

Fylde Coast Retail Study 2013 Update

Main Report

On behalf of **Fylde Borough Council** and **Wyre Borough Council**



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1 Introduction and Scope of Report

1.1 Background

- 1.1.1 In November 2010 Blackpool, Wyre and Fylde Borough Councils commissioned Roger Tym & Partners (now Peter Brett Associates) to undertake a retail capacity study for the Fylde Coast sub-region. The final report, the Fylde Coast Retail Study (FCRS), was delivered to the Councils in August 2011. The study forms a key part of the evidence base for the emerging local plans of each of the authorities.
- 1.1.2 The FCRS superseded the previous Fylde Coast Retail Study, which was published in June 2008. A key component of the FCRS was to reflect the significant changes that had occurred over the previous three years, most notably:
- the extension to the Houndshell Shopping Centre in Blackpool;
 - the impact of the recession on retail and leisure expenditure growth rates; and
 - changes to national planning policy including the introduction of a new test of soundness for development plan documents in PPS12 and the publication of PPS4, and the accompanying Practice Guidance, in December 2009.
- 1.1.3 The FCRS had five main purposes, which were to provide:
- an overview of current and emerging national retail trends likely to have an impact on the retail sector in the Fylde Coast sub-region;
 - an assessment of the vitality and viability of existing town and district centres;
 - an assessment of retail spending patterns and destinations for various leisure activities;
 - an assessment of quantitative and qualitative needs for retail floorspace, with a forward time horizon up to 2026, but with separate outputs in relation to the short term period up to 2016 and in the medium term from 2016 to 2021; and
 - an assessment of options and recommended strategy for distributing floorspace requirements and improving the Fylde Coast's sub-regional retail offer.
- 1.1.4 The FCRS was underpinned by the findings of a household telephone survey of comparison goods shopping patterns which was undertaken in January and February of 2010, for the purposes of the Tithebarn call-in inquiry in Preston, and the findings of a survey of convenience goods shopping patterns, undertaken in November 2010.

1.2 Purpose of this Update

- 1.2.1 This update of the FCRS was commissioned by Fylde Borough Council and Wyre Borough Council in September 2013. The purpose of this report is to update the quantitative assessment of retail floorspace requirements presented within the FCRS and to extend the study period to 2030 (the end of the current development plan period for both local planning authorities). These revised figures would be used to update the distribution of floorspace requirements between the centres within the study area.
- 1.2.2 The figures in this update report supersede those set out in Volumes 1 and 2 of the FCRS, but the individual survey zones used in the 2011 study have remained unchanged. The household survey figures have been applied to the latest population and expenditure data

from Experian to provide the latest position on available expenditure and floorspace requirements in the comparison and convenience sectors.

- 1.2.3 This update also takes account of the over-trading in the convenience sector which was highlighted in the FCRS, new commitments for additional retail floorspace, changes to expenditure growth rates, sales density growth and the claim of special forms of trading (i.e. non-store trading). The updated capacity assessment provides figures for appropriate interval years up to 2030 and the identified floorspace requirements are distributed between centres within the study area in accordance with the approach set out within the FCRS.

1.3 Structure of the Report

1.3.1 The remainder of this update report is structured as follows:

- Section 2 summarises the key findings from the FCRS in relation to retail expenditure capacity;
- Section 3 describes the data inputs which have informed this update report;
- Section 4 sets out the updated retail capacity forecasts for convenience and comparison goods, including the proposed distribution of floorspace requirements; and
- Section 5 provides our recommendations in terms of the main centres within the boroughs of Fylde and Wyre.

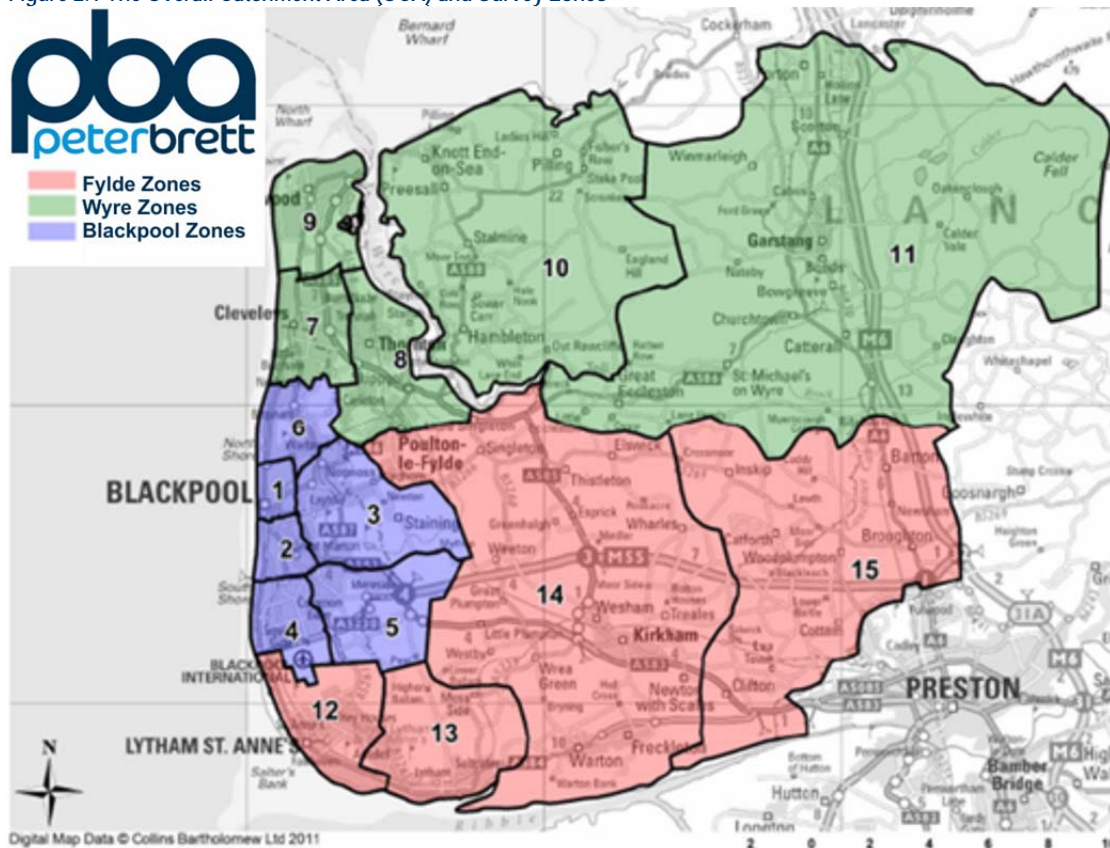
2 Key Findings from the FCRS

- 2.1.1 The FCRS provided a comprehensive update of the preceding 2008 Update Study, including a revised assessment of the performance of each of the major town centres in the Fylde Coast sub-region, and the results of comprehensive surveys of shopping patterns of residents within the study area. This in turn informed new forecasts of the quantitative need for additional comparison and convenience retail floorspace in the Fylde Coast over the period to 2026.
- 2.1.2 Reflecting the change in emphasis set out in PPS4, which was the extant national planning policy guidance at time of publication of the FCRS, the FCRS also assessed the qualitative need for additional retail floorspace. PPS4 afforded equal weight to both quantitative and qualitative needs. Therefore, there was less focus on a specific floorspace output and there was some flexibility to plan for different levels of growth if supported by qualitative factors.
- 2.1.3 Since the completion of the FCRS, the Government published the National Planning Policy Framework (NPPF), in March 2012, which forms the statutory national planning policy guidance in respect of retail matters. The NPPF supersedes PPS4, although the ‘town centres first’ approach set out in PPS4 is carried forward into the NPPF.

2.2 Catchment Area and Current Shopping Patterns

- 2.2.1 Figure 2.1 below shows the overall catchment area (OCA) of the Fylde Coast’s main centres, which formed the basis of the FCRS and this update study. The 15 survey zones covered in the OCA are based on postcode districts, and these were clustered to broadly represent the administrative boundaries of the three Fylde Coast authorities.

Figure 2.1 The Overall Catchment Area (OCA) and Survey Zones



2.3 Summary of Comparison Goods Shopping Patterns

- 2.3.1 The results of the household survey indicated that the OCA achieves a comparison goods 'retention rate' of 75.2 per cent. Thus, just over £7.50 in every £10 available to residents of the OCA for spending on comparison (non-food) goods is spent at destinations within that area.
- 2.3.2 The most popular destinations for comparison goods shopping trips are as shown in Table 2.1 below.

Table 2.1 Main comparison shopping destinations in the OCA

Retail Centre	Proportion of Total Expenditure Available
Blackpool Town Centre	35.5%
Cleveleys Town Centre	6.1%
Blackpool Retail Park	5.9%
Fleetwood Town Centre	4.6%
Clifton Retail Park	3.7%
Cherry Tree Retail Park	3.3%
St Anne's Town Centre	3.2%
Lytham Town Centre	2.9%
Freeport Shopping Village	1.4%
Garstang Town Centre	1.2%

- 2.3.3 Table 2.1 confirms that Blackpool is, by a significant margin, the main comparison shopping destination in the study area, achieving an overall market share of 35.5 per cent. Cleveleys Town Centre achieves the second-highest comparison retail turnover with a market share of 6.1 per cent, followed by Blackpool Retail Park, with a market share of 5.9 per cent. Other destinations within the OCA achieve a market share of below 5 per cent. This analysis highlights the dominance of Blackpool Town Centre compared to other destinations within the study area. However, the findings of the household survey found that the retention rate of Blackpool Town Centre is lower than the retention rate identified for that centre in a 1998 study carried out by Hiller Parker, which had Blackpool Town Centre achieving a retention rate of over 40 per cent.
- 2.3.4 The top ten destinations combined account for just over two thirds of the total available comparison expenditure available to the residents within the OCA. The remaining retained expenditure is distributed between a number of smaller centres such as Kirkham Town Centre, Poulton-le-Fylde Town Centre and South Shore Local Centre.
- 2.3.5 Of the 39.5 per cent of total available comparison goods expenditure which 'leaks' to destinations outside the catchment area, the most popular destination is Preston City Centre, which attracts almost 10 per cent of the available comparison expenditure of study area residents.

2.4 Summary of Convenience Goods Shopping Patterns

2.4.1 The results of the household survey indicated that the Fylde Coast is largely self-sufficient in terms of convenience goods shopping. Some 94 per cent of available expenditure on convenience goods is retained within the OCA. The three most popular destinations for convenience goods shopping in the OCA – Morrisons in Thornton-Cleveleys, Tesco Extra in Blackpool and Morrisons, at Squires Gate Lane – each attract a turnover of over £45 million from residents in the OCA. A number of the zones within the OCA were considered to be adequately provided for in terms of convenience goods provision. The study area's retention level by zone – that is, the proportion of expenditure on convenience goods available to residents in a specific survey zone which is spent in town centres and stores located within the study area – was highest in Zone 9 (Fleetwood) at 99.88 per cent, and was also high (i.e. above 95 per cent) in Zones 1, 2, 3, 4, 5, 6, 7, 8, 10 and 13. The retention levels in Zones 11 and 14 were above 80 per cent. Whilst the retention level of Zone 15 was low at 19 per cent, it should be noted that there were a number of convenience stores located just outside Zone 15 in the neighbouring Preston area.

2.5 Quantitative Need for Additional Floorspace

2.5.1 The FCRS provided three forecasts of the quantitative need for additional comparison goods floorspace – a '*Static Retention*' scenario, whereby current shopping patterns remain unchanged over the course of the period to 2026 (i.e. the current retention rate of 75 per cent stays the same), a '*Moderate Increase in Retention*' scenario, whereby a modest increase in the retention rate from 75 per cent to 80 per cent is achieved by 2026, and a '*Significant Increase in Retention*' scenario whereby a more significant increase in the retention rate from 75 per cent to 82 per cent is achieved by 2026. The conclusion reached in the FCRS was that there was justification to plan for a moderate increase in the retention level, so as support the performance of Blackpool Town Centre to reduce the level of unsustainable shopping trips to destinations beyond the catchment area.

2.5.2 The resultant comparison goods floorspace requirements arising from these three scenarios are set out in Table 2.2.

Table 2.2 Summary of comparison goods floorspace requirements to 2026, FCRS

Interval Period	Static Retention (sq.m net)	Moderate Increase in Retention (sq.m net)	Significant Increase in Retention (sq.m net)
2010 – 2016	-945	659	2,773
2016 – 2021	22,532	27,595	27,989
2021 – 2026	23,591	29,992	33,040
Total 2010 – 2026	45,178	58,245	63,802

Source: Volume 2, FCRS (gross figures adjusted on the basis of the net:gross ratio assumed by the FCRS)

2.5.3 The FCRS identified a total requirement for between 45,178 sq.m and 63,802 sq.m of additional comparison sales floorspace over the period 2010-2026, with the majority of this requirement arising post-2016 and relatively little capacity prior to this. The figures set out in Table 2.3 make allowance for 'committed' retail floorspace – applications for new retail floorspace which have been granted planning permission but were, at the time, yet to be implemented.

2.5.4 In terms of the quantitative need for additional convenience goods floorspace, a total requirement for 1,383 sq.m of additional sales area floorspace over the period 2010-2026 was identified. This floorspace requirement could accommodate a medium-sized foodstore. The reason for this small floorspace requirement was due to the low forecast rate of expenditure

growth in the convenience sector (relative to the comparison sector), and the substantial turnover requirements of extant permissions, in particular the proposed foodstore at Talbot Gateway, and at the new local centre in Thornton.

2.6 Qualitative Need for Additional Floorspace

- 2.6.1 As noted above, PPS4 encouraged local planning authorities to consider the qualitative need for additional retail facilities. The FCRS considered that the over-riding requirement in the comparison retail sector was to improve the quality of Blackpool Town Centre's offer in relation to competing centres located outside of the catchment area, and the out-of-centre retail parks. It stated that The Houndshill Phase II extension, the Central Station Site, and the Winter Gardens redevelopment, all presented opportunities to enhance the comparison goods offer.
- 2.6.2 The health check analysis showed that some centres in Fylde and Wyre were not performing to their full potential. It was recommended that Fleetwood, Poulton-le-Fylde, Cleveleys and Kirkham would benefit from varying degrees of quantitative and qualitative improvements in their comparison goods offer, and that these centres must also attract investment if they are to stave off competition from centres outside the FCSB.
- 2.6.3 The FCRS stated that the first priority for a qualitative improvement in the Fylde Coast's convenience retail offer was for a new food superstore as part of mixed use development at Talbot Gateway. Elsewhere in Blackpool Borough, the FCRS identified no further quantitative or qualitative requirement, in the short to medium term, for additional foodstore provision, over and above that proposed for Talbot Gateway.
- 2.6.4 The second priority identified in the FCRS was to improve the convenience offer in Poulton-le-Fylde Town Centre. It was recommended that this would best be achieved through the enhancement and/or replacement of one of the existing supermarket facilities in Poulton-le-Fylde Town Centre.
- 2.6.5 In terms of rural areas of the catchment, particularly in Fylde and Wyre, the FCRS advised that development should only be permitted where it is of an appropriate scale in relation to the role and function of nearby centres and the catchment which it serves, and does not undermine the existing retail and service offer of centres.

3 Data Inputs

3.1.1 In this section, we set out the data inputs that have been used to inform our update of the retail capacity forecasts set out in the FCRS, as summarised in the previous section. The key data inputs are as follows:

- population forecasts;
- per capita expenditure data;
- expenditure growth rates;
- special forms of trading (such as online shopping);
- turnover efficiency gain in existing retailers;
- retail planning commitments; and
- consideration of over-trading in the convenience sector.

3.1.2 We discuss each of these inputs in turn below. This section should be read alongside the quantitative data tables set out in the appendices to this report.

3.2 Population Forecasts

3.2.1 This update makes use of new baseline (2012-based) population forecasts for each of the 15 survey zones. In order to calculate the population of these survey zones over the study period to 2030, we have utilised new population forecasts which are ONS based and sourced from Experian MMG (2012). The population in the 2013 base year for the 15 survey zones is shown in Spreadsheet 2 of Appendix A.

3.2.2 The new population forecasts based on the ‘Emerging Approach’ growth rates indicate a higher level of population growth than was predicted in the FCRS. The FCRS was based on a predicted a population growth of 6 per cent between 2010 and 2026, whereas this update report is based on a predicted population growth of 8 per cent between 2013 and 2030. A summary of the population growth at the key study interval periods is shown in Table 3.1 below.

Table 3.1 Population forecasts for 2013 Update, 2013-2030

	2013	2016	2021	2026	2030	Change
2013 Update	336,381	340,839	349,091	357,316	363,277	26,896

3.3 Expenditure Growth Rates

3.3.1 In order to ascertain the amount of retail floorspace required over the course of the update period, it is necessary to forecast the level at which personal spending on comparison and convenience goods will increase over the course of the study period. This is disaggregated between a number of reporting periods: 2013-2016; 2016-2021; 2021-2026 and 2026-2030. Given the inherent uncertainty over expenditure growth rates in the longer term, forecasts for the latter timeframes should be treated with caution and be subject to regular review.

3.3.2 In the FCRS we set out justification for using mid-point forecasts of the two principal data providers – PBBI/OE and Experian – to inform expenditure growth rates over the course of the

Local Plan periods to 2026. However, for the purposes of this update, we rely solely on Experian forecasts. This is due to:

- the availability of more up-to-date data from Experian in terms of base year population forecasts (as discussed above), and personal spending data; and
- the ability to provide consistency throughout the data set, as Experian expenditure growth rates and market shares for ‘Special Forms of Trading’ are also used.

3.3.3 The new expenditure growth rates are set out in Table 3.2 below. As with the forecasts in the FCRS, expenditure growth in the long-term is expected to be relatively muted.

Table 3.2 Expenditure growth rates for retail study update

Time period	Comparison Goods			Convenience Goods		
	New growth rate (per annum)	FCRS growth rate (per annum)	Percentage Point Change from FCRS	New growth rate (per annum)	FCRS growth rate (per annum)	Percentage Point Change from FCRS
2013	3.2%	3.5%	-0.3	-0.6%	0.6%	-1.2
2016	2.9%	3.7%	-0.8	0.8%	0.8%	-
2021	2.9%	2.9%	-	0.8%	0.9%	-0.1
2026	2.9%	2.9%	-	0.8%	0.9%	-0.1
2030	2.9%	2.9%	-	0.8%	0.9%	-0.1

3.3.4 Table 3.2 indicates that there remains a cautious outlook in respect of expenditure growth, and that these have reduced further since 2011, due to the prolonged effects of the recession. These reductions are only slight in terms of longer term rates but are more significant in terms of the more reliable short term rates. We adopt the ‘new growth rate’ for comparison and convenience goods based on the latest Experian figures of October 2013 for the purposes of this study update.

3.4 Special Forms of Trading

3.4.1 Special Forms of Trading (SFT) is expenditure which is diverted from traditional retail outlets towards channels such as online shopping. SFT acts a ‘claim’ on expenditure which is available to support physical retail outlets, and therefore it is stripped out from the total expenditure pot in order to ensure that the resultant level of residual expenditure is entirely available to support physical retail floorspace development.

3.4.2 Since the FCRS was undertaken, Experian has begun to publish revised guidance on SFT forecasts, which was first set out in Experian Retail Planner Briefing Note 9 (September 2011) and has been updated through to the most recent Briefing Note 11 of October 2013. The Experian SFT figures now make allowance for ‘store-picked’ online transactions, whereby the customer orders a product online, but the transaction is processed by the nearest local branch of the retailer, thereby contributing to the sales performance of that branch. ‘Store-picked’ online shopping is currently used for two principal purposes:

- convenience goods shopping — the major supermarket retailers Asda, Sainsbury’s and Tesco all fulfil online grocery shopping orders via the nearest local large branch of their stores; and

- comparison goods shopping — an increasing number of retailers, including Argos and Currys, offer ‘click & collect’ services, whereby the product is ordered online and reserved for collection at the nearest local branch convenient to the customer.

3.4.3 Experian presents these ‘store picked’-based figures as ‘adjusted’ SFT discount rates, and we adopt these adjusted figures for the purpose of our updated assessment. Table 3.4 summarises the adjusted SFT discounts; the SFT figures used in the FCRS are also shown for reference.

Table 3.3 SFT discounts

Time period	Comparison Goods			Convenience Goods		
	Adjusted SFT discount	FCRS SFT discount	Percentage Point Change from FCRS	Adjusted SFT discount	FCRS SFT discount	Percentage Point Change from FCRS
2013	10.8%	8.2%	2.6	2.5%	1.6%	0.9
2016	13.0%	13.9%	-0.9	3.2%	2.4%	0.8
2021	15.7%	13.6%	2.1	4.6%	2.5%	2.1
2026	15.9%	13.3%	2.6	5.1%	2.7%	2.4
2030	15.9%	-	-	5.6%	-	-

3.4.4 Despite the use of the adjusted SFT figures it is still expected that the market share of SFT will be higher over the period of this update than was forecast in the previous study. This is because of the continued rapid growth in SFT, and particularly online retailing, over the last two or three years.

3.5 Turnover Efficiency Gain in Existing Retailers

3.5.1 It is also necessary to make an allowance for the growth in sales efficiency of existing convenience and comparison goods retailers within the OCA, as stores are expected to trade at increasingly efficient levels of turnover per square metre of sales area over the course of the study period.

3.5.2 The DCLG Practice Guidance that accompanied PPS4 (paragraph B.48), which remains in force, advises that such allowances should be ‘realistic’ and that the choice will depend on *the ‘capacity of existing floorspace to absorb increased sales’* and should be ‘compatible with assumptions about the growth in per capita expenditure’. Allowances for sales density growth are linked to expenditure growth. The level of comparison and convenience sales density growth that we have allowed for in the study area is summarised in Table 3.4. Owing to the low levels of convenience retail expenditure growth presently being forecast by Experian for the short term period, we do not make any allowance for sales density growth until after 2016.

Table 3.4 Rates of Floorspace Efficiency Change

Time Period	Per Annum	
	Comparison Goods	Convenience Goods
2013-2016	1.5%	0.0%
2016+	1.5%	0.3%

3.5.3 These figures are blanket sales density growth rates for all floorspace in the study area. Inevitably, different types of floorspace have different abilities to absorb expenditure growth,

with modern floorspace better equipped than older stock. However, since this study covers a variety of centres within the OCA and we are aware that the centres have both modern and older floorspace, we consider that such a uniform approach is robust.

3.6 Retail Planning Commitments

- 3.6.1 It is necessary to make deductions from any initial surplus of expenditure for the 'claim' of existing retail planning commitments. To inform our current update work, each of the three constituent local authorities has provided us with data on current commitments.
- 3.6.2 The FCRS made allowance for a number of committed comparison and convenience goods developments in the OCA. As no new household survey into shopping patterns has been undertaken to inform this update, it is also necessary to continue to treat the commitments from the FCRS as a 'claim' on total available expenditure. These are shown in Table 3.5 (for comparison goods) and Table 3.6 (for convenience goods), alongside new commitments for retail floorspace which have been granted planning permission subsequent to the completion of the FCRS.
- 3.6.3 In carrying over commitments contained within the FCRS we have had to make a number of adjustments to account for developments since 2011. These relate to the Talbot Gateway scheme in Blackpool, the proposed local centre at Thornton in Wyre, and the extant planning permission for a Booths store at Poulton-le-Fylde, also in Wyre.
- 3.6.4 Since the time of the FCRS a revised planning application (ref: 11/0961) has been determined by Blackpool Council for the proposed Sainsbury's foodstore at Talbot Gateway. This increased the proportion of sales floorspace for comparison goods within the store and decreased the proportion of sales floorspace for convenience goods.
- 3.6.5 As a result of this, Table 3.5 shows an unadjusted figure for comparison sales floorspace at Talbot Gateway carried over from the FCRS but with the balance of additional comparison retail floorspace (700 sq. m) permitted by the revised planning application included as a new commitment. Because the revised plans reduced the amount of convenience floorspace we have removed this entirely from the commitments carried over and included the full 3,338 sq.m as a new commitment.
- 3.6.6 The approved development of a local centre at Thornton has now been superseded by a planning permission for a Sainsbury's foodstore. We have therefore removed this floorspace from the commitments carried over from Tables 3.5 and 3.6 and have included relevant figures for the convenience and comparison sales floorspace of the Sainsbury's foodstore as new commitments in both tables.
- 3.6.7 In the previous study convenience and comparison floorspace commitments were included in respect of a planning permission dating from the early 2000s for the expansion of the existing Booths store at Ball Street, Poulton-le-Fylde, and the provision of a new separate non-food retail unit. This was included as a commitment because the permission had technically been commenced. However, since the time of the FCRS, planning permission has been granted for a new Booths store at the Teanlowe Centre in Poulton-le-Fylde (ref: 12/00354). We therefore consider it very unlikely that the extant planning permission would ever be implemented and it has been removed for the purposes of this update.
- 3.6.8 The tables below show existing commitments from the FCRS, in addition to new permissions which have subsequently been granted. Having made allowance for recent permissions, Table 3.5 shows that the claim arising from extant comparison goods commitments has increased from £61.3m to £99.4m.

Table 3.5 Committed comparison goods floorspace in FCSB (at October 2013)

Local Planning Authority	Location / name of scheme	Estimated floorspace (sq.m net)	Estimated turnover from study area (£m - 2016)
Previous Commitments carried over from FCRS¹			
Blackpool	Talbot Gateway, Blackpool	12,726	47.58
Blackpool	Houndshell Phase II	3,095	10.68
Blackpool	Unit A2, Blackpool Retail Park	813	2.5
Fylde	Lidl, Preston Road, Lytham	257	0.52
A. Sub-total for previous commitments		16,891	61.3 (A)
New commitments (retail planning applications approved since completion of FCRS)			
Blackpool	Sainsbury's Talbot Gateway	700	4.84
Blackpool	434 Waterloo Road Blackpool, FY4 4BL	527	1.00
Wyre	Aldi, Crescent West, Thornton Cleveleys.	203	0.84
Wyre	Sainsbury's, Land off Fleetwood Road North, Thornton Cleveleys	1,208	8.36
Wyre	Freeport Fleetwood, Anchorage Road, Fleetwood	1,576	8.98
Wyre	Victoria Market, Thornton-Cleveleys	1,003	5.72
Fylde	45 Lytham Road, Warton	97	3.22
Fylde	Heyhouse Lane, Lytham St Annes	633	3.61
Fylde	353 Clifton Drive South, St Annes	373	1.54
B. Sub-total for new commitments		6,320	38.1 (B)
Total comparison goods commitments (A+B)		21,911	99.4

3.6.9 Table 3.6 demonstrates that there have been a number of new foodstores permitted in the OCA following the completion of the FCRS – most significantly the Sainsbury's foodstore in Thornton Cleveleys. Table 3.6 shows that some 8,860 sq.m of additional convenience sales area floorspace has been permitted following the completion of the FCRS. In total there is now 11,400 sq.m of sales area floorspace, or £142.7m in forecast turnover, of committed convenience goods floorspace in the OCA.

¹ Amended as described in paragraphs 3.6.3 to 3.6.7

Table 3.6 Committed convenience goods floorspace in FCSB (at October 2013)

Local Planning Authority	Location / name of scheme	Estimated floorspace (sq.m net)	Estimated turnover from study area (£m - 2016)
Previous Commitments carried over from FCRS²			
Blackpool	Former Royal PH Marton Drive	251	3.12
Blackpool	Former Belle Vue Garage Whitegate Drive	321	3.57
Fylde	353 Clifton Drive South/St Anthony's House, St Georges Road, St Annes	939	5.96
Fylde	Lidl, Preston Road, Lytham	1029	3.14
A. Sub-total for previous commitments		2,540	15.8 (A)
New commitments (retail planning applications approved since completion of FCRS)			
Blackpool	Former Blockbuster store, Cornelian Way	274	3.36
Blackpool	Sainsbury's Talbot Gateway	3,388	42.43
Wyre	Tesco Express, Garstang Road East, Poulton-le Fylde	320	3.98
Wyre	Booths, Teanlowe Centre	564	4.84
Wyre	Tesco Express, Marsh Mill, Thornton Cleveleys	383	4.76
Wyre	Aldi, Crescent West, Thornton Cleveleys.	814	5.17
Wyre	Sainsbury's Land off Fleetwood Road North, Thornton Cleveleys	3,437	43.05
Fylde	Georges Garage, 45 Lytham Road, Warton	260	3.22
Fylde	Heyhouse Lane, Lytham St Annes	1,302	16.08
B. Sub-total for new commitments		8,860	126.9 (B)
Total convenience goods commitments (A+B)		11,400	142.7

² Amended as described in paragraphs 3.6.3 to 3.6.7

3.7 Over-trading in the Convenience Sector

- 3.7.1 The FCRS found that the aggregate level of convenience over-trading in the OCA was, £34.61m and concluded that *'unless there is clear qualitative evidence of overtrading in town centre stores which is causing customer discomfort, we consider that the notional figure for overtrading in the Fylde Coast stores should not be used to justify additional floorspace requirements.'*
- 3.7.2 After discussions with the councils it has been highlighted that over-trading in the OCA is prevalent in a number of stores and it has been requested that, in this update, over-trading should be factored in when calculating additional floorspace requirements. The aggregate level of over-trading at convenience retail floorspace across the OCA is estimated to stand at some £99.49m. This calculation is based on all foodstores operated by the main convenience operators for whom data in respect of company average sales densities is readily available.
- 3.7.3 The estimated level of existing over-trading is substantially higher than the figure reported in the FCRS. The two Morrisons stores at Squires Gate Lane, Blackpool and Amounderness Way, Thornton-Cleveleys are both estimated to be significantly over-trading at over £20m higher than company benchmark sales densities would indicate. Accordingly, there is evidence to suggest that there is additional floorspace capacity in the OCA which can be derived in part from existing stores within the catchment, without undermining the viability of existing facilities. An allowance for over-trading at existing stores is therefore made within the summary table of Spreadsheet 14.

4 Updated Quantitative Forecasts

4.1.1 Having taken into account the changes to the data inputs described in the previous section, we set out in this section the updated retail capacity forecasts for the OCA. Our findings should be read in conjunction with the Spreadsheets contained in Appendix A, which are organised as follows:

- Spreadsheet 2 sets out population forecasts for each of the zones in the OCA at the interval years of 2013, 2016, 2021, 2026 and 2030.
- Spreadsheet 3 sets out per capita spending on comparison goods for the same interval periods.
- Spreadsheet 4 sets out updated total forecasts of expenditure on comparison goods, which are calculated from the application of population figures in Spreadsheet 2 to per capita expenditure figures in Spreadsheet 3. Allowance is made for Special Forms of Trading, as discussed in the previous section.
- Spreadsheet 5 shows the current market shares for comparison goods shopping destinations in the OCA – these are unchanged from the FCRS, as no new household survey has been undertaken.
- Spreadsheet 6 applies the market shares in Spreadsheet 5 to the updated expenditure forecasts from Spreadsheet 4 to show current comparison goods spending patterns in monetary terms.
- Spreadsheet 7 presents a summary of the comparison goods retail planning commitments, as set out in the previous section.
- Spreadsheet 8 presents a summary of the revised comparison goods retail capacity forecasts for the OCA based on a constant retention rate over the course of the study period to 2030. The findings of this are discussed in greater detail below.
- Spreadsheets 9 to 14 repeat the structure of Spreadsheets 3 to 8 for convenience goods.

4.2 Population Data

4.2.1 The resident population of the OCA in 2013, disaggregated by zone, is shown in Spreadsheet 2. The overall population in 2013 amounts to approximately 336,381 persons, which is derived from Experian 'Population Projections' and Census 2011 data. The population of the OCA is forecast to increase to 363,277 by 2030, equating to an overall population increase over the 2013 to 2030 period of approximately 8 per cent.

4.3 Per Capita Expenditure Data

4.3.1 Revised per capita expenditure forecasts for comparison goods and convenience goods are set out in Spreadsheet 3 (comparison goods) and in Spreadsheet 9 (convenience goods), within Appendix A. Our previous study utilised 2008-based MapInfo figures; for the purposes of this updated assessment, these have been updated to 2012-based figures, reflecting the availability of new information from data provider Experian. The average expenditure on comparison goods across the OCA have increased slightly from £2,837³ per person in the

³ 2008 Figure

sub-region, to £2,992 per person⁴. The per capita expenditure on comparison goods in 2013 (Spreadsheet 3) varies from a low of £2,123 in Zone 1 to a high of £3,778 in Zone 15.

- 4.3.2 For convenience goods spending, the updated expenditure forecasts show the average per person spend on convenience goods to be £1,987⁵ across the OCA, representing an increase from the average of £1,564 per person⁶ in the previous study (2011). The per capita expenditure on convenience goods in 2013 varies from a low of £1,670 in Zone 1 to a high of £2,185 in Zone 13.

4.4 Total Expenditure

- 4.4.1 Spreadsheets 4 and 10 of Appendix A set out the total amount of comparison goods and convenience goods expenditure which is forecast to be available to residents across the OCA at 2013, 2016, 2021, 2026 and 2030.
- 4.4.2 The total amount of comparison goods spending for residents of the whole of the study area in 2013 is £1,000.3m (Spreadsheet 4), of which £108.04m, or 10.8 per cent, is spent on special forms of trading (catalogue, TV and internet shopping, which we subsequently abbreviate as SFT), based on Experian data. This gives a total comparison goods expenditure (excluding SFT) of £892.32 million in 2010. SFT is forecast to grow over the study period at the rates indicated in Table 3.3 resulting in total expenditure (excluding SFT) of £1,092.03 by 2021, and to £1,465.66m by 2030. This equates to total expenditure growth (excluding SFT) of £573.34m between 2013 and 2030.
- 4.4.3 The total amount of convenience goods spending for residents of the whole study area in 2013 is £658.9m (Spreadsheet 10), of which £16.4m, or 2.5 per cent, is spent on SFT. SFT rates are expected to grow over the study period by the rates shown at Table 3.3. Spreadsheet 10 shows that the total available convenience goods expenditure, less SFT expenditure, is expected to increase from £642.48m in 2013 to £728.51m in 2021 and to £754.89m in 2030.
- 4.4.4 As was the case in the FCRS, expenditure growth on convenience goods is considerably more limited than growth in comparison goods expenditure, and total expenditure growth in convenience goods is expected to amount to £112.41m between 2013 and 2030, having made an allowance for SFT.

4.5 Comparison Goods Capacity Forecasts for Fylde Coast

- 4.5.1 Spreadsheet 8 shows the revised total overall comparison goods capacity forecast for the OCA. It is structured as follows:
- Row A summarises the population of the OCA at 2013, 2016, 2021, 2026 and 2030 (derived from Spreadsheet 2).
 - Row B summarises the total comparison goods expenditure available across the OCA at the same interval years (derived from Spreadsheet 4).
 - Row C shows the proportion of total expenditure available which is retained by centres and stores within the OCA. This reflects the retention rate of 75 per cent identified by the household survey in support of the OCA, as shown in Row D.
 - Row E shows the expenditure leakage outside the OCA (Row B minus Row C).

⁴ 2013 Figure

⁵ 2013 Figure

⁶ 2008 Figure

- Row F shows the amount of inflow into the OCA which is factored into the capacity assessment. For the purposes of this assessment we have adopted the same rates of inflow into the OCA as used in the FCRS.
- Row G shows the total turnover of comparison goods stores in the OCA, derived from the total of Row C and Row F. This is held static throughout the study period, with the growth in expenditure over the study period shown in Row H.
- Rows I, J and K summarise the 'claims' on the total expenditure growth which must be deducted from the figures shown in Row H. Row I makes allowance for the increased turnover efficiency of existing retail floorspace within the study area (i.e. growth in the turnover of stores shown in Row G); Row J makes allowance for the retail planning commitments summarised at Spreadsheet 7, and the turnover efficiency of these is also grown over the course of the study period. The total 'claims' on available expenditure are summarised in Row K.
- Rows L to O then draw the information together provide an updated summary of capacity for new comparison goods floorspace in the OCA. Row L summarises the initial surplus of comparison goods expenditure available to the OCA (reflecting the figures in Row H), whilst Row M summarises the 'claims' on expenditure capacity (reflecting Row K). Row N shows that no allowance is made for over-trading of comparison goods floorspace.
- The residual amount of expenditure which is left to support new comparison goods floorspace (i.e. Row M minus Row N) is shown in Row O. Importantly, Row O shows that in the first interval period (2013-16), the claims on capacity outstrip the growth in comparison goods expenditure which is expected to take place, creating a negative residual of available expenditure.
- Rows P to X convert the residual expenditure into floorspace requirements for each of the three local planning authorities within the OCA. Rows P, S and V apply the market shares for retained comparison goods expenditure for each Borough (as identified by the household survey for the FCRS) to the residual comparison goods expenditure identified at Row O.
- The conversion from residual expenditure to floorspace requirements assumes an average sales density of £6,028 per sq. m in Blackpool Borough (Row Q) and £4,250 in Fylde Borough and Wyre Borough (Rows T and W). These reflect the assumed turnover per sq. m at 2010 adopted in the FCRS and reflect the performance of existing floorspace in the different centres in each Borough. So as to account for subdued economic conditions we have not applied any sales density growth between 2010 and 2013. Thereafter we grow the assumed turnover per sq. m for comparison goods floorspace at a rate of 1.5 per cent per annum.
- Rows R, U and X apply the residual expenditure for each Borough to the turnover per sq.m for each Borough to produce the revised comparison goods floorspace requirements. On this basis Blackpool has a total requirement for additional comparison goods sales floorspace of 15,405 sq. m over the study period, Wyre has a requirement for 6,505 sq. m and Fylde has a requirement for 3,369 sq. m. The overall figures for the OCA are shown in Table 4.1 below.

Table 4.1 Summary of quantitative capacity for additional comparison goods floorspace in Fylde Coast Area, 2013 to 2030 (all figures sq.m net)

	2013-16	2016-21	2021-26	2026-30	Total 2013- 2030 (including over-supply to 2016)
Static Retention (75%)	-14,119	9,923	15,461	14,014	25,279

- 4.5.2 Overall, there is total comparison goods requirement for **25,279 sq.m of additional sales area floorspace** over the plan period, having made allowance for the current identified over-supply of comparison goods floorspace in the OCA. This requirement is only expected to arise in the post-2021 period, and there is currently no capacity for additional comparison goods floorspace within the OCA. We advise that capacity forecasts should be subject to regular review and be updated throughout the plan period.
- 4.5.3 Our figures are presented on the basis of static retention rates for convenience and comparison goods expenditure. The FCRS distributed comparison floorspace requirements on the basis of a moderate increase in retention rates from 75 per cent to 80 per cent. However, we consider the static retention scenario to be more robust given that the higher order centres of Preston and Lancaster will continue to draw trade from the sub-region and that parts of the boroughs of Fylde and Wyre clearly fall within the established catchment areas of these centres. The moderate increase in comparison goods expenditure retention envisaged by the FCRS was intended to support Blackpool Town Centre. This consideration is less relevant to updating floorspace requirements for Fylde and Wyre where centres would not necessarily benefit from increased retention as a result of improvements to Blackpool's offer.

4.6 Convenience Goods Capacity Forecasts for Fylde Coast

- 4.6.1 Spreadsheets 9-15 of Appendix A summarise the quantitative capacity for additional convenience goods floorspace in the OCA. Spreadsheet 14 summarises the capacity for the OCA, and is structured in the same format as its comparison goods equivalent, Spreadsheet 8 as summarised above. There are a number of important differences in the approach to assessing convenience goods capacity, as summarised below.
- 4.6.2 The household survey undertaken in support of the FCRS identified considerable over-trading of many foodstores in the OCA, when compared to operator 'benchmark' turnovers. As no new household survey has been undertaken, we continue to apply this over-trading to the revised capacity forecasts. The aggregate over-trading position in the OCA is currently £99.4m. Over-trading is only factored fully into the capacity analysis in the first interval period (2013-2016), when existing commitments are also expected to be implemented and to have become operational. Given the scale of outstanding commitments, it is expected that their implementation will absorb all over-trading from existing foodstores.
- 4.6.3 Convenience goods floorspace trades at a higher sales density than comparison goods floorspace. The turnover per sq.m figures used for the purposes of assessing convenience goods capacity are £13,500 per sq.m in 2013, increasing to £13,704 at 2021, £13,911 at 2026 and £14,708 at 2030. The base year figure of £13,500 per sq.m represents the average benchmark sales density of the principal foodstore operators – Asda, Morrisons, Sainsbury's and Tesco, all of which have representation in the OCA.
- 4.6.4 Based on the revised inputs, Spreadsheet 14 shows that across the OCA there is capacity for an additional 2,825 sq.m of additional convenience sales area floorspace between 2013 and 2030. Even allowing for the over-trading of existing convenience goods floorspace in the OCA, there is no quantitative requirement for any additional convenience goods floorspace in the OCA until after 2016 (a significant existing over-supply of net floorspace is identified),

mainly because of the expected turnover of the extant commitments for convenience goods floorspace. The requirements for the remainder of the plan period are summarised in Table 4.2 below.

Table 4.2 Summary of quantitative capacity for additional convenience goods floorspace in Fylde Coast Area, 2013 to 2030 (all figures sq.m net)

	2013-16	2016-21	2021-26	2026-30	Total 2013-2030 (including over-supply to 2016)
Static Retention (95%)	-2,642	1,652	2,531	1,284	2,825

- 4.6.5 The figures set out at Tables 4.1 and 4.2 summarise the updated requirements for additional comparison and convenience goods floorspace in the OCA over the plan period to 2030, based on the revised data inputs discussed in Section 3 of this report. The Councils should seek to ensure that capacity forecasts are regularly updated throughout the course of the study period, to take account of updated population and spending data, and new retail planning commitments.

4.7 Distribution of Floorspace Requirements

- 4.7.1 Section 8 of the FCRS ('Main Report') set out the rationale for the distribution of new retail floorspace requirements between the three Fylde Coast authorities and their individual centres. Given the lack of quantitative capacity to support additional convenience goods floorspace, this exercise only applied to comparison floorspace requirements. These requirements were distributed according to each borough's current share of retained comparison goods expenditure and in accordance with the most appropriate strategic option for distribution.
- 4.7.2 The FCRS recommendation was to focus growth on Blackpool Town Centre to support its development as a strong sub-regional centre, whilst maximising the take up of opportunities in those remaining town centres where opportunity and need are greatest. This approach was considered to score well in terms of promoting sustainability, protecting vitality and viability, meeting needs and ensuring delivery. Within Fylde and Wyre floorspace requirements were channelled towards the larger centres. It is assumed that floorspace requirements should be directed to defined town centres rather than out-of-centre locations (in accordance with national and local planning policy) and that, subject to physical and environmental constraints, the Councils will seek to accommodate requirements in in-centre and edge-of-centre locations.
- 4.7.3 This update study is not supported by a new household survey or by updated health checks of centres within the Fylde Coast and we therefore propose to carry forward the approach to distribution of floorspace requirements established in the FCRS for the purposes of the update. As with the FCRS the limited capacity for additional convenience goods floorspace means that this exercise is only applied to requirements for additional comparison goods floorspace.
- 4.7.4 A small number of in-centre/edge-of-centre developments have occurred since the time of the FCRS (such as the Talbot Gateway scheme in Blackpool) but these were largely anticipated by the FCRS and are unlikely to have significantly altered the prospects of any individual centre or changed its role or function within the established retail hierarchy. We are also aware of a number of planning permissions that have been granted for retail development in out-of-centre locations but these mainly provide for additional convenience goods floorspace and would have more limited impacts on comparison shopping patterns.

- 4.7.5 Our updated assessment of comparison goods expenditure capacity for the Fylde Coast indicates residual expenditure of £177.7 million in the period from 2013 to 2030 (see Appendix A Spreadsheet 8). This would result in the distribution of comparison floorspace requirements as set out in Table 4.3 below.
- 4.7.6 The very low floorspace requirements for individual centres in the period up to 2021 is primarily a function of the existing retail commitments within the study area that represent a significant claim on expenditure capacity in the short to medium term.
- 4.7.7 There will, however, be more expenditure capacity to support new comparison floorspace in the period from 2021 and this results in overall requirements for the development plan period of 6,505 sq.m for Wyre and 3,369 sq.m for Fylde.

Table 4.3 Distribution of Comparison Floorspace Requirements

Centre	2013-2021	2021-2030	2013-2030
	Static Retention Rate (sq. m net)		
Blackpool Town Centre	-2,166	15,261	13,095
South Shore District Centre	-128	898	770
Bispham District Centre	-128	898	770
Remaining District & Local Centres	-128	898	770
Blackpool Borough Total	-2,550	17,955	15,405
Fleetwood Town Centre	-271	1,898	1,627
Cleveleys Town Centre	-271	1,898	1,627
Poulton-le-Fylde Town Centre	-271	1,898	1,627
Garstang Town Centre	-163	1,139	976
Thornton and Remaining Wyre Local Centres	-108	759	651
Wyre Borough Total	-1,084	7,592	6,508
St Annes Town Centre	-197	1,376	1,179
Lytham Town Centre	-197	1,376	1,179
Kirkham Town Centre	-112	786	674
Remaining District & Local Centres	-56	393	337
Fylde Borough Total	-562	3,931	3,369
Total for Fylde Coast⁷	-4,196	29,478	25,282

⁷ Figures differ very slightly from Table 4.1 due to cumulative effects of rounding requirements for individual centres.

5 Summary and Recommendations

5.1.1 This report provides an update of the Fylde Coast Retail Study (FCRS) of 2011 on behalf of Wyre and Fylde Borough Councils. We have updated the quantitative assessment of floorspace capacity to reflect changes to population and expenditure forecasts since 2011. We have also taken account of the growing market share of special forms of trading and new retail floorspace that has been granted planning permission since the time of the previous study. Unlike the previous study, our analysis also takes into account the over-trading of existing convenience floorspace within the sub-region.

5.1.2 In this concluding section we bring together our findings in respect of our update of floorspace capacity and the potential implications for centres within the commissioning local planning authorities. As a part of this update we have not undertaken new health checks of centres within the sub-region and it has therefore not been possible to provide new recommendations in terms of the qualitative requirements of individual centres. However, where appropriate we review the recommendations of the 2011 study in view of the findings of this update.

5.2 Retail Floorspace Requirements

5.2.1 As set out in Section 4, our updated quantitative assessment of floorspace requirements across the sub-region has identified overall requirements for an additional 2,825 sq.m of convenience sales floorspace and 25,279 sq.m of comparison sales floorspace in the period up to 2030.

5.2.2 It is important to note that floorspace requirements in this update report are presented as net figures (i.e. as sales floorspace figures) rather than gross figures as in the main report of the FCRS. This is believed to be more robust as there can be considerable variance in the net to gross floorspace splits achieved by different types of retailers and operators.

5.2.3 Our figures are also presented on the basis of static retention rates for convenience and comparison goods expenditure. The FCRS distributed comparison floorspace requirements on the basis of a moderate increase in retention rates from 75 per cent to 80 per cent. However, we consider the static retention scenario to be more robust given that the higher order centres of Preston and Lancaster will continue to draw trade from the sub-region and that parts of the boroughs of Fylde and Wyre clearly fall within the established catchment areas of these centres. The moderate increase in comparison goods expenditure retention envisaged by the FCRS was intended to support Blackpool Town Centre. This consideration is less relevant to updating floorspace requirements for Fylde and Wyre where centres would not necessarily benefit from increased retention as a result of improvements to Blackpool's offer.

5.2.4 These methodological changes have the effect of reducing the floorspace requirements identified by this update study, relative to the requirements identified in the FCRS. However, a number of other data inputs also serve to reduce the identified floorspace requirements. The key changes are:

- a significant increase in claims on expenditure capacity from existing floorspace commitments. This has resulted from new planning permissions granted since the time of the FCRS;
- an increase in the forecast market share of special forms of trading as online sales, in particular, continue to grow; and
- a decrease in short term expenditure growth forecasts for both convenience and comparison goods.

- 5.2.5 The changes in these key data inputs has outweighed the effects of increased population forecasts for the study area and the introduction of an allowance of almost £100 million for over-trading of existing convenience floorspace, which provides notional additional capacity.

5.3 Fylde Borough

- 5.3.1 In Section 4 we identified that Fylde currently has a requirement for an additional 3,369 sq.m of comparison goods sales area floorspace in the period to 2030. In Table 4.3 we distributed this requirement between the Borough's centres on the basis of the approach set out within the FCRS. This leads to negative requirements for new sales floorspace in the period up to 2021 and modest requirements thereafter in the period to 2030. The figures calculated by our assessment should be treated as a guide and, given the inherent uncertainty over longer term forecasts, we would advise the Borough Council to allow for a reasonable amount of flexibility. This should also allow the Council to take account of any physical and environmental constraints within individual centres. We therefore present our recommended floorspace allowance figures as a range and suggest that the Council should make provision for additional comparison goods sales floorspace over the 2013 to 2030 period as follows:

- 1,000 to 1,500 sq.m in the town centres of St Annes and Lytham;
- 500 to 1,000 sq.m in Kirkham Town Centre; and
- 250 to 500 sq.m for provision across the Borough's district and local centres (this is a global figure and not an allowance for each individual centre).

St Annes Town Centre

- 5.3.2 The FCRS found that St Annes was a well maintained and vibrant centre with a strong convenience retail base. At the time of the 2011 study there was an undetermined planning application for a new foodstore at an out-of-centre location at Heyhouses Lane. Permission has now been granted for this scheme and we understand that this is to be occupied by Booths following the closure of its store in St Annes Town Centre. There may therefore be a future qualitative requirement for additional convenience goods floorspace within St Annes Town Centre to support its vitality and viability.
- 5.3.3 In terms of comparison goods, St Annes was considered to be slightly under-represented in the clothing and footwear sub-category and contained a high proportion of charity shops. The vacancy rate in the town centre fell below the national average but some vacant units occupied prominent locations and it was recommended that these were modernised to promote a more diverse mix of retailers in the centre. Our updated assessment indicates that St Annes should provide between 1,000 and 1,500 sq. m of additional comparison goods sales floorspace over the period to 2030. This would allow for the development of a number of good-sized new units to meet the requirements of comparison retailers.

Lytham Town Centre

- 5.3.4 Lytham Town Centre was reported to be performing strongly by the FCRS. The centre mainly caters for local shopping requirements with a strong convenience offer and very good representation from quality independent retailers in the comparison goods sector. The main recommendation of the FCRS was therefore to maintain the centre's vitality and viability through monitoring vacancies, maintaining the public realm and using the floorspace capacity identified for the centre to complement and enhance the existing retail offer by ensuring that Lytham remains an attractive town centre that is able to compete with other destinations.
- 5.3.5 As with St Annes, the comparison floorspace requirements that we now identify for Lytham Town Centre are substantially lower than in the 2011 study. We suggest that provision is made for between 1,000 and 1,500 sq. m of additional comparison goods sales floorspace.

This would allow for a range of new, smaller units that would complement the existing offer and future demand from independent comparison operators.

Other Centres

- 5.3.6 Kirkham is a smaller town centre than either St Annes or Lytham and the 2011 study found that the principal focus here should be on halting the increasing vacancy rate and enhancing retailer representation in the comparison goods sector. It was suggested that this might be achieved through the refurbishment of existing vacant units to provide more modern floorspace that would be better suited to the requirements of multiple retailers. In addition to this, our updated assessment suggests that there may be a requirement for new comparison goods sales floorspace over the development plan period and we would suggest that provision should be made for between 500 and 1,000 sq. m in Kirkham.
- 5.3.7 In terms of Fylde's lower order centres, it could be expected that these centres might collectively provide between 250 and 500 sq. m of new comparison goods sales floorspace in the period up to 2030 (i.e. this is a global figure and not an allowance for each individual centre). However, it is recognised that small-scale facilities to meet local, day-today, shopping needs are inherently sustainable and that there may be justification for the expansion of existing district and local centres, or the creation of new centres, to meet the needs of new large-scale developments.

5.4 Wyre Borough

- 5.4.1 As in the rest of the sub-region, this study has found that Wyre Borough would now have a lower requirement for additional comparison goods sales area floorspace over the period to 2030 than was identified within the FCRS which provided forecasts up to 2026. In the case of Wyre this requirement has reduced to 6,505 sq. m, with nearly all this requirement for additional floorspace arising in the period after 2021. The figures calculated by our assessment should be treated as a guide and, given the inherent uncertainty over longer term forecasts, we would advise the Borough Council to allow for a reasonable amount of flexibility. This should also allow the Council to take account of any physical and environmental constraints within individual centres. We therefore present our recommended floorspace allowance figures as a range and suggest that the Council should make provision for additional comparison goods sales floorspace on the following basis:
- 1,500 to 2,000 sq. m in the town centres of Fleetwood, Cleveleys and Poulton-le-Fylde;
 - 750 to 1,250 sq. m in Garstang Town Centre; and
 - 500 to 750 sq. m for provision across the Borough's district and local centres (this is a global figure and not an allowance for each individual centre).

Cleveleys Town Centre

- 5.4.2 The FCRS found there was scope to improve the comparison goods offer of Cleveleys Town Centre which was focused on the value end of the market and was under-represented in terms of clothing and footwear retailers. The study also advised that the Council should promote the consolidation of the centre which takes a long, linear form. This would help to concentrate footfall and improve overall vitality and viability. The careful definition of the town centre's primary shopping area and wording of planning policies to control uses within primary and secondary retail frontages could assist in achieving such a consolidation.
- 5.4.3 Our updated assessment of floorspace capacity indicates that between 1,500 and 2,000 sq. m of additional comparison goods floorspace should be made available within Cleveleys Town Centre in the period up to 2030. Such new development should be sufficient to support the creation of a number of modern retail units that might help to diversify the comparison goods offer of the town centre and attract more national multiples.

Fleetwood Town Centre

- 5.4.4 Fleetwood Town Centre was found to have a strong convenience sector and a high localised convenience goods retention rate in 2011. The FCRS therefore recommended that there was little scope for additional convenience goods floorspace in the short to medium terms and that the focus should be on maintaining the quality of existing facilities.
- 5.4.5 However, the comparison goods offer of Fleetwood was found to be weak and focused on the lower end of the market. This was considered to result from the proximity of the out-of-centre Freeport Shopping Village. We recommend that the Council should proactively seek to bring forward development that would deliver the requirement for 1,500 to 2,000 sq.m of additional comparison goods floorspace identified within this update study to help the town centre to compete with out-of-centre destinations.

Poulton-le-Fylde Town Centre

- 5.4.6 The 2011 study recommended that the priorities for Poulton-le-Fylde would be to support the redevelopment of the Teanlowe Centre and secure an increase in the retention of convenience goods expenditure through the enhancement or replacement of one of the centre's existing foodstores. Progress has been made here with work commencing on the redevelopment of the shopping centre to provide for a relocated and enlarged Booths store.
- 5.4.7 The comparison goods offer of Poulton was considered to be limited and of a low quality, whilst vacancy rates were found to be high within the Teanlowe Centre (this issue might again be addressed by the Booths development). The requirement for additional comparison retail floorspace at Poulton is less than half than was identified in the FCRS but would still allow for the provision of modern new floorspace within the centre in the period up to 2030. We recommend that the Council should allow for additional comparison sales floorspace of between 1,500 and 2,000 sq. m over the current development plan period.

Other Centres

- 5.4.8 Garstang Town Centre was found to be in good health by the FCRS with a good selection of independent comparison retailers and a quality convenience offer including an attractive Booths foodstore. The 2011 study's recommendations therefore focused on ensuring the continued viability of Garstang's existing offer. Whilst much of Garstang's comparison shopping needs will be met by Lancaster City Centre, this study finds a requirement for between 750 to 1,250 sq. m of additional comparison sales floorspace in the period up to 2030.
- 5.4.9 In terms of Wyre's lower order centres, it could be expected that these centres might collectively provide between 500 and 750 sq. m of new comparison goods sales floorspace in the period up to 2030 (i.e. this is a global figure and not an allowance for each individual centre). However, it is recognised that small-scale facilities to meet local, day-to-day, shopping needs are inherently sustainable and that there may be justification for the expansion of existing district and local centres, or the creation of new centres, to meet the needs of new large-scale developments.

Appendix A Quantitative Assessment of Floorspace Requirements

Spreadsheet 1 - Zoning			
	Postcodes	ZONE	Predominant Local Authority
Blackpool	FY1 1, FY1 2, FY1 3	1	Blackpool
	FY1 4, FY1 5, FY1 6	2	Blackpool
	FY3 0, FY3 7, FY3 8, FY3 9	3	Blackpool
	FY4 1, FY4 2, FY4 3	4	Blackpool
	FY4 4, FY4 5	5	Blackpool
	FY2 0, FY2 9	6	Blackpool
Wyre	FY5 1, FY5 2, FY5 3	7	Wyre
	FY5 4, FY5 5, FY6 7	8	Wyre
	FY7 6, FY7 7, FY7 8	9	Wyre
	FY6 0, FY6 9, PR3 6	10	Wyre
	PR3 0, PR3 1	11	Wyre
Fylde	FY8 1, FY8 2, FY8 3	12	Fylde
	FY8 4, FY8 5	13	Fylde
	PR4 1, PR4 2, PR4 3, FY6 8	14	Fylde
	PR3 5, PR4 0	15	Preston

Spreadsheet 2 - Population Projections

	Fylde						Wyre					Blackpool				TOTAL
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	
Population 2013	13,607	21,781	33,690	26,415	17,854	22,390	31,482	25,881	26,812	12,532	17,454	28,604	16,231	31,754	9,894	336,381
Population 2016	13,866	22,163	34,211	26,663	18,081	22,465	31,581	26,340	27,401	12,552	17,672	28,859	16,371	32,587	10,027	340,839
Population 2021	14,368	22,753	35,368	27,049	18,435	22,499	31,618	27,108	28,574	12,687	18,130	29,505	16,746	33,992	10,259	349,091
Population 2026	14,822	23,313	36,320	27,522	18,720	22,710	31,846	27,901	29,732	12,795	18,524	30,207	17,052	35,396	10,456	357,316
Population 2030	15,227	23,696	37,140	27,804	18,971	22,838	32,045	28,476	30,599	12,854	18,766	30,643	17,263	36,332	10,623	363,277
Change in population 2013 - 2016																
Numeric change	259	382	521	248	227	75	99	459	589	20	218	255	140	833	133	4,458
Percentage change	1.9%	1.8%	1.5%	0.9%	1.3%	0.3%	0.3%	1.8%	2.2%	0.2%	1.2%	0.9%	0.9%	2.6%	1.3%	
Change in population 2016 - 2021																
Numeric change	502	590	1,157	386	354	34	37	768	1,173	135	458	646	375	1,405	232	8,252
Percentage change	3.6%	2.7%	3.4%	1.4%	2.0%	0.2%	0.1%	2.9%	4.3%	1.1%	2.6%	2.2%	2.3%	4.3%	2.3%	
Change in population 2021 - 2026																
Numeric change	454	560	952	473	285	211	228	793	1,158	108	394	702	306	1,404	197	8,225
Percentage change	3.2%	2.5%	2.7%	1.7%	1.5%	0.9%	0.7%	2.9%	4.1%	0.9%	2.2%	2.4%	1.8%	4.1%	1.9%	
Change in population 2026 - 2030																
Numeric change	405	383	820	282	251	128	199	575	867	59	242	436	211	936	167	5,961
Population change	2.7%	1.6%	2.3%	1.0%	1.3%	0.6%	0.6%	2.1%	2.9%	0.5%	1.3%	1.4%	1.2%	2.6%	1.6%	
Change in population 2013 - 2030																
Numeric change	1,620	1,915	3,450	1,389	1,117	448	563	2,595	3,787	322	1,312	2,039	1,032	4,578	729	26,896
Percentage change	11.9%	8.8%	10.2%	5.3%	6.3%	2.0%	1.8%	10.0%	14.1%	2.6%	7.5%	7.1%	6.4%	14.4%	7.4%	

Notes:

(1) Population data is ONS based and sourced from Experian MMG (2012).

Spreadsheet 3 - Comparison Goods Expenditure (Per Capita)

	Fylde						Wyre					Blackpool				AVERAGE
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	
	£	£	£	£	£	£	£	£	£	£	£	£	£	£	£	
2011	1,995	2,022	2,565	2,559	2,585	2,841	2,951	3,205	2,422	2,885	3,150	2,966	3,396	3,093	3,551	2,812
2013	2,123	2,151	2,729	2,723	2,750	3,023	3,140	3,410	2,577	3,070	3,352	3,156	3,613	3,291	3,778	2,992
2016	2,297	2,328	2,953	2,946	2,976	3,271	3,398	3,690	2,789	3,322	3,627	3,415	3,910	3,561	4,089	3,238
2021	2,650	2,686	3,407	3,399	3,434	3,774	3,920	4,257	3,217	3,832	4,184	3,940	4,511	4,108	4,717	3,736
2026	3,057	3,099	3,931	3,921	3,961	4,354	4,522	4,911	3,712	4,421	4,827	4,545	5,204	4,740	5,442	4,310
2030	3,428	3,474	4,407	4,397	4,441	4,881	5,070	5,506	4,161	4,957	5,412	5,096	5,835	5,314	6,101	4,832

Notes:

(1) 2011-based per capita comparison expenditure data by zone is sourced from Experian MMG3 (2012).

(2) The 2011 Experian comparison expenditure data is projected forward using the forecasts provided by Experian in Figure 1a of its Retail Planner Briefing Note 11 (October 2013).

All monetary values are held constant at 2011 prices.

Spreadsheet 4 - Total Comparison Goods Expenditure

	Fylde						Wyre					Blackpool				TOTAL
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	
Total 2013 (inc. SFT)	28.88	46.86	91.94	71.92	49.11	67.68	98.85	88.26	69.09	38.47	58.50	90.27	58.65	104.50	37.38	1,000.36
Deduction for SFT in 2010 of 10.8%	3.12	5.06	9.93	7.77	5.30	7.31	10.68	9.53	7.46	4.15	6.32	9.75	6.33	11.29	4.04	108.04
Total 2013 (exc. SFT)	25.76	41.80	82.01	64.15	43.80	60.37	88.17	78.72	61.63	34.31	52.18	80.52	52.31	93.21	33.34	892.32
Total 2016 (inc. SFT)	31.85	51.60	101.04	78.56	53.82	73.49	107.30	97.20	76.41	41.69	64.09	98.55	64.01	116.05	41.00	1,096.66
Deduction for SFT in 2016 of 13.0%	4.14	6.71	13.13	10.21	7.00	9.55	13.95	12.64	9.93	5.42	8.33	12.81	8.32	15.09	5.33	142.57
Total 2016 (exc. SFT)	27.71	44.89	87.90	68.35	46.82	63.93	93.35	84.56	66.48	36.27	55.76	85.74	55.69	100.96	35.67	954.10
Total 2021 (inc. SFT)	38.07	61.11	120.50	91.94	63.30	84.91	123.94	115.41	91.93	48.62	75.86	116.24	75.54	139.65	48.39	1,295.41
Deduction for SFT in 2021 of 15.7%	5.98	9.59	18.92	14.44	9.94	13.33	19.46	18.12	14.43	7.63	11.91	18.25	11.86	21.93	7.60	203.38
Total 2021 (exc. SFT)	32.10	51.52	101.58	77.51	53.36	71.58	104.48	97.29	77.49	40.99	63.95	97.99	63.68	117.73	40.79	1,092.03
Total 2026 (inc. SFT)	45.31	72.24	142.76	107.93	74.16	98.87	144.01	137.03	110.35	56.57	89.42	137.30	88.74	167.77	56.90	1,529.34
Deduction for SFT in 2026 of 15.9%	7.20	11.49	22.70	17.16	11.79	15.72	22.90	21.79	17.55	8.99	14.22	21.83	14.11	26.68	9.05	243.17
Total 2026 (exc. SFT)	38.11	60.75	120.06	90.77	62.36	83.15	121.11	115.24	92.80	47.57	75.20	115.47	74.63	141.09	47.85	1,286.18
Total 2030 (inc. SFT)	52.19	82.32	163.67	122.24	84.25	111.47	162.47	156.80	127.33	63.71	101.56	156.15	100.72	193.07	64.81	1,742.76
Deduction for SFT in 2030 of 15.9%	8.30	13.09	26.02	19.44	13.40	17.72	25.83	24.93	20.24	10.13	16.15	24.83	16.01	30.70	10.30	277.10
Total 2030 (exc. SFT)	43.89	69.23	137.65	102.80	70.86	93.75	136.64	131.87	107.08	53.58	85.41	131.32	84.71	162.37	54.50	1,465.66

Notes:

(1) The figures in the above table are the product of multiplying the data presented in Spreadsheet 2 (population) by Spreadsheet 3 (per capita comparison goods expenditure), and are in millions of pounds (£m).

(2) A deduction for Special Forms of Trading (SFT) (i.e. mail order, TV and internet shopping and markets) has been applied to the total expenditure figures. This is calculated on the basis of forecasts contained in Appendix 3 of Experian's Retail Planner Briefing Note 11 (October 2013) using the adjusted market shares for SFT that take into account SFT sales from stores.

All monetary values are held constant at 2011 prices.

Spreadsheet 7 - Comparison Commitments

Local Planning Authority	Location / name of scheme	Estimated floorspace (sq.m net)	Estimated turnover from study area (£m - 2016)
Existing Commitments carried over from FCRS			
Blackpool	Talbot Gateway, Blackpool	12,726	47.58
Blackpool	Houndshill Phase II	3,095	10.68
Blackpool	Unit A2, Blackpool Retail Park	813	2.50
Fylde	Lidl, Preston Road, Lytham	257	0.52
A. Sub-total for existing commitments		16,891	61.3
New commitments (retail planning applications approved since completion of FCRS)			
Blackpool	Sainsbury's Talbot Gateway	700	4.84
Blackpool	434 Waterloo Road Blackpool, FY4 4BL	527	1.00
Wyre	Aldi, Crescent West, Thornton Cleveleys.	203	0.84
Wyre	Sainsbury's Land off Fleetwood Road North, Thornton Cleveleys	1,208	8.36
Wyre	Freeport Fleetwood, Anchorage Road, Fleetwood	1,576	8.98
Wyre	Victoria Market, Thornton-Cleveleys	1,003	5.72
Fylde	353 Clifton Drive South/St Anthony's House, St Georges Road, St Annes	373	1.54
Fylde	Electronic Data Systems, Heyhouse Lane, Lytham St Annes	633	3.61
Fylde	Georges Garage, 45 Lytham Road, Warton	97	3.22
B. Sub-total for new commitments		6,320	38.11
Total comparison commitments (A+B)		23,211	99.39

Spreadsheet 8 - Study Area Comparison Goods Capacity (Static Retention)

	2013	2016	2021	2026	2030	2013-2016	2016-2021	2021-2026	2026-2030	2013-2030	
						Incremental Growth	Incremental Growth	Incremental Growth	Incremental Growth	Cumulative Growth	
A Total Population	336,381	340,839	349,091	357,316	363,277	4,458	8,252	8,225	5,961	26,896	
B Total Expenditure £m	892.3	954.1	1,092.0	1,286.2	1,465.66	61.8	137.9	194.1	179.5	573.3	
C Retained expenditure (£m)	669.7	716.1	819.6	965.3	1,100.0	46.4	103.5	145.7	134.7	430.3	
D Retained expenditure %	75%	75%	75%	75%	75%						
E Leakage £m	222.6	238.0	272.4	320.9	365.6	15.4	34.4	48.4	44.8	143.0	
F Inflow £m	134.7	145.7	168.1	194.0	217.5	11.1	22.4	25.8	23.5	82.8	
G Total Turnover of Stores in OCA £m	804.4	804.4	804.4	804.4	804.4						
H Initial Surplus £m/annum (Growth in Retained Expenditure)	0.0	57.4	183.3	354.9	513.1	57.4	125.9	171.5	158.2	513.1	
Claims on Expenditure											
I Sales efficiency growth (existing floorspace) £m	0	37	101.7	171.8	231.7	36.7	65.0	70.0	59.9	231.7	
J Commitments	0	99.4	100.7	102.2	103.8	99.4	1.3	1.5	1.5	103.8	
K Impact on Capacity £m	0	136.1	202.5	274.0	335.4	136.1	66.3	71.5	61.4	335.4	
Summary											
L Initial surplus £m						57.4	125.9	171.5	158.2	513.1	
M Claims on capacity						136.1	66.3	71.5	61.4	335.4	
N Turnover above company benchmarks						0.0					
O RESIDUAL £m						-78.7	59.6	100.0	96.8	177.7	
Blackpool											
P Residual comparison expenditure available						-54.1	40.9	68.7	66.5	122.1	
Q Turnover per sq m (assumed)	6,028					6,303	6,790	7,315	7,764		
R Floorspace Requirement for Blackpool (sq.m net)						-8,577	6,028	9,392	8,562	15,405	
Wyre											
S Residual comparison expenditure available						-16.2	12.3	20.6	20.0	36.6	
T Turnover per sq m (assumed)	4,250					4,444	4,788	5,158	5,556		
U Floorspace Requirement for Wyre (sq.m net)						-3,652	2,566	3,999	3,592	6,505	
Fylde											
V Residual comparison expenditure available						-8.4	6.4	10.7	10.3	19.0	
W Turnover per sq m (assumed)	4,250					4,444	4,788	5,158	5,556		
X Floorspace Requirement for Fylde (sq.m net)						-1,891	1,329	2,071	1,860	3,369	
						Total	Total	Total	Total		
										Total Requirement (inc. oversupply)	
Y Floorspace Requirement for FCSB area (sq.m net)						-14,119	9,923	15,461	14,014	25,279	
Growth rates used for existing traders (row J), commitments (row K) and turnover per sq.m of floorspace sales efficiency growth (row P) as follows:						2013-16	1.50%	per annum			
						2016+	1.50%	per annum			

Spreadsheet 9 - Convenience Goods Expenditure (Per Capita)

	Fylde						Wyre					Blackpool				AVERAGE
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	
	£	£	£	£	£	£	£	£	£	£	£	£	£	£	£	
2011	1,690	1,713	1,864	1,893	1,901	2,064	2,057	2,088	1,855	2,091	2,096	2,101	2,211	2,056	2,131	1,987
2013	1,670	1,693	1,842	1,870	1,878	2,039	2,032	2,063	1,833	2,066	2,071	2,076	2,185	2,031	2,106	1,964
2016	1,680	1,703	1,853	1,882	1,889	2,052	2,045	2,075	1,844	2,078	2,083	2,088	2,198	2,044	2,118	1,975
2021	1,748	1,772	1,928	1,958	1,966	2,135	2,128	2,160	1,919	2,163	2,168	2,173	2,287	2,127	2,204	2,056
2026	1,819	1,844	2,006	2,038	2,046	2,222	2,214	2,247	1,997	2,251	2,256	2,261	2,380	2,213	2,294	2,139
2030	1,878	1,904	2,071	2,104	2,112	2,294	2,286	2,320	2,061	2,324	2,329	2,335	2,457	2,285	2,368	2,208

Notes:

(1) 2011-based per capita convenience expenditure data by zone is sourced from Experian MMG3 (2012).

(2) The 2011 Experian comparison expenditure data is projected forward using the forecasts provided by Experian in Figures 1a and 1b of its Retail Planner Briefing Note 11 (October 2013).

All monetary values are held constant at 2011 prices.

Spreadsheet 10 - Total Convenience Goods Expenditure

	Fylde						Wyre					Blackpool				TOTAL
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	
Total 2013 (inc. SFT)	22.72	36.86	62.05	49.41	33.53	45.66	63.98	53.39	49.14	25.89	36.15	59.38	35.46	64.51	20.83	658.96
Deduction for SFT in 2013 of 2.5%	0.57	0.92	1.55	1.24	0.84	1.14	1.60	1.33	1.23	0.65	0.90	1.48	0.89	1.61	0.52	16.47
Total 2013 (exc. SFT)	22.15	35.94	60.50	48.17	32.70	44.52	62.38	52.06	47.91	25.24	35.24	57.89	34.57	62.89	20.31	642.48
Total 2016 (inc. SFT)	23.29	37.74	63.38	50.17	34.16	46.09	64.57	54.66	50.52	26.09	36.82	60.27	35.98	66.59	21.24	671.56
Deduction for SFT in 2016 of 3.2%	0.75	1.21	2.03	1.61	1.09	1.47	2.07	1.75	1.62	0.83	1.18	1.93	1.15	2.13	0.68	21.49
Total 2016 (exc. SFT)	22.55	36.53	61.35	48.56	33.07	44.61	62.50	52.92	48.90	25.25	35.64	58.34	34.83	64.46	20.56	650.07
Total 2021 (inc. SFT)	25.12	40.31	68.19	52.96	36.25	48.03	67.27	58.55	54.83	27.44	39.31	64.12	38.30	72.29	22.61	715.57
Deduction for SFT in 2021 of 4.6%	1.16	1.85	3.14	2.44	1.67	2.21	3.09	2.69	2.52	1.26	1.81	2.95	1.76	3.33	1.04	32.92
Total 2021 (exc. SFT)	23.96	38.46	65.05	50.53	34.58	45.82	64.18	55.85	52.30	26.18	37.50	61.17	36.54	68.96	21.57	682.65
Total 2026 (inc. SFT)	26.96	42.99	72.87	56.08	38.31	50.45	70.51	62.71	59.37	28.80	41.79	68.31	40.58	78.33	23.98	762.04
Deduction for SFT in 2026 of 5.1%	1.19	1.89	3.21	2.47	1.69	2.22	3.10	2.76	2.61	1.27	1.84	3.01	1.79	3.45	1.06	33.53
Total 2026 (exc. SFT)	25.78	41.09	69.67	53.61	36.62	48.23	67.41	59.95	56.75	27.53	39.95	65.31	38.80	74.89	22.93	728.51
Total 2030 (inc. SFT)	28.60	45.11	76.93	58.49	40.08	52.38	73.25	66.07	63.08	29.87	43.71	71.54	42.41	83.01	25.16	799.68
Deduction for SFT in 2030 of 5.6%	1.60	2.53	4.31	3.28	2.24	2.93	4.10	3.70	3.53	1.67	2.45	4.01	2.38	4.65	1.41	44.78
Total 2030 (exc. SFT)	26.99	42.58	72.62	55.21	37.83	49.45	69.15	62.37	59.54	28.20	41.26	67.54	40.04	78.36	23.75	754.89

Notes:
(1) The figures in the above table are the product of multiplying the data presented in Spreadsheet 2 (population) by Spreadsheet 12 (per capita convenience expenditure), and are in millions of pounds (£m).
(2) A deduction for Special Forms of Trading (SFT) (i.e. mail order, TV and internet shopping and markets) has been applied to the total expenditure figures. This is calculated on the basis of forecasts contained in Appendix 3 of Experian's Retail Planner Briefing Note 11 (October 2013) using the adjusted market shares for SFT that take into account SFT sales from stores.
All monetary values are held constant at 2011 prices.

Spreadsheet 13 - Convenience Commitments

Local Planning Authority	Location / Name of scheme	Estimated floorspace (sq.m net)	Estimated turnover from study area (£m - 2016)
Existing Commitments carried over from FCRS			
Blackpool	Former Royal PH Marton Drive	251	3.12
Blackpool	Former Belle Vue Garage Whitegate Drive	321	3.57
Fylde	353 Clifton Drive South/St Anthony's House, St Georges Road, St Annes	939	5.96
Fylde	Lidl, Preston Road, Lytham	1,029	3.14
A. Sub-total for existing commitments		2,540	15.8
New commitments (retail planning applications approved since completion of FCRS)			
Blackpool	Former Blockbuster, Cornelian Way	274	3.36
Blackpool	Sainsbury's Talbot Gateway	3,388	42.43
Wyre	Booths, Teanlowe Centre	564	4.84
Wyre	Tesco Express, Marsh Mill, Thornton Cleveleys	383	4.76
Wyre	Aldi, Crescent West, Thornton Cleveleys	814	5.17
Wyre	Sainsbury's, Land off Fleetwood Road North, Thornton Cleveleys	3,437	43.05
Wyre	Tesco Express, Garstang Road East, Poulton-le-Fylde	320	3.98
Fylde	Georges Garage, 45 Lytham Road, Warton	260	3.22
Fylde	Electronic Data Systems, Heyhouse Lane, Lytham St Annes	1,302	16.08
B. Sub-total for new commitments		8860	126.9
Total convenience goods commitments (A+B)		11400	142.7

Spreadsheet 14 - Study Area Convenience Goods Capacity (Static Retention)

		2013	2016	2021	2026	2030	2013-2016	2016-2021	2021-2026	2026-2030	2013-2030
							Incremental Growth	Incremental Growth	Incremental Growth	Incremental Growth	Cumulative Growth
A	Total Population	336,381	340,839	349,091	357,316	363,277	4,458	8,252	8,225	5,961	26,896
B	Total Expenditure £m	642.5	650.1	682.7	728.5	754.89	8	33	46	26	112.4
C	Retained expenditure (£m)	609.7	616.9	647.8	691.3	716.3	7.2	30.9	43.5	25.0	106.7
D	Retained expenditure %	95%	95%	95%	95%	95%					
E	Leakage £m	32.8	33.2	34.9	37.2	38.6	0.4	1.7	2.3	1.3	5.7
F	Inflow £m	53.7	54.0	56.2	58.5	60.4	0.3	2.2	2.3	1.9	6.7
G	Total Turnover of Stores in OCA £m	663.3	663.3	663.3	663.3	663.3					
H	Initial Surplus £m/annum (Growth in Retained Expenditure)	0	7.5	40.6	86.4	113.4	7.5	33.1	45.8	26.9	113.4
Claims on Expenditure											
I	Sales efficiency growth (existing floorspace) £m	0	0	10.0	20.2	28.4	0.0	10.0	10.2	8.2	28.4
J	Commitments	0	142.7	143.1	143.6	144.2	142.7	0.5	0.4	0.6	144.2
K	Impact on Capacity £m	0	142.7	153.2	163.7	172.6	142.7	10.5	10.6	8.9	172.6
Summary											
L	Initial surplus £m						7.5	33.1	45.8	26.9	113.4
M	Claims on capacity						142.7	10.5	10.6	8.9	172.6
N	Turnover above company benchmarks						99.5				99.5
O	RESIDUAL £m						-35.7	22.6	35.2	18.1	40.3
P	Turnover per sq m (assumed)	13,500					13,500	13,704	13,911	14,078	
							Total	Total	Total	Total	
											Total requirement
Q Floorspace Requirement for FCSB area (sq.m net)							2013-16	2016-21	2021-26	2026-30	(inc. oversupply)
							-2,642	1,652	2,531	1,284	2,825
Growth rates used for existing traders (row J), commitments (row K) and turnover per sq.m of floorspace sales efficiency growth (row P) as follows:								2013-16	0.00%	per annum	
								2016+	0.30%	per annum	