# Lancaster City Council

# Phase 1: Retail Development Strategy

# Final Report

## January 2014

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**WYG PLANNING & ENVIRONMENT**
**LANCASTER RETAIL STUDY UPDATE**

**TABLE 26: BENCHMARK EXISTING PROVISION (COMPARISON) (2013)**

| DESTINATION | GROSS (sq m) (b) | SALES AREA (c) | COMPARISON SALES DENSITY (B) | BENCHMARK TURNOVER (AxB) | SURVEY TURNOVER £m | DRAWN FROM STUDY AREA % | SURVEY TURNOVER £m |
|---|---|---|---|---|---|---|---|
| **LANCASTER CITY** | | | | | | | |
| **Zone 1** | | | | | | | |
| **Lancaster City Centre** | | | | | | | |
| Lancaster City Centre | 29,520 | 20,664 | 6,000 | 124.0 | **158.3** | 85 | **186.3** |
| Marks & Spencer, Penny Street, Lancaster | 1,500 | 214 | 5,047 | 1.1 | **4.4** | 90 | **4.8** |
| **Sub Total (City Centre)** | **31,020** | **20,878** | | **125.1** | **162.7** | | **191.1** |
| **Edge-of-Cente** | | | | | | | |
| Sainsbury's, Cable Street, Lancaster | | 1,141 | 7,342 | 8.4 | **6.3** | 90 | **7.0** |
| **Sub Total (Edge-of-centre)** | | | | **8.4** | **6.3** | | **7.0** |
| **Out-of-Centre (undefined)** | | | | | | | |
| Asda, Ovangle Road, Lancaster | 6,689 | 1,706 | 9,270 | 15.8 | **13.1** | 90 | **14.5** |
| B&Q, Aldcliffe Road, Lancaster | 2,100 | 1,344 | 1,813 | 2.4 | **1.0** | 100 | **1.0** |
| Booths, Hala Road, Scotforth, Lancaster | 1,486 | 80 | 5,000 | 0.4 | **0.0** | 90 | **0.0** |
| Bulk Road Retail Park and Kingsway Retail Park | 5,608 | 4,486 | | 19.0 | **31.5** | 90 | **34.9** |
| Bulk Road Retail Park | 3,180 | | | | | | |
| *Currys* | *1,460* | *1,168* | *6,125* | *7.2* | | | |
| *Comet (now vacant)* | *980* | *784* | | *0.0* | | | |
| *Halfords* | *740* | *592* | *2,904* | *1.7* | | | |
| Kingsway Retail Park | *2,428* | | | *10.1* | | | |
| *PC World* | *1,657* | *1,326* | *6,125* | 8.1 | | | |
| *Bathstore* | *350* | *280* | *3,000* | 0.8 | | | |
| *Laura Ashley* | *421* | *337* | *3,395* | 1.1 | | | |
| Skerton, Lancaster | | | | 0.1 | **0.1** | 100 | **0.1** |
| **Sub Total (out-of-centre)** | **15,883** | **7,616** | | **55.0** | **45.7** | | **50.5** |
| **Sub Total (Zone 1)** | | | | **188.4** | **214.7** | | **248.6** |
| **Zone 2** | | | | | | | |
| **Morecambe Town Centre** | | | | | | | |
| Morecambe Town Centre | 14,800 | 10,360 | 4,000 | 41.4 | **46.4** | 80 | **58.0** |
| **Sub Total (Town Centre)** | | | | **41.4** | **46.4** | | **58.0** |
| **Local Centres** | | | | | | | |
| Heysham Local Centre, Morecambe | | | | 0.4 | **0.4** | 100 | **0.4** |
| Booths, Torrisholme, Morecambe | | 24 | 5,000 | 0.1 | **0.0** | 100 | **0.0** |
| Torrisholme Local Centre | | | | 0.1 | **0.1** | 100 | **0.1** |
| **Sub Total (Local Centre)** | | | | **0.6** | **0.5** | | **0.5** |
| **Out-of-Centre (undefined)** | | | | | | | |
| Asda (Former Netto), Lancaster Road, Morecambe | | 74 | 9,270 | 0.7 | **5.7** | 90 | **6.3** |
| Central Drive Retail Park, Morecambe | 3,307 | 2,315 | 2,881 | 6.7 | **4.9** | 90 | **5.4** |
| Morrisons, Central Drive, Morecambe | 7,624 | 772 | 9,968 | 7.7 | **0.5** | 90 | **0.6** |
| Lancaster City Retail Park (Sunnycliffe) | 11,130 | 8,904 | | 22.4 | **32.0** | 90 | **35.6** |
| *Dunelm* | *2,160* | *1,728* | *2,384* | *4.1* | | | |
| *Sports Direct* | *1,250* | *1,000* | *4,886* | *4.9* | | | |
| *Dreams* | *750* | *600* | *1,335* | *0.8* | | | |
| *Carpetright* | *710* | *568* | *1,104* | *0.6* | | | |
| *Harveys (to be occupied by Pets@Home)* | *970* | *776* | *2,606* | *2.0* | | | |
| *Matalan* | *2,780* | *2,224* | *2,341* | *5.2* | | | |
| *Wickes* | *2,510* | *2,008* | *2,352* | *4.7* | | | |
| Overton Village Centre | | | | 0.1 | **0.1** | 100 | **0.1** |
| Sainsbury's, Lancaster Road, Morecambe | | 1,040 | 7,342 | 7.6 | **7.0** | 90 | **7.7** |
| **Sub Total (out-of-centre)** | **22,061** | **11,991** | | **45.2** | **50.2** | | **55.8** |
| **Sub Total (Zone 2)** | | | | **87.2** | **97.1** | | **114.3** |
| **Zone 3** | | | | | | | |
| Caton Village Centre | | | | 0.0 | **0.0** | 100 | **0.0** |
| **Sub Total (Caton)** | | | | **0.0** | **0.0** | | **0.0** |
| **Out-of-centre (undefined)** | | | | | | | |
| Ashton Golf Centre, Lancaster | | | | 0.2 | **0.2** | 100 | **0.2** |
| Ashton Hall Garden Centre, Lancaster | | | | 0.2 | **0.2** | 100 | **0.2** |
| Galgate Village Centre | | | | 0.2 | **0.2** | 100 | **0.2** |
| Marks & Spencer Simply Food, J 32-33 M6 Northbound, White Carr Lane, Lancaster | | | | 0.1 | **0.1** | 100 | **0.1** |
| **Sub Total** | | | | **0.7** | **0.7** | | **0.7** |
| **Sub Total (Zone 3)** | | | | **0.8** | **0.8** | | **0.8** |
| **Zone 6 (mainly covered by Lancaster City Council)** | | | | | | | |
| **Carnforth Town Centre** | | | | | | | |
| Carnforth Town Centre | 3,280 | 2,296 | 2,500 | 5.7 | **3.7** | 100 | **3.7** |
| **Sub Total (Carnforth)** | **3,280** | | | **5.7** | **3.7** | | **3.7** |
| **Local Centres** | | | | | | | |
| Bolton-Le-Sands, Lancaster | | | | 2.0 | **2.0** | 100 | **2.0** |
| **Sub Total (Local Centres)** | | | | **2.0** | **2.0** | | **2.0** |
| **Out-of-Centre (undefined)** | | | | | | | |
| Carnforth out of centre | | | | 0.9 | **0.9** | 100 | **0.9** |
| Slyne-with-Hest Village Centre | | | | 0.0 | **0.0** | 100 | **0.0** |
| Tesco Superstore, Lodge Quarry, Lancaster Road, Carnforth | | 376 | 11,924 | 4.5 | **0.4** | 100 | **0.4** |
| **Sub Total** | **6,560** | **376** | | **5.4** | **1.3** | | **1.3** |
| **Sub Total (Zone 6)** | | | | **13.1** | **7.0** | | **7.0** |
| **Zone 7 (mainly covered by South Lakeland District Council)** | | | | | | | |
| Silverdale Village Centre | | | | 0.1 | **0.1** | 100 | **0.1** |
| **Sub Total** | | | | **0.1** | **0.1** | | **0.1** |
| **Sub Total (Zone 7)** | | | | **0.1** | **0.1** | | **0.1** |
| **SUB-TOTAL LANCASTER** | | | | **289.6** | **319.7** | | **370.8** |

**Notes:**
a. Gross Floorspace figures taken from GOAD 2013 updated by WYG estimates for district centre where available
b. Gross to net sales area ratio is 80% for retail warehousing and 70% for traditional town centre floorspace
c. Sales densities taken from Mintel Retail Rankings 2013 (adjusted to 2011 prices) * WYG assumption for town and district centre, WYG assumed local shops (undefined) are trading at equilibrium (where no floorspace information is available
d. Sales densities (comparison goods) for supermarkets taken from Verdict Grocer Retailers (2012) (except Morrisons which is taken from Verdict 2011), and floorspace estimated drawing on estimates from Table 5
e. Percentage of turnover drawn from Study Area is based on WYG judgement and geographic position of facility within the Study Area. WYG has consider this against available information available from STEAM (2012) for each of the town centre
f. WYG has assumed Lancaster out of centre, is Bulk Road Retail Park and Kingsway Retail Park and has therefore amalgamated this with Bulk Road to have a combined derived turnover
g. WYG has amalgamated Lancaster City (Sunnycliff) Retail Park, Sunnycliff Retail Park, Mellishaw Lane and Morecambe out-of-centre from Table 25 to represent Lancaster City Retail Park

**2011 PRICES**

## TABLE 27: ESTIMATED (BASELINE) CAPACITY FOR NEW COMPARISON GOODS PROVISION WITHIN STUDY AREA

### Table 1a: Estimated 'Global Capacity' for Comparison Goods Facilities in Lancaster City (Area

| Year | Benchmark Turnover - £m[1] | Derived Expenditure Available - £m[2] | Surplus Expenditure - £m |
|---|---|---|---|
| 2013 | 370.8 | 370.8 | 0.0 |
| 2018 | 411.0 | 415.5 | 4.5 |
| 2023 | 454.6 | 481.5 | 26.9 |
| 2028 | 501.9 | 565.9 | 63.9 |
| 2031 | 532.7 | 621.7 | 89.1 |
| **Market Share** | | **31.3** | |

Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 11 (Oct 2013)
Assumes constant market share claimed by all facilitites in Lancaster City (adminstrative) facilities at 31.3% from Study Area
Assumes a inflow of16%.
At 2011 prices

### Table 1b: Quantitative Need for Additional Floorspace – Comparison Goods

| Year | Comparison Goods | | |
|---|---|---|---|
| | £m | Floorspace Requirement | |
| | | Min[1*] | Max[2*] |
| 2013 | 0.0 | 0 | 0 |
| 2018 | 4.5 | 800 | 1,400 |
| 2023 | 26.9 | 4,400 | 7,300 |
| 2028 | 63.9 | 9,400 | 15,700 |
| 2031 | 89.1 | 12,400 | 20,700 |

Average sales density assumed to be £5,000 per sq.m at min and £3,000 per sq. m for max
Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 11 (Oct 2013)
At 2011 prices

### Table 1c: Net Quantitative Need for Additional Floorspace - Comparison Goods

| Year | Comparison Goods | | | | |
|---|---|---|---|---|---|
| | £m | £m | £m | Floorspace Requirement | |
| | | Extant | Residual | Min[1*] | Max[2*] |
| 2013 | 0.0 | | | | |
| 2018 | 4.5 | 7.4 | -2.9 | -500 | -900 |
| 2023 | 26.9 | 8.2 | 18.7 | 3,100 | 5,100 |
| 2028 | 63.9 | 9.0 | 54.9 | 8,100 | 13,500 |
| 2031 | 89.1 | 9.6 | 79.5 | 11,100 | 18,400 |

Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 11 (Oct 2013)
Planning commitments taken from Table 27a below (assume 90% of planning commitments come forward) from Zones 1, 2 and 6

### Table 2a: Estimated 'Capacity' for Comparison Goods Facilities - Lancaster City (facilities in Zones 1)

| Year | Benchmark Turnover - £m[1] | Derived Expenditure Available - £m[2] | Surplus Expenditure - £m |
|---|---|---|---|
| 2013 | 248.6 | 248.6 | 0.0 |
| 2018 | 275.6 | 278.6 | 3.0 |
| 2023 | 304.8 | 322.9 | 18.0 |
| 2028 | 336.6 | 379.4 | 42.9 |
| 2031 | 357.2 | 416.9 | 59.7 |
| **Market Share** | | **21.1** | |

Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 11 (Oct 2013)
Assumes constant market share claimed by all faciliites in Lancaster Urban Area (Zones 1) facilities at 21.1% from Study Area
Assumes a inflow of 16%
At 2011 prices

### Table 2b: Quantitative Need for Additional Floorspace – Comparison Goods

| Year | Comparison Goods | | |
|---|---|---|---|
| | £m | Floorspace Requirement | |
| | | Min[1*] | Max[2*] |
| 2013 | 0.0 | 0 | 0 |
| 2018 | 3.0 | 500 | 900 |
| 2023 | 18.0 | 2,900 | 4,900 |
| 2028 | 42.9 | 6,300 | 10,600 |
| 2031 | 59.7 | 8,300 | 13,900 |

Average sales density assumed to be £5,000 per sq.m at min and £3,000 per sq. m for max
Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 11 (Oct 2013)
At 2011 prices

### Table 2c: Net Quantitative Need for Additional Floorspace - Comparison Goods

| Year | Comparison Goods | | | | |
|---|---|---|---|---|---|
| | £m | £m | £m | Floorspace Requirement | |
| | | Extant | Residual | Min[1*] | Max[2*] |
| 2013 | 0.0 | | | | |
| 2018 | 3.0 | 4.6 | -1.5 | -300 | -500 |
| 2023 | 18.0 | 5.1 | 13.0 | 2,100 | 3,500 |
| 2028 | 42.9 | 5.6 | 37.3 | 5,500 | 9,200 |
| 2031 | 59.7 | 5.9 | 53.8 | 7,500 | 12,500 |

Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 11 (Oct 2013)
Planning commitments taken from Table 27a (assume 90% of planning commitments come forward), and assumes that 70% of commitments will absorb Zone 1 capacity in accordance with currnet shopping patterns
also excludes the planning permission at Aldi at Scotforth Road, Carnforth as located in Zone 6

## TABLE 27a: COMPARISON GOODS PLANNING COMMITMENTS BENCHMARK TURNOVER WITHIN IDENTIFIED CENTRES (2013)

| Reference | Location | Proposal | Gross Retail | Net Comparison Retail | Estimated Turnover | Estimated Turnover | Trade Drawn from Study Area | |
|---|---|---|---|---|---|---|---|---|
| **Lancaster** | | | | | | | % | £m |
| **Zone 1** | | | | | | | | |
| 10/00251/FUL | Land at Lawson's Bridge, | EH Booths supermarket | 3,230 | 205 | 5,000 | 1.0 | 90 | 0.9 |
| 12/01090/FUL | Morecambe Road | Aldi, foodstore extension | 200 | 40 | 5,000 | 0.2 | 95 | 0.2 |
| 12/00917/PLDC | Aldcliffe Road, Lancaster | CLUED to convert B&Q | 2,100 | 336 | 9,500 | 3.2 | 95 | 3.0 |
| | Hala Road, Scotforth | Re-occupation of Booths for discounter | | 80 | 5,000 | 0.4 | 95 | 0.4 |
| 11/00958/FUL | Unit 1, Bulk Road, | Mezzanine floor within | | 617 | 3,062 | 1.9 | 95 | 1.8 |
| 11/01089/FUL | Former Police Station, | Construction of retail | 411 | 329 | 3,000 | 1.0 | 95 | 0.9 |
| **Zone 6** | | | | | | | | |
| 13/00217/FUL | Scotland Road, Carnforth | Aldi foodstore | 1,495 | 198 | 5,000 | 1.0 | 96 | 1.0 |
| **Sub Total (Lancaster)** | | | **5,941** | **1,805** | | **8.7** | | **8.2** |
| | | | | | | | | |
| **Total** | | | **5,941** | **1,805** | | **8.7** | | **8.2** |
| | | | | | | | | |

**Notes**
Source: Lancaster Council Retail Monitoring Report (AMR) 2012-2013
1. Floorspace for EH Booths taken from 10/00251/FUL, WYG has assumed that 100% diversion of existing Trade from current Booths store at Hala Road to new store (WYG estimate benchmark minus derived turnover from Table 5) to estimate uplift in turnover only
2. WYG has assumed re-occupation of existing Booths store for discount retailer (estimated turnover based on average of Lidl and Aldi sales density)
Net convenience floorspace derived from ratio provided by Verdict Grocer Retailers (2012) where available, otherwise WYG judgement

### Table 3a: Estimated 'Capacity' for Comparison Goods Facilities -Morecambe (Zone 2)

| Year | Benchmark Turnover - £m[1] | Derived Expenditure Available - £m[2] | Surplus Expenditure - £m |
|---|---|---|---|
| 2013 | 114.3 | 114.3 | 0.0 |
| 2018 | 126.7 | 128.1 | 1.4 |
| 2023 | 140.2 | 148.5 | 8.3 |
| 2028 | 154.8 | 174.5 | 19.7 |
| 2031 | 164.2 | 191.7 | 27.5 |
| **Market Share** | | **9.5** | |

Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 11 (Oct 2013)
Assumes constant market share claimed by all faciliites in Morcambe Urban Area (Zones 2) facilities at 9.5% from Study Area
Assumes a inflow of 18% taken from Table 26 (after allowances for trade from outside study area accounted for and account of STEAM data)
At 2011 prices

### Table 2b: Quantitative Need for Additional Floorspace – Comparison Goods

| Year | Comparison Goods | | |
|---|---|---|---|
| | £m | Floorspace Requirement | |
| 2013 | 0.0 | 0 | 0 |
| 2018 | 1.4 | 300 | 400 |
| 2023 | 8.3 | 1,400 | 2,300 |
| 2028 | 19.7 | 2,900 | 4,900 |
| 2031 | 27.5 | 3,800 | 6,400 |

Average sales density assumed to be £5,000 per sq.m at min and £3,000 per sq. m for max
Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 11 (Oct 2013)
At 2011 prices

### Table 2c: Net Quantitative Need for Additional Floorspace - Comparison Goods

| Year | Comparison Goods | | | | |
|---|---|---|---|---|---|
| | £m | £m | £m | Floorspace Requirement | |
| | | Extant | Residual | Min[1*] | Max[2*] |
| 2013 | 0.0 | | | | |
| 2018 | 1.4 | 2.0 | -0.6 | -100 | -200 |
| 2023 | 8.3 | 2.2 | 6.1 | 1,000 | 1,700 |
| 2028 | 19.7 | 2.4 | 17.3 | 2,600 | 4,300 |
| 2031 | 27.5 | 2.5 | 24.9 | 3,500 | 5,800 |

Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 11 (Oct 2013)
Planning commitments taken from Table 27a (assume 90% of planning commitments come forward), and assumes that 30% of commitments will absorb Zone 2 capacity
also excludes the planning permission at Aldi at Scotforth Road, Carnforth as located in Zone 6