

TABLE 2: CONVENIENCE GOODS EXPENDITURE PER CAPITA FORECASTS (2015 prices; excluding SFT)

ZONE:		2016	2017	2022	2027	2032	2036
	2016 (incl. SFT)	EXCLUDING SPECIAL FORMS OF TRADING					
Experian - National Average SFT Share (%)		3.0%	3.2%	4.1%	4.7%	5.1%	5.5%
Adjusted Survey-derived SFT Share (%)		2.2%	2.3%	3.0%	3.4%	3.7%	4.0%
Zone 1	£2,130	£2,066	£2,057	£2,020	£2,015	£2,017	£2,016
Zone 2	£1,880	£1,823	£1,816	£1,783	£1,779	£1,780	£1,780
Zone 3	£2,476	£2,402	£2,392	£2,349	£2,343	£2,345	£2,345
Zone 4	£2,499	£2,424	£2,414	£2,370	£2,365	£2,367	£2,366
Zone 5	£2,317	£2,247	£2,238	£2,197	£2,192	£2,194	£2,193
Zone 6	£2,279	£2,211	£2,202	£2,162	£2,157	£2,159	£2,158
Zone 7	£2,423	£2,350	£2,341	£2,298	£2,293	£2,295	£2,294
Zone 8	£2,249	£2,182	£2,173	£2,133	£2,129	£2,130	£2,130
Zone 9	£2,446	£2,373	£2,363	£2,320	£2,315	£2,317	£2,316
STUDY AREA AVERAGE:	£2,300	£2,231	£2,222	£2,181	£2,176	£2,178	£2,178

Source: Average spend per capita estimates (2014 prices) are derived from Experian 'Retail Area Planner' Reports using the MMG3 GIS.

The year-on-year expenditure growth forecasts have been informed by the latest Retail Planner Briefing Note 13 published by Experian Business Strategies (October 2015). For comparison goods the forecast annual growth rates are as follows: 2016 +3.2%, 2017 +2.9%, 2018-22 +3.0% and 2023-35 +3.2%.

Notes: An allowance has been made for the market share of retail expenditure per capita on non-store sales (SFT - including mail order and Internet shopping) at the base year informed by the household survey-derived market shares for SFT. Forecast growth in SFT is based on the year-on-year forecasts published by Experian Business Strategies in the most recent Retail Planner Briefing Note 13 (Appendix 3).

TABLE 3: TOTAL AVAILABLE CONVENIENCE GOODS EXPENDITURE, 2016 - 2037 (£m) - BASELINE SCENARIO POPULATION PROJECTIONS

ZONE:	2016 (incl SFT)	2016	2017	2022	2027	2032	2036
		EXCLUDING SPECIAL FORMS OF TRADING					
Zone 1	£184.2	£178.6	£178.5	£177.1	£180.5	£184.2	£186.7
Zone 2	£137.1	£133.0	£133.3	£134.0	£138.6	£142.8	£145.9
Zone 3	£41.1	£39.8	£39.9	£40.1	£40.8	£41.5	£42.0
Zone 4	£28.5	£27.6	£27.6	£27.7	£28.0	£28.3	£28.7
Zone 5	£120.0	£116.4	£116.9	£119.4	£123.0	£126.4	£129.5
Zone 6	£192.7	£187.0	£187.5	£190.2	£194.8	£199.4	£203.6
Zone 7	£113.5	£110.1	£110.5	£112.6	£116.0	£119.3	£122.0
Zone 8	£281.9	£273.4	£274.0	£277.2	£283.6	£290.0	£295.2
Zone 9	£94.3	£91.5	£91.7	£92.9	£95.3	£97.4	£99.1
STUDY AREA - TOTAL AVAILABLE SPEND:	£1,193.2	£1,157.4	£1,159.8	£1,171.2	£1,200.6	£1,229.2	£1,252.7

GROWTH 2017 to 2027:

%	£M
1.1%	£2.1
4.0%	£5.3
2.3%	£0.9
1.3%	£0.4
5.3%	£6.1
3.9%	£7.3
5.0%	£5.5
3.5%	£9.6
3.9%	£3.6
3.5%	£40.8

GROWTH 2017 to 2036:

%	£M
4.6%	£8.2
9.4%	£12.6
5.3%	£2.1
3.8%	£1.1
10.8%	£12.7
8.6%	£16.1
10.4%	£11.5
7.8%	£21.3
8.1%	£7.4
8.0%	£92.9

LOCAL AUTHORITY AREA	(Zones 1-2)	£311.6	£311.8	£311.1	£319.2	£327.0	£332.6
REST OF CATCHMENT AREA	(Zones 3-9)	£845.8	£848.0	£860.1	£881.5	£902.2	£920.2

2.4%	£7.4
3.9%	£33.4

6.7%	£20.8
8.5%	£72.1

Source: Tables 1 and 2

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ZONE:		2016	2017	2022	2027	2032	2036
	2016 (incl. SFT)	EXCLUDING SPECIAL FORMS OF TRADING					
Experian - National Average SFT Share (%)		3.0%	3.2%	4.1%	4.7%	5.1%	5.5%
Adjusted Survey-derived SFT Share (%)		2.2%	2.3%	3.0%	3.4%	3.7%	4.0%
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Zone 9	£2,446	£2,373	£2,363	£2,320	£2,315	£2,317	£2,316
STUDY AREA AVERAGE:	£2,300	£2,231	£2,222	£2,181	£2,176	£2,178	£2,178

Source: Average spend per capita estimates (2014 prices) are derived from Experian 'Retail Area Planner' Reports using the MMG3 GIS.

The year-on-year expenditure growth forecasts have been informed by the latest Retail Planner Briefing Note 13 published by Experian Business Strategies (October 2015). For comparison goods the forecast annual growth rates are as follows: 2016 +3.2%, 2017 +2.9%, 2018-22 +3.0% and 2023-35 +3.2%.

Notes: An allowance has been made for the market share of retail expenditure per capita on non-store sales (SFT - including mail order and Internet shopping) at the base year informed by the household survey-derived market shares for SFT. Forecast growth in SFT is based on the year-on-year forecasts published by Experian Business Strategies in the most recent Retail Planner Briefing Note 13 (Appendix 3).

TABLE 3: TOTAL AVAILABLE CONVENIENCE GOODS EXPENDITURE, 2016 - 2037 (£m) - BASELINE SCENARIO POPULATION PROJECTIONS

ZONE:	2016 (incl SFT)	2016	2017	2022	2027	2032	2036
		EXCLUDING SPECIAL FORMS OF TRADING					
Zone 1	£243.9	£236.6	£237.5	£242.5	£250.3	£258.0	£264.3
Zone 2	£92.2	£89.5	£89.9	£91.7	£94.7	£97.6	£100.0
Zone 3	£41.1	£39.8	£39.9	£40.2	£41.1	£42.2	£43.0
Zone 4	£28.6	£27.7	£27.9	£28.7	£30.0	£31.5	£32.7
Zone 5	£119.9	£116.3	£116.6	£118.5	£122.3	£126.7	£130.2
Zone 6	£192.7	£186.9	£187.5	£190.7	£197.1	£204.4	£210.2
Zone 7	£113.7	£110.3	£110.9	£114.1	£119.4	£125.3	£130.1
Zone 8	£282.9	£274.4	£275.9	£284.1	£297.2	£311.9	£323.8
Zone 9	£94.1	£91.3	£91.4	£92.1	£94.2	£96.7	£98.6
STUDY AREA - TOTAL AVAILABLE SPEND:	£1,209.1	£1,172.8	£1,177.5	£1,202.5	£1,246.4	£1,294.2	£1,333.1

GROWTH 2017 to 2027:

%	£M
5.4%	£12.8
5.4%	£4.8
3.0%	£1.2
7.7%	£2.1
5.0%	£5.8
5.2%	£9.6
7.7%	£8.5
7.7%	£21.2
3.0%	£2.8
6.3%	£73.5

GROWTH 2017 to 2036:

%	£M
11.3%	£26.7
11.3%	£10.1
7.9%	£3.2
17.5%	£4.8
11.7%	£13.7
12.2%	£22.7
17.5%	£19.2
17.5%	£47.9
7.9%	£7.2
13.7%	£160.2

LOCAL AUTHORITY AREA	(Zones 1-2)	£326.0	£327.4	£334.2	£345.0	£355.5	£364.2
REST OF CATCHMENT AREA	(Zones 3-9)	£846.8	£850.1	£868.3	£901.4	£938.7	£968.8

5.4%	£17.6
6.1%	£51.3

11.3%	£36.8
14.0%	£118.8

Source: Tables 1 and 2

TABLE 4: COMPARISON GOODS EXPENDITURE PER CAPITA FORECASTS (2015 prices; excluding SFT)

ZONE:		2016	2017	2022	2027	2032	2036
	2016 (incl. SFT)	EXCLUDING SPECIAL FORMS OF TRADING					
Experian - National Average SFT Share (%)		13.2%	13.8%	15.8%	16.1%	16.4%	16.7%
Adjusted Survey-derived SFT Share (%)		18.0%	18.8%	21.5%	22.0%	22.4%	22.8%
Zone 1	£3,461	£2,838	£2,849	£3,130	£3,637	£4,236	£4,779
Zone 2	£2,713	£2,224	£2,233	£2,453	£2,851	£3,320	£3,746
Zone 3	£4,560	£3,739	£3,754	£4,124	£4,793	£5,581	£6,297
Zone 4	£4,350	£3,567	£3,581	£3,934	£4,572	£5,324	£6,007
Zone 5	£3,891	£3,190	£3,203	£3,518	£4,089	£4,761	£5,372
Zone 6	£3,882	£3,183	£3,196	£3,511	£4,080	£4,751	£5,360
Zone 7	£4,234	£3,472	£3,485	£3,828	£4,450	£5,181	£5,846
Zone 8	£3,808	£3,123	£3,135	£3,444	£4,003	£4,661	£5,259
Zone 9	£4,155	£3,407	£3,420	£3,757	£4,367	£5,085	£5,737
STUDY AREA AVERAGE:	£3,895	£3,194	£3,206	£3,522	£4,093	£4,767	£5,378

Source: Average spend per capita estimates (2014 prices) are derived from Experian 'Retail Area Planner' Reports using the MMG3 GIS.

The year-on-year expenditure growth forecasts have been informed by the latest Retail Planner Briefing Note 13 published by Experian Business Strategies (October 2015). For comparison goods the forecast annual growth rates are as follows: 2016 +3.2%, 2017 +2.9%, 2018-22 +3.0% and 2023-35 +3.2%.

Notes: An allowance has been made for the market share of retail expenditure per capita on non-store sales (SFT - including mail order and Internet shopping) at the base year informed by the household survey-derived market shares for SFT. Forecast growth in SFT is based on the year-on-year forecasts published by Experian Business Strategies in the most recent Retail Planner Briefing Note 13 (Appendix 3).

TABLE 5: TOTAL AVAILABLE COMPARISON GOODS EXPENDITURE, 2016 - 2037 (£m) - BASELINE SCENARIO POPULATION PROJECTIONS

ZONE:	2016 (incl SFT)	2016	2017	2022	2027	2032	2036
		EXCLUDING SPECIAL FORMS OF TRADING					
Zone 1	£299.3	£245.4	£247.2	£274.4	£325.9	£386.8	£442.4
Zone 2	£197.9	£162.3	£164.0	£184.5	£222.2	£266.3	£307.1
Zone 3	£75.6	£62.0	£62.6	£70.4	£83.5	£98.7	£112.8
Zone 4	£49.6	£40.7	£41.0	£45.9	£54.1	£63.8	£72.8
Zone 5	£201.5	£165.2	£167.2	£191.2	£229.4	£274.3	£317.2
Zone 6	£328.3	£269.2	£272.1	£308.9	£368.5	£438.9	£505.8
Zone 7	£198.3	£162.6	£164.5	£187.6	£225.1	£269.3	£310.8
Zone 8	£477.2	£391.3	£395.3	£447.5	£533.3	£634.5	£729.0
Zone 9	£160.3	£131.4	£132.7	£150.4	£179.7	£213.8	£245.5
STUDY AREA - TOTAL AVAILABLE SPEND:	£1,988.0	£1,630.1	£1,646.5	£1,860.8	£2,221.7	£2,646.2	£3,043.5

GROWTH 2017 to 2027:

%	£M
32.1%	£78.7
35.9%	£58.3
33.7%	£20.9
32.3%	£13.1
37.6%	£62.2
35.8%	£96.3
37.3%	£60.6
35.3%	£138.0
35.8%	£47.0
35.3%	£575.2

GROWTH 2017 to 2036:

%	£M
79.0%	£195.2
87.3%	£143.2
80.2%	£50.2
77.7%	£31.8
89.7%	£150.0
85.9%	£233.6
89.0%	£146.4
84.4%	£333.8
85.0%	£112.8
84.8%	£1,397.0

LOCAL AUTHORITY AREA	(Zones 1-2)	£407.7	£411.1	£458.8	£548.1	£653.1	£749.5
REST OF CATCHMENT AREA	(Zones 3-9)	£1,222.4	£1,235.4	£1,401.9	£1,673.6	£1,993.1	£2,294.0

Source: Tables 1 and 2

33.6%	£137.0
35.8%	£438.2

82.3%	£338.4
85.7%	£1,058.6

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STUDY AREA AVERAGE:	£3,895	£3,194	£3,206	£3,522	£4,093	£4,767	£5,378

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ZONE:	2016 (incl SFT)	2016	2017	2022	2027	2032	2036
		EXCLUDING SPECIAL FORMS OF TRADING					
Zone 1	£396.4	£325.0	£329.0	£375.7	£451.8	£541.7	£626.3
Zone 2	£133.1	£109.2	£110.5	£126.2	£151.8	£182.0	£210.4
Zone 3	£75.6	£62.0	£62.6	£70.5	£84.0	£100.4	£115.6
Zone 4	£49.8	£40.8	£41.4	£47.7	£58.1	£70.9	£83.1
Zone 5	£201.3	£165.1	£166.8	£189.7	£228.2	£275.0	£319.0
Zone 6	£328.2	£269.1	£272.1	£309.7	£372.9	£449.9	£522.1
Zone 7	£198.6	£162.9	£165.1	£190.1	£231.7	£282.9	£331.5
Zone 8	£479.1	£392.8	£398.1	£458.6	£558.8	£682.3	£799.6
Zone 9	£159.9	£131.1	£132.3	£149.1	£177.7	£212.2	£244.4
STUDY AREA - TOTAL AVAILABLE SPEND:	£2,022.0	£1,658.0	£1,677.8	£1,917.2	£2,315.1	£2,797.3	£3,252.1

GROWTH 2017 to 2027:

%	£M
37.8%	£122.9
37.8%	£41.3
34.6%	£21.5
40.9%	£16.7
37.2%	£61.4
37.5%	£100.8
40.9%	£66.6
40.9%	£160.7
34.6%	£45.4
39.6%	£657.0

GROWTH 2017 to 2036:

%	£M
91.5%	£297.4
91.5%	£99.9
85.4%	£53.0
102.2%	£41.7
92.2%	£152.2
92.9%	£250.0
102.2%	£166.5
102.2%	£401.5
85.4%	£112.0
96.1%	£1,594.1

LOCAL AUTHORITY AREA	(Zones 1-2)	£434.2	£439.5	£501.9	£603.6	£723.7	£836.8
REST OF CATCHMENT AREA	(Zones 3-9)	£1,223.8	£1,238.4	£1,415.3	£1,711.5	£2,073.6	£2,415.3

37.8%	£164.1
38.7%	£473.1

91.5%	£397.3
96.2%	£1,177.0

Source: Tables 1 and 2