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Chartered Town Planners

EAST RIDING OF YORKSHIRE COUNCIL

EAST RIDING TOWN CENTRES AND RETAIL STUDY, RETAIL CAPACITY UPDATE, 2013

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1. INTRODUCTION

1.1 In February 2009 England & Lyle completed the Town Centres and Retail Study for East Riding of Yorkshire Council (ERYC). The overall aim of the study is to provide a robust and detailed basis for promoting the future prosperity, vitality and viability of the towns/service centres in the East Riding. The study reviews existing town/service centres and provides evidence to inform the preparation of the East Riding Local Development Framework (LDF) and to develop a forward thinking development strategy for town centres in the East Riding.

1.2 The focus of the study is on nine market towns of Beverley, Driffield, Hedon, Hornsea, Howden, Market Weighton, Pocklington, Snaith and Withernsea. In advising on the retail hierarchy and planning policy we were also requsted by the Council to consider the town centres of Cottingham, Elloughton/Brough and Hessle. The study does not consider Bridlington in detail because of other work being carried out in connection with the Town Centre Area Action Plan.

1.3 The Town Centres and Retail Study forms an important part of the evidence base for the Council's new Local Plan and informs the Council's Economic Development Strategy. It identifies the role and function of each town/service centre with an assessment of the issues and recommendations for each centre to strengthen the town centre retail and leisure 'offer' of the East Riding as a whole.

1.4 In November 2009 ERYC commissioned England & Lyle to undertake an update of those parts of the study report relating to retail expenditure and need, including the capacity for additional shopping development in each of the main towns. The Supplementary Report on Need was published in February 2010. It was prepared so that it can be compared directly with the corresponding sections of the original Town Centres and Retail Study.

1.5 ERYC commissioned England & Lyle to undertake an update of the retail need assessment in the February 2010 report. This report has the title Town Centres and Retail Study 2012 Update and was produced in April 2012. It is more limited than the Supplementary Report on Need and concentrates on three aspects:

(1) an update of the population and expenditure forecasts underlying the assessment of retail need;
(2) an update of the capacity analysis for convenience and comparison goods over the LDF period to 2028 for each centre/catchment area;
(3) a brief review of the policy implications of the new National Planning Policy Framework (NPPF).

1.6 The present report is a further update of the capacity analysis in the April 2012 Update report. It focuses on updating the population and expenditure forecasts and updating the capacity analysis over the Local Plan period to 2029 for each centre/catchment area.

1.7 The Town Centres and Retail Study was prepared in the context of national policy in PPS6 on Planning for Town Centres. The Supplementary Report on Need was prepared in the context of PPS4 on Planning for Sustainable Economic Growth published in December 2009. The Retail Study Update 2012 and this 2013 Capacity Update have been prepared following the publication of the National Planning Policy Framework (NPPF) in March 2012.

2. POPULATION AND EXPENDITURE

Population and Expenditure Base Data

2.1 In preparing the Town Centres and Retail Study, England & Lyle obtained an Experian Retail Planner Report for the East Riding study area. The report shows the resident population and retail expenditure per head in each zone in convenience and comparison goods in 2006 (in 2006 prices).

2.2 The table below shows the population by zone and the amount of expenditure per head in each zone in convenience and comparison goods. The expenditure figures are compared with the UK averages shown in the Experian report in the form of percentages of the UK base. All monetary figures are in 2006 prices for consistency with the original Town Centres and Retail Study.

	Zone	Population	Expenditure per person (2006 prices)		percent of base	
			Convenience	Comparison	Conv	Comp
			£	£	%	%
1	Hessle/Willerby	34,482	1,598	3,019	97	106
2	Elloughton/Brough	31,647	1,644	3,279	100	115
3	Cottingham	17,077	1,477	2,778	90	97
4	Beverley	48,222	1,612	3,025	98	106
5	Hornsea	21,427	1,604	3,006	97	105
6	Withernsea/Hedon	32,328	1,560	2,945	95	103
7	Bridlington	40,351	1,539	2,745	93	96
8	Driffield	33,126	1,612	3,099	98	109
9	Pocklington/Mkt Weighton	35,831	1,631	3,164	99	111
10	Goole/Howden	31,428	1,560	2,867	95	101
Study Area total		325,919				
UK base			1,649	2,850		

2.3 Expenditure per person has to be adjusted to exclude non-store retail sales (also known as special forms of trading) such as Internet shopping. The proportion of non-store retailing in convenience goods nationally is shown in the latest Experian Retail Planner Briefing Note 11 (October 2013). The figure for convenience goods in 2006 is 0.8%. Multiplying population by spending per person in each zone (excluding non-store retailing) gives total convenience goods spending by zone. The total spending by residents on convenience goods in 2006 is £513.71m. This is about 3% higher than the figure of £499.21 million shown in the Town Centres and Retail Study because the proportion of non-store retailing has been reduced in the latest Experian data.

2.4 In comparison goods expenditure per person also has to be adjusted to exclude spending on non-store retailing. The proportion of non-store retailing in comparison goods nationally in 2006 is higher than for convenience goods at 5.9%, reflecting a greater level of spending on Internet shopping (Retail Planner Briefing Note 11). Multiplying population by spending per person in each zone (excluding non-store retailing) gives total comparison goods spending by zone. The total spending by residents on comparison goods in 2006 is £920.01m. This is also about 3% higher than the figure of £891.66 million shown in the Town Centres and Retail Study because of adjustments to the proportion of non-store retailing in the latest Experian data.

Population and Expenditure Forecasts

2.5 In the original study and the Supplementary Report on Need forecasts of population and expenditure were made to 2026. The 2012 Update report extended the forecast period to 2028. The Local Plan period has now been extended to 2029. For consistency with the previous reports the base date remains at 2006. We have used an updated base year of 2012 and we continue to make forecasts in 5 year intervals for 2016 and 2021, with a final forecast year of 2029.

2.6 Population forecasts for the study area as a whole are based on the latest ONS 2011-based population projections for the East Riding, as shown below.

Total Population	2006	2012	2016	2021	2029
East Riding Total	325,920	337,110	346,840	358,620	377,740

2.7 The 2021 projection is about 2,400 lower than in the 2012 Update. The latest 2029 projection is about 3,700 higher than the previous total for 2028.

2.8 Expenditure has been projected forward to 2028 using forecasts in Experian Retail Planner Briefing Note 11 (October 2013). The forecasts of retail expenditure per head are from the Experian business strategies model of disaggregated consumer spending. They are not just trend-based but take account of economic cycles in the UK economy. The forecasts have been revised from those used in the Town Centres and Retail Study and the previous updates which are based on earlier Experian data. It is conventional to adopt the latest national forecasts of expenditure growth in retail analysis at the local level (without modification) and we have done so in this Update report. The actual and forecast growth rates are summarised below. Full details of are shown in Appendix 1.

Expenditure Growth per person	Convenience goods	Comparison goods
2006-2012 (overall)	-11.0%	14.2%
2012-2016 (overall)	-0.25%	8.8%
2016-2021 (overall)	2.9%	11.6%
2021-2029	0.7% pa	2.8% pa

2.9 The forecasts indicate a significantly greater growth in expenditure on comparison goods than on convenience goods. In convenience goods there has been an overall decline in expenditure per person between 2006 and 2012. The forecast rate of growth from 2012 to 2021 is lower than in the previous forecasts. In the longer term, after 2021, the latest forecast for convenience goods is an annual growth of 0.7% compared to 0.6% previously. In comparison goods the forecast rate of growth from 2012 to 2021 is also lower than in the previous forecasts. From 2021 to 2029 the forecast is an annual growth of 2.8% compared to 3.0% previously.

2.10 The latest Experian forecasts have to be adjusted to exclude non-store retailing which is made up predominantly of Internet shopping. Experian forecast that non-store retailing will increase further in the future but that the rate of increase will slow down, especially in comparison goods. Retail Planner Briefing Note 11 gives projected market shares for non-store retailing to 2029. The future proportions of non-store retailing are shown below. The figures have been adjusted by Experian to exclude goods sourced from stores such as supermarket home delivery items which represent sales from physical shop floorspace.

Proportion of Spending on non-store retailing	2006	2012	2016	2021	2029
Convenience Goods	0.8%	2.1%	3.2%	4.6%	5.5%
Comparison Goods	5.9%	10.5%	13.0%	15.7%	16.0%

2.11 In convenience goods the proportions of non-store retailing are slightly lower in each year than in the previous forecasts. In comparison goods the proportions of non-store retailing are slightly higher up to 2016 and more significantly higher in 2021 and 2029.

2.12 To forecast the distribution of future population within the East Riding by zone, for the years 2012 to 2029 we have used information supplied by the Council on the number of new dwellings in each settlement grouped into the study zones. The figures have been prepared by ERYC for the Local Plan and they reflect the distribution of housing development proposed for inclusion in the Strategy Document. Data on the number of houses proposed in each zone and the percentages of the total housing allocation by zone are shown in Appendix 2.

2.13 In Appendix 3 the percentages have been applied to the growth of total population in the East Riding as a whole in the periods 2012-2016, 2016-2021 and 2021-2029.

2.14 The forecasts of population by zone are shown below.

Zone		2006	2012	2016	2021	2029
1	Hessle/Willerby	34,482	35,595	36,564	37,736	39,638
2	Elloughton/Brough	31,647	32,362	32,984	33,737	34,958
3	Cottingham	17,077	17,642	18,134	18,728	19,694
4	Beverley	48,222	49,993	51,534	53,399	56,425
5	Hornsea	21,427	21,945	22,396	22,941	23,826
6	Withernsea/Hedon	32,328	32,904	33,405	34,012	34,997
7	Bridlington	40,351	41,959	43,357	45,050	47,798
8	Driffield	33,126	34,619	35,917	37,488	40,039
9	Pockl'n/Mkt W'ton	35,831	37,183	38,358	39,781	42,091
10	Goole/Howden	31,428	32,907	34,194	35,751	38,279
Study Area total		325,919	337,110	346,840	358,620	377,740
population growth			11,190	9,731	11,780	19,120

2.15 The population forecasts have been combined with retail expenditure per person by zone in future years to forecast total expenditure in the study area. Details are shown in Appendix 3A for convenience goods and 3B for comparison goods.

2.16 The expenditure forecasts are summarised below, excluding non-store retailing.

Expenditure Forecasts (2006 prices)	2006 £m	2012 £m	2016 £m	2021 £m	2029 £m
Convenience Goods	513.7	467.5	469.0	499.0	555.7
Comparison Goods	920.0	1,042.6	1,167.0	1,346.5	1,768.6

2.17 In convenience goods the forecast growth in expenditure from 2012 to 2021 is 7%, the same as in the previous forecasts. The longer term growth of convenience expenditure from 2021 to 2029 is 11%, compared to the previous growth of 7% to 2028.

2.18 In comparison goods the forecast growth in expenditure from 2012 to 2021 is 29% compared to 36% in the previous forecasts. The longer term growth of comparison expenditure from 2021 to 2029 is 31%, compared to the previous growth of 28% to 2028.

Visitor Spending

2.19 No data is available on visitor spending on shopping in the East Riding as a whole. Visitor spending is defined as expenditure by people that travel to the East Riding on a day trip or a staying visit, as distinct from 'inflow' of spending by residents living just outside the East Riding such as in Hull, Filey and Selby. In previous reports we have used estimates of visitor spending based on the value and volume of tourism to the East Riding and the impact of that expenditure in the local economy in 2006 using the Cambridge Economic Impact Model. This data was combined with estimates of spending from the England Tourism Day Visits Survey 2005.

2.20 For day visits, we assumed that the spending (all on comparison goods) would be distributed between the centres of Beverley, Bridlington, Driffield, Hornsea and Withernsea pro rata to the comparison goods turnovers of these centres which are centres most likely to attract day visitors for comparison goods shopping.

2.21 For staying visitors we assumed that the spending in comparison goods would again be distributed between the main centres pro rata to their comparison goods turnovers. In convenience goods we assumed that spending is pro rata to the turnovers of the centres taking account of out-of-centre foodstores as well as shops in the town centres.

2.23 The 2006 base data on visitor spending remains unchanged. To forecast growth in visitor spending from the 2006 base we used forecasts of expenditure per head in the Experian Retail Planner Briefing Notes. The assumption is that visitor spending will increase in line with overall retail expenditure per head over the Local Plan period. The forecasts have been updated using the latest Experian figures for October 2013. In convenience goods we forecast an annual average growth of 0.8% from 2012 onwards. In comparison goods we forecast an annual average growth of 2.6% to 2012 then 2.9% to 2029. These growth rates apply only to visitor spending in Beverley, Bridlington, Driffield, Hornsea and Withernsea. The figures on visitor spending are shown in the capacity analysis tables in the Appendices of this report.

3. NEED ASSESSMENT

Approach

3.1 In the previous studies and in this Retail Update quantitative need for retail development is assessed based on the expenditure forecasts and the extent of trade retention within each catchment area. We have adopted a market-share approach to the capacity analysis for centres, based on the market share of each centre within its defined catchment area. This is the conventional approach to assessing capacity and is the approach recommended in the Practice Guidance on Need, Impact and the Sequential Approach (December 2009). Expenditure in the base year 2006 in the catchment area is compared with the turnover in the centre estimated from the household survey. The amount of expenditure retained in the catchment area as turnover represents its market share or retention level. The scope for new retail floorspace in each centre depends on expenditure growth and on the extent to which the retention level may increase in the future. Any potential for clawback of leakage will increase the retention level. The approach assumes that each centre maintains its existing market share unless new developments take place which will increase the attractiveness of a centre and so increase its market share. The extent to which the retention level may increase is estimated based on the likely clawback of leakage of trade to a particular centre as a percentage of the total expenditure in the catchment area in 2029.

3.2 Capacity is assessed for the years 2012, 2016, 2021 and 2029 for the purposes of the Local Plan evidence base. The capacity analysis is carried out for convenience and comparison goods.

3.3 After assessing the potential for an increase in market shares or retention levels and the amount of expenditure retained, it is then necessary to allow for an increase in turnover in existing shops to reflect the trend towards improvement in sales densities over time as shops become more efficient. This trend is particularly evident in comparison goods. The latest advice on these improvements from Experian is that floorspace efficiency will increase by 0.1% per annum in convenience goods from 2021 onwards. No increase is assumed before 2021. The increase in floorspace efficiency in comparison goods is estimated to be 2.0% per annum throughout the forecasting period.

3.4 Using the market share approach, future capacity must include the turnover of centres that comes from visitor spending and inflow of trade into each catchment area. The retention level only takes account of residents spending but the future potential for retail development also needs to allow for trade that is drawn from outside the catchment area.

3.5 Subtracting the future turnover of existing shops from the amount of expenditure retained and adding future turnover from visitors and inflow gives the surplus capacity in each forecast year. An allowance must then be made for commitments for new retail development. After allowing for commitments the analysis shows the amount of residual capacity in each catchment area. The estimated turnover of commitments has been adjusted to 2006 prices.

3.6 The capacity analysis is shown in Appendix 4 of this report for convenience goods and Appendix 5 for comparison goods.

Capacity Analysis by Centre

Beverley

Convenience Goods

3.7 In the Beverley catchment area the retention level for convenience goods in 2006 is 35%, including trade in the out-of-centre Morrisons store. The retention level is assumed to remain at 35% in 2012. In the forecasts the commitments take account of the approval of variation of conditions to allow an element of convenience floorspace in the Flemingate scheme and the approval of an Aldi store at Swinemoor Lane. We estimate that, following the development of the Flemingate and Aldi schemes, the retention level will increase to 38%. This figure is applied to the expenditure forecasts to obtain the amount of expenditure retained. An allowance is then made for the future turnover of existing shops and turnover from visitors to derive surplus capacity. Because the surplus capacity is taken up by commitments, there is a negative residual capacity throughout the period to 2029.

Comparison Goods

3.8 In the Beverley catchment area the retention level for comparison goods in 2006 is about 25%, including out-of-centre retail warehouses. The retention level is forecast to increase to 26% in 2012 and 28% from 2016 onwards because of recent developments and commitments and clawback of trade to the approved retail development at Flemingate. It was accepted at the Call-in Inquiry into the Flemingate scheme that the retail development was likely to attract 65% of its turnover from clawback of leakage. The retention level is applied to the expenditure forecasts to obtain the amount of expenditure retained. An allowance is then made for the future turnover of existing shops and turnover from visitors to derive surplus capacity. Subtracting the estimated turnover of the Flemingate scheme, the residual capacity is £14.4m in 2016, rising to £25.8m in 2021 and £60.1m in 2029.

Bridlington

Convenience Goods

3.9 In the Bridlington catchment area the retention level for convenience goods in 2006 is about 61%, including trade in Morrisons and other out-of-centre supermarkets. There is potential for Bridlington to increase its market share in convenience goods because of the approval of an extension of the Morrisons superstore and the proposals for a new superstore development in the Town Centre Area Action Plan. We estimate that the retention level will increase to 63% in 2012 and 68% from 2016 onwards. These retention levels are applied to the expenditure forecasts to obtain the amount of expenditure retained. An allowance is then made for the future turnover of existing shops and turnover from visitors and inflow to derive surplus capacity. Subtracting the turnover of commitments, there is a negative capacity in 2012 and 2016 then a residual capacity of £4.7m in 2021 and £14.7m in 2029.

Comparison Goods

3.10 In the Bridlington catchment area the retention level for comparison goods in 2006 is 47%, including out-of-centre retail warehouses. The retention level is projected to increase in future years, reflecting the potential for Bridlington to take a larger market share of comparison goods shopping. The Town Centre Area Action Plan includes proposals for major redevelopment in Bridlington town centre which will increase the attraction of the town centre significantly. Based on the scale of retail development proposed in the town centre redevelopment, we consider that the retention level could increase to 49% in 2016 and 54% in 2021 and 2029. These retention levels are applied to the expenditure forecasts to obtain the amount of expenditure retained. An allowance is then made for the future turnover of existing shops and turnover from visitors and inflow to derive surplus capacity. Subtracting the estimated turnover of commitments, the residual capacity is £39.8m in 2016, rising to £67.9m in 2021 and £107.9m in 2029.

Goole

Convenience Goods

3.11 In the Goole catchment area the retention level for convenience goods in 2006 is 73%. The retention level is assumed to increase to 85% in future years because of clawback of leakage to the new Morrisons store on Boothferry Road. This retention level is applied to the expenditure forecasts to obtain the amount of expenditure retained. An allowance is then made for the future turnover of existing shops to derive surplus capacity. Subtracting the estimated convenience goods turnover of the Morrisons store there is a negative residual capacity throughout the period to 2029.

Comparison Goods

3.12 In the Goole catchment area the retention level for comparison goods in 2006 is about 51%. The retention level is assumed to increase slightly to 52% in future years because of the comparison goods element of the new Morrisons development. This retention level is applied to the expenditure forecasts to obtain the amount of expenditure retained. An allowance is then made for the future turnover of existing shops to derive surplus capacity. Subtracting the estimated comparison goods turnover of the Morrisons store, the surplus capacity is £1.1m in 2016, rising to £4.8m in 2021 and £16.6m in 2029.

Driffield

Convenience Goods

3.13 In the Driffield catchment area the retention level for convenience goods in 2006 is 59%. The retention level is assumed to increase to 90% in future years because of the new foodstore developments which have been approved – the replacement Tesco store, Aldi on the Viking Centre site and a new foodstore on the Cattle Market site. A retention level of 90% is consistent with the amount of clawback of leakage that these new stores will achieve. This retention level is applied to the expenditure forecasts to obtain the amount of expenditure retained. An allowance is then made for the future turnover of existing shops and turnover from visitors to derive surplus capacity. Because of the turnover of committed developments, there is a negative residual capacity throughout the period to 2029.

Comparison Goods

3.14 In the Driffield catchment area the retention level for comparison goods in 2006 is about 33%. The retention level is forecast to increase to 38% in future years because of the new retail developments which have been approved – the replacement Tesco store, the redevelopment of the Cattle Market site and redevelopment of the Viking Centre, all of which will include some new comparison goods floorspace. A 38% retention is consistent with the amount of clawback of leakage that these new developments will achieve by 2028. This retention level is applied to the expenditure forecasts to obtain the amount of expenditure retained. An allowance is then made for the future turnover of existing shops and turnover from visitors to derive surplus capacity. Subtracting the turnover of commitments, there is no capacity in 2016. By 2021 the residual capacity is £3.4m, rising to £14.0m in 2029.

Cottingham

Convenience Goods

3.15 In the Cottingham catchment area the retention level for convenience goods in 2006 is 32%. The retention level is assumed to increase to 60% because of the Council's approval of a new out-of-centre supermarket at Station Road in Cottingham. This retention level is applied to the expenditure forecasts to obtain the amount of expenditure retained. An allowance is then made for the future turnover of existing shops to assess capacity. Because of the approval of a new supermarket development there is a negative capacity throughout the forecast period.

Comparison Goods

3.16 In the Cottingham catchment area the retention level for comparison goods in 2006 is 12%. The retention level is assumed to remain at 12% in future years. The new supermarket development at Station Road is not expected to increase the retention level in comparison goods. This retention level is applied to the expenditure forecasts to obtain the amount of expenditure retained. An allowance is then made for the future turnover of existing shops to derive surplus capacity. There is a small capacity of £0.2m in 2016 increasing to £0.6m in 2021 and £1.8m in 2028.

Elloughton-cum-Brough

Convenience Goods

3.17 In the Elloughton-cum-Brough catchment area the retention level for convenience goods in 2006 is about 34%. The retention level (rounded) is assumed to increase to 60% because of the commitment for a new supermarket in the proposed Brough South retail development which is intended to serve planned housing growth in the Elloughton/Brough area. This retention level is applied to the expenditure forecasts to obtain the amount of expenditure retained. An allowance is then made for the future turnover of existing shops to derive surplus capacity. Allowing for commitments at Brough South, there is a negative capacity through to 2029.

Comparison Goods

3.18 In the Elloughton-cum-Brough catchment area the retention level for comparison goods in 2006 is less than 1%. Elloughton-cum-Brough has only a very small amount of comparison goods shopping. The retention level (rounded) is assumed to increase to 12% in future years because of the comparison goods element of the retail development proposed at Brough South. This retention level is applied to the expenditure forecasts to obtain the amount of expenditure retained. An allowance is then made for the future turnover of existing shops to derive surplus capacity. Because of the commitment for retail development at Brough South there is a negative capacity through to 2029.

Hedon

Convenience Goods

3.19 In the Hedon catchment area the retention level for convenience goods in 2006 is 35% including the Co-op on Hull Road. The retention level is assumed to remain at 35% in future years. There are no commitments to be taken into account. This retention level is applied to the expenditure forecasts to obtain the amount of expenditure retained. An allowance is then made for the future turnover of existing shops to derive surplus capacity. There is a negative capacity in 2016 and 2021. In 2029 the residual capacity is just £0.1m.

Comparison Goods

3.20 In the Hedon catchment area the retention level for comparison goods in 2006 is about 8%. The retention level is assumed to remain at 8% in future years. There are no commitments to be taken into account. This retention level is applied to the expenditure forecasts to obtain the amount of expenditure retained. An allowance is then made for the future turnover of existing shops to derive surplus capacity. The capacity is £0.2m in 2016, £0.4m in 2021 and £1.0m in 2029.

Hessle

Convenience Goods

3.21 In the Hessle catchment area the retention level for convenience goods in 2006 is about 71% including several out-of-centre developments (Sainsburys, Priory Way; Morrisons, Anlaby; and Willerby Shopping Park which includes Waitrose, Aldi and Lidl). The retention level is forecast to increase to 75% in future years because of the new Marks & Spencer Simply Food store at Springfield Way, Anlaby. This retention level is applied to the expenditure forecasts to obtain the amount of expenditure retained. An allowance is then made for the future turnover of existing shops to derive surplus capacity. Subtracting the turnover of the M&S Simply Food store, there is a negative capacity throughout the period to 2029.

Comparison Goods

3.22 In the Hessle catchment area the retention level for comparison goods in 2006 is 10%, including Willerby Shopping Park and Homebase, Priory Way. The retention level is forecast to increase to 15% in future years as a result of the approval of the new retail warehouse development at Anlaby Retail Park and the recent approval of additional floorspace in Unit 5. This retention level is applied to the expenditure forecasts to obtain the amount of expenditure retained. An allowance is then made for the future turnover of existing shops to derive surplus capacity. Subtracting the turnover of the Anlaby Retail Park development, there is a negative capacity throughout the period to 2029.

Hornsea

Convenience Goods

3.23 In the Hornsea catchment area the existing retention level for convenience goods is about 27%. The retention level is forecast to increase to 60% in future years because of clawback of leakage to the new Tesco store in Hornsea. This retention level is applied to the expenditure forecasts to obtain the amount of expenditure retained. An allowance is then made for the future turnover of existing shops and visitor spending to derive surplus capacity. Subtracting the convenience goods turnover of the new Tesco store, there is a negative capacity throughout the period to 2029.

Comparison Goods

3.24 In the Hornsea catchment area the existing retention level for comparison goods is about 14%. This figure excludes the Freeport Village factory outlet centre. The retention level is forecast to increase to 18% in future years as a result of clawback to the new Tesco store. This retention level is applied to the expenditure forecasts to obtain the amount of expenditure retained. An allowance is then made for the future turnover of existing shops and visitor spending to derive surplus capacity. Subtracting the comparison goods turnover of the new Tesco store, there is a capacity of £0.4m in 2016 rising to £1.3m in 2021 and £3.9m in 2029.

Howden

Convenience Goods

3.25 In the Howden catchment area the retention level for convenience goods in 2006 is about 9%. The retention level is assumed to increase to 15% in future years because of the development of the new Co-op supermarket in Howden. 15% retention is consistent with the amount of clawback of leakage that this new store is expected to achieve. This retention level is applied to the expenditure forecasts to obtain the amount of expenditure retained. An allowance is then made for the future turnover of existing shops and inflow of trade to derive surplus capacity. Because of the turnover of committed Co-op development, there is a negative capacity throughout the period to 2029.

Comparison Goods

3.26 In the Howden catchment area the retention level for comparison goods in 2006 is less than 2%. The retention level (rounded) is assumed to remain at 2% in future years. There are no commitments to be taken into account. This retention level is applied to the expenditure forecasts to obtain the amount of expenditure retained. An allowance is then made for the future turnover of existing shops and inflow of trade to derive surplus capacity. The surplus capacity is £0.2m in 2016, £0.3m in 2021 and £0.6m in 2029.

Market Weighton

Convenience Goods

3.27 In the Market Weighton catchment area the existing retention level for convenience goods is about 64%. This figure includes the turnover of the Tesco store which opened in 2007. The retention level (rounded) is assumed to remain at 64% in future years. There are no commitments to be taken into account. This retention level is applied to the expenditure forecasts to obtain the amount of expenditure retained. An allowance is then made for the future turnover of existing shops to derive surplus capacity. There is a negative capacity up to 2021. The surplus capacity is £1.7m in 2029.

Comparison Goods

3.28 In the Market Weighton catchment area the retention level for comparison goods in 2006 is about 12%. The retention level (rounded) is assumed to remain at 12% in future years. There are no commitments to be taken into account. This retention level is applied to the expenditure forecasts to obtain the amount of expenditure retained. An allowance is then made for the future turnover of existing shops to derive surplus capacity. The surplus capacity is £0.5m in 2016, increasing to £1.0m in 2021 and £2.5m in 2029.

Pocklington

Convenience Goods

3.29 In the Pocklington catchment area the retention level for convenience goods in 2006 is 61% including the edge-of-centre Sainsbury's store. The retention level is forecast to increase to 74% in future years because of clawback of leakage to the approved Aldi store and Sainsbury's extension. This retention level is applied to the expenditure forecasts to obtain the amount of expenditure retained. An allowance is then made for the future turnover of existing shops to derive surplus capacity. Subtracting the convenience goods turnover of the approved commitments, there is a negative capacity throughout the period to 2029.

Comparison Goods

3.30 In the Pocklington catchment area the retention level for comparison goods in 2006 is about 23%. The retention level (rounded) is assumed to remain at 23% in future years. There are no commitments to be taken into account in comparison goods. This retention level is applied to the expenditure forecasts to obtain the amount of expenditure retained. An allowance is then made for the future turnover of existing shops to derive surplus capacity. The surplus capacity is £1.0m in 2016, increasing to £1.9m in 2021 and £5.0m in 2029.

Withernsea

Convenience Goods

3.31 In the Withernsea catchment area the retention level for convenience goods in 2006 is about 76% including Tesco on Queen Street. The retention level (rounded) is assumed to remain at 76% in future years. There are no commitments to be taken into account. This retention level is applied to the expenditure forecasts to obtain the amount of expenditure retained. An allowance is then made for the future turnover of existing shops and visitor spending to derive surplus capacity. There is a negative capacity in 2016 and 2021. In 2029 the capacity is £0.3m.

Comparison Goods

3.32 In the Withernsea catchment area the retention level for comparison goods in 2006 is about 15%. The retention level (rounded) is assumed to remain at 15% in future years. There are no commitments to be taken into account. This retention level is applied to the expenditure forecasts to obtain the amount of expenditure retained. An allowance is then made for the future turnover of existing shops and visitor spending to derive surplus capacity. The surplus capacity is £3.0m in 2016, £3.7m in 2021 and £5.7m in 2029.

Comments on Quantitative Need

Convenience Goods

3.33 The capacity for each centre in convenience goods is summarised in the table below.

Convenience Goods Capacity (£ million)	2012	2016	2021	2029
Beverley	-5.4	-15.8	-10.2	-0.5
Bridlington	-1.8	-0.5	4.7	14.7
Goole	-14.7	-14.2	-11.3	-6.1
Driffield	-24.5	-24.0	-20.7	-14.8
Cottingham	-0.7	-14.4	-13.5	-12.0
Elloughton/Brough	-1.6	-7.8	-6.3	-3.6
Hedon	-0.9	-0.9	-0.6	0.1
Hessle	-14.2	-14.3	-11.1	-5.4
Hornsea	-18.2	-18.2	-17.2	-15.4
Howden	-1.3	-1.2	-1.0	-0.5
Market Weighton	-1.5	-1.5	-0.3	1.7
Pocklington	-3.0	-5.2	-3.9	-1.5
Withernsea	-1.8	-1.9	-1.1	0.3

3.34 The amount of capacity is related partly to the size of the catchment area and its population. Most of the capacity for new retail development is based on expenditure growth. However, existing commitments have a significant effect on the available surplus capacity. Therefore there is no additional capacity for new convenience goods development in Beverley, Goole, Driffield, Cottingham, Elloughton/Brough, Hessle, Hornsea, Howden and Pocklington in the longer term beyond the stores already approved. In the shorter term there is also no additional capacity in Hedon and Withernsea.

3.35 The greatest potential for new convenience goods development in the longer term beyond commitments is in Bridlington, sufficient to support another supermarket during the Local Plan period. There is very limited potential for new convenience goods development elsewhere. There is no capacity for large-scale convenience goods floorspace in any other centres but there is some capacity for small-scale convenience shopping such as specialist food shops. However, it should be noted that in towns that have a relatively low retention level at the present time, there may be potential in the future for the retention level to be increased through clawback of leakage if a new large-scale foodstore is developed. The capacity for additional floorspace will have to be considered as part of the assessment of any future proposal. Floorspace capacity is considered later in this Section.

Comparison Goods

3.36 The capacity for each centre in comparison goods is summarised in the table below.

Comparison Goods Capacity (£ million)	2012	2016	2021	2029
Beverley	36.1	14.4	25.8	60.1
Bridlington	28.9	39.8	67.9	107.9
Goole	-1.2	1.1	4.8	23.8
Driffield	11.5	-0.1	5.1	16.6
Cottingham	0.0	0.2	0.6	1.8
Elloughton-cum-Brough	0.6	-9.0	-7.0	-2.2
Hedon	0.1	0.2	0.4	1.0
Hessle	-6.9	-8.9	-8.4	-4.8
Hornsea	-0.1	0.4	1.3	3.9
Howden	0.2	0.2	0.3	0.6
Market Weighton	0.2	0.5	1.0	2.5
Pocklington	0.4	1.0	1.9	5.0
Withernsea	2.6	3.0	3.7	5.7

3.37 The amount of capacity for comparison goods is higher than for convenience goods because the growth of comparison goods expenditure is higher. Again capacity is related partly to the size of the catchment area and its potential for expenditure growth. However, existing commitments have a major effect on the available surplus capacity, notably in Beverley, Driffield and Brough, and to a lesser extent in Bridlington, Goole, Hessle, Hornsea and Goole.

3.38 No assumptions have been made about increases in retention levels other than because of commitments, except for Bridlington where there is potential for an increase in market share because of planned redevelopment in the town centre. The retention levels in Beverley, Driffield, Brough, Hessle and Hornsea have been increased to reflect commitments. The retention levels of all other centres are assumed to remain constant. The greatest potential for new comparison goods development beyond commitments is in Bridlington and Beverley and to a lesser extent in Goole and Driffield, sufficient to support further comparison goods shopping in these centres. There is no capacity for large-scale comparison goods floorspace in any other centres but there is some capacity for small-scale comparison shopping, except in Hessle and Brough which have a negative capacity. Floorspace capacity is considered below.

Floorspace Capacity

3.39 The capacity forecasts have been used to estimate floorspace capacity in each centre up to 2029. Retail need in terms of floorspace capacity is expressed as gross floorspace in order to represent the overall physical scale of development that needs to be accommodated. Details are shown in Appendix 4 for convenience goods and Appendix 5 for comparison goods.

3.40 A range of sales densities has been applied to the capacity forecasts using figures in 2006 prices. For convenience goods the range in 2012 is £5,000 to £10,000 per sq.m. net. The lower figure of £5,000 per sq.m. net is a typical average for small supermarkets and discount foodstores. The upper figure of £10,000 per sq.m. is a typical figure for the main foodstore operators. In convenience goods an allowance is made for growth in sales density of 0.1% from 2021 onwards. Therefore for convenience goods the sales densities are as follows. The figures are rounded.

Convenience Goods	Range of sales per sq.m. net	
2012	£5,000	£10,000
2021	£5,000	£10,000
2029	£5,040	£10,080

3.41 In comparison goods the lower figure is based on the typical existing average for smaller centres and retail warehouses of about £3,000 per sq.m. net. An upper figure of £6,000 per sq.m. net is used, based on typical sales densities for larger centres containing more multiple retailers and larger shops. In comparison goods an allowance is made for growth in sales density of 2.0% p.a. between 2012 and 2029. Therefore for comparison goods the sales densities are as follows. The figures are rounded.

Comparison Goods	Range of sales per sq.m. net	
2012	£3,000	£6,000
2021	£3,580	£7,160
2029	£4,200	£8,400

3.42 The approach adopted is to take the residual capacities for each centre (after allowing for commitments) calculated in Appendices 4 and 5 and apply the range of sales densities shown above to calculate net floorspace. Gross floorspace is then estimated by applying typical net/gross floorspace ratios of 70% for both convenience and comparison goods.

Floorspace Capacity in 2029

Convenience Goods Floorspace Capacity, 2029	Capacity (£m)	Floorspace Capacity (sq.m. gross)	
		Lower	Upper
Beverley	-0.5	nil	nil
Bridlington	14.7	2,100	4,200
Goole	-6.1	nil	nil
Driffield	-14.8	nil	nil
Cottingham	-12.0	nil	nil
Elloughton/Brough	-3.6	nil	nil
Hedon	0.1	nil	nil
Hessle	-5.4	nil	nil
Hornsea	-15.4	nil	nil
Howden	-0.5	nil	nil
Market Weighton	1.7	200	500
Pocklington	-1.5	nil	nil
Withernsea	0.3	nil	nil

3.43 In convenience goods it should be emphasised that the higher figures represent a situation in which all the capacity is taken up by smaller foodstores, which is unlikely. The capacity is more likely to be towards the lower end of the range. In Bridlington there is potential for another medium sized supermarket (or an extension to an existing supermarket) in the longer term. Elsewhere there is no further potential in addition to the foodstore developments already approved, except for a small floorspace capacity in Market Weighton.

Comparison Goods Floorspace Capacity, 2029	Capacity (£m)	Floorspace Capacity (sq.m. gross)	
		Lower	Upper
Beverley	60.1	10,200	20,500
Bridlington	107.9	18,400	36,700
Goole	16.6	2,800	5,600
Driffield	14.0	2,400	4,800
Cottingham	1.8	300	600
Elloughton/Brough	-2.2	nil	nil
Hedon	1.0	200	300
Hessle	-4.8	nil	nil
Hornsea	3.9	700	1,300
Howden	0.6	100	200
Market Weighton	2.5	400	900
Pocklington	5.0	800	1,700
Withernsea	5.7	1,000	1,900

3.44 In comparison goods it should be emphasised that the lower figures are likely to be more applicable in the larger centres where new floorspace is most likely to be occupied by multiples and other larger retailers with relatively high sales densities. The upper figures are more likely to be applicable in the smaller centres where sales densities will tend to be lower. Therefore in Bridlington we would anticipate a potential of around 18,000 sq.m. gross floorspace in the period to 2029. In Beverley the potential in the longer term is likely to be in the order of 10,000 sq.m. gross floorspace.

3.45 In Goole and Driffield there is a lower potential for further comparison goods floorspace over the Local Plan period, in addition to the developments already approved. The potential is in the order of 3,000 sq.m. gross floorspace in Goole and 2,000 sq.m. gross floorspace in Driffield. There is a more limited potential in the other centres, mostly in Pocklington, Withernsea and Hornsea.

Floorspace Capacity in 2021

Convenience Goods

3.46 In the medium term to 2021 the floorspace capacity in convenience goods is lower than in 2029 because of lower expenditure growth. The table below shows the floorspace capacity for the four main centres in 2021.

Convenience Goods Floorspace Capacity, 2021	Expenditure Capacity £m	Floorspace Capacity sq. metres gross	
		Lower	Upper
Beverley	-10.2	nil	nil
Bridlington	4.7	700	1,400
Goole	-11.3	nil	nil
Driffield	-20.7	nil	nil

3.47 In Bridlington there is potential for an extension to one of the existing supermarkets or another discount foodstore in the period to 2021. Work by Roger Tym & Partners (RTP) on the preparation of the Bridlington Area Action Plan indicates a floorspace capacity in Bridlington of 2,100 sq.m. gross in convenience goods in 2021. Our updated assessment shows a capacity of between 700 sq.m. and 1,400 sq.m. gross in 2021, slightly lower than RTP's assessment for the AAP but reflecting recent economic conditions affecting the demand for convenience good shopping.

3.48 In Beverley, Goole and Driffield there is no further potential in 2021 in addition to the foodstore developments already approved, based on the latest forecasts of future retention levels.

Comparison Goods

3.49 In the medium term to 2021 the floorspace capacity in comparison goods is also lower than in 2029 because of lower expenditure growth. The table below shows the floorspace capacity for the four main centres in 2021.

Comparison Goods Floorspace Capacity, 2021	Expenditure Capacity £m	Floorspace Capacity sq. metres gross	
		Lower	Upper
Beverley	25.8	5,100	10,300
Bridlington	67.9	13,500	27,100
Goole	4.8	1,000	1,900
Driffield	3.4	700	1,400

3.50 Bridlington has a significant capacity in comparison goods in the medium term. Work by Roger Tym & Partners on the preparation of the Bridlington Area Action Plan indicates a floorspace capacity in Bridlington of 21,660 sq.m. gross in comparison goods in 2021. Our updated assessment shows a capacity of between 13,500 sq.m. and 27,100 sq.m. gross in 2021. Our estimate of floorspace capacity confirms the assessment made for the Bridlington AAP.

3.51 Beverley also has a significant floorspace capacity in comparison goods in the medium term, and the figures for Beverley exclude the floorspace in the approved Flemingate scheme. In Goole and Driffield the potential for further comparison goods floorspace to 2021 is more limited but it does represent some scope for new development. In Driffield the figures represent a further small potential in addition to the comparison goods floorspace already approved in the redevelopment of the Cattle market site. In Goole there is a moderate potential for new comparison shopping in the medium term.

Summary of Floorspace Capacity

3.52 The following table summarises the updated estimates of floorspace capacity to 2029. It also shows the total land requirement for retail uses based simply on the floorspace capacity, excluding any allowance for car parking or other land associated with new retail development. The assessment is for the Local Plan period to 2029 and the figures represent the overall growth potential between 2012 and 2029. The figures exclude recent developments and commitments. They reflect the capacity for further retail floorspace beyond commitments in the period 2012 to 2029. The figures are rounded to the nearest 100 sq. metres and 0.1 hectares. The centres listed are in alphabetical order for consistency with the table in the Local Plan Strategy Document.

Floorspace Capacity to 2029	Convenience Goods (sq.m. gross)		Comparison Goods (sq.m. gross)		Total Land Requirement (hectares)	
Centre	Lower	Upper	Lower	Upper	Lower	Upper
Beverley	-	-	10,200	20,500	1.0	2.1
Bridlington	2,100	4,200	18,400	36,700	2.1	4.1
Cottingham	-	-	300	600	-	0.1
Driffield	-	-	2,400	4,800	0.2	0.5
Elloughton/Brough	-	-	-	-	-	-
Goole	-	-	2,800	5,600	0.3	0.6
Hedon	-	-	200	300	-	-
Hessle	-	-	-	-	-	-
Hornsea	-	-	700	1,300	0.1	0.1
Howden	-	-	100	200	-	-
Market Weighton	200	500	400	900	0.1	0.1
Pocklington	-	-	800	1,700	0.1	0.2
Withernsea		-	1,000	1,900	0.1	0.2

APPENDIX 1: EXPENDITURE GROWTH RATES

Experian Retail Planner Briefing Note 11 (October 2013)

Expenditure growth per person per annum	**Convenience goods**	**Comparison goods**
Actual annual changes *		
2006	-0.1%	6.6%
2007	-1.1%	4.6%
2008	-3.5%	3.3%
2009	-4.1%	-3.0%
2010	-0.4%	1.9%
2011	-2.3%	0.3%
Proportions of special forms of trading (SFT) *		
2006	0.8%	5.9%
2011	1.9%	9.7%
Changes and forecasts adjusted for SFT **		
2012	-0.8%	2.2%
2013	-1.0%	2.9%
2014	-0.6%	1.4%
2015	-0.1%	2.0%
2016	0.4%	2.1%
2017	0.6%	2.1%
2018	0.6%	2.2%
2019	0.6%	2.3%
2020	0.7%	2.4%
2012-2015 overall	0.975	1.088
2016-2020 overall	1.029	1.116
2021-2029 annual average	0.7% pa	2.8% pa

* Experian Retail Planner Briefing Note 11, October 2013

** The growth rates forecast by Experian exclude non-store retailing (special forms of trading) such as Internet shopping which take place outside stores. The annual growth rates and an explanation of the calculations are given in Appendix 3 of Briefing Note 11.

APPENDIX 2: HOUSING DISTRIBUTION 2012-2029

New Dwellings in the period 2012 to 2029

Study Zone	total 2012-2029	% of East Riding requirement
	[1]	[2]
1 Hessle/Willerby	2,367	9.95%
2 Elloughton/Brough	1,520	6.39%
3 Cottingham	1,201	5.05%
4 Beverley	3,767	15.83%
5 Hornsea	1,103	4.63%
6 Withernsea/Hedon	1,225	5.15%
7 Bridlington	3,421	14.37%
8 Driffield	3,174	13.34%
9 Pocklington/Market Weighton	2,875	12.08%
10 Goole/Howden	3,147	13.22%
East Riding Total	23,800	100.00%

[1] data provided by East Riding of Yorkshire Council
[2] percentages of new housing to be applied to distribute population growth to 2029

APPENDIX 3

POPULATION AND EXPENDITURE FORECASTS

3A - CONVENIENCE GOODS

3B - COMPARISON GOODS

APPENDIX 3A: POPULATION AND EXPENDITURE FORECASTS, CONVENIENCE GOODS						
Population Forecasts						
Zone		**2006**	**2012**	**2016**	**2021**	**2029**
1	Hessle/Willerby	34,482	35,595	36,564	37,736	39,638
2	Elloughton/Brough	31,647	32,362	32,984	33,737	34,958
3	Cottingham	17,077	17,642	18,134	18,728	19,694
4	Beverley	48,222	49,993	51,534	53,399	56,425
5	Hornsea	21,427	21,945	22,396	22,941	23,826
6	Withernsea/Hedon	32,328	32,904	33,405	34,012	34,997
7	Bridlington	40,351	41,959	43,357	45,050	47,798
8	Driffield	33,126	34,619	35,917	37,488	40,039
9	Pockl'n/Mkt W'ton	35,831	37,183	38,358	39,781	42,091
10	Goole/Howden	31,428	32,907	34,194	35,751	38,279
Study Area total		325,919	337,110	346,840	358,620	377,740
population growth			11,190	9,731	11,780	19,120
Expenditure per person						
Zone		**Expenditure per person ***				
		2006	**2012**	**2016**	**2021**	**2029**
1	Hessle/Willerby	£1,585	£1,395	£1,360	£1,399	£1,480
2	Elloughton/Brough	£1,631	£1,435	£1,399	£1,440	£1,522
3	Cottingham	£1,465	£1,289	£1,257	£1,293	£1,368
4	Beverley	£1,599	£1,407	£1,372	£1,412	£1,493
5	Hornsea	£1,591	£1,400	£1,365	£1,405	£1,485
6	Withernsea/Hedon	£1,548	£1,362	£1,328	£1,366	£1,444
7	Bridlington	£1,527	£1,343	£1,310	£1,348	£1,425
8	Driffield	£1,599	£1,407	£1,372	£1,412	£1,493
9	Pockl'n/Mkt W'ton	£1,618	£1,424	£1,388	£1,428	£1,510
10	Goole/Howden	£1,548	£1,362	£1,328	£1,366	£1,444
* excluding non-store retail sales (special forms of trading)						
Total Expenditure on Convenience Goods - £ million						
Zone		**2006**	**2012**	**2016**	**2021**	**2029**
1	Hessle/Willerby	54.66	49.65	49.72	52.81	58.65
2	Elloughton/Brough	51.61	46.44	46.15	48.57	53.22
3	Cottingham	25.02	22.74	22.79	24.22	26.93
4	Beverley	77.11	70.34	70.70	75.38	84.22
5	Hornsea	34.09	30.72	30.57	32.22	35.39
6	Withernsea/Hedon	50.03	44.80	44.35	46.46	50.55
7	Bridlington	61.60	56.36	56.79	60.71	68.11
8	Driffield	52.97	48.71	49.27	52.92	59.76
9	Pockl'n/Mkt W'ton	57.97	52.93	53.24	56.82	63.57
10	Goole/Howden	48.64	44.81	45.39	48.84	55.29
Study Area Total		513.71	467.51	468.97	498.95	555.70

APPENDIX 3B: POPULATION AND EXPENDITURE FORECASTS, COMPARISON GOODS						
Population Forecasts						
Zone		**2006**	**2012**	**2016**	**2021**	**2029**
1	Hessle/Willerby	34,482	35,595	36,564	37,736	39,638
2	Elloughton/Brough	31,647	32,362	32,984	33,737	34,958
3	Cottingham	17,077	17,642	18,134	18,728	19,694
4	Beverley	48,222	49,993	51,534	53,399	56,425
5	Hornsea	21,427	21,945	22,396	22,941	23,826
6	Withernsea/Hedon	32,328	32,904	33,405	34,012	34,997
7	Bridlington	40,351	41,959	43,357	45,050	47,798
8	Driffield	33,126	34,619	35,917	37,488	40,039
9	Pockl'n/Mkt W'ton	35,831	37,183	38,358	39,781	42,091
10	Goole/Howden	31,428	32,907	34,194	35,751	38,279
Study Area total		325,919	337,110	346,840	358,620	377,740
population growth			11,190	9,731	11,780	19,120
Expenditure per person						
Zone		**Expenditure per person ***				
		2006	**2012**	**2016**	**2021**	**2029**
1	Hessle/Willerby	£2,841	£3,113	£3,387	£3,780	£4,714
2	Elloughton/Brough	£3,086	£3,381	£3,679	£4,105	£5,120
3	Cottingham	£2,614	£2,865	£3,117	£3,478	£4,338
4	Beverley	£2,847	£3,119	£3,394	£3,787	£4,724
5	Hornsea	£2,829	£3,100	£3,372	£3,764	£4,694
6	Withernsea/Hedon	£2,771	£3,037	£3,304	£3,687	£4,599
7	Bridlington	£2,583	£2,831	£3,080	£3,437	£4,287
8	Driffield	£2,916	£3,196	£3,477	£3,880	£4,839
9	Pockl'n/Mkt W'ton	£2,977	£3,263	£3,550	£3,961	£4,941
10	Goole/Howden	£2,698	£2,956	£3,216	£3,590	£4,477
* excluding non-store retail sales (special forms of trading)						
Total Expenditure on Comparison Goods - £ million						
Zone		**2006**	**2012**	**2016**	**2021**	**2029**
1	Hessle/Willerby	97.96	110.81	123.84	142.64	186.87
2	Elloughton/Brough	97.65	109.42	121.34	138.50	179.00
3	Cottingham	44.64	50.54	56.52	65.14	85.43
4	Beverley	137.27	155.94	174.89	202.24	266.54
5	Hornsea	60.61	68.02	75.53	86.34	111.84
6	Withernsea/Hedon	89.59	99.92	110.37	125.41	160.94
7	Bridlington	104.23	118.77	133.52	154.83	204.89
8	Driffield	96.60	110.63	124.87	145.46	193.76
9	Pockl'n/Mkt W'ton	106.68	121.31	136.16	157.59	207.96
10	Goole/Howden	84.79	97.28	109.98	128.33	171.37
Study Area Total		920.01	1,042.64	1,167.03	1,346.49	1,768.61

APPENDIX 4

CAPACITY ANALYSIS, CONVENIENCE GOODS

CAPACITY ANALYSIS, CONVENIENCE GOODS

Beverley Catchment Area (2006 prices) [1]

	2006	**2012**	**2016**	**2021**	**2029**
Expenditure (£m)	244.58	222.20	223.12	237.44	264.70
Existing Turnover in Beverley from residents of catchment area (£m) [2]	85.47	-	-	-	-
Retention level [3]	34.9%	35%	38%	38%	38%
Future Expenditure Retained (£m)	-	77.8	84.8	90.2	100.6
less Future Turnover of Existing Shops (£m) [4]	-	85.5	85.5	85.5	86.3
plus Turnover from Visitors and Inflow [5]	2.3	2.3	2.4	2.5	2.6
Surplus Capacity (£m)	-	-5.4	1.7	7.2	16.9
less Commitments (£m) [6]	-	-	17.4	17.4	17.4
Residual Capacity (£m)	-	-5.4	-15.8	-10.2	-0.5
Sales density (£)	low	5,000	5,000	5,000	5,040
	high	10,000	10,000	10,000	10,080
Floorspace capacity (sq.m. net)	lower	-	-	-	-
	upper	-	-	-	-
Floorspace capacity (sq.m. gross)	lower	-	-	-	-
	upper	-	-	-	-

[1] defined as Zones 4 Beverley, 8 Driffield, 5 Hornsea, 3 Cottingham, 2 Elloughton/Brough (part), 9 Pocklington/Market Weighton (part)

[2] convenience goods turnover in Beverley town centre and out-of-centre (Morrisons)

[3] assuming a small increase in retention level for convenience goods because of the commitments for a conveneince foodstore in the Flemingate scheme

[4] assuming increase in sales density at 0.1% per annum from 2021 onwards

[5] visitor spending assumed to increase by 0.8% p.a from 2012 onwards

[6] Convenience foodstore in Flemingate scheme: estimated turnover £14.2m
Aldi, Swinemoor Lane 792 sq.m. net convenience; estimated turnover £3.24m

CAPACITY ANALYSIS, CONVENIENCE GOODS

Bridlington Catchment Area (2006 prices) [1]

	2006	2012	2016	2021	2029
Expenditure (£m)	114.57	105.07	106.06	113.63	128.87
Existing Turnover in Bridlington from residents of catchment area (£m) [2]	70.31	-	-	-	-
Retention level [3]	61.4%	63%	68%	68%	68%
Future Expenditure Retained (£m)	-	66.2	72.1	77.3	87.6
less Future Turnover of Existing Shops (£m) [4]	-	70.3	70.3	70.3	70.9
plus Turnover from Visitors and Inflow [5]	2.2	2.3	2.4	2.5	2.6
Surplus Capacity (£m)	-	-1.8	4.2	9.4	19.4
less Commitments (£m) [6]	-	-	4.7	4.7	4.7
Residual Capacity (£m)	-	-1.8	-0.5	4.7	14.7
Sales density (£)	low	5,000	5,000	5,000	5,040
	high	10,000	10,000	10,000	10,080
Floorspace capacity (sq.m. net)	lower	-	-	474	1458
	upper	-	-	948	2917
Floorspace capacity (sq.m. gross)	lower	-	-	677	2083
	upper	-	-	1354	4167

[1] defined as Zones 7 Bridlington and 8 Driffield

[2] convenience goods turnover in Bridlington town centre and out-of-centre (Morrisons)

[3] assuming a small increase in Bridlington's market share for convenience goods because of the approval of Morrisons' extension and the potential for a new superstore development in the Town Centre Area Action Plan

[4] assuming increase in sales density at 0.1% per annum from 2021 onwards

[5] visitor spending assumed to increase by 0.8% p.a from 2012 onwards

[6] Morrisons' extension: estimated convenience goods turnover £4.7m

CAPACITY ANALYSIS, CONVENIENCE GOODS					
Goole Catchment Area (2006 prices) [1]					
	2006	**2012**	**2016**	**2021**	**2029**
Expenditure (£m)	48.64	44.81	45.39	48.84	55.29
Existing Turnover in Goole from residents of catchment area (£m) [2]	35.52	-	-	-	-
Retention level [3]	73.0%	85%	85%	85%	85%
Future Expenditure Retained (£m)	-	38.1	38.6	41.5	47.0
less Future Turnover of Existing Shops (£m) [4]	-	35.5	35.5	35.5	35.8
plus Turnover from Visitors and Inflow [5]	-	-	-	-	-
Surplus Capacity (£m)	-	2.6	3.1	6.0	11.2
less Commitments (£m) [6]	-	17.3	17.3	17.3	17.3
Residual Capacity (£m)	-	-14.7	-14.2	-11.3	-6.1
Sales density (£)	low	5,000	5,000	5,000	5,040
	high	10,000	10,000	10,000	10,080
Floorspace capacity (sq.m. net)	lower	-	-	-	-
	upper	-	-	-	-
Floorspace capacity (sq.m. gross)	lower	-	-	-	-
	upper	-	-	-	-

[1] defined as Zone 10 Goole/Howden

[2] convenience goods turnover in Goole town centre

[3] assuming an increase in retention level because of clawback of leakage to Morrisons

[4] assuming increase in sales density at 0.1% per annum from 2021 onwards

[5] no significant inflow or spending by visitors

[6] Morrisons, Boothferry Road, Goole:

	2005 prices	2006 prices
1,539 sq.m. net convenience goods	£16.9m	£17.3m

CAPACITY ANALYSIS, CONVENIENCE GOODS

Driffield Catchment Area (2006 prices) [1]

	2006	2012	2016	2021	2029
Expenditure (£m)	52.97	48.71	49.27	52.92	59.76
Existing Turnover in Driffield from residents of catchment area (£m) [2]	31.27	-	-	-	-
Retention level [3]	59.0%	90%	90%	90%	90%
Future Expenditure Retained (£m)	-	43.8	44.3	47.6	53.8
less Future Turnover of Existing Shops (£m) [4]	-	31.3	31.3	31.3	31.6
plus Turnover from Visitors and Inflow [5]	0.8	0.8	0.8	0.9	0.9
Surplus Capacity (£m)	-	13.4	13.9	17.2	23.1
less Commitments (£m) [6]	-	37.9	37.9	37.9	37.9
Residual Capacity (£m)	-	-24.5	-24.0	-20.7	-14.8
Sales density (£)	low	5,000	5,000	5,000	5,040
	high	10,000	10,000	10,000	10,080
Floorspace capacity (sq.m. net)	lower	-	-	-	-
	upper	-	-	-	-
Floorspace capacity (sq.m. gross)	lower	-	-	-	-
	upper	-	-	-	-

[1] defined as Zone 8 Driffield

[2] convenience goods turnover in Driffield town centre

[3] assuming an increase in retention level for convenience goods following new foodstore developments (allowing for 50% of turnover of schemes from clawback)

[4] assuming increase in sales density at 0.1% per annum from 2021 onwards

[5] visitor spending assumed to increase by 0.8% p.a from 2012 onwards

[6] Commitments in convenience goods in Driffield:

(adjusted to 2006 prices)	sq.m. net	£ million
Tesco replacement store (increase in turnover)	690	9.6
Aldi, Viking Centre	994	3.7
Foodstore, Cattle Market site	2,400	24.6
Total		37.9

CAPACITY ANALYSIS, CONVENIENCE GOODS

Cottingham Catchment Area (2006 prices) [1]

	2006	2012	2016	2021	2029
Expenditure (£m)	25.02	22.74	22.79	24.22	26.93
Existing Turnover in Cottingham from residents of catchment area (£m) [2]	8.02	-	-	-	-
Retention level [3]	32.1%	32%	60%	60%	60%
Future Expenditure Retained (£m)	-	7.3	13.7	14.5	16.2
less Future Turnover of Existing Shops (£m) [4]	-	8.0	8.0	8.0	8.1
plus Turnover from Visitors and Inflow [5]	-	-	-	-	-
Surplus Capacity (£m)	-	-0.7	5.7	6.5	8.1
less Commitments (£m) [6]	-	-	20.1	20.1	20.1
Residual Capacity (£m)	-	-0.7	-14.4	-13.5	-12.0
Sales density (£)	low	5,000	5,000	5,000	5,040
	high	10,000	10,000	10,000	10,080
Floorspace capacity (sq.m. net)	lower	-	-	-	-
	upper	-	-	-	-
Floorspace capacity (sq.m. gross)	lower	-	-	-	-
	upper	-	-	-	-

[1] defined as Zone 3 Cottingham

[2] convenience goods turnover in Cottingham

[3] assuming an increase in retention level for convenience goods because of new supermarket development

[4] assuming increase in sales density at 0.1% per annum from 2021 onwards

[5] no significant inflow or spending by visitors

[6] Commitments in convenience goods in Cottingham:
new supermarket 1,631 sq.m. convenience goods: turnover £20.05m

CAPACITY ANALYSIS, CONVENIENCE GOODS

Elloughton-cum-Brough Catchment Area (2006 prices) [1]

	2006	**2012**	**2016**	**2021**	**2029**
Expenditure (£m)	51.61	46.44	46.15	48.57	53.22
Existing Turnover in Elloughton/Brough from residents of catchment area (£m) [2]	17.39	-	-	-	-
Retention level [3]	33.7%	34%	60%	60%	60%
Future Expenditure Retained (£m)	-	15.8	27.7	29.1	31.9
less Future Turnover of Existing Shops (£m) [4]	-	17.4	17.4	17.4	17.5
plus Turnover from Visitors and Inflow [5]	-	-	-	-	-
Surplus Capacity (£m)	-	-1.6	10.3	11.7	14.4
less Commitments (£m) [6]	-	-	18.0	18.0	18.0
Residual Capacity (£m)	-	-1.6	-7.8	-6.3	-3.6
Sales density (£)	low	5,000	5,000	5,000	5,040
	high	10,000	10,000	10,000	10,080
Floorspace capacity (sq.m. net)	lower	-	-	-	-
	upper	-	-	-	-
Floorspace capacity (sq.m. gross)	lower	-	-	-	-
	upper	-	-	-	-

[1] defined as Zone 2 Elloughton/Brough

[2] convenience goods turnover in Elloughton-cum-Brough

[3] assuming an increase in retention level for convenience goods to reflect the potential for an improvement in services and facilities in Brough, including a new supermarket development to serve planned housing growth

[4] assuming increase in sales density at 0.1% per annum from 2021 onwards

[5] no significant inflow or visitor spending

[6] Commitments in convenience goods in Brough:
new supermarket Brough South 1,726 sq.m.net; estimated turnover £18.04m

CAPACITY ANALYSIS, CONVENIENCE GOODS

Hedon Catchment Area (2006 prices) [1]

	2006	**2012**	**2016**	**2021**	**2029**
Expenditure (£m)	25.02	22.40	22.18	23.23	25.28
Existing Turnover in Hedon from residents of catchment area (£m) [2]	8.74	-	-	-	-
Retention level [3]	34.9%	35%	35%	35%	35%
Future Expenditure Retained (£m)	-	7.8	7.8	8.1	8.8
less Future Turnover of Existing Shops (£m) [4]	-	8.7	8.7	8.7	8.8
plus Turnover from Visitors and Inflow [5]	-	-	-	-	-
Surplus Capacity (£m)	-	-0.9	-0.9	-0.6	0.1
less Commitments (£m) [6]	-	-	-	-	-
Residual Capacity (£m)	-	-0.9	-0.9	-0.6	0.1
Sales density (£)	low	5,000	5,000	5,000	5,040
	high	10,000	10,000	10,000	10,080
Floorspace capacity (sq.m. net)	lower	-	-	-	8
	upper	-	-	-	15
Floorspace capacity (sq.m. gross)	lower	-	-	-	11
	upper	-	-	-	22

[1] defined as Zone 6 Withernsea/Hedon (50% of expenditure)

[2] convenience goods turnover in Hedon including Co-op, Hull Road

[3] assuming no increase in retention level for convenience goods

[4] assuming increase in sales density at 0.1% per annum from 2021 onwards

[5] no significant inflow or visitor spending

[6] No commitments in convenience goods in Hedon

CAPACITY ANALYSIS, CONVENIENCE GOODS

Hessle Catchment Area (2006 prices) [1]

	2006	2012	2016	2021	2029
Expenditure (£m)	80.47	72.87	72.80	77.10	85.26
Existing Turnover in Hessle from residents of catchment area (£m) [2]	56.87	-	-	-	-
Retention level [3]	70.7%	75%	75%	75%	75%
Future Expenditure Retained (£m)	-	54.7	54.6	57.8	63.9
less Future Turnover of Existing Shops (£m) [4]	-	56.9	56.9	56.9	57.4
plus Turnover from Visitors and Inflow [5]	-	-	-	-	-
Surplus Capacity (£m)	-	-2.2	-2.3	0.9	6.6
less Commitments (£m) [6]	-	12.0	12.0	12.0	12.0
Residual Capacity (£m)	-	-14.2	-14.3	-11.1	-5.4
Sales density (£)	low	5,000	5,000	5,000	5,040
	high	10,000	10,000	10,000	10,080
Floorspace capacity (sq.m. net)	lower	-	-	-	-
	upper	-	-	-	-
Floorspace capacity (sq.m. gross)	lower	-	-	-	-
	upper	-	-	-	-

[1] defined as Zones 1 Hessle/Willerby and 2 Elloughton/Brough (50% of expenditure)

[2] convenience goods turnover in Hessle and out-of-centre stores
(Sainsburys, Priory Way; Morrisons, Anlaby; and Waitrose, Willerby Shopping Park)

[3] assuming an increase in retention level because of clawback of leakage to M&S Simply Food, Anlaby

[4] assuming increase in sales density at 0.1% per annum from 2021 onwards

[5] no significant inflow or visitor spending

[6] M&S Simply Food, Springfield Way, Anlaby:

	2005 prices	2006 prices
1,022 sq.m. net convenience goods	£11.76m	£12.03m

CAPACITY ANALYSIS, CONVENIENCE GOODS

Hornsea Catchment Area (2006 prices) [1]

	2006	**2012**	**2016**	**2021**	**2029**
Expenditure (£m)	34.09	30.72	30.57	32.22	35.39
Existing Turnover in Hornsea from residents of catchment area (£m) [2]	9.29	-	-	-	-
Retention level [3]	27.3%	60%	60%	60%	60%
Future Expenditure Retained (£m)	-	18.4	18.3	19.3	21.2
less Future Turnover of Existing Shops (£m) [4]	-	9.3	9.3	9.3	9.4
plus Turnover from Visitors and Inflow [5]	0.5	0.5	0.5	0.5	0.6
Surplus Capacity (£m)	-	9.6	9.6	10.6	12.4
less Commitments (£m) [6]	-	27.8	27.8	27.8	27.8
Residual Capacity (£m)	-	-18.2	-18.2	-17.2	-15.4
Sales density (£)	low	5,000	5,000	5,000	5,040
	high	10,000	10,000	10,000	10,080
Floorspace capacity (sq.m. net)	lower	-	-	-	-
	upper	-	-	-	-
Floorspace capacity (sq.m. gross)	lower	-	-	-	-
	upper	-	-	-	-

[1] defined as Zone 5 Hornsea

[2] convenience goods turnover in Hornsea

[3] assuming an increase in retention level because of clawback of leakage to Tesco

[4] assuming increase in sales density at 0.1% per annum from 2021 onwards

[5] visitor spending assumed to increase by 0.8% p.a from 2012 onwards

[6] Tesco, Hornsea:

	2005 prices	2006 prices
2,136 sq.m. net convenience goods	£27.2m	£27.8m

CAPACITY ANALYSIS, CONVENIENCE GOODS

Howden Catchment Area (2006 prices) [1]

	2006	2012	2016	2021	2029
Expenditure (£m)	24.32	22.41	23.20	24.42	27.65
Existing Turnover in Howden from residents of catchment area (£m) [2]	2.10	-	-	-	-
Retention level [3]	8.6%	15%	15%	15%	15%
Future Expenditure Retained (£m)	-	3.4	3.5	3.7	4.1
less Future Turnover of Existing Shops (£m) [4]	-	2.1	2.1	2.1	2.1
plus Turnover from Visitors and Inflow [5]	0.2	0.2	0.2	0.2	0.2
Surplus Capacity (£m)	-	1.5	1.6	1.8	2.3
less Commitments (£m) [6]	-	2.8	2.8	2.8	2.8
Residual Capacity (£m)	-	-1.3	-1.2	-1.0	-0.5
Sales density (£)	low	5,000	5,000	5,000	5,040
	high	10,000	10,000	10,000	10,080
Floorspace capacity (sq.m. net)	lower	-	-	-	-
	upper	-	-	-	-
Floorspace capacity (sq.m. gross)	lower	-	-	-	-
	upper	-	-	-	-

[1] defined as Zone 10 Goole/Howden (50% of expenditure)

[2] convenience goods turnover in Howden

[3] assuming an increase in retention level for convenience goods following new Co-op store development (allowing for 60% of turnover of supermarket from clawback)

[4] assuming increase in sales density at 0.1% per annum from 2021 onwards

[5] no significant inflow or visitor spending

[6] Commitments in convenience goods in Howden:

	£ million
Co-op supermarket, Howden	2.8

CAPACITY ANALYSIS, CONVENIENCE GOODS

Market Weighton Catchment Area (2006 prices) [1]

	2006	**2012**	**2016**	**2021**	**2029**
Expenditure (£m)	28.99	26.47	26.62	28.41	31.79
Existing Turnover in Market Weighton from residents of catchment area (£m) [2]	18.47	-	-	-	-
Retention level [3]	63.7%	64%	64%	64%	64%
Future Expenditure Retained (£m)	-	16.9	17.0	18.2	20.3
less Future Turnover of Existing Shops (£m) [4]	-	18.5	18.5	18.5	18.6
plus Turnover from Visitors and Inflow [5]	-	-	-	-	-
Surplus Capacity (£m)	-	-1.5	-1.5	-0.3	1.7
less Commitments (£m) [6]	-	-	-	-	-
Residual Capacity (£m)	-	-1.5	-1.5	-0.3	1.7
Sales density (£)	low	5,000	5,000	5,000	5,040
	high	10,000	10,000	10,000	10,080
Floorspace capacity (sq.m. net)	lower	-	-	-	168
	upper	-	-	-	336
Floorspace capacity (sq.m. gross)	lower	-	-	-	240
	upper	-	-	-	480

[1] defined as Zone 9 Pocklington/Market Weighton (50% of expenditure)

[2] convenience goods turnover in Market Weighton including Tesco

[3] assuming no increase in retention level for convenience goods

[4] assuming increase in sales density at 0.1% per annum from 2021 onwards

[5] no significant inflow or visitor spending

[6] No commitments in convenience goods in Market Weighton

CAPACITY ANALYSIS, CONVENIENCE GOODS

Pocklington Catchment Area (2006 prices) [1]

	2006	**2012**	**2016**	**2021**	**2029**
Expenditure (£m)	28.99	26.47	26.62	28.41	31.79
Existing Turnover in Pocklington from residents of catchment area (£m) [2]	17.68	-	-	-	-
Retention level [3]	61.0%	68%	74%	74%	74%
Future Expenditure Retained (£m)	-	18.0	19.7	21.0	23.5
less Future Turnover of Existing Shops (£m) [4]	-	17.7	17.7	17.7	17.9
plus Turnover from Visitors and Inflow [5]	-	-	-	-	-
Surplus Capacity (£m)	-	0.3	2.0	3.3	5.7
less Commitments (£m) [6]	-	3.3	7.2	7.2	7.2
Residual Capacity (£m)	-	-3.0	-5.2	-3.9	-1.5
Sales density (£)	low	5,000	5,000	5,000	5,040
	high	10,000	10,000	10,000	10,080
Floorspace capacity (sq.m. net)	lower	-	-	-	-
	upper	-	-	-	-
Floorspace capacity (sq.m. gross)	lower	-	-	-	-
	upper	-	-	-	-

[1] defined as Zone 9 Pocklington/Market Weighton (50% of expenditure)

[2] convenience goods turnover in Pocklington, including Sainsburys

[3] assuming an increase in retention level because of clawback of leakage to Aldi and Morrisons extension

[4] assuming increase in sales density at 0.1% per annum from 2021 onwards

[5] no significant inflow or visitor spending

[6] Commitments, Pocklington:	2006 prices
Aldi: 868 sq.m. net	£3.3m
Sainsury's extension: 458 sq.m. net	£3.9m

CAPACITY ANALYSIS, CONVENIENCE GOODS

Withernsea Catchment Area (2006 prices) [1]

	2006	2012	2016	2021	2029
Expenditure (£m)	25.02	22.40	22.18	23.23	25.28
Existing Turnover in Withernsea from residents of catchment area (£m) [2]	18.88	-	-	-	-
Retention level [3]	75.5%	76%	76%	76%	76%
Future Expenditure Retained (£m)	-	17.0	16.9	17.7	19.2
less Future Turnover of Existing Shops (£m) [4]	-	18.9	18.9	18.9	19.1
plus Turnover from Visitors and Inflow [5]	0.1	0.1	0.1	0.1	0.1
Surplus Capacity (£m)	-	-1.8	-1.9	-1.1	0.3
less Commitments (£m) [6]	-	-	-	-	-
Residual Capacity (£m)	-	-1.8	-1.9	-1.1	0.3
Sales density (£)	low	5,000	5,000	5,000	5,040
	high	10,000	10,000	10,000	10,080
Floorspace capacity (sq.m. net)	lower	-	-	-	25
	upper	-	-	-	50
Floorspace capacity (sq.m. gross)	lower	-	-	-	36
	upper	-	-	-	72

[1] defined as Zone 6 Withernsea/Hedon (50% of expenditure)

[2] convenience goods turnover in Withernsea, including Tesco

[3] assuming no increase in retention level for convenience goods

[4] assuming increase in sales density at 0.1% per annum from 2021 onwards

[5] visitor spending assumed to increase by 0.8% p.a from 2012 onwards

[6] No commitments in convenience goods in Withernsea

APPENDIX 5

CAPACITY ANALYSIS, COMPARISON GOODS

CAPACITY ANALYSIS, COMPARISON GOODS

Beverley Catchment Area (2006 prices) [1]

	2006	2012	2016	2021	2029
Expenditure (£m)	441.29	500.50	560.56	647.23	851.05
Existing Turnover in Beverley from residents of catchment area (£m) [2]	112.22	-	-	-	-
Retention level [3]	25.4%	26%	28%	28%	28%
Future Expenditure Retained (£m)	-	130.1	157.0	181.2	238.3
less Future Turnover of Existing Shops (£m) [4]	-	126.4	136.8	151.0	177.0
plus Turnover from Visitors and Inflow [5]	30.5	35.5	39.8	45.9	57.7
Surplus Capacity (£m)	-	39.3	60.0	76.1	119.1
less Commitments (£m) [6]	-	3.2	45.6	50.3	58.9
Residual Capacity (£m)	-	36.1	14.4	25.8	60.1
Sales density (£)	low	3,000	3,250	3,580	4,200
	high	6,000	6,500	7,170	8,400
Floorspace capacity (sq.m. net)	lower	6,012	2,219	3,602	7,160
	upper	12,024	4,437	7,214	14,319
Floorspace capacity (sq.m. gross)	lower	8,588	3,169	5,146	10,228
	upper	17,176	6,339	10,305	20,456

[1] defined as Zones 4 Beverley, 8 Driffield, 5 Hornsea, 3 Cottingham, 2 Elloughton/Brough (part), 9 Pocklington/Market Weighton (part)

[2] comparison goods turnover in Beverley town centre and out-of-centre retail warehouses

[3] assuming an increase in retention level because of clawback of leakage to Flemingate (clawback is estimated to represent 65% of the turnover of the Flemingate scheme)

[4] assuming increase in sales density at 2.0% per annum

[5] inflow and visitor spending assumed to increase at 2.6% p.a. to 2012 then 2.9% p.a. to 2029 (average rate of expenditure growth per head)

[6] Commitments in comparison goods in Beverley:

Browns dept store, Saturday Market (836 sq.m. net)	3.2	from 2011
Flemingate (comparison goods) (10,112 sq.m. net)	33.3	from 2016
former Focus store, Grovehill (3,106 sq.m. net)	8.8	from 2016
total	45.3	

and assuming turnover of commitments increases at 2.0% per annum

CAPACITY ANALYSIS, COMPARISON GOODS

Bridlington Catchment Area (2006 prices) [1]

	2006	2012	2016	2021	2029
Expenditure (£m)	200.83	229.40	258.39	300.29	398.65
Existing Turnover in Bridlington from residents of catchment area (£m) [2]	94.92	-	-	-	-
Retention level [3]	47.3%	48%	49%	54%	54%
Future Expenditure Retained (£m)	-	110.1	126.6	162.2	215.3
less Future Turnover of Existing Shops (£m) [4]	-	106.9	115.7	127.7	149.7
plus Turnover from Visitors and Inflow [5]	24.2	28.2	31.6	36.5	45.8
Surplus Capacity (£m)	-	31.4	42.5	70.9	111.4
less Commitments (£m) [6]	-	2.5	2.7	3.0	3.5
Residual Capacity (£m)	-	28.9	39.8	67.9	107.9
Sales density (£)	low	3,000	3,250	3,580	4,200
	high	6,000	6,500	7,170	8,400
Floorspace capacity (sq.m. net)	lower	4,818	6,124	9,468	12,849
	upper	9,637	12,249	18,963	25,697
Floorspace capacity (sq.m. gross)	lower	6,884	8,749	13,526	18,355
	upper	13,767	17,498	27,089	36,710

[1] defined as Zones 7 Bridlington and 8 Driffield

[2] comparison goods turnover in Bridlington town centre and out-of-centre retail warehouses

[3] assuming an increase in Bridlington's market share for comparison goods because of Morrisons extension and an overall increase in the market share arising from the potential for redevelopment identified in the Town Centre Area Action Plan

[4] assuming increase in sales density at 2.0% per annum

[5] inflow and visitor spending assumed to increase at 2.6% p.a. to 2012 then 2.9% p.a. to 2029 (average rate of expenditure growth per head)

[6] Morrisons extension (287 sq.m. net comparison) £2.5m
and assuming turnover of commitments increases at 2.0% per annum

CAPACITY ANALYSIS, COMPARISON GOODS

Goole Catchment Area (2006 prices) [1]

	2006	2012	2016	2021	2029
Expenditure (£m)	84.79	97.28	109.98	128.33	171.37
Existing Turnover in Goole from residents of catchment area (£m) [2]	42.80	-	-	-	-
Retention level [3]	50.5%	52%	52%	52%	52%
Future Expenditure Retained (£m)	-	50.6	57.2	66.7	89.1
less Future Turnover of Existing Shops (£m) [4]	-	48.2	52.2	57.6	67.5
plus Turnover from Visitors and Inflow [5]	-	-	-	-	-
Surplus Capacity (£m)	-	2.4	5.0	9.1	21.6
less Commitments (£m) [6]	-	3.6	3.9	4.3	5.0
Residual Capacity (£m)	-	-1.2	1.1	4.8	16.6
Sales density (£)	low	3,000	3,250	3,580	4,200
	high	6,000	6,500	7,170	8,400
Floorspace capacity (sq.m. net)	lower	-	172	673	1,974
	upper	-	345	1,348	3,948
Floorspace capacity (sq.m. gross)	lower	-	246	962	2,820
	upper	-	492	1,926	5,640

[1] defined as Zone 10 Goole/Howden

[2] comparison goods turnover in Goole town centre and out-of-centre retail warehouses

[3] assuming a small increase in retention level because of clawback of leakage to Morrisons

[4] assuming increase in sales density at 2.0% per annum

[5] no allowance made for inflow and visitors

[6] Commitments in comparison goods in Goole:

	£m
Morrisons (385 sq.m. net)	3.6

turnover of commitments assumed to increase at 2.0% per annum

CAPACITY ANALYSIS, COMPARISON GOODS

Driffield Catchment Area (2006 prices) [1]

	2006	**2012**	**2016**	**2021**	**2029**
Expenditure (£m)	96.60	110.63	124.87	145.46	193.76
Existing Turnover in Driffield from residents of catchment area (£m) [2]	31.39	-	-	-	-
Retention level [3]	32.5%	33%	38%	38%	38%
Future Expenditure Retained (£m)	-	36.5	47.5	55.3	73.6
less Future Turnover of Existing Shops (£m) [4]	-	35.4	38.3	42.2	49.5
plus Turnover from Visitors and Inflow [5]	8.5	9.9	11.1	12.8	16.1
Surplus Capacity (£m)	-	11.1	20.3	25.9	40.2
less Commitments (£m) [6]	-	-	20.3	22.4	26.3
Residual Capacity (£m)	-	11.1	0.0	3.4	14.0
Sales density (£)	low	3,000	3,250	3,580	4,200
	high	6,000	6,500	7,170	8,400
Floorspace capacity (sq.m. net)	lower	1,845	0	480	1,665
	upper	3,691	1	961	3,331
Floorspace capacity (sq.m. gross)	lower	2,636	1	685	2,379
	upper	5,273	1	1,373	4,758

[1] defined as Zone 8 Driffield

[2] comparison goods turnover in Driffield town centre

[3] assuming an increase in retention level for comparison goods following new retail developments
(allowing for 50% of turnover of schemes from clawback)

[4] assuming increase in sales density at 2.0% p.a.

[5] inflow and visitor spending assumed to increase at 2.6% p.a. to 2012
then 2.9% p.a. to 2029 (average rate of expenditure growth per head)

[6] Commitments in comparison goods in Driffield:

(adjusted to 2006 prices)	sq.m. net	£ million
Tesco replacement store (increase in turnover)	430	6.0
Viking Centre redevelopment	270	1.1
Cattle Market site redevelopment	800	13.2
Total		20.3

turnover of commitments assumed to increase at 2.0% per annum

CAPACITY ANALYSIS, COMPARISON GOODS

Cottingham Catchment Area (2006 prices) [1]

	2006	**2012**	**2016**	**2021**	**2029**
Expenditure (£m)	44.64	50.54	56.52	65.14	85.43
Existing Turnover in Cottingham from residents of catchment area (£m) [2]	5.37	-	-	-	-
Retention level [3]	12.0%	12%	12%	12%	12%
Future Expenditure Retained (£m)	-	6.1	6.8	7.8	10.3
less Future Turnover of Existing Shops (£m) [4]	-	6.0	6.5	7.2	8.5
plus Turnover from Visitors and Inflow [5]	-	-	-	-	-
Surplus Capacity (£m)	-	0.0	0.2	0.6	1.8
less Commitments (£m) [6]	-	-	-	-	-
Residual Capacity (£m)	-	0.0	0.2	0.6	1.8
Sales density (£)	low	3,000	3,250	3,580	4,200
	high	6,000	6,500	7,170	8,400
Floorspace capacity (sq.m. net)	lower	3	36	82	212
	upper	6	73	165	425
Floorspace capacity (sq.m. gross)	lower	4	52	117	303
	upper	8	104	235	607

[1] defined as Zone 3 Cottingham

[2] comparison goods turnover in Cottingham

[3] assuming no increase in retention level for comparison goods

[4] assuming increase in sales density at 2.0% p.a.

[5] no allowance made for inflow and visitors

[6] No commitments in comparison goods in Cottingham

CAPACITY ANALYSIS, COMPARISON GOODS

Elloughton/Brough Catchment Area (2006 prices) [1]

	2006	2012	2016	2021	2029
Expenditure (£m)	97.65	109.42	121.34	138.50	179.00
Existing Turnover in Elloughton/Brough from residents of catchment area (£m) [2]	0.44	-	-	-	-
Retention level [3]	0.5%	1%	12%	12%	12%
Future Expenditure Retained (£m)	-	1.1	14.6	16.6	21.5
less Future Turnover of Existing Shops (£m) [4]	-	0.5	0.5	0.6	0.7
plus Turnover from Visitors and Inflow [5]	-	-	-	-	-
Surplus Capacity (£m)	-	0.6	14.0	16.0	20.8
less Commitments (£m) [6]	-	-	28.7	31.6	37.1
Residual Capacity (£m)	-	0.6	-9.0	-7.0	-2.2
Sales density (£)	low	3,000	3,250	3,580	4,200
	high	6,000	6,500	7,170	8,400
Floorspace capacity (sq.m. net)	lower	100	-	-	-
	upper	200	-	-	-
Floorspace capacity (sq.m. gross)	lower	143	-	-	-
	upper	285	-	-	-

[1] defined as Zone 2 Elloughton/Brough

[2] comparison goods turnover in Brough

[3] assuming an increase in retention level for comparison goods to reflect the potential for an improvement in services and facilities in Brough, including new comparison retail development to serve planned housing growth

[4] assuming increase in sales density at 2.0% p.a.

[5] no allowance made for inflow and visitors

[6] Commitments in comparison goods in Brough:
Brough South scheme 5,452 sq.m. net comparison: estimated turnover £28.66m
turnover of commitments assumed to increase at 2.0% per annum

CAPACITY ANALYSIS, COMPARISON GOODS

Hedon Catchment Area (2006 prices) [1]

	2006	2012	2016	2021	2029
Expenditure (£m)	44.80	49.96	55.19	62.71	80.47
Existing Turnover in Hedon from residents of catchment area (£m) [2]	3.45	-	-	-	-
Retention level [3]	7.7%	8%	8%	8%	8%
Future Expenditure Retained (£m)	-	4.0	4.4	5.0	6.4
less Future Turnover of Existing Shops (£m) [4]	-	3.9	4.2	4.6	5.4
plus Turnover from Visitors and Inflow [5]	-	-	-	-	-
Surplus Capacity (£m)	-	0.1	0.2	0.4	1.0
less Commitments (£m) [6]	-	-	-	-	-
Residual Capacity (£m)	-	0.1	0.2	0.4	1.0
Sales density (£)	low	3,000	3,250	3,580	4,200
	high	6,000	6,500	7,170	8,400
Floorspace capacity (sq.m. net)	lower	19	32	52	119
	upper	37	64	104	237
Floorspace capacity (sq.m. gross)	lower	27	46	74	170
	upper	53	92	149	339

[1] defined as Zone 6 Withernsea/Hedon (50% of expenditure)

[2] convenience goods turnover in Hedon

[3] assuming no increase in retention level for comparison goods

[4] assuming increase in sales density at 2.0% p.a.

[5] no allowance made for inflow and visitors

[6] No commitments in comparison goods in Hedon

CAPACITY ANALYSIS, COMPARISON GOODS

Hessle Catchment Area (2006 prices) [1]

	2006	2012	2016	2021	2029
Expenditure (£m)	146.79	165.52	184.51	211.89	276.37
Existing Turnover in Hessle from residents of catchment area (£m) [2]	14.88	-	-	-	-
Retention level [3]	10.1%	13%	15%	15%	15%
Future Expenditure Retained (£m)	-	21.5	27.7	31.8	41.5
less Future Turnover of Existing Shops (£m) [4]	-	14.9	16.2	17.6	19.8
plus Turnover from Visitors and Inflow [5]	-	-	-	-	-
Surplus Capacity (£m)	-	6.6	11.5	14.2	21.6
less Commitments (£m) [6]	-	13.5	20.4	22.5	26.4
Residual Capacity (£m)	-	-6.9	-8.9	-8.4	-4.8
Sales density (£)	low	3,000	3,250	3,580	4,200
	high	6,000	6,500	7,170	8,400
Floorspace capacity (sq.m. net)	lower	-	-	-	-
	upper	-	-	-	-
Floorspace capacity (sq.m. gross)	lower	-	-	-	-
	upper	-	-	-	-

[1] defined as Zones 1 Hessle/Willerby and 2 Elloughton/Brough (part)

[2] comparison goods turnover in Hessle, Willerby Shopping Park and Homebase, Priory Way

[3] assuming an increase in retention level for comparison goods because of clawback of trade to Anlaby Retail Park

[4] assuming increase in sales density at 2.0% p.a.

[5] no allowance made for inflow and visitors

[6] Commitments in comparison goods in Hessle:

	£m
Anlaby Retail Park: 5,525 sq.m. net	13.5
Unit 5 additional floorspace: 1,392 sq.m.	5.8
	19.3

turnover of commitments assumed to increase at 2.0% per annum

CAPACITY ANALYSIS, COMPARISON GOODS

Hornsea Catchment Area (2006 prices) [1]

	2006	**2012**	**2016**	**2021**	**2029**
Expenditure (£m)	60.61	68.02	75.53	86.34	111.84
Existing Turnover in Hornsea from residents of catchment area (£m) [2]	8.69	-	-	-	-
Retention level [3]	14.3%	18%	18%	18%	18%
Future Expenditure Retained (£m)	-	12.2	13.6	15.5	20.1
less Future Turnover of Existing Shops (£m) [4]	-	9.8	10.6	11.7	13.7
plus Turnover from Visitors and Inflow [5]	4.3	5.0	5.6	6.5	8.2
Surplus Capacity (£m)	-	7.5	8.6	10.3	14.6
less Commitments (£m) [6]	-	7.6	8.2	9.1	10.6
Residual Capacity (£m)	-	-0.1	0.4	1.3	3.9
Sales density (£)	low	3,000	3,250	3,580	4,200
	high	6,000	6,500	7,170	8,400
Floorspace capacity (sq.m. net)	lower	-	61	174	469
	upper	-	123	349	938
Floorspace capacity (sq.m. gross)	lower	-	88	249	670
	upper	-	176	499	1,340

[1] defined as Zone 5 Hornsea

[2] comparison goods turnover in Hornsea (excluding Freeport Village factory outlet centre)

[3] assuming a small increase in the retention level for comparison goods following new retail developments

[4] assuming increase in sales density at 2.0% p.a.

[5] includes Freeport village
inflow and visitor spending assumed to increase at 2.6% p.a. to 2012
then 2.9% p.a. to 2029 (average rate of expenditure growth per head)

[6] Commitments in comparison goods in Hornsea:

	2006 prices £m
Tesco (642 sq.m. net)	5.8
Ispace development, Newbegin	1.8
Total	7.6

turnover of commitments assumed to increase at 2.0% per annum

CAPACITY ANALYSIS, COMPARISON GOODS

Howden Catchment Area (2006 prices) [1]

	2006	2012	2016	2021	2029
Expenditure (£m)	42.40	48.64	54.99	64.17	85.69
Existing Turnover in Howden from residents of catchment area (£m) [2]	0.72	-	-	-	-
Retention level [3]	1.7%	2%	2%	2%	2%
Future Expenditure Retained (£m)	-	1.0	1.1	1.3	1.7
less Future Turnover of Existing Shops (£m) [4]	-	0.8	0.9	1.0	1.1
plus Turnover from Visitors and Inflow [5]	-	-	-	-	-
Surplus Capacity (£m)	-	0.2	0.2	0.3	0.6
less Commitments (£m) [6]	-	-	-	-	-
Residual Capacity (£m)	-	0.2	0.2	0.3	0.6
Sales density (£)	low	3,000	3,250	3,580	4,200
	high	6,000	6,500	7,170	8,400
Floorspace capacity (sq.m. net)	lower	27	34	44	69
	upper	54	68	88	138
Floorspace capacity (sq.m. gross)	lower	39	49	63	98
	upper	77	98	125	197

[1] defined as Zone 10 Goole/Howden (part)

[2] comparison goods turnover in Howden

[3] assuming no increase in retention level for comparison goods

[4] assuming increase in sales density at 2.0% p.a.

[5] no allowance made for inflow or visitors

[6] No commitments in comparison goods in Howden

CAPACITY ANALYSIS, COMPARISON GOODS					
Market Weighton Catchment Area (2006 prices) [1]					
	2006	**2012**	**2016**	**2021**	**2029**
Expenditure (£m)	53.34	60.66	68.08	78.80	103.98
Existing Turnover in Market Weighton from residents of catchment area (£m) [2]	6.31	-	-	-	-
Retention level [3]	11.8%	12%	12%	12%	12%
Future Expenditure Retained (£m)	-	7.3	8.2	9.5	12.5
less Future Turnover of Existing Shops (£m) [4]	-	7.1	7.7	8.5	10.0
plus Turnover from Visitors and Inflow [5]	-	-	-	-	-
Surplus Capacity (£m)	-	0.2	0.5	1.0	2.5
less Commitments (£m) [6]	-	-	-	-	-
Residual Capacity (£m)	-	0.2	0.5	1.0	2.5
Sales density (£)	low	3,000	3,250	3,580	4,200
	high	6,000	6,500	7,170	8,400
Floorspace capacity (sq.m. net)	lower	29	73	134	301
	upper	58	147	269	602
Floorspace capacity (sq.m. gross)	lower	41	105	192	430
	upper	82	210	384	860
[1] defined as Zone 9 Pocklington/Market Weighton (50% of expenditure)					
[2] comparison goods turnover in Market Weighton					
[3] assuming no increase in retention level for comparison goods					
[4] assuming increase in sales density at 2.0% p.a.					
[5] no allowance made for inflow and visitors					
[6] No commitments in comparison goods in Market Weighton					

CAPACITY ANALYSIS, COMPARISON GOODS

Pocklington Catchment Area (2006 prices) [1]

	2006	2012	2016	2021	2029
Expenditure (£m)	53.34	60.66	68.08	78.80	103.98
Existing Turnover in Pocklington from residents of catchment area (£m) [2]	12.02	-	-	-	-
Retention level [3]	22.5%	23%	23%	23%	23%
Future Expenditure Retained (£m)	-	14.0	15.7	18.1	23.9
less Future Turnover of Existing Shops (£m) [4]	-	13.5	14.7	16.2	19.0
plus Turnover from Visitors and Inflow [5]	-	-	-	-	-
Surplus Capacity (£m)	-	0.4	1.0	1.9	5.0
less Commitments (£m) [6]	-	-	-	-	-
Residual Capacity (£m)	-	0.4	1.0	1.9	5.0
Sales density (£)	low	3,000	3,250	3,580	4,200
	high	6,000	6,500	7,170	8,400
Floorspace capacity (sq.m. net)	lower	69	155	271	591
	upper	138	310	543	1,181
Floorspace capacity (sq.m. gross)	lower	99	221	388	844
	upper	197	442	776	1,687

[1] defined as Zone 9 Pocklington/Market Weighton (50% of expenditure)

[2] comparison goods turnover in Pocklington

[3] assuming no increase in retention level for comparison goods

[4] assuming increase in sales density at 2.0% p.a.

[5] no allowance made for inflow and visitors

[6] No commitments in comparison goods in Pocklington

CAPACITY ANALYSIS, COMPARISON GOODS

Withernsea Catchment Area (2006 prices) [1]

	2006	2012	2016	2021	2029
Expenditure (£m)	44.80	49.96	55.19	62.71	80.47
Existing Turnover in Withernsea from residents of catchment area (£m) [2]	6.58	-	-	-	-
Retention level [3]	14.7%	15%	15%	15%	15%
Future Expenditure Retained (£m)	-	7.5	8.3	9.4	12.1
less Future Turnover of Existing Shops (£m) [4]	-	7.4	8.0	8.9	10.4
plus Turnover from Visitors and Inflow [5]	2.1	2.5	2.8	3.2	4.0
Surplus Capacity (£m)	-	2.6	3.0	3.7	5.7
less Commitments (£m) [6]	-	-	-	-	-
Residual Capacity (£m)	-	2.6	3.0	3.7	5.7
Sales density (£)	low	3,000	3,250	3,580	4,200
	high	6,000	6,500	7,170	8,400
Floorspace capacity (sq.m. net)	lower	426	466	523	680
	upper	852	932	1,047	1,361
Floorspace capacity (sq.m. gross)	lower	609	666	747	972
	upper	1,218	1,332	1,496	1,944

[1] defined as Zone 6 Withernsea/Hedon (50% of expenditure)

[2] comparison goods turnover in Withernsea

[3] assuming no increase in retention level for comparison goods

[4] assuming increase in sales density at 2.0% p.a.

[5] inflow and visitor spending assumed to increase at 2.6% p.a. to 2012
then 2.9% p.a. to 2029 (average rate of expenditure growth per head)

[6] No commitments in comparison goods in Withernsea