0.0	£0.0	£0.0	£0.7	£1.3	£1.9
Coventry	£0.0	£1.1	£3.1	£91.9	£2.6	£0.5	£99.2
Rugby	£0.0	£0.6	£0.0	£14.7	£9.3	£0.0	£24.5
Shirley	£0.0	£0.0	£0.0	£0.0	£0.7	£2.2	£2.9
Solihull	£1.0	£0.0	£0.0	£0.0	£1.1	£34.2	£36.3
Stratford-upon-Avon	£0.0	£0.0	£0.5	£0.0	£23.4	£43.9	£67.7
Other	£2.3	£1.3	£1.2	£16.4	£29.7	£28.0	£79.0
OUTSIDE DISTRICT (LEAKAGE) SUBTOTAL	£3.3	£3.0	£4.8	£123.0	£71.2	£110.1	£315.4
TOTAL	£142.3	£70.0	£54.7	£136.0	£115.9	£144.9	£663.8

Source: Expenditure allocated to centres/stores based on the baseline market shares derived from 2008 HTIS (Table 7) applied to available expenditure (Table 3) in each study zone.

TABLE 8: POTENTIAL' CONVENIENCE GOODS TURNOVER IN 2027 (£m)

	CORE EAST	CORE WEST	KENILWORTH	NORTH	EAST	WEST	ALL ZONES
	Zones 1 & 3	Zone 2	Zone 7	Zone 5 & 6	Zones 4 & 10	Zones 8 & 9	Zones 1-10
LEAMINGTON SPA							
Tesco (Parade)	£29.2	£1.2	£0.0	£1.0	£6.1	£0.0	£37.5
Mark and Spencer (Parade)	£4.8	£1.1	£0.9	£1.1	£1.2	£1.3	£10.4
Iceland (Bath Street)	£0.8	£0.0	£0.0	£0.0	£0.2	£0.0	£1.0
Co-Op (Clemens Street)	£1.9	£0.3	£0.0	£0.0	£0.5	£0.0	£2.6
Cost Cutter (High Street)	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other Convenience Floorspace	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
WARWICK							
Marks and Spencer (Market Street)	£0.0	£0.8	£0.0	£0.0	£0.5	£0.3	£1.6
Sainsburys (Saltisford)	£0.5	£19.3	£2.0	£1.5	£1.0	£9.4	£33.7
Other convenience floorspace	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
KENILWORTH							
Waitrose (Bertie Road)	£0.5	£0.6	£4.3	£1.1	£0.0	£1.0	£7.7
Somerfield (The Square)	£0.0	£0.0	£9.2	£0.0	£0.0	£0.0	£9.2
Iceland (Warwick Road)	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.2
Sainsburys (Warwick Road)	£1.1	£0.3	£22.2	£1.2	£0.0	£1.3	£26.1
Other convenience floorspace	£0.0	£0.0	£0.0	£0.0	£0.4	£0.0	£0.4
OUT OF TOWN STORES							
Sainsburys (The Shires, Leamington Spa)	£28.5	£7.9	£0.7	£0.6	£13.3	£1.8	£52.7
Asda (Chesterton Drive, Sydenham)	£41.8	£3.4	£2.0	£4.3	£12.5	£1.8	£65.7
Sainsburys Local (Coten End, Warwick)	£1.1	£9.9	£0.7	£0.9	£2.2	£9.3	£24.2
Tesco (Emscote Road, Warwick)	£26.0	£23.3	£5.2	£0.9	£5.8	£5.0	£66.3
One Stop (Tournament Square, Warwick)	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Lidl (Myton Road, Warwick)	£0.5	£0.3	£0.5	£0.0	£0.0	£0.7	£2.0
ALL OTHER SHOPS AND STORES IN DISTRICT	£14.1	£4.0	£5.0	£1.3	£4.4	£5.1	£33.8
INSIDE DISTRICT (RETENTION) SUBTOTAL	£150.9	£72.4	£52.8	£14.0	£48.1	£37.0	£375.2
OTHER CENTRES AND STORES OUTSIDE THE DISTRICT							
Banbury	£0.0	£0.0	£0.0	£0.0	£4.1	£0.0	£4.1
Birmingham	£0.0	£0.0	£0.0	£0.0	£0.7	£1.3	£2.1
Coventry	£0.0	£1.2	£3.2	£99.0	£2.8	£0.5	£106.8
Rugby	£0.0	£0.6	£0.0	£15.8	£10.0	£0.0	£26.4
Shirley	£0.0	£0.0	£0.0	£0.0	£0.7	£2.4	£3.1
Solihull	£1.1	£0.0	£0.0	£0.0	£1.2	£36.5	£38.8
Stratford-upon-Avon	£0.0	£0.0	£0.5	£0.0	£25.1	£46.8	£72.4
Other	£2.5	£1.4	£1.3	£17.7	£31.9	£29.9	£84.8
OUTSIDE DISTRICT (LEAKAGE) SUBTOTAL	£3.6	£3.2	£5.1	£132.5	£76.6	£117.5	£338.5
TOTAL	£154.4	£75.6	£57.9	£146.5	£124.8	£154.6	£713.7

Source: Expenditure allocated to centres/stores based on the baseline market shares derived from 2008 HTIS (Table 7) applied to available expenditure (Table 3) in each study zone.

Convenience Goods Capacity Refresh

TABLE 9: POTENTIAL' CONVENIENCE GOODS TURNOVER IN 2029 (£m)

	CORE EAST	CORE WEST	KENILWORTH	NORTH	EAST	WEST	ALL ZONES
	Zones 1 & 3	Zone 2	Zone 7	Zone 5 & 6	Zones 4 & 10	Zones 8 & 9	Zones 1-10
LEAMINGTON SPA							
Tesco (Parade)	£30.1	£1.3	£0.0	£1.0	£6.3	£0.0	£38.7
Mark and Spencer (Parade)	£4.9	£1.1	£1.0	£1.1	£1.2	£1.4	£10.7
Iceland (Bath Street)	£0.8	£0.0	£0.0	£0.0	£0.2	£0.0	£1.0
Co-Op (Clemens Street)	£1.9	£0.3	£0.0	£0.0	£0.5	£0.0	£2.7
Cost Cutter (High Street)	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other Convenience Floorspace	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
WARWICK							
Marks and Spencer (Market Street)	£0.0	£0.9	£0.0	£0.0	£0.5	£0.3	£1.7
Sainsburys (Saltisford)	£0.6	£19.8	£2.0	£1.5	£1.1	£9.6	£34.6
Other convenience floorspace	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
KENILWORTH							
Waitrose (Bertie Road)	£0.6	£0.6	£4.4	£1.2	£0.0	£1.0	£7.9
Somerfield (The Square)	£0.0	£0.0	£9.4	£0.0	£0.0	£0.0	£9.4
Iceland (Warwick Road)	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.2
Sainsburys (Warwick Road)	£1.1	£0.3	£22.7	£1.2	£0.0	£1.4	£26.7
Other convenience floorspace	£0.0	£0.0	£0.0	£0.0	£0.4	£0.0	£0.4
OUT OF TOWN STORES							
Sainsburys (The Shires, Leamington Spa)	£29.4	£8.1	£0.7	£0.6	£13.6	£1.8	£54.2
Asda (Chesterton Drive, Sydenham)	£43.0	£3.5	£2.1	£4.4	£12.8	£1.8	£67.6
Sainsburys Local (Coten End, Warwick)	£1.1	£10.2	£0.7	£1.0	£2.2	£9.6	£24.8
Tesco (Emscote Road, Warwick)	£26.8	£24.0	£5.3	£1.0	£6.0	£5.1	£68.2
One Stop (Tournament Square, Warwick)	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Lidl (Myton Road, Warwick)	£0.6	£0.3	£0.5	£0.0	£0.0	£0.7	£2.1
ALL OTHER SHOPS AND STORES IN DISTRICT	£14.5	£4.1	£5.1	£1.3	£4.6	£5.3	£34.8
INSIDE DISTRICT (RETENTION) SUBTOTAL	£155.5	£74.4	£54.0	£14.4	£49.5	£37.9	£385.5
OTHER CENTRES AND STORES OUTSIDE THE DISTRICT							
Banbury	£0.0	£0.0	£0.0	£0.0	£4.2	£0.0	£4.2
Birmingham	£0.0	£0.0	£0.0	£0.0	£0.7	£1.4	£2.1
Coventry	£0.0	£1.3	£3.3	£101.7	£2.9	£0.6	£109.7
Rugby	£0.0	£0.6	£0.0	£16.2	£10.3	£0.0	£27.1
Shirley	£0.0	£0.0	£0.0	£0.0	£0.7	£2.4	£3.2
Solihull	£1.1	£0.0	£0.0	£0.0	£1.2	£37.3	£39.7
Stratford-upon-Avon	£0.0	£0.0	£0.5	£0.0	£25.8	£47.9	£74.2
Other	£2.6	£1.4	£1.3	£18.2	£32.8	£30.6	£87.0
OUTSIDE DISTRICT (LEAKAGE) SUBTOTAL	£3.7	£3.3	£5.2	£136.1	£78.7	£120.2	£347.2
TOTAL	£159.2	£77.7	£59.1	£150.5	£128.2	£158.1	£732.7

Source: Expenditure allocated to centres/stores based on the baseline market shares derived from 2008 HTIS (Table 7) applied to available expenditure (Table 3) in each study zone.

TABLE 10: POTENTIAL' CONVENIENCE GOODS TURNOVER IN 2031 (£m)

	CORE EAST	CORE WEST	KENILWORTH	NORTH	EAST	WEST	ALL ZONES
	Zones 1 & 3	Zone 2	Zone 7	Zone 5 & 6	Zones 4 & 10	Zones 8 & 9	Zones 1-10
LEAMINGTON SPA							
Tesco (Parade)	£30.9	£1.3	£0.0	£1.1	£6.4	£0.0	£39.7
Mark and Spencer (Parade)	£5.1	£1.2	£1.0	£1.1	£1.3	£1.4	£11.0
Iceland (Bath Street)	£0.9	£0.0	£0.0	£0.0	£0.2	£0.0	£1.1
Co-Op (Clemens Street)	£2.0	£0.3	£0.0	£0.0	£0.5	£0.0	£2.8
Cost Cutter (High Street)	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other Convenience Floorspace	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
WARWICK							
Marks and Spencer (Market Street)	£0.0	£0.9	£0.0	£0.0	£0.5	£0.3	£1.7
Sainsburys (Saltisford)	£0.6	£20.4	£2.0	£1.5	£1.1	£9.8	£35.5
Other convenience floorspace	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
KENILWORTH							
Waitrose (Bertie Road)	£0.6	£0.7	£4.5	£1.2	£0.0	£1.1	£8.0
Somerfield (The Square)	£0.0	£0.0	£9.6	£0.0	£0.0	£0.0	£9.6
Iceland (Warwick Road)	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.2
Sainsburys (Warwick Road)	£1.2	£0.3	£23.1	£1.2	£0.0	£1.4	£27.2
Other convenience floorspace	£0.0	£0.0	£0.0	£0.0	£0.4	£0.0	£0.4
OUT OF TOWN STORES							
Sainsburys (The Shires, Leamington Spa)	£30.2	£8.3	£0.8	£0.6	£14.0	£1.8	£55.6
Asda (Chesterton Drive, Sydenham)	£44.2	£3.5	£2.1	£4.5	£13.2	£1.8	£69.4
Sainsburys Local (Coten End, Warwick)	£1.2	£10.5	£0.8	£1.0	£2.3	£9.8	£25.4
Tesco (Emscote Road, Warwick)	£27.6	£24.7	£5.4	£1.0	£6.1	£5.2	£69.9
One Stop (Tournament Square, Warwick)	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Lidl (Myton Road, Warwick)	£0.6	£0.3	£0.5	£0.0	£0.0	£0.7	£2.1
ALL OTHER SHOPS AND STORES IN DISTRICT	£14.9	£4.2	£5.1	£1.3	£4.7	£5.4	£35.6
INSIDE DISTRICT (RETENTION) SUBTOTAL	£159.8	£76.5	£54.9	£14.7	£50.7	£38.7	£395.2
OTHER CENTRES AND STORES OUTSIDE THE DISTRICT							
Banbury	£0.0	£0.0	£0.0	£0.0	£4.3	£0.0	£4.3
Birmingham	£0.0	£0.0	£0.0	£0.0	£0.8	£1.4	£2.2
Coventry	£0.0	£1.3	£3.4	£104.3	£3.0	£0.6	£112.5
Rugby	£0.0	£0.7	£0.0	£16.6	£10.5	£0.0	£27.8
Shirley	£0.0	£0.0	£0.0	£0.0	£0.8	£2.5	£3.2
Solihull	£1.2	£0.0	£0.0	£0.0	£1.3	£38.1	£40.5
Stratford-upon-Avon	£0.0	£0.0	£0.5	£0.0	£26.5	£48.9	£75.8
Other	£2.7	£1.5	£1.4	£18.7	£33.6	£31.2	£89.0
OUTSIDE DISTRICT (LEAKAGE) SUBTOTAL	£3.8	£3.4	£5.3	£139.6	£80.6	£122.6	£355.4
TOTAL	£163.6	£79.9	£60.1	£154.3	£131.3	£161.3	£750.6

Source: Expenditure allocated to centres/stores based on the baseline market shares derived from 2008 HTIS (Table 7) applied to available expenditure (Table 3) in each study zone.

Convenience Goods Capacity Refresh

TABLE 11: ESTIMATED TRADE DRAW FROM OUTSIDE STUDY AREA (%)

	2012	2017	2022	2027	2029	2031
LEAMINGTON SPA	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
WARWICK	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
KENILWORTH	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OUT OF TOWN STORES	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
ALL OTHER	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Source: SP Estimate based on survey evidence, previous retail studies and judgement as to the likely trade draw of stores and centres from outside the defined study area (based on location, scale, range and quality of offer compared with competing centres/stores).

TABLE 12: TOTAL 'POTENTIAL' TURNOVER OF ALL CENTRES & SHOPPING LOCATIONS WITHIN DISTRICT (£m)

	2012	2017	2022	2027	2029	2031
LEAMINGTON SPA	£41.4	£44.2	£47.7	£51.6	£53.1	£54.6
WARWICK	£29.2	£30.8	£32.9	£35.3	£36.3	£37.2
KENILWORTH	£38.0	£39.1	£41.0	£43.5	£44.5	£45.4
OUT OF TOWN STORES	£170.8	£181.6	£195.3	£210.8	£216.8	£222.5
SUB TOTAL FOR MAIN CENTRES & OUT OF CENTRE STORES:	£279.4	£295.6	£316.9	£341.3	£350.8	£359.6
ALL OTHER CENTRES & STORES:	£27.8	£29.4	£31.4	£33.8	£34.8	£35.6
DISTRICT AREA TOTAL:	£307.2	£325.0	£348.3	£375.2	£385.5	£395.2

Source: Tables 7 - 13.

Convenience Goods Capacity Refresh

TABLE 13: ESTIMATED CONVENIENCE GOODS FLOORSPACE & 'BENCHMARK' TURNOVER LEVELS (£m)

	Estimated Conv Sales Area (m ² net)	Average Sales Density (£ per m ²)	2012	2017	2022	2027	2029	2031
LEAMINGTON SPA								
Tesco (Parade)	1,858	£13,000	£24.2	£24.4	£24.9	£25.4	£25.6	£25.8
Mark and Spencer (Parade)	1,115	£11,000	£12.3	£12.4	£12.7	£12.9	£13.0	£13.1
Iceland (Bath Street)	557	£6,500	£3.6	£3.7	£3.7	£3.8	£3.8	£3.9
Co-Op (Clemens Street)	650	£7,655	£5.0	£5.0	£5.1	£5.2	£5.3	£5.3
Cost Cutter (High Street)	130	£3,500	£0.5	£0.5	£0.5	£0.5	£0.5	£0.5
Other convenience floorspace	2,550	£3,500	£8.9	£9.0	£9.2	£9.4	£9.5	£9.5
Subtotal	6,860	£7,929	£54.4	£55.1	£56.1	£57.2	£57.7	£58.2
WARWICK								
Marks and Spencer (Market Street)	612	£11,000	£6.7	£6.8	£6.9	£7.1	£7.1	£7.2
Sainsburys (Saltisford)	2,415	£13,062	£31.5	£31.9	£32.5	£33.2	£33.5	£33.7
Other convenience floorspace	650	£3,500	£2.3	£2.3	£2.3	£2.4	£2.4	£2.4
Subtotal	3,677	£11,028	£40.6	£41.0	£41.8	£42.7	£43.0	£43.4
KENILWORTH								
Waitrose (Bertie Road)	1,966	£11,500	£22.6	£22.9	£23.3	£23.8	£24.0	£24.2
Co-Op (The Square)	348	£7,655	£2.7	£2.7	£2.7	£2.8	£2.8	£2.8
Iceland (Warwick Road)	186	£6,500	£1.2	£1.2	£1.2	£1.3	£1.3	£1.3
Sainsburys (Warwick Road)	1,731	£13,062	£22.6	£22.9	£23.3	£23.8	£24.0	£24.2
Other convenience floorspace	500	£3,500	£1.8	£1.8	£1.8	£1.8	£1.9	£1.9
Subtotal	4,731	£10,747	£50.8	£51.5	£52.4	£53.5	£53.9	£54.4
OUT OF TOWN STORES								
Sainsburys (Leamington Shopping Park)	4,219	£13,062	£55.1	£55.8	£56.8	£58.0	£58.5	£58.9
Asda (Chesterton Drive, Sydenham)	2,651	£15,000	£39.8	£40.2	£41.0	£41.8	£42.2	£42.5
Sainsburys Local (Coten End, Warwick)	293	£13,062	£3.8	£3.9	£3.9	£4.0	£4.1	£4.1
Tesco (Embscote Road, Warwick)	3,730	£13,000	£48.5	£49.1	£50.0	£51.0	£51.4	£51.8
One Stop (Tournament Square, Warwick)	280	£3,000	£0.8	£0.8	£0.9	£0.9	£0.9	£0.9
Lidl (Myton Road, Warwick)	1,063	£3,500	£3.7	£3.8	£3.8	£3.9	£3.9	£4.0
Subtotal	12,235	£12,402	£151.7	£153.6	£156.5	£159.7	£161.0	£162.2
TOTAL	27,503	£10,818	£297.5	£301.1	£306.9	£313.1	£315.6	£318.1

Notes: The convenience goods sales area estimates are informed by the 2009 Warwick RLS and have been updated, where necessary, based on recent permissions and the latest Experian Goad data.

Average sales density estimates have been informed by published company averages as set out in Mintel's 'UK Retail Rankings' (discounting non-retail sales, such as VAT & petrol sales, etc.), other retail assessment and professional judgement.

SP has made an allowance for annual 'productivity' growth in existing and new floorspace of:

2013:	0.0%
2014-18:	0.3%
2019-31:	0.4%

TABLE 14: COMMITTED/PLANNED RETAIL DEVELOPMENTS - FLOORSPACE & TURNOVER ESTIMATES (£m)

	Estimated Conv Sales Area (sqm net)	Average Sales Density (£ per sqm)	2012	2017	2022	2027	2029	2031
Aldi (Land off Queensway, Leamington Spa)	956	£4,500	-	£4.3	£4.4	£4.5	£4.5	£4.5
Morrison's (Old Warwick Road, Leamington Spa)	2,686	£12,850	-	£34.6	£35.3	£36.0	£36.3	£36.6
Co-Op (Land Adjacent to Woodloes Tavern, Warwick)	250	£7,250	-	£1.8	£1.9	£1.9	£1.9	£1.9
Subtotal	3,892		-	£40.7	£41.6	£42.4	£42.7	£43.1

Source: Warwick District Council. Average sales density estimated informed by a variety of sources, including the retail assessments submitted in support of the planning applications. Morrison's store assumed to have a 70:30 food:non-food split.

Notes: Average sales density estimates make an allowance for VAT.

Convenience Goods Capacity Refresh

TABLE 15: WARWICK DISTRICT - CONVENIENCE GOODS CAPACITY ASSESSMENT: BASELINE SCENARIO

	2012	2017	2022	2027	2029	2031
STEP 1: TOTAL EXISTING FLOORSPACE IN DISTRICT - Excluding smaller centres, parades and convenience stores (sqm net):	27,503	27,503	27,503	27,503	27,503	27,503
STEP 2: TOTAL FORECAST 'POTENTIAL' TURNOVER (£ m):						
(i) Total 'Potential' Turnover (£ million):	£279.4	£295.6	£316.9	£341.3	£350.8	£359.6
(ii) Average Sales Density (£ per sq.m):	£10,160	£10,748	£11,522	£12,411	£12,753	£13,074
STEP 3: TOTAL FORECAST 'BENCHMARK' TURNOVER (£ m):						
(i) Total 'Benchmark' Turnover (£ million):	£297.5	£301.1	£306.9	£313.1	£315.6	£318.1
(ii) Average Sales Density (£ per sq.m):	£10,818	£10,949	£11,158	£11,383	£11,474	£11,566
STEP 4: NET RESIDUAL EXPENDITURE - EXCL COMMITMENTS (£m)	-£18.1	-£5.5	£10.0	£28.3	£35.2	£41.5
STEP 5: TURNOVER OF ALL COMMITTED FLOORSPACE (£ m):	£0.0	£40.7	£41.6	£42.4	£42.7	£43.1
STEP 6: NET RESIDUAL EXPENDITURE - AFTER COMMITMENTS:	-£18.1	-£46.2	-£31.6	-£14.1	-£7.6	-£1.6
STEP 7: FORECAST CAPACITY FOR NEW CONVENIENCE GOODS FLOORSPACE:						
CAPACITY FOR NEW SUPERSTORE (sq m):						
(i) Estimated Average Sales Density (£ per sq m):	£12,500	£12,651	£12,893	£13,153	£13,258	£13,365
(ii) Net Floorspace Capacity (sq m):	-1,448	-3,656	-2,448	-1,074	-570	-121
(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):	-2,069	-5,222	-3,496	-1,534	-815	-173
CAPACITY FOR NEW SUPERMARKET / DEEP DISCOUNTER (sq m):						
(i) Estimated Average Sales Density (£ per sq m):	£6,000	£6,072	£6,189	£6,313	£6,364	£6,415
(ii) Net Floorspace Capacity (sq m):	-3,017	-7,616	-5,099	-2,237	-1,188	-253
(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):	-4,311	-10,880	-7,284	-3,196	-1,697	-361

Step 1: The total estimated existing convenience goods sales area in the District.

Step 2: The total 'potential' turnover of all existing convenience goods floorspace at 2012 (based on Table 11). The growth in 'potential' turnover up to 2031 assumes constant market shares over the forecast period.

Step 3: The total 'benchmark' turnover of existing convenience goods floorspace at 2011. Make an allowance for annual floorspace 'productivity' growth of:

2013:	0.0%
2014-2018:	0.3%
2019-2031:	0.4%

Step 4: The forecast residual expenditure capacity available to support new convenience goods floorspace over the forecast period (i.e. the difference between the 'benchmark' and 'potential' turnovers).

Step 5: The forecast convenience goods turnover of all committed floorspace that had planning permission and/or was under construction at the time of preparing this assessment. Allow for growth in 'productivity' of all committed floorspace (as above).

Step 6: The net residual expenditure available to support new convenience goods floorspace after taking account of all new commitments.

Step 7: Forecasts the capacity for major new superstore and/or smaller format supermarket floorspace. This assumes a major superstore operator achieves an average sales density of circa £12,500 per m² in 2012, which is based on the published average sales figures for Asda, Tesco, Sainsbury's, Morrisons and Waitrose. For a smaller format supermarket and/or deep discounter we have assumed an average sales density of £6,000 per m² and this is based on the published sales levels for a range of operators including, Co-Op, Budgens, Lidl and Aldi.

Convenience Goods Capacity Refresh

TABLE 16: WARWICK DISTRICT - ADDITIONAL POPULATION & EXPENDITURE ARISING FROM PLANNED HOUSING GROWTH

		2012	2017	2022	2027	2029	2031
Assumptions							
Average persons per dwelling (2):	2.3						
Average spend per person (£/ person) (3):		£1,976	£1,987	£2,039	£2,106	£2,131	£2,154
Estimated retention of expenditure within District (4):	90.0%						
Proposed Local Plan Housing Growth (1):							
Total Requirement 2011-2029	10,800						
Completions and commitments as of August 2012	3,814						
Proposal Local Plan Housing Allocations							
Leamington Spa	1,210	290	1,450	2,900	4,350	4,900	4,900
Warwick	2,780	225	1,125	2,250	3,375	3,800	3,800
Other	4,340	125	625	1,250	1,875	2,105	2,105
Total remainder housing requirement	8,330	640	3,200	6,400	9,600	10,805	10,805
Total additional people:							
Leamington Spa		667	3,335	6,670	10,005	11,270	11,270
Warwick		518	2,588	5,175	7,763	8,740	8,740
Other		288	1,438	2,875	4,313	4,842	4,842
Subtotal		1,472	7,360	14,720	22,080	24,852	24,852
Revised population growth after allowing for double-counting at: 50%							
Leamington Spa		334	1,668	3,335	5,003	5,635	5,635
Warwick		259	1,294	2,588	3,881	4,370	4,370
Other		144	719	1,438	2,156	2,421	2,421
Subtotal		736	3,680	7,360	11,040	12,426	12,426
Total estimated additional expenditure from planned housing growth							
Leamington Spa		£0.6	£3.0	£6.1	£9.5	£10.8	£10.9
Warwick		£0.5	£2.3	£4.7	£7.4	£8.4	£8.5
Other		£0.3	£1.3	£2.6	£4.1	£4.6	£4.7
TOTAL		£1.3	£6.6	£13.5	£20.9	£23.8	£24.1

Notes:

- (1) Planned housing growth up to 2029 taken from emerging Local Plan Preferred Options.
- (2): Average persons per household derived from Experian Reports.
- (3) Average expenditure per capita taken as average of all zones.
- (4) Average retention rate is an SP estimate based on market shares shown in Table 5.

TABLE 17: WARWICK DISTRICT - REVISED CONVENIENCE GOODS CAPACITY FORECASTS: GROWTH SCENARIO

	2012	2017	2022	2027	2029	2031
DISTRICT WIDE						
Net residual expenditure (not including commitments)	-£18.1	-£5.5	£10.0	£28.3	£35.2	£41.5
Additional expenditure from planned housing	£1.3	£6.6	£13.5	£20.9	£23.8	£24.1
All Planned Commitments	-	-£40.7	-£41.6	-£42.4	-£42.7	-£43.1
TOTAL RESIDUAL EXPENDITURE CAPACITY:	-£16.8	-£39.7	-£18.1	£6.8	£16.3	£22.5
CAPACITY FOR NEW SUPERSTORE FLOORSPACE (sq m):						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,651	£12,893	£13,153	£13,258	£13,365
(ii) Net Floorspace Capacity (sq m):	-1,344	-3,135	-1,400	517	1,227	1,681
(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):	-1,920	-4,479	-2,000	739	1,753	2,401
CAPACITY FOR NEW SUPERMARKET / DEEP DISCOUNTER FLOORSPACE (sq m):						
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,072	£6,189	£6,313	£6,364	£6,415
(ii) Net Floorspace Capacity (sq m):	-2,799	-6,532	-2,917	1,077	2,556	3,501
(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):	-3,999	-9,332	-4,167	1,539	3,651	5,002

Source: District wide figures taken from Tables 14, 15 & 16. Share of residual expenditure derived from Table 17. Forecast capacity based on constant market shares.