Nathaniel Lichfield & Partners
Planning. Design. Economics.

Pendle Retail Study

Pendle Borough Council

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41080

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Registered Office:
14 Regent's Wharf
All Saints Street
London N1 9RL

Contents

1.0 Introduction

Background

1.1 Nathaniel Lichfield & Partners (NLP) were commissioned by Pendle Borough Council to prepare a Retail Capacity Study in 2007. Due to recent changes in population and the continued effects of the recession on retail expenditure levels and forecasts, NLP has been commissioned to undertake a partial update focusing on the retail floorspace projections.

1.2 It is not considered necessary to update the findings of the previous study in relation to commercial leisure provisions, the network of centres, centre health checks and centre boundaries, because these remain relatively up to date and the conclusions remain robust.

Report Structure

1.3 Section 2 of this report summarises recent relevant changes to the retail capacity assessments and outlines retail trends. Section 3 sets out the updated retail capacity and quantitative need assessment. Section 4 provides the recommendations and conclusions.

2.0 Recent Changes and Trends

The Need for the Study Update

2.1 The Council's previous Retail Capacity Study (2007) provided projections up to 2021 and these figures now need to be updated and rolled forward to 2033.

2.2 Central government guidance in PPS4 has been replaced by the NPPF and this will have implications for plan making and development control decisions.

The National Planning Policy Framework

2.3 The 2010 study update was based on the guidance set out in PPS4: 'Planning for Sustainable Growth' published in December 2009. This guidance has now been superseded by the NPPF published by the Department for Communities and Local Government on 27 March 2012. It sets out the Government's planning policies for England and replaces all previously issued Planning Policy Statements (PPSs) and Planning Policy Guidance Notes (PPGs) with a single national planning policy document.

2.4 At the heart of the NPPF is a presumption in favour of sustainable development, which should be seen as a golden thread running through both plan-making and decision-taking. In terms of plan-making this means that (para. 14):

- Local planning authorities should positively seek opportunities to meet development needs of their area;
- Local Plans should meet objectively assessed needs, with sufficient flexibility to adapt to rapid change, unless:
  - any adverse impacts of doing so would significantly and demonstrably outweigh the benefits, when assessed against the policies in this Framework taken as a whole; or
  - specific policies in this Framework indicate development should be restricted.

2.5 All plans should be based upon and reflect the presumption in favour of sustainable development, with clear policies that will guide how the presumption should be applied locally (para. 15).

2.6 A set of 12 core land-use planning principles should underpin both plan-making and decision-taking (para. 17), including:

- proactively drive and support sustainable economic development to deliver the homes, business and industrial units, infrastructure and thriving local places that the country needs. Every effort should be made objectively to meet the needs of an area, and respond positively to wider opportunities for growth. Plans should take account of market signals, such as land prices and housing affordability, and set out a clear strategy for allocating sufficient land which is suitable for development in their area, taking account of the needs of residential and business communities;
- take account of the different roles and character of different areas, promoting the vitality of main urban areas;
- encourage the effective use of land by reusing land that has been previously developed (brownfield land), provided that it is not of high environmental value.

2.7 Local Planning Authorities should plan proactively to meet the development needs of business and support an economy fit for the 21st century (para. 20).

2.8 In terms of plan making, the NPPF (para. 161) states that Local Planning Authorities should use their evidence base to assess:

- the need for land or floorspace for economic development, including both quantitative and qualitative needs for all foreseeable types of economic activity over the plan period, including retail and leisure development.
- the role and function of town centres and the relationship between them, including any trends in the performance of centres.
- the capacity of existing centres to accommodate new development.

2.9 In terms of retail development, the NPPF states (para. 23) that planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. In drawing up Local Plans, local planning authorities should:

- recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;
- define a network and hierarchy of centres that is resilient to anticipated future economic changes;
- define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations;
- promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;
- retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;

- allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability. Local planning authorities should therefore undertake an assessment of the need to expand town centres to ensure a sufficient supply of suitable sites;
- allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge of centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre;
- set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;
- recognise that residential development can play an important role in ensuring the vitality of centres and set out policies to encourage residential development on appropriate sites; and
- where town centres are in decline, local planning authorities should plan positively for their future to encourage economic activity.

2.10 Applications for retail and town centre uses that are not in an existing centre and are not in accordance with an up-to-date Local Plan will be assessed against NPPF policies and the key sequential and impact tests.

2.11 In terms of the sequential test, the policy requirements are largely unchanged from PPS4. Applications for main town centre uses should be located in town centres, then in edge of centre locations and only if suitable sites are not available should out of centre sites be considered. When considering edge and out of centre proposals, preference should be given to accessible sites that are well connected to the town centre. Both applicants and local planning authorities should demonstrate flexibility on issues such as format and scale (para. 24).

2.12 The NPPF states that Local Planning Authorities should require an impact assessment for applications for retail, leisure and office development outside of town centres, which are not in accordance with an up-to-date development plan and are over a proportionate, locally set floorspace threshold. If there is not a locally set threshold, the default threshold is 2,500 sq m (para. 26). This should include an assessment of:

- the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and
- the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area, up to five years from the time the application is made. For major schemes where the full impact will not be realised in five years, the impact should be assessed up to ten years from the time the application is made.

2.13 Where an application fails to satisfy the sequential test or is likely to have a significant adverse impact on one of more of the above factors, it should be refused (para. 27).

Rural Policy

2.14 The NPPF states that in relation to the rural economy, local and neighbourhood plans should promote the retention and development of local services and community facilities in villages, such as local shops, meeting places, sports venues, cultural buildings, public houses and places of worship (para. 28).

The Economic Downturn

2.15 The economic downturn is still having a significant impact on the retail sector. A number of national operators have failed or reduced the number of stores, leaving major voids within centres and retail parks (e.g. Clinton Cards, Woolworths, MFI, Land of Leather, Borders, Game, Firetrap, Peacocks, La Senza, Past Times, Barratts and Habitat). Many town centre development schemes have been delayed and the demand for traditional retail warehouse operators has also been affected. Even some of the main food store operators have seen a reduction in growth.

2.16 Projecting expenditure levels within this study update takes into account the economic downturn, particularly in the short term. Careful consideration is needed to establish the appropriate level of expenditure growth to be adopted over the plan period. This study takes a long term view for the LDF period recognising the cyclical nature of expenditure growth. Trends in population growth, home shopping/internet sales and growth in turnover efficiency also need to be carefully considered. We believe the study should take a balanced approach.

Retail Trends

2.17 A revised assessment of the need for retail facilities in Borough of Pendle is set out in Section 3.0 of this report. This section provides an overview of national tends within the retail sector.

Expenditure Growth

2.18 Historic retail trends indicate that expenditure has consistently grown in real terms, generally following a cyclical growth trend. The underlying trend shows consistent growth and this trend is expected to continue in the future. However, the post 2007 economic downturn is expected to lead to limited growth in the short term.

2.19 In the past expenditure growth has fuelled the growth in retail floorspace, including major out-of-centre development, particularly in the 1980’s and 1990’s. The economic downturn suggests that rates of growth between 2000 and 2007 are unlikely to be achieved in the short term. However the underlying trend over the medium and long terms is expected to lead to a need for further retail floorspace. We anticipate these national trends will be mirrored in the region.

New Forms of Retailing

2.20 Home and electronic shopping have emerged in recent years as an alternative to more traditional shopping facilities, with the increasing growth in the use of personal computers and the internet. Trends within this sector will have implications for retailing within Pendle. The growth in home computing, internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street. Growth in home shopping needs to be considered in Pendle.

2.21 On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains a relatively small percentage of total retail expenditure (Experian Briefing Note 9 September 2011). Recent trends suggest continued strong growth in this sector, from 5.1% of retail transactions in 2008 to 9.6%% in 2011 (Experian Briefing Note 9), but there is still uncertainty about its longer-term prospects and the potential effects on the high street. Experian's Retail Planning Note 9 states:

"Growth in internet shopping has exceeded our expectations. Online spending increased in real terms by 18% in 2010 in line with the forecast in Retail Planner 8 of August 2010. However, 2011 has seen expansion continue at this impressive pace, despite the squeeze on consumers, rather than easing as in our previous forecast. We retain our assumption that non-store retailing will increase at a faster pace than total retail sales in the next few years, but we now expect that market share holds constant from 2018 (rather than 2016). Our assumption that after 2018 internet shopping grows in line with total retail sales reflects the maturing of the market as the number of computer-literate adults reaches saturation point."

2.22 In addition to new forms of retailing, retail operators have responded to changes in customers' requirements. For example, extended opening hours and Sunday trading increased significantly in the 1990s. In addition some major food operators have introduced smaller store formats capable of being accommodated within town centres, such as the Tesco Metro, Sainsbury's Central/Local store and Marks and Spencer's Simply Foods formats. Food operators have also entered the local convenience store market, for example Tesco Express stores and convenience stores linked with petrol filling stations. The entrance of European discount food operators such as Aldi and Lidl has also been rapid during the last decade.

2.23 Food store operators have also implemented a programme of store extensions, particularly Tesco, Sainsbury's and Asda. These operators, faced with limited growth in food expenditure, have attempted to increase the sale of non-food products within their food stores, including clothing and electrical goods.

2.24 Comparison retailers have also responded to recent market conditions. The bulky goods retail warehouse sector has rationalised and there have been a number of mergers. For example there are now fewer DIY operators and B&Q and Homebase have scaled down or closed some of their stores. This may be due to the recent downturn in the housing market, which has been historically linked to the success of DIY store operators.

2.25 Other traditional high street retailers have sought out-of-centre stores, for example Boots and Poundstretcher. Matalan has also opened numerous discount clothing stores across the country.

2.26 The economic downturn has had, and is likely to continue to have, an impact on the retail sector. The effects of the recession may continue to have an impact on shop vacancy levels in the Borough. The demand for premises within the bulky goods sector, i.e. furniture, carpets, electrical and DIY goods are particularly weak at present.

2.27 Within town centres, some high street multiple comparison retailers changed their format. High street national multiples have increasingly sought larger modern shop units (over 200 sq m/2,150 sq ft) with an increasing polarisation of activity into the larger regional and sub-regional centres, and out of centre retail parks. The continuation of these trends will influence future operator requirements in Pendle with smaller vacant units in town centres becoming less attractive for new occupiers and existing retailers looking to relocate into larger units in higher order centres or on retail parks.

2.28 Operator demand for new space has decreased during the recession, and of those national multiples looking for space many prefer to locate in larger centres i.e. Burnley, Blackburn and Keighley. Demand from multiples within the Borough’s town centres is likely to be weaker, which will affect the appropriate strategies for individual centres.

3.0 Retail Capacity Update

Introduction

3.1 This section assesses the quantitative scope for new retail floorspace in Pendle up to 2033. It sets out the methodology adopted for this analysis and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison shopping.

3.2 All monetary values expressed in this analysis are at 2010 prices unless stated otherwise. The previous 2007 study was based on 2005 prices and therefore the figures are not directly comparable.

Methodology and Data

3.3 The quantitative analysis is based on a study area defined for the six main shopping centres within the Borough - Nelson, Colne, Barnoldswick, Brierfield, Barrowford and Earby as defined in the 2007 retail study.

3.4 A number of different scenarios have been tested reflecting different population and expenditure projections as well as the impact of current food store applications.

Consumer Expenditure

3.5 The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's latest local consumer expenditure estimates for comparison and convenience goods for the study area for the year 2010 have been obtained.

3.6 Experian's EBS (Experian Business Strategies) national expenditure information has been used to forecast expenditure within the study area in the short term (2010 to 2013). For projections beyond 2013 we have adopted Experian's forecast growth rates (0.55% per annum for convenience goods and 3% for comparison). We believe that the EBS growth rates reflect the current economic downturn and provide an appropriate growth rate for the short and long term.

Population

3.7 Sub-National Population Projections (SNPP) 2010 take account of net changes for births, deaths and internal and international migration. For Pendle Borough the level of projected net international in-migration is significant and is based on past trends between 2005 and 2010. The Council considers these past trends are not typical and as such do not provide an accurate basis for making long term projections. We have projected study area population to 2033 on a baseline growth scenario which removes the growth attributable to international net in migration from the projections. A high population growth scenario which includes international migration has also been tested as a sensitivity test.

3.8 The study area population for 2012 to 2033 on the basis of these two scenarios is set out in Tables 1.3 and 1.4 in Appendix 1.

Available Spending

3.9 The levels of available spending are derived by combining the population in Tables 1.3 and 1.4 with per capita spending figures (Table 1.5 for convenience goods and Table 2.2 for comparison goods).

3.10 Experian's Goods Based Expenditure (GBE) estimates include projections for Special Forms of Trading (SFT). SFT includes other forms of retail expenditure not spent in shops e.g. mail order sales, some internet sales, vending machines, party plan selling, market stalls and door to door selling. SFT needs to be excluded from retail assessments because it relates to expenditure not spent in shops and does not have a direct relationship to the demand for retail floorspace. The growth in home computing, Internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street.

3.11 For both convenience and comparison spending, a reduction has been made for SFT such as mail order, e-tail (where not related to high street retailing) and vending machines.

3.12 Experian SFT projections have been used to exclude expenditure that will not directly impact on the demand for retail floorspace. Based on Experian data SFT (including all SFT but excluding e-tailing by high street retailers) is 3.7% and 8.8% of total convenience and comparison goods expenditure respectively in 2010. The projections provided by Experian suggest that these percentages could increase to 5.9% and 12.7% by 2016. The amount of e-tail expenditure through non-retail businesses is expected to increase significantly in proportional terms, but as a proportion of total expenditure this sector is expected to remain relatively insignificant for the foreseeable future.

3.13 As a consequence of growth in population and per capita spending, baseline convenience goods spending within the study area is forecast to increase from £216.74 million in 2012 to £244.06 million in 2033, as shown in Table 1.6 in Appendix 1.

3.14 Comparison goods spending is forecast to increase from £295.48 million in 2012 to £550.92 million in 2033, as shown in Table 2.3 in Appendix 2. These figures relate to real growth and exclude inflation.

Existing Spending Patterns 2012

Convenience Shopping

3.15 The results of the household shopper questionnaire survey, undertaken by NEMS Market Research (a survey research company) in 2006 have been used to estimate existing shopping patterns within the study area in Table 1.8. Adjustments have been made to these 2006 market shares in Table 1.9 to take account of major changes in convenience goods provision since the 2006 survey was undertaken. The main change is the completion of a new Sainsbury's food store in Colne of 4,181 sq m net.

3.16 Table 1.10 indicates that the level of convenience goods expenditure attracted to shops/stores in the Pendle Borough in 2012 is estimated to be £160.12 million. Most of this expenditure £137.96 million comes from residents living in the Borough i.e. excluding inflow and expenditure from Zones 11, 12, 13 and 17 which principally lie outside the Borough boundary. Pendle's market share of total convenience expenditure in the Borough as a whole is estimated to be about 87% (£137.96 million of £157.97 million). The zones and postcode sectors are shown below.

Zone 1	BB8 0
Zone 2	BB8 7
Zone 3	BB8 8
Zone 4	BB8 9
Zone 5	BB9 0
Zone 6	BB9 5
Zone 7	BB9 6
Zone 8	BB9 7
Zone 9	BB9 8
Zone 10	BB9 9
Zone 11	BB10 1
Zone 12	BB10 2
Zone 13	BB10 3
Zone 14	BB12 9
Zone 15	BB18 5
Zone 16	BB18 6
Zone 17	BD23 3

3.17 Company average turnover to sales floorspace densities are available for major food store operators and are compiled by Verdict Research (a leading authority on retailing in the UK). Company average sales densities (adjusted to exclude petrol and comparison sales and include VAT) have been applied to the sales area of the large food stores listed in Table 11 in Appendix 1, and a benchmark turnover for each store has been calculated. This benchmark turnover is not necessarily the actual turnover of the food store, but it does provide a useful benchmark for assessing existing shopping patterns and the adequacy of current floorspace in quantitative terms.

3.18 The estimated convenience goods sales areas have been derived from a combination of the Experian's Goad data (retail floorspace data derived from Goad Plans of town centres across the country) and the Institute of Grocery Distribution (IGD). Estimates for comparison sales floorspace within large food stores has been deducted from the figures in Table 1A in Appendix 1, for consistency with the use of goods based expenditure figures.

3.19 Average sales densities are not widely available for small convenience shops, particularly independent retailers. An average sales density of between £3,500 - £4,000 per sq m has been adopted for small convenience shops. The total benchmark turnover of existing convenience sales floorspace within Pendle is £156.32 million.

3.20 The assessment of shopping patterns suggests that the level of convenience goods expenditure available to facilities in Pendle in 2012 is £154.34 million (Table 1.10). These figures suggest that collectively convenience retail facilities in Pendle are trading at around average levels.

Comparison Shopping

3.21 Table 2.7 indicates that the level of comparison goods expenditure attracted to shops/stores in the Pendle Borough in 2012 is estimated to be £129.61 million. Most of this expenditure £112.75 million comes from residents living in the Borough i.e. excluding inflow and expenditure from Zones 11, 12, 13 and 17 which principally lie outside the Borough boundary. Pendle's market share of total comparison expenditure in the Borough as a whole is estimated to be about 52% (£112.75 million of £215.07 million) as derived from figures in Table 2.7, as such 48% of comparison expenditure is spent elsewhere.

3.22 Company average sales densities are only available for a selection of multiple retailers. Available information indicates that the sales densities amongst comparison retailers vary significantly.

3.23 The current level of comparison expenditure attracted to facilities in Pendle is £129.61 million (Table 2.7), which suggests an average turnover density of around £2,873 per sq m net, based on 45,047 sq m net in total (Table 2.1 in Appendix 2). This is a relatively low average turnover density. We would normally anticipate turnover densities between £4,000 to £6,000 per sq m net. However the Pendle figure is distorted by Boundary Mill, Pendle Village Mill (formerly Junction 12 Outlet) and B&Q. These stores are large out of centre outlets that account for over half the sales floorspace in the Borough. On balance, comparison shopping facilities within Pendle appear to be trading satisfactorily, based on the average sales density implied by the household survey and the nature of retail floorspace in Pendle.

Future Spending Patterns

3.24 New retail floorspace is likely to have an impact on shopping patterns and may alter the base year market shares recorded in the 2006 household survey.

3.25 There is an extant commitment for a Booths food store in Barrowford. This store has a net retail floorspace of 725 sq m. It is expected to draw trade from Barrowford and the surrounding hinterland, and will reduce leakage out of the village to larger stores in Nelson and Colne. Revised convenience goods market shares for 2018, which take account of this commitment, are set out in Table 1.11.

3.26 There are three planning applications for large food stores that have yet to be determined. If large food store provision is improved in Barnoldswick then the market share of the town will increase. The potential for Barnoldswick to increase its market share of convenience goods expenditure has been assessed as a separate scenario at Table 1.20, although the food store proposals are not included within the baseline scenario as these applications have yet to be determined. The Council has commissioned DLP Planning to undertake an assessment of these food store proposals.

3.27 There are a number of comparison goods floorspace commitments, particularly in Colne on the former Boundary Mill site, which are likely to reduce leakage and increase Colne's market share of comparison goods expenditure. Adjusted market shares for 2018 have been assumed in Table 2.6 to take account of these commitments.

Quantitative Capacity for Convenience Floorspace

3.28 The level of available convenience goods expenditure in the baseline scenario in 2018, 2023, 2028 and 2033 is shown at Tables 1.12 to 1.15 in Appendix 1.

3.29 The total level of available convenience goods expenditure available for shops in Pendle between 2012 and 2033 is summarised in Table 1.16. This represents the baseline expenditure and population growth scenarios. The benchmark turnover of existing convenience floorspace and food store commitments has been subtracted from the estimates of available expenditure to provide surplus expenditure estimates.

3.30 Table 1.16 assumes that the benchmark turnover of convenience floorspace will not increase during 2012 to 2033 due to the recession. Experian suggest there could be a reduction in convenience efficiency in the short term, then 0.4% per annum growth is recommended between 2014 to 2018 and 0.2% thereafter (Source: Experian Retail Planner Briefing (September 2011)). The reduction in turnover efficiency in the short term is expected to cancel out longer term growth, therefore no change in convenience goods turnover efficiency is assumed in this study.

3.31 The estimates of surplus/deficit expenditure are converted into floorspace projections in Table 1.18, Appendix 1. These floorspace projections relate only to convenience sales floorspace and exclude any comparison sales within food stores. The projections assume that a mix of different types of floorspace would be provided i.e. large food superstores in the higher order settlements of Nelson and Colne, and smaller supermarkets and small shops in the lower order settlements of Barnoldswick, Brierfield, Earby and Barrowford. These projections are over and above commitments.

3.32 In the study area as a whole there is currently a small deficit of convenience expenditure (-£3.15 million as shown in Table 1.16 column 2). As a result of the commitment in Barrowford, there will continue to be a deficit of expenditure capacity across the Borough as a whole by 2018, although there will be small level of capacity emerging in Nelson, Colne and Brierfield.

3.33 By 2033, there will be £11.74 million of expenditure capacity in both Nelson and Colne, as shown in Table 1.16 Column 6.

3.34 As indicated above, the Council has received three planning applications for new food stores in Barnoldswick (Tesco, Aldi and a proposal with an unnamed operator). A separate report has been prepared by DLP Planning Ltd on behalf of Pendle Borough Council which provides a critique of the Aldi and Tesco applications in Barnoldswick.

3.35 We have assessed the potential for Barnoldswick to increase its convenience goods expenditure retention, and the adjusted market shares are set out in Table 1.20.

Quantitative Capacity for Comparison Floorspace

3.36 We have projected the level of comparison goods expenditure available to shops in Pendle Borough at 2018, 2023, 2028 and 2033 as shown in Tables 2.8 – 2.11 in Appendix 2, taking account the impact developments implemented since 2006 will have on shopping patterns.

3.37 Future available expenditure is compared with the projected turnover of existing and retail facilities within the Borough in order to provide estimates of surplus expenditure, as shown in Table 2.12 based on the baseline population projections. The projections for the higher population growth scenario are shown in Table 2.13.

3.38 Trends indicate that comparison retailers historically will achieve some growth in trading efficiency. This is a function of spending growing at faster rates than new floorspace provision and retailers' ability to absorb real increases in their costs by increasing their turnover to floorspace ratio. Tables 2.12 and 2.13 therefore assume that the existing turnover of comparison floorspace will increase its benchmark turnover in real terms. A growth rate of 1.7% per annum is adopted as recommended by Experian.

Retail Floorspace Projections

3.39 Surplus convenience expenditure has been converted into floorspace projections in Table 1.18 for the baseline scenario and Table 1.19 for the high population growth scenario.

3.40 The limited expenditure capacity in the short and medium term results in a low convenience goods floorspace projection during the plan period, and therefore there is no need to allocate sites for new food stores under the baseline scenario.

3.41 Surplus comparison expenditure has been converted into comparison floorspace projections at the foot of Table 2.12 in Appendix 2 for the baseline population scenario and Table 2.13 for the high population scenario.

3.42 For the baseline scenario, surplus expenditure at 2018 could support around 4,142 sq m net of comparison goods floorspace in the Borough as a whole, and 8,889 sq m net up to 2033, as shown in Table 2.12.

3.43 These floorspace projections assume that new shopping facilities within Pendle can help to maintain the principal towns' current market share of expenditure within the study area, recognising that other competing centres will improve in the future. There are a number of issues that may influence the scope for new retail floorspace and the appropriate location for this development, as follows:

- major retail developments in competing centres;
- the re-occupation of vacant retail floorspace;
- the availability of land to accommodate new development;
- the reliability of long term expenditure projections, particularly after 2021;
- the effect of internet/home shopping on the demand for retail property; or
- the level of retail operator demand for floorspace.

3.44 Projections up to 2018 are based on up-to-date forecasts, which take into account the effects of the recession. The medium and long term floorspace projections (beyond 2023) should be treated with caution and should only be used as a broad guide, particularly when translated into the development plan allocations or when used to guide development management decisions. Long term forecasts may be subject to change due to unforeseen circumstances. Projected surplus expenditure is primarily attributable to projected growth in spending per capita. Long term projections should be monitored and kept under review.

3.45 These projections relate to Class A1 retail uses only. Based on the typical mix of uses within town centres derived from Goad Plan information, it may be reasonable to assume there will be scope for a further 15% floorspace that can be occupied by Class A2 to A5 uses and Class A1 non-retail services.

4.0 Conclusions

4.1 This report provides an update of the Borough wide needs assessment for retail development in Pendle and should be read alongside the 2007 Study. The principal conclusions of the analysis contained within this study are summarised below.

Meeting Shopping Needs in Pendle

4.2 The NPPF states that local planning authorities should assess the quantitative and qualitative needs for land or floorspace for retail development over the plan period.

4.3 When planning for growth in their town centres, local planning authorities should allocate a range of suitable sites to meet the scale and type of retail development needed. It is important that the needs for retail and other main town centre uses are met in full and not compromised by limited site availability.

4.4 Long term forecasts up to 2033 may be more susceptible to change, due to unforeseen circumstances. Projected surplus expenditure beyond 2018 is attributable to projected growth in spending per capita, extrapolated from past growth projections, as well as population growth. If the growth in expenditure is lower than that forecast then the scope for additional space will reduce. Long term projections should be monitored and kept under review. The implications of major retail development within and surrounding the Borough should also be monitored along with the affect proposals may have on the demand for additional development in Pendle.

Retail Floorspace Projections

4.5 The expenditure projections in this study take into account home shopping, because SFT have been excluded. The study assumes that SFT will increase in the future, including the growth of internet shopping. However, the impact of internet growth on the demand for retail floorspace is unclear. Some retailers' home delivery and internet services utilise existing stores, therefore, internet sales will not always significantly reduce the demand for shop floorspace. In addition, some of the growth in Internet sales may divert trade away from mail order companies rather than retail operators. Overall the long term impact of home shopping on expenditure projections is uncertain.

4.6 The quantitative assessment of the potential capacity for new retail floorspace suggests that there is scope for new retail development within Pendle. The baseline projections suggest new floorspace (over and above commitments) should be distributed as follows:

Class A1 Retail Floorspace Projections – Baseline Population Growth

Location	Sales Floorspace (sq.m. net)		
	Convenience	Comparison	Total
Up to 2023			
Barnoldswick	-	246	**246**
Barrowford	-	111	**111**
Brierfield	68	192	**260**
Colne	75	1,888	**2,143**
Earby	-	18	**18**
Nelson	408	1,479	**1,886**
Total	**551**	**3,933**	**4,663**
Up to 2033			
Barnoldswick	-	251	**251**
Barrowford	-	557	**557**
Brierfield	88	434	**521**
Colne	496	4,266	**4,942**
Earby	-	40	**40**
Nelson	678	3,342	**4,020**
Total	**1,262**	**8,889**	**10,330**

4.7 The figures above do **not** take into account any improvements to large food store provision at Barnoldswick. If Barnoldswick can increase its retention of convenience goods expenditure then there will be additional scope for convenience goods floorspace in the town.

4.8 A separate report has been prepared by DLP Planning Ltd on behalf of Pendle Borough Council which provides a critique of the Aldi and Tesco applications in Barnoldswick.

Convenience Goods Floorspace Projections – with increased market shares in Barnoldswick

Location	Sales Floorspace (sq.m. net)
Up to 2023	
Barnoldswick	2,198
Barrowford	-
Brierfield	68
Colne	-
Earby	-
Nelson	322
Total	**2,588**
Up to 2033	
Barnoldswick	2,333
Barrowford	-
Brierfield	88
Colne	-
Earby	-
Nelson	589
Total	**3,010**

Appendix 1 Convenience Goods Capacity

Table 1.1 - Convenience Floorspace and Benchmark Turnover (2010 prices)

Town	Store	Net Sales Floorspace Sq M	Convenience % Sales Floorspace	Convenience Floorspace Sq M Net	Turnover Density £ per Sq M	Total Convenience Turnover £M
Nelson						
	Tesco, Leeds Road	1,610	85%	1,369	£12,432	£17.01
	Farmfoods	300	100%	300	£4,000	£1.20
	Other convenience shops	397	100%	397	£4,000	£1.59
	Lidl, Rigby Street	929	85%	790	£3,030	£2.39
	Morrisons, Pendle Street	3,243	80%	2,594	£12,400	£32.17
	Nelson Total	**6,479**		**5,450**	**£9,976**	**£54.36**
Colne						
	Co-op, Market St	265	95%	252	£7,279	£1.83
	Tesco Express, Market St	186	95%	177	£12,432	£2.20
	Farmfoods	300	100%	300	£4,000	£1.20
	One Stop	150	100%	150	£4,000	£0.60
	Other convenience shops	987	100%	987	£4,000	£3.95
	Asda, Corporation Street	3,840	70%	2,688	£14,187	£38.13
	Sainsbury's, Windy Bank	4,181	75%	3,136	£12,599	£39.51
	Aldi, North Valley Retail Park	650	65%	423	£6,148	£2.60
	Colne Total	**10,559**		**8,112**	**£11,097**	**£90.02**
Barnoldswick						
	Co-op, Rainhall Road	755	95%	717	£7,279	£5.22
	One-Stop	143	95%	136	£4,000	£0.54
	Other convenience shops	400	100%	400	£3,500	£1.40
	Barnoldswick Total	**1,298**		**1,253**	**£5,717**	**£7.16**
Brierfield						
	Co-op, Colne Road	180	80%	144	£7,279	£1.05
	Other convenience shops	204	100%	204	£3,500	£0.71
	Brierfield Total	**384**		**348**	**£5,064**	**£1.76**
Earby						
	Co-op, Victoria Road	224	90%	202	£7,279	£1.47
	Other convenience shops	96	100%	96	£3,500	£0.34
	Earby Total	**320**		**298**	**£6,060**	**£1.80**
Barrowford						
	Convenience shops	346	100%	346	£3,500	£1.21
	Barrowford Total	**346**		**346**	**£3,500**	**£1.21**
	GRAND TOTAL	**19,386**		**15,806**	**£9,890**	**£156.32**
		Comparison Sales Floorspace in Food Stores Sq M Net				**3,580**

Sources: IGD Food Store Directory
Experian Goad
Verdict Report on Grocery Retailers 2011

Table 1.2 - Proposed Convenience Floorspace and Benchmark Turnover (2010 prices)

Town	Store	Net Sales Floorspace Sq M	Convenience % Sales Floorspace	Convenience Floorspace Sq M Net	Turnover Density £ per Sq M	Total Convenience Turnover £M
Barnoldswick						
	Aldi, Skipton Road	700	85%	595	£6,148	£3.66
	Tesco, L&P Springs Site	2,005	77%	1,541	£12,432	£19.16
	Barnoldswick Total	**2,705**		**2,136**	**£10,682**	**£22.82**
		Comparison Sales Floorspace in Food Stores Sq M Net				569

Commitments

Town	Store	Net Sales Floorspace Sq M	Convenience % Sales Floorspace	Convenience Floorspace Sq M Net	Turnover Density £ per Sq M	Total Convenience Turnover £M
Barrowford	Booths foodstore	725	95%	689	£12,000	£8.27

Table 1.3 : Population Projections - Baseline (Zero Net International Migration)

Zone Area	2001	2012	2018	2023	2028	2033
Zone 1	6,110	6,206	6,322	6,411	6,411	6,391
Zone 2	4,594	4,666	4,754	4,821	4,821	4,805
Zone 3	4,767	4,842	4,933	5,002	5,002	4,986
Zone 4	7,490	7,608	7,750	7,859	7,859	7,834
Zone 5	10,836	11,006	11,213	11,371	11,371	11,334
Zone 6	6,817	6,924	7,054	7,153	7,153	7,130
Zone 7	4,893	4,970	5,063	5,134	5,134	5,118
Zone 8	7,757	7,879	8,027	8,140	8,140	8,114
Zone 9	7,473	7,590	7,733	7,842	7,842	7,816
Zone 10	6,532	6,635	6,759	6,854	6,854	6,832
Zone 11	8,894	9,034	9,203	9,333	9,333	9,303
Zone 12	10,769	10,938	11,143	11,300	11,300	11,264
Zone 13	7,966	8,091	8,243	8,359	8,359	8,332
Zone 14	3,056	3,104	3,162	3,207	3,207	3,196
Zone 15	7,657	7,777	7,923	8,035	8,035	8,009
Zone 16	9,514	9,663	9,845	9,983	9,983	9,951
Zone 17	3,964	4,026	4,102	4,160	4,160	4,146
	119,089	**120,958**	**123,228**	**124,963**	**124,963**	**124,563**

Sources: *2001 Census Population*
ONS 2010 Sub-National Population Projections

Table 1.4 : Population Projections - High Growth (International Migration)

Zone Area	2001	2012	2018	2023	2028	2033
Zone 1	6,110	6,254	6,500	6,720	6,863	6,973
Zone 2	4,594	4,702	4,888	5,052	5,161	5,243
Zone 3	4,767	4,879	5,072	5,243	5,355	5,440
Zone 4	7,490	7,666	7,969	8,237	8,414	8,548
Zone 5	10,836	11,091	11,528	11,917	12,172	12,367
Zone 6	6,817	6,977	7,253	7,497	7,658	7,780
Zone 7	4,893	5,008	5,206	5,381	5,496	5,584
Zone 8	7,757	7,940	8,253	8,531	8,714	8,853
Zone 9	7,473	7,649	7,951	8,219	8,395	8,529
Zone 10	6,532	6,686	6,949	7,184	7,338	7,455
Zone 11	8,894	9,103	9,462	9,781	9,991	10,150
Zone 12	10,769	11,023	11,457	11,843	12,097	12,290
Zone 13	7,966	8,154	8,475	8,761	8,948	9,091
Zone 14	3,056	3,128	3,251	3,361	3,433	3,488
Zone 15	7,657	7,837	8,146	8,421	8,601	8,739
Zone 16	9,514	9,738	10,122	10,463	10,687	10,858
Zone 17	3,964	4,057	4,217	4,360	4,453	4,524
	119,089	**121,893**	**126,699**	**130,971**	**133,775**	**135,911**

Sources: *2001 Census Population*
ONS 2010 Sub-National Population Projections

Table 1.5: Convenience Goods Expenditure Per Capita (2010 Prices)

Expenditure Per Capita	2012	2018	2023	2028	2033
Zone 1	£1,757	£1,789	£1,830	£1,869	£1,921
Zone 2	£2,115	£2,153	£2,203	£2,250	£2,313
Zone 3	£1,959	£1,994	£2,041	£2,084	£2,142
Zone 4	£1,850	£1,883	£1,927	£1,968	£2,023
Zone 5	£1,799	£1,831	£1,874	£1,914	£1,967
Zone 6	£1,637	£1,666	£1,705	£1,741	£1,790
Zone 7	£2,135	£2,173	£2,224	£2,271	£2,335
Zone 8	£1,311	£1,334	£1,366	£1,395	£1,433
Zone 9	£1,686	£1,716	£1,756	£1,794	£1,844
Zone 10	£1,580	£1,608	£1,646	£1,681	£1,728
Zone 11	£1,605	£1,633	£1,672	£1,707	£1,755
Zone 12	£1,953	£1,988	£2,035	£2,078	£2,136
Zone 13	£1,927	£1,961	£2,007	£2,050	£2,107
Zone 14	£2,203	£2,243	£2,295	£2,344	£2,409
Zone 15	£1,830	£1,863	£1,906	£1,947	£2,001
Zone 16	£1,781	£1,813	£1,855	£1,894	£1,947
Zone 17	£1,818	£1,850	£1,894	£1,934	£1,988

Sources:

Experian local estimates for 2010 convenience goods expenditure per capita

Excluding special forms of trading (SFT) - 4.6% in 2012 increasing to 7% in 2028

Experian Business Strategies - recommended forecast growth rates up to 2013

Mid-point of Experian growth forecast and ultra long term trend beyond 2013 (0.55% per annum)

Table 1.6: Baseline Convenience Goods Expenditure (£M - 2010 Prices)

Zone	2012	2018	2023	2028	2033
Zone 1	£10.90	£11.31	£11.73	£11.98	£12.28
Zone 2	£9.87	£10.23	£10.62	£10.85	£11.11
Zone 3	£9.49	£9.84	£10.21	£10.42	£10.68
Zone 4	£14.07	£14.59	£15.15	£15.47	£15.85
Zone 5	£19.80	£20.53	£21.31	£21.76	£22.29
Zone 6	£11.33	£11.75	£12.20	£12.45	£12.76
Zone 7	£10.61	£11.00	£11.42	£11.66	£11.95
Zone 8	£10.33	£10.71	£11.12	£11.35	£11.63
Zone 9	£12.80	£13.27	£13.77	£14.07	£14.41
Zone 10	£10.48	£10.87	£11.28	£11.52	£11.81
Zone 11	£14.50	£15.03	£15.60	£15.93	£16.33
Zone 12	£21.36	£22.15	£23.00	£23.48	£24.06
Zone 13	£15.59	£16.16	£16.78	£17.14	£17.56
Zone 14	£6.84	£7.09	£7.36	£7.52	£7.70
Zone 15	£14.23	£14.76	£15.31	£15.64	£16.03
Zone 16	£17.21	£17.85	£18.52	£18.91	£19.38
Zone 17	£7.32	£7.59	£7.88	£8.04	£8.24
Total	**£216.74**	**£224.74**	**£233.25**	**£238.20**	**£244.06**

Table 1.7: High Growth Convenience Goods Expenditure (£M - 2010 Prices)

Zone	2012	2018	2023	2028	2033
Zone 1	£10.99	£11.63	£12.30	£12.83	£13.40
Zone 2	£9.95	£10.52	£11.13	£11.61	£12.13
Zone 3	£9.56	£10.11	£10.70	£11.16	£11.65
Zone 4	£14.18	£15.00	£15.87	£16.56	£17.29
Zone 5	£19.95	£21.11	£22.33	£23.30	£24.33
Zone 6	£11.42	£12.08	£12.78	£13.33	£13.93
Zone 7	£10.69	£11.31	£11.97	£12.48	£13.04
Zone 8	£10.41	£11.01	£11.65	£12.16	£12.69
Zone 9	£12.90	£13.64	£14.43	£15.06	£15.73
Zone 10	£10.56	£11.17	£11.82	£12.33	£12.88
Zone 11	£14.61	£15.45	£16.35	£17.05	£17.81
Zone 12	£21.53	£22.78	£24.10	£25.14	£26.25
Zone 13	£15.71	£16.62	£17.58	£18.34	£19.16
Zone 14	£6.89	£7.29	£7.71	£8.05	£8.40
Zone 15	£14.34	£15.18	£16.05	£16.75	£17.49
Zone 16	£17.34	£18.35	£19.41	£20.24	£21.14
Zone 17	£7.38	£7.80	£8.26	£8.61	£8.99
Total	**£218.41**	**£231.07**	**£244.46**	**£255.00**	**£266.30**

Table 1.8: **Convenience Shopping Penetration Rates 2006**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	% Inflow
Nelson																		
Farmfoods, Admiral Centre	0%	0%	0%	0%	0%	2%	0%	2%	0%	2%	0%	0%	0%	0%	0%	0%	0%	1%
Iceland, Admiral Centre	0%	0%	0%	0%	1%	1%	1%	1%	1%	3%	0%	0%	0%	0%	0%	0%	0%	1%
Kwik Save, Leeds Road	0%	0%	0%	0%	5%	1%	3%	4%	3%	8%	0%	0%	0%	0%	0%	0%	0%	1%
Other Local Shops	0%	1%	0%	0%	14%	2%	1%	10%	8%	17%	0%	2%	0%	0%	0%	0%	0%	1%
Lidl, Rigby Street	0%	0%	0%	2%	0%	1%	1%	2%	1%	1%	2%	1%	0%	3%	0%	0%	0%	2%
Morrisons, Pendle St	14%	14%	13%	13%	48%	30%	46%	59%	28%	46%	5%	13%	3%	39%	11%	5%	0%	5%
Nelson Total	**14%**	**15%**	**13%**	**15%**	**68%**	**37%**	**52%**	**78%**	**41%**	**77%**	**7%**	**16%**	**3%**	**42%**	**11%**	**5%**	**0%**	
Colne																		
Co-op, Market Street	15%	1%	1%	7%	0%	0%	2%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	1%
Tesco, Market Street	12%	6%	5%	7%	1%	0%	0%	0%	1%	0%	0%	0%	0%	5%	0%	0%	1%	1%
Farmfoods, Market Street	4%	0%	4%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	1%	0%	1%
Other Local Shops	11%	13%	7%	14%	1%	0%	0%	1%	1%	0%	0%	0%	0%	3%	1%	1%	0%	1%
Asda, Corporation Street	36%	35%	50%	38%	18%	16%	21%	16%	46%	18%	1%	3%	0%	14%	22%	24%	9%	5%
Aldi, North Valley Retail Park	5%	15%	6%	13%	1%	0%	3%	0%	1%	0%	0%	0%	0%	0%	2%	4%	1%	2%
Colne Total	**83%**	**70%**	**73%**	**80%**	**21%**	**16%**	**26%**	**17%**	**49%**	**18%**	**1%**	**3%**	**0%**	**22%**	**26%**	**31%**	**11%**	
Barnoldswick																		
Co-op, Rainhall Road	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	18%	16%	6%	1%
Other Local Shops	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	10%	6%	2%	1%
Barnoldswick Total	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**28%**	**22%**	**8%**	
Brierfield																		
Co-op, Colne Road	0%	0%	0%	0%	0%	9%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%
Other Local Shops	0%	0%	0%	0%	0%	6%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	1%
Brierfield Total	**0%**	**0%**	**0%**	**0%**	**0%**	**15%**	**0%**	**1%**	**0%**	**0%**	**0%**	**1%**	**0%**	**0%**	**0%**	**0%**	**0%**	
Earby																		
Co-op, Victoria Road	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	13%	14%	0%	1%
Other Local Shops	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	2%	1%	1%
Earby Total	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**0%**	**13%**	**16%**	**1%**	
Barrowford																		
Local Shops	0%	1%	0%	0%	0%	0%	8%	1%	5%	0%	0%	0%	0%	5%	1%	0%	1%	1%
Barrowford Total	**0%**	**1%**	**0%**	**0%**	**0%**	**0%**	**8%**	**1%**	**5%**	**0%**	**0%**	**0%**	**0%**	**5%**	**1%**	**0%**	**1%**	
Other Study Area	**0%**	**1%**	**1%**	**0%**	**1%**	**2%**	**0%**	**0%**	**0%**	**0%**	**13%**	**9%**	**13%**	**0%**	**0%**	**0%**	**7%**	**0%**
Study Area Sub-Total	**97%**	**87%**	**87%**	**95%**	**90%**	**70%**	**86%**	**97%**	**95%**	**95%**	**21%**	**29%**	**16%**	**69%**	**79%**	**74%**	**28%**	**n/a**
Burnley	2%	12%	6%	4%	10%	28%	12%	2%	3%	5%	78%	69%	84%	26%	7%	5%	2%	n/a
Skipton	0%	1%	2%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	10%	21%	59%	n/a
Other	1%	0%	5%	1%	0%	2%	2%	1%	2%	0%	1%	2%	0%	5%	4%	0%	11%	n/a
Market Share Total	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***n/a***

Source: *Market shares based on NEMS household survey 2006*

Table 1.9: Convenience Shopping Penetration Rates 2012 (adjusted)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	% Inflow
Nelson	12%	13%	11%	13%	60%	32%	46%	69%	36%	68%	6%	14%	3%	37%	4%	4%	0%	5%
Colne	85%	78%	81%	83%	33%	33%	39%	27%	55%	28%	3%	6%	1%	33%	41%	41%	20%	5%
Barnoldswick	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	17%	16%	8%	1%
Brierfield	0%	0%	0%	0%	0%	13%	0%	1%	0%	0%	0%	1%	0%	0%	1%	0%	0%	1%
Earby	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	3%	4%	1%	1%
Barrowford	0%	1%	0%	0%	0%	0%	8%	1%	5%	0%	0%	0%	0%	5%	1%	0%	1%	1%
Other Study Area	0%	1%	1%	0%	1%	2%	0%	0%	0%	0%	13%	9%	13%	0%	0%	0%	7%	0%
Study Area Sub-Total	**97%**	**93%**	**93%**	**96%**	**94%**	**80%**	**93%**	**98%**	**96%**	**96%**	**22%**	**30%**	**17%**	**75%**	**67%**	**65%**	**37%**	**n/a**
Outflow	**3%**	**7%**	**7%**	**4%**	**6%**	**20%**	**7%**	**2%**	**4%**	**4%**	**78%**	**70%**	**83%**	**25%**	**33%**	**35%**	**63%**	**n/a**
Market Share Total	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***n/a***

Source: *Market shares based on:*
NEMS household survey 2006 with NLP adjustments to reflect changes for Zones 1 to 14 and 17
DJS Research survey June 2011 and Savill's RIA for Zones 15 and 16

Table 1.10: Baseline Convenience Expenditure 2012 £Million

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	% Inflow	Total
Expenditure	**£10.90**	**£9.87**	**£9.49**	**£14.07**	**£19.80**	**£11.33**	**£10.61**	**£10.33**	**£12.80**	**£10.48**	**£14.50**	**£21.36**	**£15.59**	**£6.84**	**£14.23**	**£17.21**	**£7.32**		
Nelson	£1.31	£1.28	£1.04	£1.83	£11.88	£3.63	£4.88	£7.13	£4.61	£7.13	£0.87	£2.99	£0.47	£2.53	£0.57	£0.69	£0.00	£2.78	£55.61
Colne	£9.27	£7.70	£7.68	£11.68	£6.53	£3.74	£4.14	£2.79	£7.04	£2.94	£0.43	£1.28	£0.16	£2.26	£5.84	£7.06	£1.46	£4.32	£86.30
Barnoldswick	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£2.42	£2.75	£0.59	£0.06	£5.82
Brierfield	£0.00	£0.00	£0.00	£0.00	£0.00	£1.47	£0.00	£0.10	£0.00	£0.00	£0.00	£0.21	£0.00	£0.00	£0.14	£0.00	£0.00	£0.02	£1.95
Earby	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.43	£0.69	£0.07	£0.01	£1.20
Barrowford	£0.00	£0.10	£0.00	£0.00	£0.00	£0.00	£0.85	£0.10	£0.64	£0.00	£0.00	£0.00	£0.00	£0.34	£0.14	£0.00	£0.07	£0.02	£2.27
Other Study Area	£0.00	£0.10	£0.09	£0.00	£0.20	£0.23	£0.00	£0.00	£0.00	£0.00	£1.88	£1.92	£2.03	£0.00	£0.00	£0.00	£0.51	£0.00	£6.96
Sub-Total	**£10.58**	**£9.18**	**£8.82**	**£13.51**	**£18.61**	**£9.07**	**£9.87**	**£10.12**	**£12.29**	**£10.06**	**£3.19**	**£6.41**	**£2.65**	**£5.13**	**£9.54**	**£11.19**	**£2.71**	**£7.21**	**£160.12**
Outflow	£0.33	£0.69	£0.66	£0.56	£1.19	£2.27	£0.74	£0.21	£0.51	£0.42	£11.31	£14.95	£12.94	£1.71	£4.70	£6.02	£4.61	**n/a**	**£63.82**
Total	**£10.90**	**£9.87**	**£9.49**	**£14.07**	**£19.80**	**£11.33**	**£10.61**	**£10.33**	**£12.80**	**£10.48**	**£14.50**	**£21.36**	**£15.59**	**£6.84**	**£14.23**	**£17.21**	**£7.32**	**£7.21**	**£223.95**

Table 1.11: **Convenience Shopping Penetration Rates (adjusted to include Barrowford Commitment)**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	% Inflow
Nelson	12%	13%	11%	13%	60%	32%	41%	69%	32%	68%	6%	14%	3%	34%	4%	4%	0%	5%
Colne	85%	78%	81%	83%	33%	33%	36%	27%	44%	28%	3%	6%	1%	31%	41%	41%	20%	5%
Barnoldswick	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	17%	16%	8%	1%
Brierfield	0%	0%	0%	0%	0%	13%	0%	1%	0%	0%	0%	1%	0%	0%	1%	0%	0%	1%
Earby	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	3%	4%	1%	1%
Barrowford	0%	1%	0%	0%	0%	0%	18%	1%	20%	0%	0%	0%	0%	10%	1%	0%	1%	1%
Other Study Area	0%	1%	1%	0%	1%	2%	0%	0%	0%	0%	13%	9%	13%	0%	0%	0%	7%	0%
Study Area Sub-Total	**97%**	**93%**	**93%**	**96%**	**94%**	**80%**	**95%**	**98%**	**96%**	**96%**	**22%**	**30%**	**17%**	**75%**	**67%**	**65%**	**37%**	**n/a**
Outflow	**3%**	**7%**	**7%**	**4%**	**6%**	**20%**	**5%**	**2%**	**4%**	**4%**	**78%**	**70%**	**83%**	**25%**	**33%**	**35%**	**63%**	**n/a**
Market Share Total	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***n/a***

Source: *Market shares based on:*
NEMS household survey 2006 with NLP adjustments to reflect changes for Zones 1 to 14 and 17
DJS Research survey June 2011 and Savill's RIA for Zones 15 and 16

Table 1.12: Baseline Convenience Expenditure 2018 £Million (With commitments)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	% Inflow	Total
Expenditure	**£11.31**	**£10.23**	**£9.84**	**£14.59**	**£20.53**	**£11.75**	**£11.00**	**£10.71**	**£13.27**	**£10.87**	**£15.03**	**£22.15**	**£16.16**	**£7.09**	**£14.76**	**£17.85**	**£7.59**		
Nelson	£1.36	£1.33	£1.08	£1.90	£12.32	£3.76	£4.51	£7.39	£4.25	£7.39	£0.90	£3.10	£0.48	£2.41	£0.59	£0.71	£0.00	£2.82	£56.30
Colne	£9.61	£7.98	£7.97	£12.11	£6.77	£3.88	£3.96	£2.89	£5.84	£3.04	£0.45	£1.33	£0.16	£2.20	£6.05	£7.32	£1.52	£4.37	£87.46
Barnoldswick	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£2.51	£2.86	£0.61	£0.06	£6.03
Brierfield	£0.00	£0.00	£0.00	£0.00	£0.00	£1.53	£0.00	£0.11	£0.00	£0.00	£0.00	£0.22	£0.00	£0.00	£0.15	£0.00	£0.00	£0.02	£2.02
Earby	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.44	£0.71	£0.08	£0.01	£1.25
Barrowford	£0.00	£0.10	£0.00	£0.00	£0.00	£0.00	£1.98	£0.11	£2.65	£0.00	£0.00	£0.00	£0.00	£0.71	£0.15	£0.00	£0.08	£0.06	£5.83
Other Study Area	£0.00	£0.10	£0.10	£0.00	£0.21	£0.24	£0.00	£0.00	£0.00	£0.00	£1.95	£1.99	£2.10	£0.00	£0.00	£0.00	£0.53	£0.00	£7.22
Sub-Total	**£10.97**	**£9.52**	**£9.15**	**£14.01**	**£19.30**	**£9.40**	**£10.45**	**£10.49**	**£12.74**	**£10.43**	**£3.31**	**£6.65**	**£2.75**	**£5.32**	**£9.89**	**£11.60**	**£2.81**	**£7.34**	**£166.12**
Outflow	£0.34	£0.72	£0.69	£0.58	£1.23	£2.35	£0.55	£0.21	£0.53	£0.43	£11.72	£15.51	£13.42	£1.77	£4.87	£6.25	£4.78	**n/a**	**£65.96**
Total	**£11.31**	**£10.23**	**£9.84**	**£14.59**	**£20.53**	**£11.75**	**£11.00**	**£10.71**	**£13.27**	**£10.87**	**£15.03**	**£22.15**	**£16.16**	**£7.09**	**£14.76**	**£17.85**	**£7.59**	**£7.34**	**£232.08**

Table 1.13: Convenience Expenditure 2023 £Million

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	% Inflow	Total
Expenditure	**£11.73**	**£10.62**	**£10.21**	**£15.15**	**£21.31**	**£12.20**	**£11.42**	**£11.12**	**£13.77**	**£11.28**	**£15.60**	**£23.00**	**£16.78**	**£7.36**	**£15.31**	**£18.52**	**£7.88**		
Nelson	£1.41	£1.38	£1.12	£1.97	£12.79	£3.90	£4.68	£7.67	£4.41	£7.67	£0.94	£3.22	£0.50	£2.50	£0.61	£0.74	£0.00	£2.92	£58.44
Colne	£9.97	£8.28	£8.27	£12.57	£7.03	£4.02	£4.11	£3.00	£6.06	£3.16	£0.47	£1.38	£0.17	£2.28	£6.28	£7.59	£1.58	£4.54	£90.77
Barnoldswick	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£2.60	£2.96	£0.63	£0.06	£6.26
Brierfield	£0.00	£0.00	£0.00	£0.00	£0.00	£1.59	£0.00	£0.11	£0.00	£0.00	£0.00	£0.23	£0.00	£0.00	£0.15	£0.00	£0.00	£0.02	£2.10
Earby	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.46	£0.74	£0.08	£0.01	£1.29
Barrowford	£0.00	£0.11	£0.00	£0.00	£0.00	£0.00	£2.06	£0.11	£2.75	£0.00	£0.00	£0.00	£0.00	£0.74	£0.15	£0.00	£0.08	£0.06	£6.06
Other Study Area	£0.00	£0.11	£0.10	£0.00	£0.21	£0.24	£0.00	£0.00	£0.00	£0.00	£2.03	£2.07	£2.18	£0.00	£0.00	£0.00	£0.55	£0.00	£7.50
Sub-Total	**£11.38**	**£9.88**	**£9.49**	**£14.54**	**£20.03**	**£9.76**	**£10.85**	**£10.90**	**£13.22**	**£10.83**	**£3.43**	**£6.90**	**£2.85**	**£5.52**	**£10.26**	**£12.04**	**£2.91**	**£7.62**	**£172.41**
Outflow	£0.35	£0.74	£0.71	£0.61	£1.28	£2.44	£0.57	£0.22	£0.55	£0.45	£12.17	£16.10	£13.92	£1.84	£5.05	£6.48	£4.96	**n/a**	**£68.46**
Total	**£11.73**	**£10.62**	**£10.21**	**£15.15**	**£21.31**	**£12.20**	**£11.42**	**£11.12**	**£13.77**	**£11.28**	**£15.60**	**£23.00**	**£16.78**	**£7.36**	**£15.31**	**£18.52**	**£7.88**	**£7.62**	**£240.87**

Table 1.14: Convenience Expenditure 2028 £Million

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	% Inflow	Total
Expenditure	**£11.98**	**£10.85**	**£10.42**	**£15.47**	**£21.76**	**£12.45**	**£11.66**	**£11.35**	**£14.07**	**£11.52**	**£15.93**	**£23.48**	**£17.14**	**£7.52**	**£15.64**	**£18.91**	**£8.04**		
Nelson	£1.44	£1.41	£1.15	£2.01	£13.06	£3.99	£4.78	£7.83	£4.50	£7.83	£0.96	£3.29	£0.51	£2.56	£0.63	£0.76	£0.00	£2.98	£59.68
Colne	£10.19	£8.46	£8.44	£12.84	£7.18	£4.11	£4.20	£3.07	£6.19	£3.23	£0.48	£1.41	£0.17	£2.33	£6.41	£7.75	£1.61	£4.63	£92.70
Barnoldswick	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£2.66	£3.03	£0.64	£0.06	£6.39
Brierfield	£0.00	£0.00	£0.00	£0.00	£0.00	£1.62	£0.00	£0.11	£0.00	£0.00	£0.00	£0.23	£0.00	£0.00	£0.16	£0.00	£0.00	£0.02	£2.15
Earby	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.47	£0.76	£0.08	£0.01	£1.32
Barrowford	£0.00	£0.11	£0.00	£0.00	£0.00	£0.00	£2.10	£0.11	£2.81	£0.00	£0.00	£0.00	£0.00	£0.75	£0.16	£0.00	£0.08	£0.06	£6.18
Other Study Area	£0.00	£0.11	£0.10	£0.00	£0.22	£0.25	£0.00	£0.00	£0.00	£0.00	£2.07	£2.11	£2.23	£0.00	£0.00	£0.00	£0.56	£0.00	£7.65
Sub-Total	**£11.62**	**£10.09**	**£9.69**	**£14.85**	**£20.46**	**£9.96**	**£11.08**	**£11.13**	**£13.51**	**£11.06**	**£3.50**	**£7.04**	**£2.91**	**£5.64**	**£10.48**	**£12.29**	**£2.98**	**£7.78**	**£176.07**
Outflow	£0.36	£0.76	£0.73	£0.62	£1.31	£2.49	£0.58	£0.23	£0.56	£0.46	£12.43	£16.44	£14.22	£1.88	£5.16	£6.62	£5.07	**n/a**	**£69.91**
Total	**£11.98**	**£10.85**	**£10.42**	**£15.47**	**£21.76**	**£12.45**	**£11.66**	**£11.35**	**£14.07**	**£11.52**	**£15.93**	**£23.48**	**£17.14**	**£7.52**	**£15.64**	**£18.91**	**£8.04**	**£7.78**	**£245.98**

Table 1.15: Convenience Expenditure 2033 £Million

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	% Inflow	Total
Expenditure	**£12.28**	**£11.11**	**£10.68**	**£15.85**	**£22.29**	**£12.76**	**£11.95**	**£11.63**	**£14.41**	**£11.81**	**£16.33**	**£24.06**	**£17.56**	**£7.70**	**£16.03**	**£19.38**	**£8.24**		
Nelson	£1.47	£1.44	£1.17	£2.06	£13.38	£4.08	£4.90	£8.02	£4.61	£8.03	£0.98	£3.37	£0.53	£2.62	£0.64	£0.78	£0.00	£3.06	£61.14
Colne	£10.44	£8.67	£8.65	£13.15	£7.36	£4.21	£4.30	£3.14	£6.34	£3.31	£0.49	£1.44	£0.18	£2.39	£6.57	£7.94	£1.65	£4.75	£94.98
Barnoldswick	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£2.72	£3.10	£0.66	£0.07	£6.55
Brierfield	£0.00	£0.00	£0.00	£0.00	£0.00	£1.66	£0.00	£0.12	£0.00	£0.00	£0.00	£0.24	£0.00	£0.00	£0.16	£0.00	£0.00	£0.02	£2.20
Earby	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.48	£0.78	£0.08	£0.01	£1.35
Barrowford	£0.00	£0.11	£0.00	£0.00	£0.00	£0.00	£2.15	£0.12	£2.88	£0.00	£0.00	£0.00	£0.00	£0.77	£0.16	£0.00	£0.08	£0.06	£6.34
Other Study Area	£0.00	£0.11	£0.11	£0.00	£0.22	£0.26	£0.00	£0.00	£0.00	£0.00	£2.12	£2.17	£2.28	£0.00	£0.00	£0.00	£0.58	£0.00	£7.84
Sub-Total	**£11.91**	**£10.34**	**£9.93**	**£15.21**	**£20.96**	**£10.21**	**£11.35**	**£11.39**	**£13.84**	**£11.33**	**£3.59**	**£7.22**	**£2.98**	**£5.78**	**£10.74**	**£12.59**	**£3.05**	**£7.97**	**£180.40**
Outflow	£0.37	£0.78	£0.75	£0.63	£1.34	£2.55	£0.60	£0.23	£0.58	£0.47	£12.73	£16.84	£14.57	£1.93	£5.29	£6.78	£5.19	**n/a**	**£71.63**
Total	**£12.28**	**£11.11**	**£10.68**	**£15.85**	**£22.29**	**£12.76**	**£11.95**	**£11.63**	**£14.41**	**£11.81**	**£16.33**	**£24.06**	**£17.56**	**£7.70**	**£16.03**	**£19.38**	**£8.24**	**£7.97**	**£252.03**

Table 1.16: Surplus Convenince Expenditure 2012 to 2033 £M - Baseline Scenario

Town	2012	2018	2023	2028	2033
Available Expenditure in Study Area					
Nelson	£55.61	£56.30	£58.44	£59.68	£61.14
Colne	£86.30	£87.46	£90.77	£92.70	£94.98
Barnoldswick	£5.82	£6.03	£6.26	£6.39	£6.55
Brierfield	£1.95	£2.02	£2.10	£2.15	£2.20
Earby	£1.20	£1.25	£1.29	£1.32	£1.35
Barrowford	£2.27	£5.83	£6.06	£6.18	£6.34
Total	**£153.16**	**£158.90**	**£164.91**	**£168.42**	**£172.55**
Benchmark Turnover of Existing Facilities					
Nelson	£54.36	£54.36	£54.36	£54.36	£54.36
Colne	£90.02	£90.02	£90.02	£90.02	£90.02
Barnoldswick	£7.16	£7.16	£7.16	£7.16	£7.16
Brierfield	£1.76	£1.76	£1.76	£1.76	£1.76
Earby	£1.80	£1.80	£1.80	£1.80	£1.80
Barrowford	£1.21	£1.21	£1.21	£1.21	£1.21
Total	**£156.31**	**£156.31**	**£156.31**	**£156.31**	**£156.31**
Commitments					
Barrowford (Booths)		**£8.27**	**£8.27**	**£8.27**	**£8.27**
Surplus Expenditure					
Nelson	£1.25	£1.94	£4.08	£5.32	£6.78
Colne	-£3.72	-£2.56	£0.75	£2.68	£4.96
Barnoldswick	-£1.34	-£1.13	-£0.90	-£0.77	-£0.61
Brierfield	£0.19	£0.26	£0.34	£0.39	£0.44
Earby	-£0.60	-£0.55	-£0.51	-£0.48	-£0.45
Barrowford	£1.06	-£3.65	-£3.42	-£3.30	-£3.14
Total	**-£3.15**	**-£5.68**	**£0.33**	**£3.84**	**£7.97**

Table 1.17: Surplus Convenience Expenditure 2012 to 2033 £M - High Population

Town	2012	2018	2023	2028	2033
Available Expenditure in Study Area					
Nelson	£56.04	£57.89	£61.25	£63.89	£66.71
Colne	£86.97	£89.93	£95.13	£99.23	£103.63
Barnoldswick	£5.86	£6.20	£6.56	£6.84	£7.15
Brierfield	£1.97	£2.08	£2.20	£2.30	£2.40
Earby	£1.21	£1.28	£1.35	£1.41	£1.47
Barrowford	£2.29	£6.00	£6.35	£6.62	£6.91
Total	**£154.34**	**£163.38**	**£172.84**	**£180.29**	**£188.28**
Benchmark Turnover of Existing Facilities					
Nelson	£54.36	£54.36	£54.36	£54.36	£54.36
Colne	£90.02	£90.02	£90.02	£90.02	£90.02
Barnoldswick	£7.16	£7.16	£7.16	£7.16	£7.16
Brierfield	£1.76	£1.76	£1.76	£1.76	£1.76
Earby	£1.80	£1.80	£1.80	£1.80	£1.80
Barrowford	£1.21	£1.21	£1.21	£1.21	£1.21
Total	**£156.31**	**£156.31**	**£156.31**	**£156.31**	**£156.31**
Commitments					
Barrowford (Booths)		**£8.27**	**£8.27**	**£8.27**	**£8.27**
Surplus Expenditure					
Nelson	£1.68	£3.53	£6.89	£9.53	£12.35
Colne	-£3.05	-£0.09	£5.11	£9.21	£13.61
Barnoldswick	-£1.30	-£0.96	-£0.60	-£0.32	-£0.01
Brierfield	£0.21	£0.32	£0.44	£0.54	£0.64
Earby	-£0.59	-£0.52	-£0.45	-£0.39	-£0.33
Barrowford	£1.08	-£3.48	-£3.13	-£2.86	-£2.57
Total	**-£1.97**	**-£1.20**	**£8.26**	**£15.71**	**£23.70**

Table 1.18: Convenience Floorspace Projections 2012 to 2033 (£Million)

Town	2012	2018	2023	2028	2033
Surplus Expenditure					
Nelson	£1.25	£1.94	£4.08	£5.32	£6.78
Colne	-£3.72	-£2.56	£0.75	£2.68	£4.96
Barnoldswick	-£1.34	-£1.13	-£0.90	-£0.77	-£0.61
Brierfield	£0.19	£0.26	£0.34	£0.39	£0.44
Earby	-£0.60	-£0.55	-£0.51	-£0.48	-£0.45
Barrowford	£1.06	-£3.65	-£3.42	-£3.30	-£3.14
Total	**-£3.15**	**-£5.68**	**£0.33**	**£3.84**	**£7.97**
Tunrover Density Per Sq M Net					
Nelson	£10,000	£10,000	£10,000	£10,000	£10,000
Colne	£10,000	£10,000	£10,000	£10,000	£10,000
Barnoldswick	£5,000	£5,000	£5,000	£5,000	£5,000
Brierfield	£5,000	£5,000	£5,000	£5,000	£5,000
Earby	£5,000	£5,000	£5,000	£5,000	£5,000
Barrowford	£5,000	£5,000	£5,000	£5,000	£5,000
Sales Floorspace Projections Sq M Net					
Nelson	125	194	408	532	678
Colne	-372	-256	75	268	496
Barnoldswick	-269	-226	-180	-154	-122
Brierfield	38	53	68	77	88
Earby	-120	-111	-102	-96	-90
Barrowford	212	-729	-685	-659	-629
Total	**-384**	**-1,074**	**-416**	**-32**	**421**

Table 1.19: Convenience Floorspace Projections 2012 to 2033 (High Pop) (£Million)

Town	2012	2018	2023	2028	2033
Surplus Expenditure					
Nelson	£1.68	£3.53	£6.89	£9.53	£12.35
Colne	-£3.05	-£0.09	£5.11	£9.21	£13.61
Barnoldswick	-£1.30	-£0.96	-£0.60	-£0.32	-£0.01
Brierfield	£0.21	£0.32	£0.44	£0.54	£0.64
Earby	-£0.59	-£0.52	-£0.45	-£0.39	-£0.33
Barrowford	£1.08	-£3.48	-£3.13	-£2.86	-£2.57
Total	**-£1.97**	**-£1.20**	**£8.26**	**£15.71**	**£23.70**
Tunrover Density Per Sq M Net					
Nelson	£10,000	£10,000	£10,000	£10,000	£10,000
Colne	£10,000	£10,000	£10,000	£10,000	£10,000
Barnoldswick	£5,000	£5,000	£5,000	£5,000	£5,000
Brierfield	£5,000	£5,000	£5,000	£5,000	£5,000
Earby	£5,000	£5,000	£5,000	£5,000	£5,000
Barrowford	£5,000	£5,000	£5,000	£5,000	£5,000
Sales Floorspace Projections Sq M Net					
Nelson	168	353	689	953	1,235
Colne	-305	-9	511	921	1,361
Barnoldswick	-260	-192	-120	-63	-3
Brierfield	41	64	88	107	128
Earby	-118	-104	-89	-78	-65
Barrowford	216	-696	-627	-572	-513
Total	**-257**	**-584**	**452**	**1,269**	**2,143**

Table 1.20: Future Convenience Shopping Penetration Rates (increase market shares in Barnoldswick)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	% Inflow
Nelson	12%	12%	10%	12%	60%	32%	40%	69%	32%	68%	6%	14%	3%	34%	3%	3%	0%	5%
Colne	85%	74%	77%	79%	33%	33%	35%	27%	44%	28%	3%	6%	1%	31%	13%	13%	16%	5%
Barnoldswick	0%	5%	5%	5%	0%	0%	2%	0%	0%	0%	0%	0%	0%	0%	70%	70%	25%	5%
Brierfield	0%	0%	0%	0%	0%	13%	0%	1%	0%	0%	0%	1%	0%	0%	1%	0%	0%	1%
Earby	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	2%	3%	1%	1%
Barrowford	0%	1%	0%	0%	0%	0%	18%	1%	20%	0%	0%	0%	0%	10%	1%	0%	1%	1%
Other Study Area	0%	1%	1%	0%	1%	2%	0%	0%	0%	0%	13%	9%	13%	0%	0%	0%	7%	0%
Study Area Sub-Total	**97%**	**93%**	**93%**	**96%**	**94%**	**80%**	**95%**	**98%**	**96%**	**96%**	**22%**	**30%**	**17%**	**75%**	**90%**	**89%**	**50%**	**n/a**
Outflow	**3%**	**7%**	**7%**	**4%**	**6%**	**20%**	**5%**	**2%**	**4%**	**4%**	**78%**	**70%**	**83%**	**25%**	**10%**	**11%**	**50%**	**n/a**
Market Share Total	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***n/a***

Source: *Market shares based on:*
NEMS household survey 2006 with NLP adjustments to reflect changes for Zones 1 to 14 and 17
DJS Research survey June 2011 and Savill's RIA for Zones 15 and 16

Table 1.21: Convenience Turnover and Surplus Expenditure - With increased shares in Barnoldswick (£Million)

Town	2012	2018	2023	2028	2033
Available Expenditure in Study Area					
Nelson	£55.61	£55.48	£57.58	£58.81	£60.25
Colne	£86.30	£75.96	£78.83	£80.50	£82.48
Barnoldswick	£5.82	£28.08	£29.14	£29.76	£30.49
Brierfield	£1.95	£2.02	£2.10	£2.15	£2.20
Earby	£1.20	£0.92	£0.95	£0.97	£1.35
Barrowford	£2.27	£5.83	£6.06	£6.18	£6.34
Total	**£153.16**	**£168.29**	**£174.65**	**£178.37**	**£183.11**
Benchmark Turnover of Existing Facilities					
Nelson	£54.36	£54.36	£54.36	£54.36	£54.36
Colne	£90.02	£90.02	£90.02	£90.02	£90.02
Barnoldswick	£7.16	£7.16	£7.16	£7.16	£7.16
Brierfield	£1.76	£1.76	£1.76	£1.76	£1.76
Earby	£1.80	£1.80	£1.80	£1.80	£1.80
Barrowford	£1.21	£1.21	£1.21	£1.21	£1.21
Total	**£156.31**	**£156.31**	**£156.31**	**£156.31**	**£156.31**
Commitments					
Barrowford (Booths)		**£8.27**	**£8.27**	**£8.27**	**£8.27**
Surplus Expenditure					
Nelson	£1.25	£1.12	£3.22	£4.45	£5.89
Colne	-£3.72	-£14.06	-£11.19	-£9.52	-£7.54
Barnoldswick	-£1.34	£20.92	£21.98	£22.60	£23.33
Brierfield	£0.19	£0.26	£0.34	£0.39	£0.44
Earby	-£0.60	-£0.88	-£0.85	-£0.83	-£0.45
Barrowford	£1.06	-£3.65	-£3.42	-£3.30	-£3.14
Total	**-£3.15**	**£3.71**	**£10.07**	**£13.79**	**£18.53**

Table 1.22: Convenience Turnover and Surplus Expenditure (High Pop)- With increased shares in Barnoldswick (£Million)

Town	2012	2018	2023	2028	2033
Available Expenditure in Study Area					
Nelson	£56.04	£57.04	£60.35	£59.81	£65.74
Colne	£86.97	£78.10	£82.62	£81.87	£90.00
Barnoldswick	£5.86	£28.87	£30.54	£30.26	£33.26
Brierfield	£1.97	£2.08	£2.20	£2.27	£2.40
Earby	£1.21	£0.94	£1.00	£1.03	£1.47
Barrowford	£2.29	£6.00	£6.35	£6.55	£6.91
Total	**£154.34**	**£173.03**	**£183.05**	**£181.80**	**£199.79**
Benchmark Turnover of Existing Facilities					
Nelson	£54.36	£54.36	£54.36	£54.36	£54.36
Colne	£90.02	£90.02	£90.02	£90.02	£90.02
Barnoldswick	£7.16	£7.16	£7.16	£7.16	£7.16
Brierfield	£1.76	£1.76	£1.76	£1.76	£1.76
Earby	£1.80	£1.80	£1.80	£1.80	£1.80
Barrowford	£1.21	£1.21	£1.21	£1.21	£1.21
Total	**£156.31**	**£156.31**	**£156.31**	**£156.31**	**£156.31**
Commitments					
Barrowford (Booths)		**£8.27**	**£8.27**	**£8.27**	**£8.27**
Surplus Expenditure					
Nelson	£1.68	£2.68	£5.99	£5.45	£11.38
Colne	-£3.05	-£11.92	-£7.40	-£8.15	-£0.02
Barnoldswick	-£1.30	£21.71	£23.38	£23.10	£26.10
Brierfield	£0.21	£0.32	£0.44	£0.51	£0.64
Earby	-£0.59	-£0.86	-£0.80	-£0.77	-£0.33
Barrowford	£1.08	-£3.48	-£3.13	-£2.93	-£2.57
Total	**-£1.97**	**£8.45**	**£18.47**	**£17.22**	**£35.21**

Table 1.23: Convenience Floorspace Projections with increased shares in Barnoldswick (£Million)

Town	2012	2018	2023	2028	2033
Surplus Expenditure					
Nelson	£1.25	£1.12	£3.22	£4.45	£5.89
Colne	-£3.72	-£14.06	-£11.19	-£9.52	-£7.54
Barnoldswick	-£1.34	£20.92	£21.98	£22.60	£23.33
Brierfield	£0.19	£0.26	£0.34	£0.39	£0.44
Earby	-£0.60	-£0.88	-£0.85	-£0.83	-£0.45
Barrowford	£1.06	-£3.65	-£3.42	-£3.30	-£3.14
Total	**-£3.15**	**£3.71**	**£10.07**	**£13.79**	**£18.53**
Tunrover Density Per Sq M Net					
Nelson	£10,000	£10,000	£10,000	£10,000	£10,000
Colne	£10,000	£10,000	£10,000	£10,000	£10,000
Barnoldswick	£10,000	£10,000	£10,000	£10,000	£10,000
Brierfield	£5,000	£5,000	£5,000	£5,000	£5,000
Earby	£5,000	£5,000	£5,000	£5,000	£5,000
Barrowford	£5,000	£5,000	£5,000	£5,000	£5,000
Sales Floorspace Projections Sq M Net					
Nelson	125	112	322	445	589
Colne	-372	-1,406	-1,119	-952	-754
Barnoldswick	-134	2,092	2,198	2,260	2,333
Brierfield	38	53	68	77	88
Earby	-120	-177	-170	-166	-90
Barrowford	212	-729	-685	-659	-629
Total	**-250**	**-56**	**614**	**1,005**	**1,537**

Table 1.24: Convenience Floorspace Projections with increased shares in Barnoldswick (£Million) (High Pop)

Town	2012	2018	2023	2028	2033
Surplus Expenditure					
Nelson	£1.68	£2.68	£5.99	£5.45	£11.38
Colne	-£3.05	-£11.92	-£7.40	-£8.15	-£0.02
Barnoldswick	-£1.30	£21.71	£23.38	£23.10	£26.10
Brierfield	£0.21	£0.32	£0.44	£0.51	£0.64
Earby	-£0.59	-£0.86	-£0.80	-£0.77	-£0.33
Barrowford	£1.08	-£3.48	-£3.13	-£2.93	-£2.57
Total	**-£1.97**	**£8.45**	**£18.47**	**£17.22**	**£35.21**
Tunrover Density Per Sq M Net					
Nelson	£10,000	£10,000	£10,000	£10,000	£10,000
Colne	£10,000	£10,000	£10,000	£10,000	£10,000
Barnoldswick	£10,000	£10,000	£10,000	£10,000	£10,000
Brierfield	£5,000	£5,000	£5,000	£5,000	£5,000
Earby	£5,000	£5,000	£5,000	£5,000	£5,000
Barrowford	£5,000	£5,000	£5,000	£5,000	£5,000
Sales Floorspace Projections Sq M Net					
Nelson	168	268	599	545	1,138
Colne	-305	-1,192	-740	-815	-2
Barnoldswick	-130	2,171	2,338	2,310	2,610
Brierfield	41	64	88	103	128
Earby	-118	-172	-161	-154	-65
Barrowford	216	-696	-627	-585	-513
Total	**-127**	**443**	**1,497**	**1,403**	**3,296**

Appendix 2 Comparison Goods Capacity

Table 2.1 - Comparison Sales Floorspace in Pendle (incl. Food Stores)

Town Centre	Net Sales Floorspace Sq M
Nelson	
Town comparison shops	6,343
Pendle Village Mill (formerly Junction 12 Outlet)	8,181
B&Q, Churchill Way	3,617
Food store comparison sales	1,029
Total	**19,170**
Brierfield	
Town centre comparison shops	490
Food store comparison sales	36
Total	**526**
Barrowford	
Town Centre comparison shops	484
Food store comparison sales	0
Total	**484**
Colne	
Town Centre comparison shops	3,678
Matalan, North Valley Retail Park	960
InStore, North Valley Retail Park	649
Boundary Mills, Corporation Street	11,782
Argos Extra Boundary Mills RP, Corporation Street)	
Next Boundary Mills RP, Corporation Street)	3,800
DFS Boundary Mills RP, Corporation Street)	
Food store comparison sales	2,447
Total	**23,316**
Barnoldswick	
Town Centre comparison shops	1,254
Food store comparison sales	45
Total	**1,299**
Earby	
Town Centre comparison shops	229
Food store comparison sales	22
Total	**251**
GRAND TOTAL	**45,047**

Sources: NLP 2007 study plus changes since 2007

Table 2.2: Comparison Goods Expenditure Per Capita (2010 Prices)

	2012	2018	2023	2028	2033
Zone 1	£2,182	£2,710	£2,930	£3,396	£3,937
Zone 2	£3,102	£3,854	£4,166	£4,830	£5,599
Zone 3	£2,746	£3,411	£3,687	£4,274	£4,955
Zone 4	£2,663	£3,308	£3,576	£4,146	£4,806
Zone 5	£2,379	£2,955	£3,195	£3,704	£4,294
Zone 6	£2,126	£2,641	£2,855	£3,310	£3,837
Zone 7	£3,184	£3,956	£4,276	£4,957	£5,747
Zone 8	£1,742	£2,164	£2,340	£2,712	£3,144
Zone 9	£2,140	£2,658	£2,874	£3,331	£3,862
Zone 10	£1,969	£2,446	£2,644	£3,065	£3,553
Zone 11	£2,000	£2,484	£2,685	£3,113	£3,609
Zone 12	£2,748	£3,413	£3,690	£4,277	£4,959
Zone 13	£2,631	£3,268	£3,533	£4,096	£4,748
Zone 14	£3,354	£4,167	£4,505	£5,222	£6,054
Zone 15	£2,583	£3,209	£3,468	£4,021	£4,661
Zone 16	£2,405	£2,988	£3,230	£3,745	£4,341
Zone 17	£2,732	£3,394	£3,669	£4,253	£4,931

Sources:

Experian local estimates for 2010 comparison goods expenditure per capita

Excluding special forms of trading (SFT) - 10.9% in 2012 increasing to 12.8% in 2018

Experian Business Strategies - recommended forecast growth rates

Table 2.3: Baseline Comparison Goods Expenditure (£M - 2010 Prices)

Zone	2012	2018	2023	2028	2033
Zone 1	£13.54	£17.13	£18.52	£21.77	£25.24
Zone 2	£14.48	£18.32	£19.80	£23.28	£26.99
Zone 3	£13.29	£16.82	£18.19	£21.38	£24.79
Zone 4	£20.26	£25.64	£27.72	£32.59	£37.77
Zone 5	£26.18	£33.14	£35.82	£42.12	£48.82
Zone 6	£14.72	£18.63	£20.14	£23.68	£27.45
Zone 7	£15.83	£20.03	£21.65	£25.45	£29.51
Zone 8	£13.73	£17.37	£18.78	£22.07	£25.59
Zone 9	£16.24	£20.55	£22.22	£26.12	£30.28
Zone 10	£13.06	£16.53	£17.87	£21.01	£24.35
Zone 11	£18.06	£22.86	£24.71	£29.05	£33.68
Zone 12	£30.05	£38.03	£41.12	£48.33	£56.04
Zone 13	£21.29	£26.94	£29.12	£34.24	£39.69
Zone 14	£10.41	£13.18	£14.25	£16.75	£19.41
Zone 15	£20.09	£25.42	£27.48	£32.31	£37.45
Zone 16	£23.24	£29.42	£31.80	£37.39	£43.34
Zone 17	£11.00	£13.92	£15.05	£17.69	£20.51
Total	**£295.48**	**£373.94**	**£404.24**	**£475.22**	**£550.92**

Sources: *Table 1.2 and Table 2.2*

Table 2.4: High Pop Growth Comparison Goods Expenditure (£M - 2010 Prices)

Zone	2012	2018	2023	2028	2033
			low	low	low
Zone 1	£13.64	£17.62	£19.69	£23.31	£27.45
Zone 2	£14.59	£18.84	£21.05	£24.93	£29.36
Zone 3	£13.40	£17.30	£19.33	£22.89	£26.96
Zone 4	£20.41	£26.36	£29.46	£34.88	£41.08
Zone 5	£26.39	£34.07	£38.08	£45.09	£53.10
Zone 6	£14.84	£19.16	£21.40	£25.35	£29.85
Zone 7	£15.95	£20.59	£23.01	£27.25	£32.09
Zone 8	£13.83	£17.86	£19.96	£23.63	£27.83
Zone 9	£16.37	£21.13	£23.62	£27.96	£32.94
Zone 10	£13.16	£17.00	£18.99	£22.49	£26.49
Zone 11	£18.20	£23.51	£26.26	£31.10	£36.63
Zone 12	£30.28	£39.10	£43.70	£51.74	£60.95
Zone 13	£21.45	£27.70	£30.95	£36.65	£43.17
Zone 14	£10.49	£13.55	£15.14	£17.93	£21.11
Zone 15	£20.24	£26.14	£29.20	£34.59	£40.73
Zone 16	£23.42	£30.25	£33.80	£40.02	£47.13
Zone 17	£11.08	£14.31	£16.00	£18.94	£22.31
Total	**£297.76**	**£384.48**	**£429.64**	**£508.73**	**£599.18**

Sources: *Table 1.3 and Table 2.3*

Table 2.5: Comparison Shopping Market Penetration Rates 2006

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	% Inflow
Nelson	9%	5%	6%	11%	34%	19%	15%	42%	26%	42%	5%	7%	2%	7%	5%	6%	0%	5%
B&Q, Nelson	4%	5%	5%	5%	4%	4%	8%	6%	7%	9%	1%	2%	2%	3%	5%	1%	2%	5%
Brierfield	3%	2%	3%	1%	1%	10%	2%	2%	3%	1%	1%	3%	2%	3%	1%	0%	1%	1%
Barrowford	0%	1%	1%	1%	1%	1%	9%	2%	3%	0%	0%	0%	0%	3%	0%	1%	0%	1%
Colne	40%	35%	27%	36%	9%	6%	12%	9%	17%	11%	1%	4%	1%	7%	7%	9%	8%	5%
Barnoldswick	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	22%	14%	2%	1%
Earby	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	2%	1%	1%
Borough Total	**56%**	**49%**	**42%**	**54%**	**49%**	**40%**	**46%**	**61%**	**56%**	**63%**	**8%**	**16%**	**7%**	**23%**	**40%**	**33%**	**14%**	**n/a**
Other Study Area	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	2%	1%
Study Area Total	**56%**	**49%**	**42%**	**54%**	**49%**	**40%**	**46%**	**61%**	**56%**	**63%**	**8%**	**16%**	**7%**	**23%**	**40%**	**33%**	**16%**	**n/a**
Outflow																		
Burnley	26%	33%	32%	30%	33%	47%	29%	22%	23%	24%	80%	62%	70%	33%	25%	34%	7%	n/a
Manchester	4%	2%	8%	4%	4%	3%	4%	2%	6%	3%	3%	9%	6%	20%	4%	3%	3%	n/a
Skipton	3%	0%	1%	4%	0%	1%	3%	1%	1%	0%	0%	1%	0%	0%	14%	16%	41%	n/a
Blackburn	3%	2%	8%	1%	6%	4%	4%	5%	3%	2%	3%	5%	4%	6%	4%	3%	1%	n/a
Other Outflow	8%	14%	9%	7%	8%	5%	14%	9%	11%	8%	6%	7%	13%	18%	13%	11%	32%	n/a
TOTAL	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**n/a**

Sources: *NEMS Household Surveys 2006*

Table 2.6: **Comparison Shopping Market Penetration Rates in 2012**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	% Inflow
Nelson	8%	7%	8%	12%	35%	22%	20%	40%	29%	47%	6%	8%	4%	9%	10%	6%	1%	5%
Brierfield	3%	2%	3%	1%	1%	10%	2%	2%	3%	1%	1%	3%	2%	3%	1%	0%	0%	1%
Barrowford	0%	1%	1%	1%	1%	1%	9%	2%	3%	0%	0%	0%	0%	3%	0%	1%	0%	1%
Colne	60%	50%	40%	50%	15%	10%	20%	15%	25%	17%	2%	8%	2%	10%	10%	15%	15%	5%
Barnoldswick	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	22%	14%	2%	1%
Earby	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	2%	1%	1%
Borough Total	**71%**	**61%**	**52%**	**64%**	**52%**	**43%**	**51%**	**59%**	**60%**	**65%**	**9%**	**19%**	**8%**	**25%**	**43%**	**38%**	**19%**	**n/a**
Other Study Area	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	2%	1%
Study Area Total	**71%**	**61%**	**52%**	**64%**	**52%**	**43%**	**51%**	**59%**	**60%**	**65%**	**9%**	**19%**	**8%**	**25%**	**43%**	**38%**	**21%**	**n/a**
Outflow	29%	39%	48%	36%	48%	57%	49%	41%	40%	35%	91%	81%	92%	75%	57%	62%	79%	n/a
TOTAL	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**n/a**

Sources: *NEMS Household Surveys 2006*
NLP Adjustments to take account of commitments in Colne and Nelson

Table 2.7: **Comparison Expenditure Patterns and Turnover 2012 (£ Millions)**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	% Inflow	Total
Expendiutre 2012	**£13.54**	**£14.48**	**£13.29**	**£20.26**	**£26.18**	**£14.72**	**£15.83**	**£13.73**	**£16.24**	**£13.06**	**£18.06**	**£30.05**	**£21.29**	**£10.41**	**£20.09**	**£23.24**	**£11.00**		
Nelson	£1.08	£1.01	£1.06	£2.43	£9.16	£3.24	£3.17	£5.49	£4.71	£6.14	£1.08	£2.40	£0.85	£0.94	£2.01	£1.39	£0.11	£2.44	£48.73
Brierfield	£0.41	£0.29	£0.40	£0.20	£0.26	£1.47	£0.32	£0.27	£0.49	£0.13	£0.18	£0.90	£0.43	£0.31	£0.20	£0.00	£0.00	£0.06	£6.32
Barrowford	£0.00	£0.14	£0.13	£0.20	£0.26	£0.15	£1.42	£0.27	£0.49	£0.00	£0.00	£0.00	£0.00	£0.31	£0.00	£0.23	£0.00	£0.04	£3.66
Colne	£8.12	£7.24	£5.32	£10.13	£3.93	£1.47	£3.17	£2.06	£4.06	£2.22	£0.36	£2.40	£0.43	£1.04	£2.01	£3.49	£1.65	£3.11	£62.20
Barnoldswick	£0.00	£0.14	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£4.42	£3.25	£0.22	£0.08	£8.12
Earby	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.46	£0.11	£0.01	£0.58
Borough Total	**£9.61**	**£8.83**	**£6.91**	**£12.97**	**£13.62**	**£6.33**	**£8.07**	**£8.10**	**£9.75**	**£8.49**	**£1.63**	**£5.71**	**£1.70**	**£2.60**	**£8.64**	**£8.83**	**£2.09**	**£5.73**	**£129.61**
Other Study Area	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.22	£0.00	£0.22
Study Area Total	**£9.61**	**£8.83**	**£6.91**	**£12.97**	**£13.62**	**£6.33**	**£8.07**	**£8.10**	**£9.75**	**£8.49**	**£1.63**	**£5.71**	**£1.70**	**£2.60**	**£8.64**	**£8.83**	**£2.31**	**n/a**	**n/a**
Outflow	£3.93	£5.65	£6.38	£7.29	£12.57	£8.39	£7.75	£5.63	£6.50	£4.57	£16.44	£24.34	£19.59	£7.81	£11.45	£14.41	£8.69	n/a	n/a
TOTAL	**£13.54**	**£14.48**	**£13.29**	**£20.26**	**£26.18**	**£14.72**	**£15.83**	**£13.73**	**£16.24**	**£13.06**	**£18.06**	**£30.05**	**£21.29**	**£10.41**	**£20.09**	**£23.24**	**£11.00**	**n/a**	**n/a**

Sources: *Table 2.3 and 2.5*

Table 2.8: **Comparison Expenditure Patterns and Turnover 2018 (£ Millions)**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	% Inflow	Total
Expendiutre 2018	**17.13**	**18.32**	**16.82**	**25.64**	**33.14**	**18.63**	**20.03**	**17.37**	**20.55**	**16.53**	**22.86**	**38.03**	**26.94**	**13.18**	**25.42**	**29.42**	**13.92**		
Nelson	1.37	1.28	1.35	3.08	11.60	4.10	4.01	6.95	5.96	7.77	1.37	3.04	1.08	1.19	2.54	1.77	0.14	3.08	61.66
Brierfield	0.51	0.37	0.50	0.26	0.33	1.86	0.40	0.35	0.62	0.17	0.23	1.14	0.54	0.40	0.25	0.00	0.00	0.08	8.00
Barrowford	0.00	0.18	0.17	0.26	0.33	0.19	1.80	0.35	0.62	0.00	0.00	0.00	0.00	0.40	0.00	0.29	0.00	0.05	4.63
Colne	10.28	9.16	6.73	12.82	4.97	1.86	4.01	2.61	5.14	2.81	0.46	3.04	0.54	1.32	2.54	4.41	2.09	3.94	78.72
Barnoldswick	0.00	0.18	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.59	4.12	0.28	0.10	10.28
Earby	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.59	0.14	0.01	0.73
Borough Total	**12.17**	**11.18**	**8.75**	**16.41**	**17.23**	**8.01**	**10.21**	**10.25**	**12.33**	**10.74**	**2.06**	**7.23**	**2.16**	**3.29**	**10.93**	**11.18**	**2.64**	**7.26**	**164.03**
Other Study Area	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.28	0.00	0.28
Study Area Total	**12.17**	**11.18**	**8.75**	**16.41**	**17.23**	**8.01**	**10.21**	**10.25**	**12.33**	**10.74**	**2.06**	**7.23**	**2.16**	**3.29**	**10.93**	**11.18**	**2.92**	**n/a**	**n/a**
Outflow	4.97	7.14	8.08	9.23	15.91	10.62	9.81	7.12	8.22	5.79	20.80	30.81	24.79	9.88	14.49	18.24	11.00	n/a	n/a
TOTAL	**17.13**	**18.32**	**16.82**	**25.64**	**33.14**	**18.63**	**20.03**	**17.37**	**20.55**	**16.53**	**22.86**	**38.03**	**26.94**	**13.18**	**25.42**	**29.42**	**13.92**	**n/a**	**n/a**

Table 2.9: **Comparison Expenditure Patterns and Turnover 2023 (£ Millions)**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	% Inflow	Total
Expendiutre 2023	**£18.52**	**£19.80**	**£18.19**	**£27.72**	**£35.82**	**£20.14**	**£21.65**	**£18.78**	**£22.22**	**£17.87**	**£24.71**	**£41.12**	**£29.12**	**£14.25**	**£27.48**	**£31.80**	**£15.05**		
Nelson	£1.48	£1.39	£1.45	£3.33	£12.54	£4.43	£4.33	£7.51	£6.44	£8.40	£1.48	£3.29	£1.16	£1.28	£2.75	£1.91	£0.15	£3.33	£66.66
Brierfield	£0.56	£0.40	£0.55	£0.28	£0.36	£2.01	£0.43	£0.38	£0.67	£0.18	£0.25	£1.23	£0.58	£0.43	£0.27	£0.00	£0.00	£0.09	£8.65
Barrowford	£0.00	£0.20	£0.18	£0.28	£0.36	£0.20	£1.95	£0.38	£0.67	£0.00	£0.00	£0.00	£0.00	£0.43	£0.00	£0.32	£0.00	£0.05	£5.00
Colne	£11.11	£9.90	£7.27	£13.86	£5.37	£2.01	£4.33	£2.82	£5.56	£3.04	£0.49	£3.29	£0.58	£1.42	£2.75	£4.77	£2.26	£4.25	£85.10
Barnoldswick	£0.00	£0.20	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£6.05	£4.45	£0.30	£0.11	£11.11
Earby	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.64	£0.15	£0.01	£0.79
Borough Total	**£13.15**	**£12.08**	**£9.46**	**£17.74**	**£18.63**	**£8.66**	**£11.04**	**£11.08**	**£13.33**	**£11.62**	**£2.22**	**£7.81**	**£2.33**	**£3.56**	**£11.82**	**£12.08**	**£2.86**	**£7.84**	**£177.32**
Other Study Area	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.30	£0.00	£0.30
Study Area Total	**£13.15**	**£12.08**	**£9.46**	**£17.74**	**£18.63**	**£8.66**	**£11.04**	**£11.08**	**£13.33**	**£11.62**	**£2.22**	**£7.81**	**£2.33**	**£3.56**	**£11.82**	**£12.08**	**£3.16**	**n/a**	**n/a**
Outflow	£5.37	£7.72	£8.73	£9.98	£17.20	£11.48	£10.61	£7.70	£8.89	£6.25	£22.49	£33.31	£26.79	£10.68	£15.66	£19.71	£11.89	n/a	n/a
TOTAL	**£18.52**	**£19.80**	**£18.19**	**£27.72**	**£35.82**	**£20.14**	**£21.65**	**£18.78**	**£22.22**	**£17.87**	**£24.71**	**£41.12**	**£29.12**	**£14.25**	**£27.48**	**£31.80**	**£15.05**	**n/a**	**n/a**

Table 2.10: **Comparison Expenditure Patterns and Turnover 2028 (£ Millions)**

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	% Inflow	Total
Expendiutre 2028	**21.77**	**23.28**	**21.38**	**32.59**	**42.12**	**23.68**	**25.45**	**22.07**	**26.12**	**21.01**	**29.05**	**48.33**	**34.24**	**16.75**	**32.31**	**37.39**	**17.69**		
Nelson	1.74	1.63	1.71	3.91	14.74	5.21	5.09	8.83	7.57	9.87	1.74	3.87	1.37	1.51	3.23	2.24	0.18	3.92	78.37
Brierfield	0.65	0.47	0.64	0.33	0.42	2.37	0.51	0.44	0.78	0.21	0.29	1.45	0.68	0.50	0.32	0.00	0.00	0.10	10.17
Barrowford	0.00	0.23	0.21	0.33	0.42	0.24	2.29	0.44	0.78	0.00	0.00	0.00	0.00	0.50	0.00	0.37	0.00	0.06	5.88
Colne	13.06	11.64	8.55	16.29	6.32	2.37	5.09	3.31	6.53	3.57	0.58	3.87	0.68	1.67	3.23	5.61	2.65	5.00	100.04
Barnoldswick	0.00	0.23	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7.11	5.23	0.35	0.13	13.06
Earby	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.75	0.18	0.01	0.93
Borough Total	**15.46**	**14.20**	**11.12**	**20.85**	**21.90**	**10.18**	**12.98**	**13.02**	**15.67**	**13.66**	**2.61**	**9.18**	**2.74**	**4.19**	**13.89**	**14.21**	**3.36**	**9.22**	**208.45**
Other Study Area	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.35	0.00	0.36
Study Area Total	**15.46**	**14.20**	**11.12**	**20.85**	**21.90**	**10.18**	**12.98**	**13.02**	**15.67**	**13.66**	**2.61**	**9.18**	**2.74**	**4.19**	**13.89**	**14.21**	**3.72**	**n/a**	**n/a**
Outflow	6.31	9.08	10.26	11.73	20.22	13.50	12.47	9.05	10.45	7.35	26.44	39.15	31.50	12.56	18.42	23.18	13.98	n/a	n/a
TOTAL	**21.77**	**23.28**	**21.38**	**32.59**	**42.12**	**23.68**	**25.45**	**22.07**	**26.12**	**21.01**	**29.05**	**48.33**	**34.24**	**16.75**	**32.31**	**37.39**	**17.69**	**n/a**	**n/a**

Table 2.11: Comparison Expenditure Patterns and Turnover 2033 (£ Millions)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	% Inflow	Total
Expendiutre 2033	**25.24**	**26.99**	**24.79**	**37.77**	**48.82**	**27.45**	**29.51**	**25.59**	**30.28**	**24.35**	**33.68**	**56.04**	**39.69**	**19.41**	**37.45**	**43.34**	**20.51**		
Nelson	2.02	1.89	1.98	4.53	17.09	6.04	5.90	10.24	8.78	11.45	2.02	4.48	1.59	1.75	3.74	2.60	0.21	4.54	90.85
Brierfield	0.76	0.54	0.74	0.38	0.49	2.74	0.59	0.51	0.91	0.24	0.34	1.68	0.79	0.58	0.37	0.00	0.00	0.12	11.79
Barrowford	0.00	0.27	0.25	0.38	0.49	0.27	2.66	0.51	0.91	0.00	0.00	0.00	0.00	0.58	0.00	0.43	0.00	0.07	6.82
Colne	15.14	13.50	9.91	18.89	7.32	2.74	5.90	3.84	7.57	4.14	0.67	4.48	0.79	1.94	3.74	6.50	3.08	5.80	115.97
Barnoldswick	0.00	0.27	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	8.24	6.07	0.41	0.15	15.14
Earby	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.87	0.21	0.01	1.08
Borough Total	**17.92**	**16.46**	**12.89**	**24.17**	**25.39**	**11.80**	**15.05**	**15.10**	**18.17**	**15.83**	**3.03**	**10.65**	**3.18**	**4.85**	**16.10**	**16.47**	**3.90**	**10.69**	**241.65**
Other Study Area	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.41	0.00	0.41
Study Area Total	**17.92**	**16.46**	**12.89**	**24.17**	**25.39**	**11.80**	**15.05**	**15.10**	**18.17**	**15.83**	**3.03**	**10.65**	**3.18**	**4.85**	**16.10**	**16.47**	**4.31**	**n/a**	**n/a**
Outflow	7.32	10.53	11.90	13.60	23.44	15.64	14.46	10.49	12.11	8.52	30.65	45.39	36.51	14.56	21.35	26.87	16.20	n/a	n/a
TOTAL	**25.24**	**26.99**	**24.79**	**37.77**	**48.82**	**27.45**	**29.51**	**25.59**	**30.28**	**24.35**	**33.68**	**56.04**	**39.69**	**19.41**	**37.45**	**43.34**	**20.51**	**n/a**	**n/a**

Table 2.12: **Floorspace Capacity Summary 2012 to 2033 (Baseline Population)**

	2012	2018	2023	2028	2033
Available Expenditure					
Nelson	£48.73	£61.66	£66.66	£78.37	£90.85
Brierfield	£6.32	£8.00	£8.65	£10.17	£11.79
Barrowford	£3.66	£4.63	£5.00	£5.88	£6.82
Colne	£62.20	£78.72	£85.10	£100.04	£115.97
Barnoldswick	£8.12	£10.28	£11.11	£13.06	£15.14
Earby	£0.58	£0.73	£0.79	£0.93	£1.08
Borough Total	**£129.61**	**£164.03**	**£177.32**	**£208.45**	**£241.65**
Expected Turnover					
Nelson	£48.73	£53.91	£58.65	£63.81	£69.42
Brierfield	£6.32	£7.00	£7.61	£8.28	£9.01
Barrowford	£3.66	£4.05	£4.40	£4.79	£5.21
Colne	£62.20	£68.82	£74.87	£81.46	£88.62
Barnoldswick	£8.12	£8.98	£9.77	£10.63	£11.57
Earby	£0.58	£0.64	£0.70	£0.76	£0.83
Borough Total	**£129.61**	**£143.40**	**£156.01**	**£163.97**	**£172.34**
Surplus Expenditure					
Nelson	n/a	£7.75	£8.01	£14.56	£21.43
Brierfield	n/a	£1.01	£1.04	£1.89	£2.78
Barrowford	n/a	£0.58	£0.60	£1.09	£1.61
Colne	n/a	£9.90	£10.22	£18.58	£27.35
Barnoldswick	n/a	£1.29	£1.33	£2.43	£3.57
Earby	n/a	£0.09	£0.10	£0.17	£0.26
Borough Total	n/a	**£20.62**	**£21.30**	**£38.72**	**£56.99**
Average sales density £ sq m Net	£4,500	£4,979	£5,417	£5,893	£6,411
Net Sales Floorspace sq m net					
Nelson	n/a	1,557	1,479	2,470	3,342
Brierfield	n/a	202	192	321	434
Barrowford	n/a	117	111	185	251
Colne	n/a	1,988	1,888	3,153	4,266
Barnoldswick	n/a	259	246	412	557
Earby	n/a	19	18	29	40
Borough Total	n/a	**4,142**	**3,933**	**6,570**	**8,889**
Gross Sales Floorspace sq m					
Nelson	n/a	2,076	1,972	3,293	4,456
Brierfield	n/a	269	256	427	578
Barrowford	n/a	156	148	247	334
Colne	n/a	2,650	2,517	4,204	5,688
Barnoldswick	n/a	346	328	549	742
Earby	n/a	25	23	39	53
Borough Total	**n/a**	**5,523**	**5,244**	**8,760**	**11,852**

Table 2.13: **Floorspace Capacity Summary 2012 - 2033 (high population)**

	2012	2018	2023	2028	2033
Available Expenditure					
Nelson	£49.10	£63.40	£70.85	£83.89	£98.81
Brierfield	£6.37	£8.23	£9.20	£10.89	£12.82
Barrowford	£3.69	£4.76	£5.32	£6.30	£7.42
Colne	£62.68	£80.94	£90.45	£107.09	£126.13
Barnoldswick	£8.18	£10.57	£11.80	£13.98	£16.46
Earby	£0.59	£0.76	£0.84	£1.00	£1.18
Borough Total	**£130.61**	**£168.65**	**£188.46**	**£223.15**	**£262.82**
Expected Turnover					
Nelson	£49.10	£54.33	£59.11	£64.30	£69.96
Brierfield	£6.37	£7.05	£7.67	£8.35	£9.08
Barrowford	£3.69	£4.08	£4.44	£4.83	£5.25
Colne	£62.68	£69.35	£75.45	£82.09	£89.31
Barnoldswick	£8.18	£9.05	£9.85	£10.72	£11.66
Earby	£0.59	£0.65	£0.70	£0.77	£0.83
Borough Total	**£130.61**	**£144.51**	**£145.72**	**£153.15**	**£160.96**
Surplus Expenditure					
Nelson	n/a	£9.07	£11.75	£19.59	£28.85
Brierfield	n/a	£1.18	£1.52	£2.54	£3.74
Barrowford	n/a	£0.68	£0.88	£1.47	£2.17
Colne	n/a	£11.58	£14.99	£25.01	£36.83
Barnoldswick	n/a	£1.51	£1.96	£3.26	£4.81
Earby	n/a	£0.11	£0.14	£0.23	£0.34
Borough Total	n/a	**£24.14**	**£31.24**	**£52.11**	**£76.74**
Average sales density £ sq m Net	£4,500	£4,979	£5,417	£5,893	£6,411
Net Sales Floorspace sq m net					
Nelson	n/a	1,822	2,169	3,324	4,500
Brierfield	n/a	237	281	431	584
Barrowford	n/a	137	163	249	338
Colne	n/a	2,326	2,768	4,243	5,744
Barnoldswick	n/a	304	361	554	750
Earby	n/a	22	26	40	54
Borough Total	**n/a**	**4,847**	**5,768**	**8,842**	**11,969**
Gross Sales Floorspace sq m net					
Nelson	n/a	2,430	2,891	4,432	6,000
Brierfield	n/a	315	375	575	779
Barrowford	n/a	182	217	333	450
Colne	n/a	3,102	3,691	5,658	7,659
Barnoldswick	n/a	405	481	739	1,000
Earby	n/a	29	34	53	71
Borough Total	**n/a**	**6,463**	**7,690**	**11,789**	**15,958**

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