APPENDIX 6

QUANTITATIVE RETAIL AND LEISURE SPREADSHEETS

Epping Forest Town Centres Study

Table 1: Composition of Zones

Study Zone	Postcode Sectors [1]	Local Authorities [2]
1	CM16 4, CM16 5, CM16 6, CM16 7, CM18 7	Epping Forest, Harlow
2	IG10 3, IG10 2, IG10 1	Epping Forest
3	EN11 0, EN10 6, EN8 0, EN9 2, CM19 5, EN8 9	Broxbourne, East Hertfordshire, Epping Forest, Harlow
4	CM17 0, CM5 0, CM21 9, CM17 9	East Hertfordshire, Epping Forest, Harlow, Uttlesford
5	CM4 0, CM15 0, CM14 5, CM5 9	Brentwood, Chelmsford, Epping Forest, Havering
6	E4 7, EN9 1, EN3 6, EN3 7, EN8 7, EN9 3, IG10 4	Enfield, Epping Forest, Waltham Forest, Broxbourne
7	E4 6, IG7 5, IG8 8, IG8 0, IG9 5, IG9 6, IG8 7	Epping Forest, Redbridge, Waltham Forest
8	IG7 6, RM4 1, IG7 4	Epping Forest, Redbridge, Waltham Forest

Notes:
(1) Postcode sectors are accurate in 2006 and obtained via MapInfo Anysite based on information from and approved by the Post Office.
(2) Local autorities (or part of) within each zone and only shown where the local authority represents more than 5% of the land area in the relevant zone.

Epping Forest Town Centres Study

Table 2: Population (2009 to 2031)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	All Zones Total
Population 2009	32,617	27,086	46,940	32,402	27,419	67,799	60,838	16,320	311,420
Population 2011	33,019	27,412	47,505	32,797	27,891	68,602	61,714	16,544	315,483
Population 2016	34,056	28,244	48,936	33,812	29,009	70,649	63,850	17,102	325,658
Population 2021	35,169	29,246	50,476	34,901	30,169	72,835	65,958	17,692	336,446
Population 2026	36,233	30,134	51,932	35,946	31,256	74,913	67,877	18,253	346,545
Population 2031	37,200	30,957	53,267	36,893	32,234	76,818	69,593	18,762	355,724
Change in population 2009 - 2011									
Numeric change	402	326	565	395	472	803	876	224	4,063
Percentage change	1.2%	1.2%	1.2%	1.2%	1.7%	1.2%	1.4%	1.4%	1.3%
Change in population 2011 - 2016									
Numeric change	1,037	832	1,431	1,015	1,118	2,047	2,136	558	10,175
Percentage change	3.1%	3.0%	3.0%	3.1%	4.0%	3.0%	3.5%	3.4%	3.2%
Change in population 2016 - 2021									
Numeric change	1,113	1,002	1,540	1,089	1,159	2,186	2,108	590	10,787
Percentage change	3.3%	3.5%	3.1%	3.2%	4.0%	3.1%	3.3%	3.5%	3.3%
Change in population 2021 - 2026									
Numeric change	1,065	888	1,456	1,045	1,087	2,078	1,919	561	10,099
Percentage change	3.0%	3.0%	2.9%	3.0%	3.6%	2.9%	2.9%	3.2%	3.0%
Change in population 2026 - 2031									
Numeric change	967	822	1335	947	978	1906	1716	509	9,180
Percentage change	2.7%	2.7%	2.6%	2.6%	3.1%	2.5%	2.5%	2.8%	2.6%
Change in population 2009 - 2031									
Numeric change	4,584	3,871	6,327	4,491	4,815	9,019	8,755	2,442	44,304
Percentage change	12.3%	12.5%	11.9%	12.2%	14.9%	11.7%	12.6%	13.0%	12.5%

Notes
(1) Population base data was provided by MapInfo (2007) and projections were derived from the ONS Mid-year Population Estimates .

Epping Forest Town Centres Study

Table 3: Per Capita Comparison Expenditure Estimates (£)

Year	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
2009	3,490	3,495	3,196	3,452	3,931	3,296	3,467	3,423
2011	3,512	3,517	3,216	3,473	3,955	3,316	3,488	3,444
2016	4,183	4,189	3,831	4,138	4,712	3,951	4,156	4,103
2021	4,905	4,912	4,491	4,851	5,524	4,632	4,872	4,810
2026	5,631	5,639	5,156	5,569	6,342	5,318	5,594	5,523
2031	6,465	6,474	5,920	6,394	7,281	6,105	6,422	6,340

Notes:

(1) Per capita expenditure by zone from 2007 is obtained from Pitney Bowes Business Insight/Oxford Economics (PBBI/OE) using our in-house GIS (MapInfo) system. This is projected to the base year (2009) and the forecast years using per annum growth rates derived from PBBI/OE and Experian (as explained in Appendix 4). These are applied consistently across all zones.

All monetary values held as constant 2007 prices.

Epping Town Centres Study

Table 4: Total Comparison Expenditure (£m)

Year	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	All Zones Total
Total 2009 (including SFT)	113.8	94.7	150.0	111.9	107.8	223.5	210.9	55.9	**1,068.4**
Deduction for SFT in 2009 of 7.4%	8.4	7.0	11.1	8.3	8.0	16.5	15.6	4.1	**79.1**
Total 2009 (excluding SFT)	**105.4**	**87.7**	**138.9**	**103.6**	**99.8**	**206.9**	**195.3**	**51.7**	**989.3**
Total 2011 (including SFT)	115.9	96.4	152.8	113.9	110.3	227.5	215.3	57.0	**1,089.1**
Deduction for SFT in 2011 of 8.4%	9.7	8.1	12.8	9.6	9.3	19.1	18.1	4.8	**91.5**
Total 2011 (excluding SFT)	**106.2**	**88.3**	**139.9**	**104.3**	**101.1**	**208.4**	**197.2**	**52.2**	**997.6**
Total 2016 (including SFT)	142.5	118.3	187.5	139.9	136.7	279.1	265.4	70.2	1,339.5
Deduction for SFT in 2016 of 9.6%	13.7	11.4	18.0	13.4	13.1	26.8	25.5	6.7	128.6
Total 2016 (excluding SFT)	**128.8**	**107.0**	**169.5**	**126.5**	**123.6**	**252.3**	**239.9**	**63.4**	**1,210.9**
Total 2021 (including SFT)	172.5	143.6	226.7	169.3	166.7	337.4	321.4	85.1	1,622.7
Deduction for SFT in 2021 of 9.4%	16.2	13.5	21.3	15.9	15.7	31.7	30.2	8.0	152.5
Total 2021 (excluding SFT)	**156.3**	**130.1**	**205.4**	**153.4**	**151.0**	**305.7**	**291.2**	**77.1**	**1,470.1**
Total 2026 (including SFT)	204.0	169.9	267.8	200.2	198.2	398.4	379.7	100.8	1,919.0
Deduction for SFT in 2026 of 9.1%	18.6	15.5	24.4	18.2	18.0	36.3	34.6	9.2	174.6
Total 2026 (excluding SFT)	**185.5**	**154.5**	**243.4**	**182.0**	**180.2**	**362.1**	**345.1**	**91.6**	**1,744.4**
Total 2031 (including SFT)	240.5	200.4	315.3	235.9	234.7	469.0	446.9	119.0	2,261.7
Deduction for SFT in 2026 of 9.1%	21.9	18.2	28.7	21.5	21.4	42.7	40.7	10.8	205.8
Total 2031 (excluding SFT)	**218.6**	**182.2**	**286.6**	**214.4**	**213.4**	**426.3**	**406.3**	**108.1**	**2,055.9**
Growth in total expenditure 2009 - 2011	0.8	0.6	1.0	0.8	1.2	1.5	1.9	0.5	**8.3**
Growth in total expenditure 2011 - 2016	22.6	18.7	29.5	22.1	22.5	43.9	42.7	11.2	**213.3**
Growth in total expenditure 2016 - 2021	27.5	23.2	35.9	26.9	27.4	53.3	51.3	13.7	**259.2**
Growth in total expenditure 2021 - 2026	29.2	24.3	38.0	28.6	29.2	56.5	54.0	14.5	**274.3**
Growth in total expenditure 2026 - 2031	33.1	27.7	43.2	32.4	33.2	64.2	61.1	16.5	**311.5**
Growth 2009 - 2031	**113.2**	**94.5**	**147.7**	**110.9**	**113.5**	**219.4**	**210.9**	**56.4**	**1,066.5**

Notes

(1) The 2009 expenditure and subsequent figures for the forecast years and are the products of multiplying the data presented in Table 2 (population) by Table 3 (per capita comparison goods expenditure).

(2) A decuction is made for a percentage of expenditure for Special Forms of Trading (SFT) (i.e. mail order, TV and internet shopping) from the total expenditure. We have adopted the comparison goods SFT projections in Appendix 3 of Experian Retail Planner Note 7.1 (August 2009).

All monetary values are held constant at 2007 prices.

Epping Forest Town Centres Study

Table 5: Comparison Market Shares 2009 (%)

Destination [1]	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
Zone 1								
Epping	15.6%	1.3%	0.5%	1.7%	0.8%	0.5%	2.2%	1.2%
Other Zone 1	1.1%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.2%
Zone 2								
Loughton Broadway	0.8%	7.3%	0.1%	0.0%	0.3%	0.2%	2.7%	0.8%
Loughton High Road	1.4%	28.6%	0.0%	0.3%	0.2%	3.9%	6.1%	3.7%
Homebase, Church Hill, Loughton	0.6%	5.8%	0.0%	0.0%	0.0%	0.3%	0.9%	0.9%
Zone 3								
Brookfield Centre, Cheshunt	1.0%	1.9%	24.6%	1.4%	0.0%	4.5%	1.6%	1.1%
Other Zone 3	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 4								
Other Zone 4	0.3%	0.0%	0.1%	1.3%	0.0%	0.0%	0.0%	0.0%
Zone 5								
Chipping Ongar	0.1%	0.0%	0.1%	2.3%	4.0%	0.0%	0.0%	0.0%
Ingatestone	0.0%	0.0%	0.0%	0.0%	2.1%	0.1%	0.5%	0.0%
Other Zone 5	0.0%	0.0%	0.0%	0.3%	0.6%	0.0%	0.0%	0.0%
Zone 6								
Waltham Abbey	1.0%	1.2%	0.9%	0.2%	0.0%	4.2%	0.5%	0.0%
Waltham Cross	0.9%	1.8%	7.1%	0.9%	0.0%	13.2%	1.1%	0.0%
Homebase, High St, Waltham Cross	0.0%	0.0%	2.2%	0.0%	0.0%	1.9%	0.4%	0.0%
Tesco, Sewardstone Road, Waltham Abbey	0.1%	0.8%	0.8%	0.0%	0.0%	4.4%	0.3%	0.0%
Other Zone 6	0.0%	0.4%	0.7%	0.0%	0.0%	1.1%	0.4%	0.0%
Zone 7								
Buckhurst Hill	0.0%	0.6%	0.1%	0.0%	0.2%	0.0%	1.7%	0.0%
North Chingford	0.3%	1.0%	0.0%	0.0%	0.2%	5.1%	6.4%	0.0%
Chingford	0.0%	0.3%	0.0%	0.0%	0.0%	1.6%	3.0%	0.0%
Other Zone 7	0.1%	0.4%	0.0%	0.0%	0.0%	0.0%	3.4%	0.0%
Zone 8								
Chigwell	1.1%	0.8%	0.0%	0.0%	0.0%	0.1%	0.6%	7.3%
Combined Sub-Total for Zones 1-8	24.4%	52.2%	37.4%	8.5%	8.4%	41.0%	31.7%	15.2%
Sub-Total inside Epping Forest District	22.1%	47.4%	2.6%	4.6%	5.7%	18.7%	21.3%	14.2%
Outside Study Area								
Basildon	0.2%	0.0%	0.1%	0.0%	3.6%	0.0%	1.8%	0.0%
Brentwood	0.2%	0.4%	0.0%	0.5%	28.8%	0.2%	0.4%	1.1%
Chelmsford	3.8%	0.4%	0.4%	5.9%	16.2%	1.2%	0.2%	0.0%
Enfield	0.8%	2.2%	11.5%	0.4%	0.0%	27.2%	5.1%	0.0%
Harlow	57.2%	6.0%	31.2%	65.3%	6.2%	8.4%	0.2%	3.4%
Ilford	0.0%	5.5%	0.1%	0.0%	0.0%	0.5%	16.6%	26.5%
Lakeside Regional Shopping Centre	2.7%	3.1%	1.2%	1.9%	8.2%	2.6%	1.3%	5.6%
Romford	1.3%	11.6%	0.1%	2.4%	13.4%	1.0%	8.1%	30.4%
The West End	2.9%	5.4%	2.1%	1.0%	1.5%	2.9%	11.7%	2.9%
Walthamstow	0.0%	0.8%	0.1%	0.0%	0.0%	0.9%	4.4%	0.0%
Lakeside Retail Parks	0.4%	0.9%	0.1%	0.8%	3.7%	0.5%	0.7%	0.6%
Other outside Study Area	6.1%	11.5%	15.8%	13.3%	10.0%	13.5%	17.8%	14.4%
Sub-Total for Outside Zones 1-8	75.6%	47.8%	62.6%	91.5%	91.6%	59.0%	68.3%	84.8%
Sub-Total Outside Epping Forest District	77.9%	52.6%	97.4%	95.4%	94.3%	81.3%	78.7%	85.8%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Notes
(1) Obtained from the household survey undertaken by NEMS Market Research in April 2009. All centres that receive a 3% of greater market share from any one zone are listed separately. The Epping Forest District market share account for all destinations in Zones 1 and Zone 2, plus the relevant centres in Epping Forest within zones 3 to 8 inclusive..

Epping Forest Town Centres Study

Table 6: Comparison Goods Turnover in 2009 (£m)

Destination [1]	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	All Zones Total	Study Area Share (%) [2]
Zone 1										
Epping	16.5	1.1	0.7	1.8	0.8	1.1	4.2	0.6	**26.8**	**2.7%**
Other Zone 1	1.1	0.0	0.0	0.1	0.0	0.0	0.0	0.1	**1.3**	**0.1%**
Zone 2										
Loughton Broadway	0.9	6.4	0.1	0.0	0.3	0.3	5.3	0.4	**13.6**	**1.4%**
Loughton High Road	1.5	25.0	0.0	0.3	0.2	8.0	11.8	1.9	**48.8**	**4.9%**
Homebase, Church Hill, Loughton	0.6	5.1	0.0	0.0	0.0	0.6	1.8	0.5	**8.5**	**0.9%**
Zone 3										
Brookfield Centre, Cheshunt	1.1	1.6	34.2	1.5	0.0	9.3	3.2	0.6	**51.3**	**5.2%**
Other Zone 3	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	**0.3**	**0.0%**
Zone 4										
Other Zone 4	0.3	0.0	0.1	1.3	0.0	0.0	0.0	0.0	**1.7**	**0.2%**
Zone 5										
Chipping Ongar	0.1	0.0	0.2	2.4	4.0	0.0	0.0	0.0	**6.7**	**0.7%**
Ingatestone	0.0	0.0	0.0	0.0	2.1	0.2	1.0	0.0	**3.3**	**0.3%**
Other Zone 5	0.0	0.0	0.0	0.3	0.6	0.0	0.0	0.0	**0.9**	**0.1%**
Zone 6										
Waltham Abbey	1.0	1.1	1.3	0.2	0.0	8.7	1.0	0.0	**13.3**	**1.3%**
Waltham Cross	0.9	1.6	9.9	1.0	0.0	27.2	2.1	0.0	**42.6**	**4.3%**
Homebase, High St, Waltham Cross	0.0	0.0	3.0	0.0	0.0	3.9	0.8	0.0	**7.7**	**0.8%**
Tesco, Sewardstone Road, Waltham Abbey	0.1	0.7	1.2	0.0	0.0	9.1	0.6	0.0	**11.7**	**1.2%**
Other Zone 6	0.0	0.4	0.9	0.0	0.0	2.2	0.7	0.0	**4.2**	**0.4%**
Zone 7										
Buckhurst Hill	0.0	0.5	0.2	0.0	0.2	0.0	3.4	0.0	**4.4**	**0.4%**
North Chingford	0.3	0.9	0.0	0.0	0.2	10.6	12.5	0.0	**24.5**	**2.5%**
Chingford	0.0	0.2	0.0	0.0	0.0	3.2	5.9	0.0	**9.4**	**1.0%**
Other Zone 7	0.1	0.3	0.0	0.0	0.0	0.0	6.6	0.0	**7.0**	**0.7%**
Zone 8										
Chigwell	1.2	0.7	0.0	0.0	0.0	0.2	1.1	3.8	**6.9**	**0.7%**
Combined Sub-Total for Zones 1-8	25.7	45.8	52.0	8.8	8.4	84.8	61.9	7.9	**295.1**	**29.8%**
Sub-Total inside Epping Forest District	23.0	40.7	3.6	4.8	5.5	28.0	29.1	7.3	**142.1**	**14.4%**
Outside Study Area										
Basildon	0.2	0.0	0.1	0.0	3.6	0.0	3.5	0.0	**7.5**	**0.8%**
Brentwood	0.2	0.4	0.0	0.5	28.7	0.5	0.7	0.6	**31.6**	**3.2%**
Chelmsford	4.0	0.4	0.5	6.1	16.2	2.5	0.4	0.0	**30.0**	**3.0%**
Enfield	0.9	1.9	15.9	0.5	0.0	56.3	10.0	0.0	**85.5**	**8.6%**
Harlow	60.3	5.2	43.3	67.6	6.1	17.4	0.4	1.7	**202.1**	**20.4%**
Ilford	0.0	4.8	0.1	0.0	0.0	1.0	32.5	13.7	**52.2**	**5.3%**
Lakeside Regional Shopping Centre	2.8	2.7	1.7	2.0	8.2	5.4	2.6	2.9	**28.3**	**2.9%**
Romford	1.4	10.2	0.1	2.5	13.3	2.2	15.9	15.7	**61.2**	**6.2%**
The West End	3.1	4.8	2.9	1.1	1.5	6.1	22.8	1.5	**43.7**	**4.4%**
Walthamstow	0.0	0.7	0.2	0.0	0.0	1.8	8.7	0.0	**11.3**	**1.1%**
Lakeside Retail Parks	0.5	0.8	0.2	0.8	3.7	1.0	1.3	0.3	**8.6**	**0.9%**
Other outside Study Area	6.4	10.0	21.9	13.8	10.0	27.9	34.7	7.5	**132.3**	**13.4%**
Sub-Total for Outside Zones 1-8	79.7	41.9	86.9	94.8	91.4	122.2	133.5	43.9	**694.2**	**70.2%**
Sub-Total Outside Epping Forest District	82.4	47.0	135.3	98.8	94.3	178.9	166.2	44.4	**847.3**	**85.6%**
TOTAL	**105.4**	**87.7**	**138.9**	**103.6**	**99.8**	**206.9**	**195.3**	**51.7**	**989.3**	**100.0%**

Notes
(1) Turnover by zone by destination is the product of 2009 total turnover (Table 4) and the market share by destination by zone (Table 5)
(2) The share of the study area expenditure from each centre

All monetary values are held constant at 2007 prices.

Epping Forest Town Centres Study

Table 7 Comparison Goods Sales Densities in 2009

Destination	Gross Floorspace (1)	Gross to Net ratio	Net Comparison Floospace (2)	Net Comparison Floorspace in Foodstores (3)	Total Net Comparison Floorspace (4)	Turnover from Study Area (5)	Inflow (6)	Inflow	Total Turnover	2009 Sales Density (7)
	sqm	%	sqm			£m	%	£m	£m	£/sqm
Designated Centres										
Epping	11,180	70%	7,826	556	8,382	26.8	10%	3.0	29.8	3,558
Loughton High Road	10,830	70%	7,581	995	8,576	48.8	5%	2.6	51.4	5,993
Waltham Abbey	1,900	70%	1,330	532	1,862	25.0	5%	1.3	26.3	14,141
Loughton Broadway	3,540	70%	2,478	102	2,580	13.6	5%	0.7	14.3	5,561
Chipping Ongar	1,928	70%	1,350	84	1,433	6.7	5%	0.4	7.0	4,899
Buckhurst Hill	3,419	70%	2,393	230	2,623	4.4	24%	1.4	5.7	2,185

Notes

(1) Floorspace provided by Experian Goad and updated by RTP in April 2009, except for Chipping Ongar and Buckhurst Hill, which were derived from an Ordnance Survey base map. Gross Floorspace is comparison floorspace only.
(2) Typical gross to net ratio of 70% for town centres.
(3) Derived from benchmark analysis of foodstores at Table 13.
(4) Sum of net comparison floorspace and comparison floorspace in foodstores
(5) Obtained from Table 6, Waltham Abbey includes turnover to Tesco store.
(6) Inflow is based on RTP assumptions inflormed by the visitor surveys.
(7) Total turnover per net sqm of comparison floorspace

All monetary values are held constant at 2007 prices.

Epping Forest Town Centres Study

Table 8a: Comparison Expenditure Capacity and Floorspace Requirements for Epping District *(Constant Market Shares)*

		2009	2011	2016	2021	2026	2031	2009-11	2011-16	2016-21	2021-26	2026-31	2009-31
								Change	Change	Change	Change	Change	Change
Available Expenditure and Expenditure Retention by Epping Forest District (1)													
A	Total Study Area Comparison Expenditure (£m)	989.3	997.6	1,210.9	1,470.1	1,744.4	2,055.9	8.3	213.3	259.2	274.3	311.5	**1,066.5**
B	Current Market Share for Centres in Epping Foprest District (%)	*14.4%*	*14.4%*	*14.4%*	*14.4%*	*14.4%*	*14.4%*	-	-	-	-	-	-
C	Retained Expenditure in Epping Forest District (£m) (=A*B)	142.1	143.3	173.9	211.1	250.5	295.2	1.2	30.6	37.2	39.4	44.7	**153.2**
D	Inflow Expenditure to Epping Forest District (£m)	9.3	9.4	11.4	13.8	16.4	19.4	0.1	2.0	2.4	2.6	2.9	**10.0**
Claim on Expenditure from Turnover of Centres in Epping Forest District (2)													
E	Turnover of Centres in Epping Forest District(£m) (=C+D in 2009)	151.4	151.4	151.4	151.4	151.4	151.4	-	-	-	-	-	**-**
F	Growth in Turnover of Existing Centres (£m)	0.0	0.4	10.9	21.1	30.4	40.3	0.4	10.5	10.2	9.4	9.9	**40.3**
Claim on Expenditure from Commitments to New Floorspace (3)													
	(i) Browns car showroom, Loughton High Road	0.0	3.0	3.2	3.4	3.6	3.8	3.0	0.2	0.2	0.2	0.2	**3.8**
G	Total Claim on Expenditure from Commitments (£m)	0.0	3.0	3.2	3.4	3.6	3.8	3.0	0.2	0.2	0.2	0.2	**3.8**
Residual Expenditure Available to Support New Floorspace (4)													
H	Residual Expenditure (£m) (=C+D-E-F-G)	0.0	-2.1	19.8	49.1	81.5	119.1	-2.1	21.9	29.3	32.4	37.6	**119.1**
Comparison Floorspace Requirements for Epping Forest District (5)													
I	Assumed Sales Density for New Comparison Floorspace (£/sqm)	4,891	4,902	5,243	5,572	5,874	6,193	-	-	-	-	-	-
J	Net Comparison Sales Floorspace Requirement forEpping Forest District (sqm net) (=H/I)	0	-422	3,782	8,811	13,878	19,236	-422	4,204	5,029	5,067	5,358	**19,236**
K	Gross Comparison Floorspace Requirement for Epping Forest District (=J/75%)	0	-563	5,042	11,748	18,504	25,648	-563	5,605	6,705	6,756	7,145	**25,648**

Notes:
1. Row A is taken from Table 3; Row B is the market share of centres in Epping Forest District taken from Table 6 and remains constant for each forecast year; Row C is is the product of the current market share and the total study area expenditure; Row D is expenditure spent in centres in Epping Forest District from beyond the study area, taken from Table 7 and remains constant as a proportion of retained expenditure in the forecast years.
2. Row E is the turnover of centres in Epping Forest District incorporating both expenditure from the study area and inflow and remains constant in the forecast years; Row F is the growth in turnover of these centres increasing by 0.1% per annum to 2011, 1.4% per annum to 2016, 1.2% per annum to 2021 and 1.1% per annum to 2031.
3. Row G represents the turnover of commitments to new floorspace in the study area, which are also assumed to increase by the same level of sales density growth as described at (2). The only commitment we have modelled is the Brown's car show room site on Loughton High Road, which has planning permission for some 810 sqm (gross) of A1 use, which we assume will be 100% comparison floorspace, have a net to gross ratio of 75% and will achieve a 2009 turnover of £4,902 per sqm in 2011.
4. Row H represnets the product of the retail expenditure and expenditure inflow, less the deductions for the existing centres turnover, turnover growth and commitments.
5. Row I represents the assumed sales density to calculate floorspace requirement taken from Experian Retail Planner Briefing Note 7.1 as a sales density for in-town modern floorspace, which increased by the same level of sales density growth described at (2); Row J represents net floorspace requirements calculated by the division of residual expenditure by assumed sales density; and Row K reoresents gross requirements through the application of a 75% net to gross ratio.

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Table 8b: Comparison Expenditure Capacity and Floorspace Requirements for Epping District *(Increased Market Shares)*

		2009	2011	2016	2021	2026	2031	2009-11	2011-16	2016-21	2021-26	2026-31	2009-31
								Change	Change	Change	Change	Change	Change
Available Expenditure and Expenditure Retention by Epping Forest District (1)													
A	Total Study Area Comparison Expenditure (£m)	989.3	997.6	1,210.9	1,470.1	1,744.4	2,055.9	8.3	213.3	259.2	274.3	311.5	**1,066.5**
B	Current Market Share for Centres in Epping Foprest District (%)	*14.4%*	*14.4%*	*17.0%*	*17.0%*	*17.0%*	*17.0%*	-	-	-	-	-	-
C	Retained Expenditure in Epping Forest District (£m) (=A*B)	142.1	143.3	205.9	249.9	296.5	349.5	1.2	62.6	44.1	46.6	53.0	**207.4**
D	Inflow Expenditure to Epping Forest District (£m)	9.3	9.4	13.5	16.4	19.4	22.9	0.1	4.1	2.9	3.1	3.5	**13.6**
Claim on Expenditure from Turnover of Centres in Epping Forest District (2)													
E	Turnover of Centres in Epping Forest District(£m) (=C+D in 2009)	151.4	151.4	151.4	151.4	151.4	151.4	-	-	-	-	-	**-**
F	Growth in Turnover of Existing Centres (£m)	0.0	0.4	10.9	21.1	30.4	40.3	0.4	10.5	10.2	9.4	9.9	**40.3**
Claim on Expenditure from Commitments to New Floorspace (3)													
	(i) Browns car showroom, Loughton High Road	0.0	3.0	3.2	3.4	3.6	3.8	3.0	0.2	0.2	0.2	0.2	**3.8**
G	Total Claim on Expenditure from Commitments (£m)	0.0	3.0	3.2	3.4	3.6	3.8	3.0	0.2	0.2	0.2	0.2	**3.8**
Residual Expenditure Available to Support New Floorspace (4)													
H	Residual Expenditure (£m) (=C+D-E-F-G)	0.0	-2.1	53.9	90.4	130.6	177.0	-2.1	56.0	36.6	40.1	46.4	**177.0**
Comparison Floorspace Requirements for Epping Forest District (5)													
I	Assumed Sales Density for New Comparison Floorspace (£/sqm)	4,891	4,902	5,243	5,572	5,874	6,193	-	-	-	-	-	-
J	Net Comparison Sales Floorspace Requirement forEpping Forest District (sqm net) (=H/I)	0	-422	10,278	16,232	22,230	28,574	-422	10,700	5,954	5,998	6,343	**28,574**
K	Gross Comparison Floorspace Requirement for Epping Forest District (=J/75%)	0	-563	13,704	21,642	29,640	38,098	-563	14,267	7,938	7,998	8,458	**38,098**

Notes:
1. Row A is taken from Table 3; Row B is the market share of centres in Epping Forest District taken from Table 6 and increases from 2016; Row C is is the product of the current market share and the total study area expenditure; Row D is expenditure spent in centres in Epping Forest District from beyond the study area, taken from Table 7 and remains constant as a proportion of retained expenditure in the forecast years.
2. Row E is the turnover of centres in Epping Forest District incorporating both expenditure from the study area and inflow and remains constant in the forecast years; Row F is the growth in turnover of these centres increasing by 0.1% per annum to 2011, 1.4% per annum to 2016, 1.2% per annum to 2021 and 1.1% per annum to 2031.
3. Row G represents the turnover of commitments to new floorspace in the study area, which are also assumed to increase by the same level of sales density growth as described at (2). . The only commitment we have modelled is the Brown's car show room site on Loughton High Road, which has planning permission for some 810 sqm (gross) of A1 use, which we assume will be 100% comparison floorspace, have a net to gross ratio of 75% and will achieve a 2009 turnover of £4,902 per sqm in 2011.
4. Row H represnets the product of the retail expenditure and expenditure inflow, less the deductions for the existing centres turnover, turnover growth and commitments.
5. Row I represents the assumed sales density to calculate floorspace requirement taken from Experian Retail Planner Briefing Note 7.1 as a sales density for in-town modern floorspace, which increased by the same level of sales density growth described at (2); Row J represents net floorspace requirements calculated by the division of residual expenditure by assumed sales density; and Row K reoresents gross requirements through the application of a 75% net to gross ratio.

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Table 9: Per Capita Convenience Expenditure Estimates (£)

Year	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
2009	1,807	1,848	1,716	1,789	1,999	1,879	1,967	1,919
2011	1,845	1,887	1,752	1,827	2,041	1,918	2,008	1,960
2016	1,945	1,988	1,846	1,925	2,151	2,021	2,116	2,065
2021	2,023	2,068	1,921	2,003	2,237	2,103	2,202	2,148
2026	2,115	2,163	2,009	2,095	2,340	2,199	2,302	2,247
2031	2,212	2,262	2,101	2,191	2,447	2,300	2,408	2,350

Notes:

(1) Per capita expenditure by zone from 2007 is obtained from Pitney Bowes Business Insight/Oxford Economics (PBBI/OE) using our in-house GIS (MapInfo) system. This is projected to the base year (2009) and the forecast years using per annum growth rates derived from PBBI/OE and Experian (as explained in Appendix 4). These are applied consistently across all zones.

All monetary values are held constant at 2007 prices.

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Table 10: Total Convenience Expenditure (£m)

Year	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	All Zones Total
Total 2009 (including SFT)	58.9	50.0	80.5	58.0	54.8	127.4	119.7	31.3	580.7
Deduction for SFT in 2009 of 2.0%	1.1	1.0	1.6	1.1	1.1	2.5	2.3	0.6	11.3
Total 2009 (excluding SFT)	**57.8**	**49.1**	**79.0**	**56.8**	**53.7**	**124.9**	**117.3**	**30.7**	**569.3**
Total 2011 (including SFT)	60.9	51.7	83.2	59.9	56.9	131.6	124.0	32.4	600.7
Deduction for SFT in 2011 of 2.2%	1.3	1.1	1.8	1.3	1.3	2.9	2.7	0.7	13.2
Total 2011 (excluding SFT)	**59.6**	**50.6**	**81.4**	**58.6**	**55.7**	**128.7**	**121.2**	**31.7**	**587.5**
Total 2016 (including SFT)	66.2	56.2	90.4	65.1	62.4	142.8	135.1	35.3	653.5
Deduction for SFT in 2016 of 2.7%	1.8	1.5	2.4	1.7	1.7	3.8	3.6	0.9	17.3
Total 2016 (excluding SFT)	**64.5**	**54.7**	**88.0**	**63.4**	**60.7**	**139.0**	**131.5**	**34.4**	**636.2**
Total 2021 (including SFT)	71.1	60.5	96.9	69.9	67.5	153.2	145.2	38.0	702.3
Deduction for SFT in 2021 of 2.8%	2.0	1.7	2.7	2.0	1.9	4.3	4.1	1.1	19.7
Total 2021 (excluding SFT)	**69.1**	**58.8**	**94.2**	**67.9**	**65.6**	**148.9**	**141.1**	**36.9**	**682.7**
Total 2026 (including SFT)	76.7	65.2	104.3	75.3	73.1	164.7	156.3	41.0	756.6
Deduction for SFT in 2026 of 3.0%	2.3	1.9	3.1	2.2	2.2	4.9	4.6	1.2	22.3
Total 2026 (excluding SFT)	**74.4**	**63.3**	**101.2**	**73.1**	**71.0**	**159.9**	**151.7**	**39.8**	**734.3**
Total 2031 (including SFT)	82.3	70.0	111.9	80.8	78.9	176.7	167.6	44.1	812.2
Deduction for SFT in 2031 of 3.0%	2.4	2.1	3.3	2.4	2.3	5.2	4.9	1.3	24.0
Total 2031 (excluding SFT)	**79.9**	**68.0**	**108.6**	**78.4**	**76.5**	**171.5**	**162.6**	**42.8**	**788.3**
Growth in total expenditure 2009 - 2011	1.8	1.5	2.4	1.8	1.9	3.8	3.9	1.0	18.2
Growth in total expenditure 2011 - 2016	4.9	4.1	6.6	4.8	5.1	10.3	10.3	2.7	48.7
Growth in total expenditure 2016 - 2021	4.7	4.1	6.3	4.6	4.9	9.8	9.6	2.6	46.5
Growth in total expenditure 2021 - 2026	5.2	4.5	7.0	5.1	5.4	11.0	10.5	2.9	51.6
Growth in total expenditure 2026 - 2031	5.5	4.7	7.4	5.4	5.6	11.6	11.0	3.0	54.0
Growth 2009 - 2031	**22.1**	**18.9**	**29.6**	**21.6**	**22.8**	**46.6**	**45.3**	**12.1**	**218.9**

Notes
(1) The 2009 expenditure and subsequent figures for the forecast years and are the products of multiplying the data presented in Table 2 (population) by Table 9 (per capita convenience goods expenditure).
(2) A decuction is made for a percentage of expenditure for Special Forms of Trading (SFT) (i.e. mail order, TV and internet shopping) from the total expenditure. We have adopted 50% of the convenience goods SFT projections in Appendix 3 of Experian Retail Planner Note 7.1 (August 2009), since we expect a large proportion of SFT to be shelf picking.

All monetary values are held constant at 2007 prices.

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Table 11: Convenience Goods Market Shares 2009 (%)

Destination (1)	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
Zone 1								
Tesco, 77-79 High Street, Epping	34.4%	1.8%	0.9%	1.8%	3.0%	0.0%	0.0%	7.9%
Marks and Spencer's Simply Food, 239-253 High Street, Epping	4.0%	0.0%	0.3%	0.8%	0.0%	0.3%	0.0%	0.4%
Local Stores, Epping	3.2%	0.0%	0.3%	1.1%	0.0%	0.2%	0.0%	0.1%
Other Stores Zone 1	7.0%	0.0%	0.3%	0.3%	0.0%	0.0%	0.0%	0.8%
Zone 2								
Morrisons, 246-250 High Road, Loughton	2.8%	32.4%	0.0%	0.0%	0.0%	2.0%	3.6%	4.7%
Sainsburys, Old Station Road, Loughton	0.0%	25.5%	0.0%	0.0%	0.0%	6.5%	3.8%	5.1%
Sainsburys, 12 Torrington Drive, GLC Debden Estate, Loughton	0.0%	12.2%	0.0%	0.0%	0.0%	0.0%	0.9%	3.5%
Iceland, 22/24 The Broadway, Debden, Loughton	0.0%	3.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Stores, Loughton Broadway	0.0%	2.7%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Stores, Loughton High Road	0.1%	3.3%	0.0%	0.0%	0.0%	1.3%	0.4%	0.1%
Zone 3								
Tesco Extra, Brookfield Centre	0.0%	1.8%	42.7%	0.0%	0.3%	3.0%	0.0%	0.0%
Other Stores Zone 3	0.0%	0.0%	3.7%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 4								
Tesco, Church Langley Centre, Harlow	15.6%	0.0%	3.8%	33.7%	1.0%	0.0%	0.0%	0.0%
Budgens, London Road, Sawbridgeworth	0.3%	0.0%	0.0%	3.0%	0.0%	0.0%	0.0%	0.0%
Other Stores Zone 4	0.0%	0.0%	0.0%	2.9%	0.2%	0.0%	0.3%	0.0%
Zone 5								
Sainsburys, Bansons Lane, Chipping Ongar	0.0%	0.0%	0.0%	8.0%	23.7%	0.0%	0.0%	0.0%
Other Stores Zone 5	0.0%	0.0%	0.0%	2.2%	6.0%	0.3%	0.0%	0.0%
Zone 6								
Tesco, Sewardstone Road, Waltham Abbey	0.0%	4.9%	5.4%	0.0%	0.0%	30.0%	0.9%	1.2%
Sainsburys, High Street, Waltham Cross	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%	0.0%	8.2%
Somerfield, 4 Station Road, Chingford	0.0%	0.0%	0.0%	0.0%	0.0%	3.1%	0.0%	0.0%
Co-op, 654-674 Hertford Road, Enfield	0.0%	0.0%	0.3%	0.0%	0.0%	5.8%	0.0%	0.0%
Other Zone 6	0.0%	3.0%	1.9%	0.0%	0.0%	9.3%	3.0%	0.0%
Zone 7								
Waitrose, 27-43 Queens Road, Buckhurst Hill	0.9%	1.8%	0.0%	0.0%	0.0%	0.0%	12.1%	2.8%
Tesco, Southend Road, Woodford Green	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	13.9%	0.4%
Other Zone 7	0.1%	1.1%	0.0%	0.0%	0.3%	0.9%	11.4%	0.1%
Zone 8								
Tesco Express, 185 Manford Way, Grange Hill Estate, Chigwell	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	4.6%
Local Stores, Chigwell	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	2.0%	6.1%
Other Zone 8	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%
Combined Sub-Total for Zones 1-8	**68.5%**	**94.0%**	**59.8%**	**53.8%**	**34.5%**	**64.2%**	**52.6%**	**47.8%**
Sub-Total inside Epping Forest District	**52.5%**	**88.1%**	**7.4%**	**14.8%**	**26.8%**	**40.1%**	**24.3%**	**37.3%**
Outside Study Area								
Asda, Watergardens, Southgate, Harlow	7.0%	0.0%	3.5%	10.2%	0.0%	1.0%	0.0%	0.0%
Morrisons, Salisbury Hall Gardens, Chingford Road, Chingford	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%	6.5%	0.0%
Sainsburys, 51 North Service Road, Brentwood	0.3%	0.3%	0.0%	0.0%	30.3%	0.0%	0.0%	0.0%
Sainsburys, 11 Walthamstow Avenue, Low Hall, Chingford	0.0%	0.0%	0.9%	0.0%	0.0%	1.0%	5.3%	0.0%
Sainsburys, 13 Hall Lane, Chingford	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	5.3%	0.0%
Sainsburys, Fifth Avenue, Allende Avenue, Harlow	5.1%	0.0%	3.8%	2.3%	0.0%	1.0%	0.0%	0.0%
Sainsburys, Brewery Road, Hoddesdon	0.0%	0.3%	14.3%	0.0%	0.0%	1.0%	0.0%	0.0%
Sainsburys, 176 George Lane, South Woodford	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	6.2%	2.8%
Tesco Extra, Bryant Avenue, Romford	0.0%	0.0%	2.1%	0.0%	7.0%	0.0%	0.0%	3.5%
Tesco, 796 Cranbrook Road, Barkingside	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	6.5%	19.6%
Tesco, Princes Road, Chelmsford	7.3%	2.8%	0.0%	0.9%	2.0%	0.0%	0.0%	0.0%
Tesco, East Road, Edinburgh Way, Harlow	3.7%	0.0%	1.8%	15.3%	0.0%	0.0%	0.0%	0.0%
Tesco, Unit 1-6 The Harvey Centre, Harlow	2.6%	0.0%	0.3%	6.6%	0.0%	1.0%	0.0%	0.0%
Other stores outside study area	4.6%	2.7%	13.4%	10.9%	26.2%	27.6%	17.6%	26.3%
Sub-Total for Outside Zones 1-8	**31.5%**	**6.0%**	**40.2%**	**46.2%**	**65.5%**	**35.8%**	**47.4%**	**52.2%**
Sub-Total Outside Epping Forest District	**47.5%**	**11.9%**	**92.6%**	**85.2%**	**73.2%**	**59.9%**	**75.7%**	**62.7%**
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes
(1) Obtained from the household survey undertaken by NEMS Market Research in April 2009. All stores that receive a 3% of greater market share from any one zone are listed separately. The Epping Forest DIstrict market share account for all stores in Zones 1 and 2 and the relevant stores in Epping Forest in Zones 3 to 8 inclusive

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Table 12: Convenience Goods Turnover in 2009 (£m)

Destination [1]	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	All Zones	Study Area Share (%) [2]
Zone 1										
Tesco, 77-79 High Street, Epping	19.9	0.9	0.7	1.0	1.6	0.0	0.0	2.4	26.5	4.7%
Marks and Spencer's Simply Food, 239-253 High Street, Epping	2.3	0.0	0.2	0.5	0.0	0.3	0.0	0.1	3.5	0.6%
Local Stores, Epping	1.9	0.0	0.2	0.6	0.0	0.2	0.0	0.0	3.0	0.5%
Other Stores Zone 1	4.0	0.0	0.2	0.2	0.0	0.0	0.0	0.3	4.7	0.8%
Zone 2										
Morrisons, 246-250 High Road, Loughton	1.6	15.9	0.0	0.0	0.0	2.5	4.2	1.4	25.7	4.5%
Sainsburys, Old Station Road, Loughton	0.0	12.5	0.0	0.0	0.0	8.1	4.5	1.6	26.7	4.7%
Sainsburys, 12 Torrington Drive, GLC Debden Estate, Loughton	0.0	6.0	0.0	0.0	0.0	0.0	1.0	1.1	8.1	1.4%
Iceland, 22/24 The Broadway, Debden, Loughton	0.0	1.6	0.0	0.0	0.0	0.0	0.0	0.0	1.6	0.3%
Local Stores, Loughton Broadway	0.0	1.3	0.2	0.0	0.0	0.0	0.0	0.0	1.5	0.3%
Local Stores, Loughton High Road	0.1	1.6	0.0	0.0	0.0	1.6	0.5	0.0	3.8	0.7%
Zone 3										
Tesco Extra, Brookfield Centre	0.0	0.9	33.7	0.0	0.2	3.7	0.0	0.0	38.5	6.8%
Other Stores Zone 3	0.0	0.0	2.9	0.0	0.0	0.0	0.0	0.0	2.9	0.5%
Zone 4										
Tesco, Church Langley Centre, Harlow	9.0	0.0	3.0	19.2	0.5	0.0	0.0	0.0	31.7	5.6%
Budgens, London Road, Sawbridgeworth	0.1	0.0	0.0	1.7	0.0	0.0	0.0	0.0	1.9	0.3%
Other Stores Zone 4	0.0	0.0	0.0	1.6	0.1	0.0	0.3	0.0	2.0	0.4%
Zone 5										
Sainsburys, Bansons Lane, Chipping Ongar	0.0	0.0	0.0	4.5	12.7	0.0	0.0	0.0	17.3	3.0%
Other Stores Zone 5	0.0	0.0	0.0	1.3	3.2	0.3	0.0	0.0	4.8	0.8%
Zone 6										
Tesco, Sewardstone Road, Waltham Abbey	0.0	2.4	4.3	0.0	0.0	37.4	1.0	0.4	45.5	8.0%
Sainsburys, High Street, Waltham Cross	0.0	0.0	0.0	0.0	0.0	2.2	0.0	2.5	4.7	0.8%
Somerfield, 4 Station Road, Chingford	0.0	0.0	0.0	0.0	0.0	3.8	0.0	0.0	3.8	0.7%
Co-op, 654-674 Hertford Road, Enfield	0.0	0.0	0.2	0.0	0.0	7.2	0.0	0.0	7.5	1.3%
Other Zone 6	0.0	1.5	1.5	0.0	0.0	11.7	3.5	0.0	18.2	3.2%
Zone 7										
Waitrose, 27-43 Queens Road, Buckhurst Hill	0.5	0.9	0.0	0.0	0.0	0.0	14.2	0.9	16.4	2.9%
Tesco, Southend Road, Woodford Green	0.0	0.0	0.0	0.0	0.0	0.0	16.3	0.1	16.4	2.9%
Other Zone 7	0.1	0.5	0.0	0.0	0.2	1.1	13.4	0.0	15.3	2.7%
Zone 8										
Tesco Express, 185 Manford Way, Grange Hill Estate, Chigwell	0.0	0.0	0.0	0.0	0.0	0.0	0.3	1.4	1.7	0.3%
Local Stores, Chigwell	0.0	0.1	0.0	0.0	0.0	0.0	2.4	1.9	4.3	0.8%
Other Zone 8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.5	0.1%
Combined Sub-Total for Zones 1-8	**39.6**	**46.1**	**47.3**	**30.6**	**18.5**	**80.2**	**61.7**	**14.7**	**338.7**	**59.5%**
Sub-Total inside Epping Forest District	**30.3**	**43.2**	**5.9**	**8.4**	**14.4**	**50.1**	**28.5**	**11.5**	**192.3**	**33.8%**
Outside Study Area										
Asda, Watergardens, Southgate, Harlow	4.0	0.0	2.8	5.8	0.0	1.2	0.0	0.0	13.9	2.4%
Morrisons, Salisbury Hall Gardens, Chingford Road, Chingford	0.0	0.0	0.0	0.0	0.0	2.5	7.6	0.0	10.1	1.8%
Sainsburys, 51 North Service Road, Brentwood	0.1	0.1	0.0	0.0	16.3	0.0	0.0	0.0	16.6	2.9%
Sainsburys, 11 Walthamstow Avenue, Low Hall, Chingford	0.0	0.0	0.7	0.0	0.0	1.2	6.3	0.0	8.2	1.4%
Sainsburys, 13 Hall Lane, Chingford	0.0	0.0	0.0	0.0	0.0	1.2	6.2	0.0	7.4	1.3%
Sainsburys, Fifth Avenue, Allende Avenue, Harlow	2.9	0.0	3.0	1.3	0.0	1.2	0.0	0.0	8.5	1.5%
Sainsburys, Brewery Road, Hoddesdon	0.0	0.1	11.3	0.0	0.0	1.2	0.0	0.0	12.7	2.2%
Sainsburys, 176 George Lane, South Woodford	0.6	0.0	0.0	0.0	0.0	0.0	7.2	0.9	8.7	1.5%
Tesco Extra, Bryant Avenue, Romford	0.0	0.0	1.6	0.0	3.7	0.0	0.0	1.1	6.5	1.1%
Tesco, 796 Cranbrook Road, Barkingside	0.0	0.0	0.0	0.0	0.0	0.3	7.6	6.0	14.0	2.5%
Tesco, Princes Road, Chelmsford	4.2	1.4	0.0	0.5	1.1	0.0	0.0	0.0	7.2	1.3%
Tesco, East Road, Edinburgh Way, Harlow	2.1	0.0	1.4	8.7	0.0	0.0	0.0	0.0	12.2	2.1%
Tesco, Unit 1-6 The Harvey Centre, Harlow	1.5	0.0	0.2	3.8	0.0	1.2	0.0	0.0	6.7	1.2%
Other stores outside study area	2.6	1.3	10.6	6.2	14.1	34.4	20.7	8.1	98.0	17.2%
Sub-Total for Outside Zones 1-8	**18.2**	**2.9**	**31.7**	**26.3**	**35.2**	**44.7**	**55.6**	**16.0**	**230.7**	**40.5%**
Sub-Total Outside Epping Forest District	**27.5**	**5.9**	**73.1**	**48.4**	**39.3**	**74.8**	**88.8**	**19.2**	**377.0**	**66.2%**
TOTAL	**57.8**	**49.1**	**79.0**	**56.8**	**53.7**	**124.9**	**117.3**	**30.7**	**569.3**	**100.0%**

Notes
(1) Turnover by zone by destination is the product of 2009 total turnover (Table 10) and the market share by destination by zone (Table 11)
(2) The share of the study area expenditure from each store/centre.

All monetary values are held constant at 2007 prices.

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Table 13: Benchmark Sales Densities for Foodstores

	Zone	Gross Floorspace (1)	Net Floorspace	Conv. Floorspace (2)	Net Conv. Floorspace	Average Sales Density (3)	Benchmark Turnover	Survey Derived Turnover	Inflow	Inflow	Total Survey Derived Turnover	Under /Over Trading (4)
		sqm	sqm	%	sqm	£/sqm	%	£m	%	£m	£m	£m
Main Foodstores in Epping District												
Tesco, 77-79 High Street, Epping	1	3,397	1,630	85%	1,385	13,631	18.9	26.5	21.0%	7.1	33.6	14.7
Marks and Spencer's Simply Food, 239-253 High Street, Epping	1	-	1,161	70%	813	11,283	9.2	3.5	21.0%	0.9	4.4	-4.8
Morrisons, 246-250 High Road, Loughton	2	3,326	2,648	77%	2,039	12,321	25.1	25.7	11.0%	3.2	28.8	3.7
Sainsburys, Old Station Road, Loughton	2	-	2,610	72%	1,880	10,387	19.5	26.7	11.0%	3.3	30.0	10.5
Sainsburys, 12 Torrington Drive, GLC Debden Estate, Loughton	2	1,689	678	90%	610	10,387	6.3	8.1	9.0%	0.8	8.9	2.6
Iceland, 22/24 The Broadway, Debden, Loughton	2	-	451	92%	415	5,876	2.4	1.6	9.0%	0.2	1.7	-0.7
Sainsburys, Bansons Lane, Chipping Ongar, Ongar	5	1,654	929	90%	836	10,387	8.7	17.3	10.0%	1.9	19.2	10.5
Tesco, Sewardstone Road, Waltham Abbey	6	6,586	3,325	80%	2,660	13,631	36.3	45.5	5.0%	2.4	47.9	11.6
Waitrose, 27-43 Queens Road, Buckhurst Hill	7	-	1,909	86%	1,642	11,864	19.5	16.4	12.0%	2.2	18.7	-0.8
TOTAL							145.9	171.3		22.0	193.2	47.3

Notes:
(1) Floorspace for foodstores in Epping Forest District with a meaningful market share is shown, the floorspace (both gross and net) is taken from IGD. For smaller stores the survey derived turnover is less reliable.
(2) The proportion of convenience floorspace is taken from the company average food/non-food splits in Verdict's 2009 UK Grocery Retailers document or RTP estimates on visits to the stores.
(3) Average sales densities are the company average turnover, derived from Mintel's 2009 Retail Rankings document.
(4) A positive figure indicates that the store is overtrading compared to company averages.

All monetary values are held constant at 2007 prices.

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Table 14a: Convenience Expenditure Capacity in Epping Forest

		2009	2011	2016	2021	2026	2031	2009-11	2011-16	2016-21	2021-26	2026-31	2009-26
								Change	Change	Change	Change	Change	Change
Available Expenditure and Expenditure Retention by Epping Forest District [1]													
A	Total Study Area Expenditure (£m)	569.3	587.5	636.2	682.7	734.3	788.3	18.2	48.7	46.5	51.6	54.0	**218.9**
B	Current Market Share for Centres in Epping Forest District (%)	*33.8%*	*33.8%*	*33.8%*	*33.8%*	*33.8%*	*33.8%*	-	-	-	-		-
C	Retained Expenditure in Epping Forest District (£m) (=A*B)	192.3	198.5	214.9	230.6	248.1	266.3	6.1	16.4	15.7	17.4	18.2	**74.0**
D	Inflow Expenditure to Epping Forest District (£m)	22.0	22.7	24.5	26.3	28.3	30.4	0.7	1.9	1.8	2.0	2.1	**8.4**
Claim on Expenditure from Turnover of Centres in Epping Forest District [2]													
E	Turnover of Centres in Epping Forest District (£m) (=C+D in 2009)	214.3	214.3	214.3	214.3	214.3	214.3	-	-	-	-	-	**-**
F	Grrowth in Turnover of Existing Centres (£m)	0.0	0.4	5.6	9.7	14.4	19.2	0.4	5.3	4.1	4.7	4.8	**19.2**
Claim on Expenditure from Commitments to New Floorspace [3]													
	(i) Lidl, Catersfield Road	0.0	1.9	1.9	1.9	2.0	2.0	1.9	0.0	0.0	0.0	0.0	**2.0**
	(ii) Highbridge Retail Park	0.0	2.3	2.4	2.4	2.4	2.5	2.3	0.0	0.0	0.1	0.1	**2.5**
G	Total Claim from Commitments (£m)	0.0	4.2	4.2	4.3	4.4	4.5	4.2	0.0	0.1	0.1	0.1	**4.5**
Residual Expenditure Available to Support New Floorspace [4]													
H	Residual Expenditure (£m) (=C+D-E-F-G)	0.0	2.2	15.3	28.7	43.3	58.7	2.2	13.0	13.4	14.6	15.4	**58.7**

Notes:
1. Row A is taken from Table 3; Row B is the market share of stores in Epping Forest District taken from Table 12 and remains constant for each forecast year; Row C is is the product of the current market share and the total study area expenditure; Row D is expenditure spent in centres in EppingForest District from beyond the study area and is assumed to be nil for the purposes of this assessment.
2. Row E is the turnover of centres in Epping Forest District incorporating both expenditure from the study area and inflow and remains constant in the forecast years; Row F is the growth in turnover of these centres, which we have forecast this turnover to increase by 0.1% per annum to 2011, 0.5% per annum to 2016, 0.4% per annum to 2031.
3. Row G represents the turnover of commitments to new floorspace in the study area, which are also assumed to increase by the same level of sales density growth as described at (2). The commitments modelled are the planning applications for a Lidl at Catersfield Road, Waltham Abbey - 1,643 sqm gross (Ref EPF/1771/08) and Unit 1 of Highbridge Retail Park, Waltham Abbey - 1,485 sqm gross Ref EPF/1305/08). Both schemes are assumed to have a net to gross ratio of 65%, with the Lidl floorspace based on 78:22 convenience:comparison and achieving a 2009 turnover of £2,252 per sqm, and the Highbridge Retail Park floorspace based on 71:29 convenience:comparison split and achieving a turnover of 3,413 per sqm in 2009.
4. Row H represents the product of the retail expenditure and expenditure inflow, less the deductions for the existing centres turnover, turnover growth and commitments.

All monetary values are held constant at 2007 prices.

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Table 14b: Convenience Expenditure Capacity in Epping Forest District *(with overtrading)*

		2009	2011	2016	2021	2026	2031	2009-11	2011-16	2016-21	2021-26	2026-31	2009-31
								Change	Change	Change	Change	Change	Change
Available Expenditure and Expenditure Retention by Epping Forest District [(1)]													
A	Total Study Area Expenditure (£m)	569.3	587.5	636.2	682.7	734.3	788.3	18.2	48.7	46.5	51.6	54.0	**218.9**
B	Current Market Share for Stores in Epping Forest District (%)	*33.8%*	*33.8%*	*33.8%*	*33.8%*	*33.8%*	*33.8%*	-	-	-	-	0.0	-
C	Retained Expenditure in Epping Forest District (£m) (=A*B)	192.3	198.5	214.9	230.6	248.1	266.3	6.1	16.4	15.7	17.4	18.2	**74.0**
D	Inflow Expenditure to Epping Forest District (£m)	22.0	22.7	24.5	26.3	28.3	30.4	0.7	1.9	1.8	2.0	2.1	**8.4**
Claim on Expenditure from Turnover of Centres in Epping Forest District [(2)]													
E	Turnover of Stores in Epping Forest District (£m) (=C+D in 2009)	214.3	214.3	214.3	214.3	214.3	214.3	-	-	-	-	-	**-**
F	Grrowth in Turnover of Existing Stores (£m)	0.0	0.4	5.6	9.7	14.4	19.2	0.4	5.3	4.1	4.7	4.8	**19.2**
Claim on Expenditure from Commitments to New Floorspace [(3)]													
	(i) Lidl, Catersfield Road	0.0	1.9	1.9	1.9	2.0	2.0	1.9	0.0	0.0	0.0	0.0	**2.0**
	(ii) Highbridge Retail Park	0.0	2.3	2.4	2.4	2.4	2.5	2.3	0.0	0.0	0.1	0.1	**2.5**
G	Total Claim from Commitments (£m)	0.0	4.2	4.2	4.3	4.4	4.5	4.2	0.0	0.1	0.1	0.1	**4.5**
Allowance for Overtrading of Existing Foodstores in the Base Year [(4)]													
H	Turnover of Main Foodstores in Excess of Company Average	47.3	47.3	47.3	47.3	47.3	47.3	2.2	13.0	13.4	14.6	15.4	**58.7**
Residual Expenditure Available to Support New Floorspace [(5)]													
I	Residual Expenditure (£m) (=C+D-E-F-G+H)	47.3	49.6	62.6	76.0	90.6	106.1	0.0	0.0	0.0	0.0	0.0	**43.3**

Notes:

1. Row A is taken from Table 3; Row B is the market share of stores in Epping Forest District taken from Table 12 and remains constant for each forecast year; Row C is is the product of the current market share and the total study area expenditure; Row D is expenditure spent in centres in EppingForest District from beyond the study area and is assumed to be nil for the purposes of this assessment.
2. Row E is the turnover of centres in Epping Forest District incorporating both expenditure from the study area and inflow and remains constant in the forecast years; Row F is the growth in turnover of these centres, which we have forecast this turnover to increase by 0.2% per annum to 2016, 0.6% per annum to 2021 and 0.3% per annum to 2026.
3. Row G represents the turnover of commitments to new floorspace in the study area, which are also assumed to increase by the same level of sales density growth as described at (2). The commitments modelled are the planning applications for a Lidl at Catersfield Road, Waltham Abbey - 1,643 sqm gross (Ref EPF/1771/08) and Unit 1 of Highbridge Retail Park, Waltham Abbey - 1,485 sqm gross Ref EPF/1305/08). Both schemes are assumed to have a net to gross ratio of 65%, with the Lidl floorspace based on 78:22 convenience:comparison and achieving a 2009 turnover of £2,252 per sqm, and the Highbridge Retail Park floorspace based on 71:29 convenience:comparison split and achieving a turnover of 3,413 per sqm in 2009.
4. Row I represents the product of the retail expenditure and expenditure inflow, less the deductions for the existing centres turnover, turnover growth and commitments.

All monetary values are held constant at 2007 prices.

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Table 14c: Convenience Expenditure Capacity in Epping Forest *(increasing market share)*

		2009	2011	2016	2021	2026	2031	2009-11	2011-16	2016-21	2021-26	2026-31	2009-26
								Change	Change	Change	Change	Change	Change
Available Expenditure and Expenditure Retention by Epping Forest District [(1)]													
A	Total Study Area Expenditure (£m)	569.3	587.5	636.2	682.7	734.3	788.3	18.2	48.7	46.5	51.6	54.0	**218.9**
B	Current Market Share for Centres in Epping Forest District (%)	*33.8%*	*33.8%*	*38.0%*	*38.0%*	*38.0%*	*38.0%*	-	-	-	-		-
C	Retained Expenditure in Epping Forest District (£m) (=A*B)	192.3	198.5	241.7	259.4	279.0	299.5	6.1	43.3	17.7	19.6	20.5	**107.2**
D	Inflow Expenditure to Epping Forest District (£m)	22.0	22.7	27.6	29.6	31.9	34.2	0.7	4.9	2.0	2.2	2.3	**12.2**
Claim on Expenditure from Turnover of Centres in Epping Forest District [(2)]													
E	Turnover of Centres in Epping Forest District (£m) (=C+D in 2009)	214.3	214.3	214.3	214.3	214.3	214.3	-	-	-	-	-	**-**
F	Grrowth in Turnover of Existing Centres (£m)	0.0	0.4	5.6	9.7	14.4	19.2	0.4	5.3	4.1	4.7	4.8	**19.2**
Claim on Expenditure from Commitments to New Floorspace [(3)]													
	(i) Lidl, Catersfield Road	0.0	1.9	1.9	1.9	2.0	2.0	1.9	0.0	0.0	0.0	0.0	**2.0**
	(ii) Highbridge Retail Park	0.0	2.3	2.4	2.4	2.4	2.5	2.3	0.0	0.0	0.1	0.1	**2.5**
G	Total Claim from Commitments (£m)	0.0	4.2	4.2	4.3	4.4	4.5	4.2	0.0	0.1	0.1	0.1	**4.5**
Residual Expenditure Available to Support New Floorspace [(4)]													
H	Residual Expenditure (£m) (=C+D-E-F-G)	0.0	2.2	45.2	60.7	77.8	95.8	2.2	42.9	15.6	17.1	18.0	**95.8**

Notes:
1. Row A is taken from Table 3; Row B is the market share of stores in Epping Forest District taken from Table 12 and remains constant for each forecast year; Row C is is the product of the current market share and the total study area expenditure; Row D is expenditure spent in centres in EppingForest District from beyond the study area and is assumed to be nil for the purposes of this assessment.
2. Row E is the turnover of centres in Epping Forest District incorporating both expenditure from the study area and inflow and remains constant in the forecast years; Row F is the growth in turnover of these centres, which we have forecast this turnover to increase by 0.1% per annum to 2011, 0.5% per annum to 2016, 0.4% per annum to 2031.
3. Row G represents the turnover of commitments to new floorspace in the study area, which are also assumed to increase by the same level of sales density growth as described at (2). The commitments modelled are the planning applications for a Lidl at Catersfield Road, Waltham Abbey - 1,643 sqm gross (Ref EPF/1771/08) and Unit 1 of Highbridge Retail Park, Waltham Abbey - 1,485 sqm gross Ref EPF/1305/08). Both schemes are assumed to have a net to gross ratio of 65%, with the Lidl floorspace based on 78:22 convenience:comparison and achieving a 2009 turnover of £2,252 per sqm, which the Highbrigdge Retail Park floorspace based on 71:29 convenience:comparison split and achieving a turnover of 3,413 per sqm in 2009.
4. Row H represents the product of the retail expenditure and expenditure inflow, less the deductions for the existing centres turnover, turnover growth and commitments.

All monetary values are held constant at 2007 prices.

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Table 14d: Convenience Expenditure Capacity in Epping Forest District *(with overtrading and increasing market share)*

		2009	2011	2016	2021	2026	2031	2009-11	2011-16	2016-21	2021-26	2026-31	2009-31
								Change	Change	Change	Change	Change	Change
Available Expenditure and Expenditure Retention by Epping Forest District [1]													
A	Total Study Area Expenditure (£m)	569.3	587.5	636.2	682.7	734.3	788.3	18.2	48.7	46.5	51.6	54.0	**218.9**
B	Current Market Share for Stores in Epping Forest District (%)	*33.8%*	*33.8%*	*38.0%*	*38.0%*	*38.0%*	*38.0%*	-	-	-	-	0.0	-
C	Retained Expenditure in Epping Forest District (£m) (=A*B)	192.3	198.5	241.7	259.4	279.0	299.5	6.1	43.3	17.7	19.6	20.5	**107.2**
D	Inflow Expenditure to Epping Forest District (£m)	22.0	22.7	27.6	29.6	31.9	34.2	0.7	4.9	2.0	2.2	2.3	**12.2**
Claim on Expenditure from Turnover of Centres in Epping Forest District [2]													
E	Turnover of Stores in Epping Forest District (£m) (=C+D in 2009)	214.3	214.3	214.3	214.3	214.3	214.3	-	-	-	-	-	**-**
F	Grrowth in Turnover of Existing Stores (£m)	0.0	0.4	5.6	9.7	14.4	19.2	0.4	5.3	4.1	4.7	4.8	**19.2**
Claim on Expenditure from Commitments to New Floorspace [3]													
	(i) Lidl, Catersfield Road	0.0	1.9	1.9	1.9	2.0	2.0	1.9	0.0	0.0	0.0	0.0	**2.0**
	(ii) Highbridge Retail Park	0.0	2.3	2.4	2.4	2.4	2.5	2.3	0.0	0.0	0.1	0.1	**2.5**
G	Total Claim from Commitments (£m)	0.0	4.2	4.2	4.3	4.4	4.5	4.2	0.0	0.1	0.1	0.1	**4.5**
Allowance for Overtrading of Existing Foodstores in the Base Year [4]													
H	Turnover of Main Foodstores in Excess of Company Average	47.3	47.3	47.3	47.3	47.3	47.3	2.2	42.9	15.6	17.1	18.0	**95.8**
Residual Expenditure Available to Support New Floorspace [5]													
I	Residual Expenditure (£m) (=C+D-E-F-G+H)	47.3	49.6	92.5	108.1	125.2	143.1	0.0	0.0	0.0	0.0	0.0	**77.8**

Notes:

1. Row A is taken from Table 3; Row B is the market share of stores in Epping Forest District taken from Table 12 and remains constant for each forecast year; Row C is is the product of the current market share and the total study area expenditure; Row D is expenditure spent in centres in EppingForest District from beyond the study area and is assumed to be nil for the purposes of this assessment.
2. Row E is the turnover of centres in Epping Forest District incorporating both expenditure from the study area and inflow and remains constant in the forecast years; Row F is the growth in turnover of these centres, which we have forecast this turnover to increase by 0.2% per annum to 2016, 0.6% per annum to 2021 and 0.3% per annum to 2026.
3. Row G represents the turnover of commitments to new floorspace in the study area, which are also assumed to increase by the same level of sales density growth as described at (2). The commitments modelled are the planning applications for a Lidl at Catersfield Road, Waltham Abbey - 1,643 sqm gross (Ref EPF/1771/08) and Unit 1 of Highbridge Retail Park, Waltham Abbey - 1,485 sqm gross Ref EPF/1305/08). Both schemes are assumed to have a net to gross ratio of 65%, with the Lidl floorspace based on 78:22 convenience:comparison and achieving a 2009 turnover of £2,252 per sqm, and the Highbridge Retail Park floorspace based on 71:29 convenience:comparison split and achieving a turnover of 3,413 per sqm in 2009.
4. Row I represents the product of the retail expenditure and expenditure inflow, less the deductions for the existing centres turnover, turnover growth and commitments.

All monetary values are held constant at 2007 prices.

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Table 15a: Convenience Floorspace Requirements for Epping Forest District

		2009	2011	2016	2021	2026	2031	2009-11	2011-16	2016-21	2021-26	2026-31	2009-26
								Change	Change	Change	Change	Change	Change
Residual Expenditure Available to Support New Floorspace (1)													
A	Residual Convenience Expenditure (£m)	0.0	2.2	15.3	28.7	43.3	58.7	13.0	13.4	14.6	14.6	15.4	**58.7**
B	Superstore/Supermarket Expenditure (£m) (=A*70%)	0.0	1.6	10.7	20.1	30.3	41.1	9.1	9.4	10.3	10.3	10.8	**41.1**
C	Small Foodstore/Deep Discounter Expenditure (£m) (=A*30%)	0.0	0.7	4.6	8.6	13.0	17.6	3.9	4.0	4.4	4.4	4.6	**17.6**
Superstore/Supermarket Floorspace Requirement for Epping Forest District (2)													
D	Superstore/Supermarket Sales Density (£/sqm)	12,800	12,822	13,136	13,378	13,659	13,945	-	-	-	-	-	**-**
E	Net Supermarket/Superstore Floorspace Requirement (sqm net) (=B/D)	0	123	814	1,499	2,219	2,949	692	685	720	720	730	**2,219**
F	Gross Supermarket/Superstore Floorspace Requirement (sqm) (=E/65%)	0	189	1,252	2,307	3,414	4,537	1,064	1,054	1,107	1,107	1,107	**3,414**
Small Foodstore/Deep Discounter Requirement for Epping Forest District (3)													
G	Small Foodstore/Deep Discounter Sales Density (£/sqm)	5,600	5,610	5,747	5,853	5,976	6,101	-	-	-	-	-	**-**
H	Net Small Foodstore/Deep Discounter Floorspace Requirement (sqm net) (=C/G)	0	120	797	1,469	2,174	2,889	120	677	671	705	715	**2,889**
I	Gross Small Foodstore/Deep Discounter Floorspace Requirement (sqm) (=H/65%)	0	185	1,227	2,260	3,344	4,444	185	1,042	1,033	1,085	1,100	**4,444**

Notes:
1. Row A represents residual convenience expenditure taken from Table 14a. Row B represents 70% of the residual expenditure, assumed to be spent in larger superstores/supermarkets. Row C represents 30% of the residual expenditure, assumed to be spent in small foodstores or deep discounters.
2. Row D represents the assumed sales density to calculate a superstore/supermarket floorspace requirement, which is the average sales density for Tesco, Asda, Sainsbury's, Morrisons, Waitrose and Marks and Spencer and is increased by 0.1% per annum to 2011, 0.5% per annum 2016 and 0.4% per annum to 2031. Row E represents net floorspace requirements calculated by the division of residual expenditure by assumed sales density; and Row F represents gross requirements through the application of a 65% net to gross ratio.
3. Row G represents the assumed sales density to calculate a small foodstore/deep discounter floorspace requirement, which is the aveage sales density for Somerfield, Co-op, Iceland, Lidl, Aldi and Netto and is increased by 0.2% per annum to 2016, 0.6% per annum to 2021 and 0.3% per annum to 2026. Row H represents net floorspace requirements calculated by the division of residual expenditure by assumed sales density; and Row G represents gross requirements through the application of a 65% net to gross ratio.

All monetary values are held constant at 2007 prices.

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Table 15b: Convenience Floorspace Requirements for Epping Forest District *(with overtrading)*

		2009	2011	2016	2021	2026	2031	2009-11	2011-16	2016-21	2021-26	2026-31	2009-26
								Change	Change	Change	Change	Change	Change
Residual Expenditure Available to Support New Floorspace [1]													
A	Residual Convenience Expenditure (£m)	47.3	49.6	62.6	76.0	90.6	106.1	13.0	13.4	14.6	14.6	15.4	**58.7**
B	Superstore/Supermarket Expenditure (£m) (=A*70%)	33.1	34.7	43.8	53.2	63.5	74.3	9.1	9.4	10.3	10.3	10.8	**41.1**
C	Small Foodstore/Deep Discounter Expenditure (£m) (=A*30%)	14.2	14.9	18.8	22.8	27.2	31.8	3.9	4.0	4.4	4.4	4.6	**17.6**
Superstore/Supermarket Floorspace Requirement for Epping Forest District [2]													
D	Superstore/Supermarket Sales Density (£/sqm)	12,800	12,925	13,241	13,485	13,768	14,056	-	-	-	-	-	**-**
E	Net Supermarket/Superstore Floorspace Requirement (sqm net) (=B/D)	2,589	2,686	3,311	3,945	4,609	5,283	625	635	664	664	675	**2,020**
F	Gross Supermarket/Superstore Floorspace Requirement (sqm) (=E/65%)	3,984	4,132	5,093	6,070	7,090	8,128	961	976	1,021	1,021	1,021	**3,107**
Small Foodstore/Deep Discounter Requirement for Epping Forest District [3]													
G	Small Foodstore/Deep Discounter Sales Density (£/sqm)	5,600	5,610	5,747	5,853	5,976	6,101	-	-	-	-	-	**-**
H	Net Small Foodstore/Deep Discounter Floorspace Requirement (sqm net) (=C/G)	2,536	2,652	3,269	3,896	4,551	5,217	116	617	627	655	666	**2,681**
I	Gross Small Foodstore/Deep Discounter Floorspace Requirement (sqm) (=H/65%)	3,902	4,080	5,029	5,993	7,001	8,026	178	949	964	1,008	1,025	**4,124**

Notes:
1. Row A represents residual convenience expenditure taken from Table 14a. Row B represents 70% of the residual expenditure, assumed to be spent in larger superstores/supermarkets. Row C represents 30% of the residual expenditure, assumed to be spent in small foodstores or deep discounters.
2. Row D represents the assumed sales density to calculate a superstore/supermarket floorspace requirement, which is the average sales density for Tesco, Asda, Sainsbury's, Morrisons, Waitrose and Marks and Spencer and is increased by 0.1% per annum to 2011, 0.5% per annum to 2016 and 0.4% per annum to 2031. Row E represents net floorspace requirements calculated by the division of residual expenditure by assumed sales density; and Row F represents gross requirements through the application of a 65% net to gross ratio.
3. Row G represents the assumed sales density to calculate a small foodstore/deep discounter floorspace requirement, which is the aveage sales density for Somerfield, Co-op, Iceland, Lidl, Aldi and Netto and is increased by 0.2% per annum to 2016, 0.6% per annum to 2021 and 0.3% per annum to 2026. Row H represents net floorspace requirements calculated by the division of residual expenditure by assumed sales density; and Row G represents gross requirements through the application of a 65% net to gross ratio.

All monetary values are held constant at 2007 prices.

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Table 15c: Convenience Floorspace Requirements for Epping Forest District *(increasing market share)*

		2009	2011	2016	2021	2026	2031	2009-11	2011-16	2016-21	2021-26	2026-31	2009-26
								Change	Change	Change	Change	Change	Change
Residual Expenditure Available to Support New Floorspace (1)													
A	Residual Convenience Expenditure (£m)	0.0	2.2	45.2	60.7	77.8	95.8	42.9	15.6	17.1	17.1	18.0	**95.8**
B	Superstore/Supermarket Expenditure (£m) (=A*70%)	0.0	1.6	31.6	42.5	54.5	67.1	30.0	10.9	11.9	11.9	12.6	**67.1**
C	Small Foodstore/Deep Discounter Expenditure (£m) (=A*30%)	0.0	0.7	13.6	18.2	23.3	28.7	12.9	4.7	5.1	5.1	5.4	**28.7**
Superstore/Supermarket Floorspace Requirement for Epping Forest District (2)													
D	Superstore/Supermarket Sales Density (£/sqm)	12,800	12,822	13,136	13,378	13,659	13,945	-	-	-	-	-	**-**
E	Net Supermarket/Superstore Floorspace Requirement (sqm net) (=B/D)	0	123	2,407	3,178	3,987	4,808	2,284	771	810	810	821	**3,987**
F	Gross Supermarket/Superstore Floorspace Requirement (sqm) (=E/65%)	0	189	3,703	4,889	6,135	7,398	3,515	1,186	1,245	1,245	1,245	**6,135**
Small Foodstore/Deep Discounter Requirement for Epping Forest District (3)													
G	Small Foodstore/Deep Discounter Sales Density (£/sqm)	5,600	5,610	5,747	5,853	5,976	6,101	-	-	-	-	-	**-**
H	Net Small Foodstore/Deep Discounter Floorspace Requirement (sqm net) (=C/G)	0	120	2,358	3,113	3,906	4,710	120	2,238	755	793	804	**4,710**
I	Gross Small Foodstore/Deep Discounter Floorspace Requirement (sqm) (=H/65%)	0	185	3,628	4,789	6,009	7,247	185	3,443	1,162	1,220	1,237	**7,247**

Notes:
1. Row A represents residual convenience expenditure taken from Table 14a. Row B represents 70% of the residual expenditure, assumed to be spent in larger superstores/supermarkets. Row C represents 30% of the residual expenditure, assumed to be spent in small foodstores or deep discounters.
2. Row D represents the assumed sales density to calculate a superstore/supermarket floorspace requirement, which is the average sales density for Tesco, Asda, Sainsbury's, Morrisons, Waitrose and Marks and Spencer and is increased by 0.1% per annum to 2011, 0.5% per annum 2016 and 0.4% per annum to 2031. Row E represents net floorspace requirements calculated by the division of residual expenditure by assumed sales density; and Row F represents gross requirements through the application of a 65% net to gross ratio.
3. Row G represents the assumed sales density to calculate a small foodstore/deep discounter floorspace requirement, which is the aveage sales density for Somerfield, Co-op, Iceland, Lidl, Aldi and Netto and is increased by 0.2% per annum to 2016, 0.6% per annum to 2021 and 0.3% per annum to 2026. Row H represents net floorspace requirements calculated by the division of residual expenditure by assumed sales density; and Row G repesents gross requirements through the application of a 65% net to gross ratio.

All monetary values are held constant at 2007 prices.

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Table 15d: Convenience Floorspace Requirements for Epping Forest District *(with overtrading and increasing market share)*

		2009	2011	2016	2021	2026	2031	2009-11	2011-16	2016-21	2021-26	2026-31	2009-26
								Change	Change	Change	Change	Change	Change
Residual Expenditure Available to Support New Floorspace (1)													
A	Residual Convenience Expenditure (£m)	47.3	49.6	92.5	108.1	125.2	143.1	42.9	15.6	17.1	17.1	18.0	**95.8**
B	Superstore/Supermarket Expenditure (£m) (=A*70%)	33.1	34.7	64.8	75.7	87.6	100.2	30.0	10.9	11.9	11.9	12.6	**67.1**
C	Small Foodstore/Deep Discounter Expenditure (£m) (=A*30%)	14.2	14.9	27.8	32.4	37.5	42.9	12.9	4.7	5.1	5.1	5.4	**28.7**
Superstore/Supermarket Floorspace Requirement for Epping Forest District (2)													
D	Superstore/Supermarket Sales Density (£/sqm)	12,800	12,925	13,241	13,485	13,768	14,056	-	-	-	-	-	**-**
E	Net Supermarket/Superstore Floorspace Requirement (sqm net) (=B/D)	2,589	2,686	4,891	5,610	6,363	7,128	2,205	720	753	753	765	**3,774**
F	Gross Supermarket/Superstore Floorspace Requirement (sqm) (=E/65%)	3,984	4,132	7,524	8,631	9,789	10,966	3,392	1,107	1,158	1,158	1,158	**5,806**
Small Foodstore/Deep Discounter Requirement for Epping Forest District (3)													
G	Small Foodstore/Deep Discounter Sales Density (£/sqm)	5,600	5,610	5,747	5,853	5,976	6,101	-	-	-	-	-	**-**
H	Net Small Foodstore/Deep Discounter Floorspace Requirement (sqm net) (=C/G)	2,536	2,652	4,829	5,540	6,283	7,039	116	2,177	710	743	755	**4,502**
I	Gross Small Foodstore/Deep Discounter Floorspace Requirement (sqm) (=H/65%)	3,902	4,080	7,430	8,523	9,666	10,829	178	3,350	1,093	1,143	1,162	**6,926**

Notes:
1. Row A represents residual convenience expenditure taken from Table 14a. Row B represents 70% of the residual expenditure, assumed to be spent in larger superstores/supermarkets. Row C represents 30% of the residual expenditure, assumed to be spent in small foodstores or deep discounters.
2. Row D represents the assumed sales density to calculate a superstore/supermarket floorspace requirement, which is the average sales density for Tesco, Asda, Sainsbury's, Morrisons, Waitrose and Marks and Spencer and is increased by 0.1% per annum to 2011, 0.5% per annum to 2016 and 0.4% per annum to 2031. Row E represents net floorspace requirements calculated by the division of residual expenditure by assumed sales density; and Row F represents gross requirements through the application of a 65% net to gross ratio.
3. Row G represents the assumed sales density to calculate a small foodstore/deep discounter floorspace requirement, which is the aveage sales density for Somerfield, Co-op, Iceland, Lidl, Aldi and Netto and is increased by 0.2% per annum to 2016, 0.6% per annum to 2021 and 0.3% per annum to 2026. Row H represents net floorspace requirements calculated by the division of residual expenditure by assumed sales density; and Row G represents gross requirements through the application of a 65% net to gross ratio.

All monetary values are held constant at 2007 prices.

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Table 16 Per Capita Expenditure on Leisure Services (£)

Year	Expenditure Category	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
2009 (1)	Recreational & cultural services - per capita	611	625	572	614	698	517	522	547
	Restaurants - per capita	1,237	1,263	1,153	1,256	1,433	1,424	1,562	1,433
	Hotels - per capita	212	217	199	216	246	235	256	238
	Hair & personal grooming - per capita	110	112	103	111	127	105	110	109
	Total Leisure Services Expenditure in 2009	**2,171**	**2,217**	**2,026**	**2,198**	**2,504**	**2,281**	**2,451**	**2,327**
2011	Recreational & cultural services - per capita	607	620	567	609	692	513	518	542
	Restaurants - per capita	1,227	1,252	1,144	1,246	1,422	1,412	1,550	1,422
	Hotels - per capita	211	215	197	214	244	234	254	236
	Hair & personal grooming - per capita	110	112	102	111	126	104	110	108
	Total Leisure Services Expenditure in 2011	**2,153**	**2,199**	**2,010**	**2,180**	**2,484**	**2,263**	**2,431**	**2,308**
2016	Recreational & cultural services - per capita	650	665	608	653	742	550	555	581
	Restaurants - per capita	1,315	1,343	1,226	1,335	1,524	1,514	1,661	1,524
	Hotels - per capita	226	231	211	230	262	250	272	253
	Hair & personal grooming - per capita	117	120	109	118	135	111	117	115
	Total Leisure Services Expenditure in 2016	**2,308**	**2,358**	**2,155**	**2,337**	**2,663**	**2,426**	**2,606**	**2,474**
2021	Recreational & cultural services - per capita	711	727	665	714	811	602	607	635
	Restaurants - per capita	1,438	1,468	1,341	1,460	1,666	1,655	1,816	1,666
	Hotels - per capita	247	252	231	251	286	274	297	277
	Hair & personal grooming - per capita	128	131	119	130	148	122	128	126
	Total Leisure Services Expenditure in 2021	**2,524**	**2,578**	**2,356**	**2,555**	**2,911**	**2,652**	**2,849**	**2,705**
2026	Recreational & cultural services - per capita	777	794	727	781	887	658	664	695
	Restaurants - per capita	1,572	1,605	1,466	1,596	1,822	1,809	1,985	1,822
	Hotels - per capita	270	276	252	275	313	299	325	303
	Hair & personal grooming - per capita	140	143	131	142	161	133	140	138
	Total Leisure Services Expenditure in 2026	**2,759**	**2,818**	**2,575**	**2,793**	**3,183**	**2,899**	**3,115**	**2,957**
2031	Recreational & cultural services - per capita	850	869	794	854	970	719	726	759
	Restaurants - per capita	1,718	1,755	1,602	1,745	1,992	1,978	2,171	1,992
	Hotels - per capita	295	302	276	300	342	327	355	331
	Hair & personal grooming - per capita	154	156	143	155	176	145	154	151
	Total Leisure Services Expenditure in 2031	**3,016**	**3,081**	**2,816**	**3,054**	**3,480**	**3,170**	**3,406**	**3,233**

Notes
(1) The 2009 expenditure and expenditure in subsequent forecast years is based on 2007 data by category by zone (supplied by MapInfo) and increased to 2031 as advised by Experian Retail Planner Briefing Note 7.1, Figure 1

All monetary values are held constant at 2007 prices.

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Table 17 Leisure Expenditure Growth by Category by Zone (£m)

Year	Expenditure Category	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	TOTAL
2009 [(1)]	Recreational & cultural services	19.9	16.9	26.8	19.9	19.1	35.1	31.8	8.9	178.5
	Restaurants	40.3	34.2	54.1	40.7	39.3	96.5	95.0	23.4	423.6
	Hotels	6.9	5.9	9.3	7.0	6.7	16.0	15.6	3.9	71.3
	Hair & personal grooming	3.6	3.0	4.8	3.6	3.5	7.1	6.7	1.8	34.2
	Total Leisure Services Expenditure	**70.8**	**60.1**	**95.1**	**71.2**	**68.7**	**154.7**	**149.1**	**38.0**	**707.6**
2011	Recreational & cultural services	20.0	17.0	26.9	20.0	19.3	35.2	32.0	9.0	179.4
	Restaurants	40.5	34.3	54.3	40.9	39.7	96.9	95.6	23.5	425.7
	Hotels	7.0	5.9	9.4	7.0	6.8	16.0	15.7	3.9	71.7
	Hair & personal grooming	3.6	3.1	4.8	3.6	3.5	7.1	6.8	1.8	34.3
	Total Leisure Services Expenditure	**75.7**	**60.3**	**95.5**	**71.5**	**69.3**	**155.2**	**150.0**	**38.2**	**715.7**
2016	Recreational & cultural services - per capita	22.1	18.8	29.8	22.1	21.5	38.9	35.5	9.9	198.6
	Restaurants - per capita	44.8	37.9	60.0	45.2	44.2	106.9	106.1	26.1	471.1
	Hotels - per capita	7.7	6.5	10.3	7.8	7.6	17.7	17.4	4.3	79.3
	Hair & personal grooming - per capita	4.0	3.4	5.3	4.0	3.9	7.9	7.5	2.0	38.0
	Total Leisure Services Expenditure	**83.6**	**66.6**	**105.4**	**79.0**	**77.2**	**171.4**	**166.4**	**42.3**	**792.0**
2021	Recreational & cultural services - per capita	25.0	21.3	33.5	24.9	24.5	43.8	40.1	11.2	224.3
	Restaurants - per capita	50.6	42.9	67.7	51.0	50.3	120.5	119.8	29.5	532.2
	Hotels - per capita	8.7	7.4	11.7	8.8	8.6	19.9	19.6	4.9	89.6
	Hair & personal grooming - per capita	4.5	3.8	6.0	4.5	4.5	8.9	8.5	2.2	42.9
	Total Leisure Services Expenditure	**88.7**	**75.4**	**118.9**	**89.2**	**87.8**	**193.2**	**187.9**	**47.9**	**889.0**
2026	Recreational & cultural services - per capita	28.2	23.9	37.7	28.1	27.7	49.3	45.1	12.7	252.6
	Restaurants - per capita	56.9	48.4	76.1	57.4	56.9	135.5	134.8	33.3	599.3
	Hotels - per capita	9.8	8.3	13.1	9.9	9.8	22.4	22.1	5.5	100.9
	Hair & personal grooming - per capita	5.1	4.3	6.8	5.1	5.0	10.0	9.5	2.5	48.3
	Total Leisure Services Expenditure	**100.0**	**84.9**	**133.7**	**100.4**	**99.5**	**217.2**	**211.4**	**54.0**	**1,001.1**
2031	Recreational & cultural services - per capita	31.6	26.9	42.3	31.5	31.3	55.2	50.5	14.2	**283.6**
	Restaurants - per capita	63.9	54.3	85.4	64.4	64.2	152.0	151.1	37.4	**672.6**
	Hotels - per capita	11.0	9.3	14.7	11.1	11.0	25.1	24.7	6.2	**113.2**
	Hair & personal grooming - per capita	5.7	4.8	7.6	5.7	5.7	11.2	10.7	2.8	**54.2**
	Total Leisure Services Expenditure	**112.2**	**95.4**	**150.0**	**112.7**	**112.2**	**243.5**	**237.0**	**60.7**	**1,123.6**

Notes
(1) The 2009 expenditure and subsequent figures for the forecast years are the products of multiplying the data presented in Table 2 (population) by Table 16 (per capita leisure expenditure).

All monetary values are held constant at 2007 prices.

Epping Forest Town Centres Study

Table 18 Summary of Leisure Expenditure Growth (£m)

Year	Expenditure Category	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	TOTAL
2009-2011 (1)	Recreational & cultural services	0.1	0.1	0.1	0.1	0.2	0.1	0.2	0.0	0.9
	Restaurants	0.2	0.1	0.2	0.2	0.4	0.4	0.6	0.1	2.1
	Hotels	0.0	0.0	0.0	0.0	0.1	0.1	0.1	0.0	0.4
	Hair & personal grooming	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2
	Total Leisure Services Expenditure	4.9	0.2	0.4	0.3	0.6	0.6	0.9	0.2	8.1
2011-2016	Recreational & cultural services	2.1	1.8	2.8	2.1	2.2	3.7	3.5	1.0	19.1
	Restaurants	4.3	3.6	5.7	4.3	4.6	10.1	10.4	2.5	45.4
	Hotels	0.7	0.6	1.0	0.7	0.8	1.7	1.7	0.4	7.6
	Hair & personal grooming	0.4	0.3	0.5	0.4	0.4	0.7	0.7	0.2	3.7
	Total Leisure Services Expenditure	7.5	6.3	10.0	7.5	8.0	16.1	16.4	4.1	75.9
2016-2021	Recreational & cultural services - per capita	2.9	2.5	3.8	2.8	2.9	4.9	4.6	1.3	25.8
	Restaurants - per capita	5.8	5.0	7.7	5.8	6.1	13.6	13.7	3.4	61.0
	Hotels - per capita	1.0	0.9	1.3	1.0	1.0	2.2	2.2	0.6	10.3
	Hair & personal grooming - per capita	0.5	0.4	0.7	0.5	0.5	1.0	1.0	0.3	4.9
	Total Leisure Services Expenditure	10.1	8.8	13.5	10.2	10.6	21.8	21.5	5.5	102.0
2021-2026	Recreational & cultural services - per capita	3.2	2.7	4.2	3.1	3.2	5.5	5.0	1.4	28.3
	Restaurants - per capita	6.4	5.4	8.4	6.4	6.7	15.0	15.0	3.8	67.1
	Hotels - per capita	1.1	0.9	1.5	1.1	1.1	2.5	2.5	0.6	11.3
	Hair & personal grooming - per capita	0.6	0.5	0.8	0.6	0.6	1.1	1.1	0.3	5.4
	Total Leisure Services Expenditure	11.2	9.5	14.8	11.2	11.7	24.0	23.5	6.1	112.2
2026-2031	Recreational & cultural services - per capita	3.4	2.9	4.6	3.4	3.5	6.0	5.4	1.6	30.9
	Restaurants - per capita	7.0	6.0	9.2	7.0	7.3	16.4	16.3	4.1	73.3
	Hotels - per capita	1.2	1.0	1.6	1.2	1.2	2.7	2.7	0.7	12.3
	Hair & personal grooming - per capita	0.6	0.5	0.8	0.6	0.6	1.2	1.2	0.3	5.9
	Total Leisure Services Expenditure	12.2	10.5	16.2	12.3	12.7	26.3	25.6	6.7	122.4
2009-2031	Recreational & cultural services - per capita	11.7	10.0	15.5	11.6	12.1	20.2	18.7	5.3	105.0
	Restaurants - per capita	23.6	20.1	31.2	23.7	24.9	55.4	56.0	14.0	249.0
	Hotels - per capita	4.0	3.5	5.4	4.1	4.3	9.2	9.2	2.3	41.9
	Hair & personal grooming - per capita	2.1	1.8	2.8	2.1	2.2	4.1	4.0	1.1	20.1
	Total Leisure Services Expenditure	**41.4**	**35.3**	**54.9**	**41.5**	**43.5**	**88.8**	**87.9**	**22.7**	**416.0**

Notes
(1) This represents the growth in leisure expenditure, by category, in between each of the forecast years and is derived from Table 17.

All monetary values are held constant at 2007 prices.

Epping Forest Town Centres Study

Table 19 Summary of Leisure Expenditure Growth by Sub-Category (£m)

COICOP Category	Expenditure Category [1]	2009	2011	2016	2021	2026	2031	2009-2011	2011-2016	2016-2021	2021-2026	2026-2031	2009-2031
9.4.1	Recreation and sporting services	40.2	40.4	44.7	50.5	56.9	63.9	0.2	4.3	5.8	6.4	7.0	23.7
9.4.2	Cultural Services	85.3	85.8	94.9	107.2	120.8	135.6	0.4	9.2	12.3	13.5	14.8	50.2
09.4.2(pt)	*Cinema admissions (sub part of cultural services)*	*2.6*	*2.6*	*2.9*	*3.3*	*3.7*	*4.2*	*0.0*	*0.3*	0.4	*0.4*	0.5	1.6
09.4.2(pt)	*Theatre admissions (sub part of cultural services)*	*4.7*	*4.7*	*5.2*	*5.9*	*6.7*	*7.5*	*0.0*	*0.5*	0.7	*0.7*	0.8	2.8
09.4.2(pt)	*Television and video rentals (sub part of cultural services)*	*1.3*	*1.4*	*1.5*	*1.7*	*1.9*	*2.1*	*0.0*	*0.1*	0.2	*0.2*	0.2	0.8
09.4.2(pt)	*Social subscriptions (sub part of cultural services)*	*2.7*	*2.8*	*3.0*	*3.4*	*3.9*	*4.4*	*0.0*	*0.3*	0.4	*0.4*	0.5	1.6
09.4.2(pt)	*Photographic processing (sub part of cultural services)*	*2.6*	*2.6*	*2.9*	*3.3*	*3.7*	*4.2*	*0.0*	*0.3*	0.4	*0.4*	0.5	1.5
09.4.2(pt)	*Other (sub part of cultural services)*	*26.7*	*26.9*	*29.7*	*33.6*	*37.8*	*42.5*	*0.1*	*2.9*	3.9	*4.2*	4.6	15.7
09.4.3	Games of chance	53.0	53.2	58.9	66.5	74.9	84.1	0.3	5.7	7.6	8.4	9.2	31.2
11.1.1	Restaurants, Cafes, Etc	379.0	380.9	421.5	476.1	536.2	601.7	1.9	40.7	54.6	60.1	65.5	222.7
11.1.2	Canteens	44.6	44.8	49.6	56.0	63.1	70.8	0.2	4.8	6.4	7.1	7.7	26.2
11.2	Accommodation Services	71.3	71.7	79.3	89.6	100.9	113.2	0.4	7.6	10.3	11.3	12.3	41.9
12.1.1	Hairdressing Salons & personal grooming establishments	34.2	34.3	38.0	42.9	48.3	54.2	0.2	3.7	4.9	5.4	5.9	20.1
Total	**Leisure Services**	**707.6**	**711.1**	**787.0**	**889.0**	**1,001.1**	**1,123.6**	**3.5**	**75.9**	**102.0**	**112.2**	**122.4**	**440.0**

Notes
(1) This represents the growth in leisure expenditure, by category, in between each of the forecast years and is derived from Table 17. The expenditure splits are provided by MapInfo.

All monetary values are held constant at 2007 prices.

Epping Forest Town Centres Study

Table 20: Food and Drink Expenditure Capacity and Indicative Floorpace Requirements for Epping Forest District

		2009	2011	2016	2021	2026	2031	2009-11	2011-16	2016-21	2021-26	2026-31	2009-31
								Change	Change	Change	Change	Change	Change
Available Expenditure and Expenditure Retention by Epping Forest District (1)													
A	Total Study Area Expenditure on Food and Drink (£m)	423.6	425.7	471.1	532.2	599.3	672.6	2.1	45.4	61.0	67.1	73.3	**249.0**
B	Current Market Share for Centres in Epping Forest District (%)	*28.8%*	*28.8%*	*28.8%*	*28.8%*	*28.8%*	*28.8%*	-	-	-	-	-	-
C	Retained Expenditure in Epping Forest District (£m) (=A*B)	122.1	122.7	135.7	153.3	172.7	193.8	0.6	13.1	17.6	19.3	21.1	**71.7**
D	Inflow Expenditure to Epping Forest District (£m)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Claim on Expenditure from Turnover of Centres in Epping Forest District (2)													
E	Turnover of Centres inEpping Forest (£m) (=C+D in 2009)	122.1	122.1	122.1	122.1	122.1	122.1	-	-	-	-	-	**-**
F	Grrowth in Turnover of Existing Centres (£m)	0.0	-0.4	2.9	7.2	11.7	16.3	-0.4	3.3	4.3	4.5	4.6	**16.3**
Claim on Expenditure from Commitments to New Floorspace (3)													
	(i) Browns car showroom, Loughton High Road	0.0	2.7	2.8	2.9	3.0	3.1	2.7	0.1	0.1	0.1	0.1	**3.1**
G	Total Claim on Expenditure from Commitments (£m)	0.0	2.7	2.8	2.9	3.0	3.1	2.7	0.1	0.1	0.1	0.1	**3.1**
Residual Expenditure Available to Support New Floorspace (4)													
H	Residual Expenditure (£m) (=C+D-E-F-G)	0.0	-1.7	8.0	21.2	36.0	52.4	-1.7	9.8	13.2	14.8	16.4	**52.4**
Food and Drink Floorspace Requirements for Epping Forest District (5)													
I	Assumed Gross Sales Density for New Food and Drink Floorspace (£/sqm)	7,707	7,813	8,083	8,363	8,652	8,952	-	-	-	-	-	**-**
J	Gross Food and Drink Floorspace Requirement for Epping Forest District (sqm net) (=H/I)	0	-220	994	2,536	4,158	5,848	-220	1,214	1,541	1,622	1,691	**5,848**

Notes:
1. Row A is taken from Table 3; Row B is the market share of stores in Epping Forest District taken from Table 12 and remains constant for each forecast year; Row C is is the product of the current market share and the total study area expenditure; Row D is expenditure spent in centres in Epping Forest District from beyond the study area and is assumed to be nil for the purposes of this assessment.
2. Row E is the turnover of centres in Epping Forest District incorporating both expenditure from the study area and inflow and remains constant in the forecast years; Row F is the growth in turnover of these centres. This will reduce by 0.2% per annum to 2011 and then increase by 0.5% per annum to 2016 and then by 0.7% per annum to 2031.
3. Row G represents the turnover of commitments to new floorspace in the study area, which are also assumed to increase by the same level of sales density growth as described at (2). The only commitment we have modelled is the Brown's car showroom site on Loughton High Road, which has planning permission for some 349 sqm (gross) of A3 use, which we assume will have a 2009 turnover of £7,707 per sqm.
4. Row H represents the product of the retail expenditure and expenditure inflow, less the deductions for the existing centres turnover, turnover growth and commitments.
5. Row J represents the indicative assumed sales density to calculate a food and drink floorspace requirement, which increases by the same level of sales density growth described at (2). Only a gross requirement is shown for food and drink uses.

All monetary values are held constant at 2007 prices.