Nathaniel Lichfield & Partners
Planning. Design. Economics.

South Lakeland Retail Study Update 2012

South Lakeland District Council

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1.0 Planning for South Lakeland Town Centres

1.1 South Lakeland District Council commissioned Nathaniel Lichfield & Partners (NLP) to complete a retail study, compliant with the requirements of Planning Policy Statement 4 (2009) 'Planning for Sustainable Economic Growth'. This 2012 Study updates the South Lakeland Retail Study (2007) regarding capacity for new floorspace in the principal centres, and is concerned with those areas of the District which are outside of the Lake District National Park and Yorkshire Dales National Park (the Local Development Framework area).

1.2 The objective of this Study is to provide a robust retail evidence base to inform preparation of the Local Development Framework (LDF), Supplementary Planning Documents (SPDs) and management plans for individual town centres. The Study is written to inform policy development across the District but focuses specifically upon Kendal, Ulverston, Grange over Sands, Kirkby Lonsdale and Milnthorpe town centres. The Study:

- provides up to date advice on the market demand and capacity for additional convenience and comparison retail floorspace in the District up to 2025; and
- advises on potential options to meet any identified quantitative and qualitative capacity for new convenience and comparison retail floorspace up to 2025.

1.3 In the Study: Section 2.0 provides an overview of retail trends; Section 3.0 summarises national and local planning policy; Section 4.0 details new empirical research; Section 5.0 provides an overview of retail performance; Section 6.0 considers the need for new retail floorspace; Section 7.0 appraises development sites; Section 8.0 provides analysis of 'food deserts'; Section 9.0 considers local impact tests; and Section 10.0 presents conclusions and recommendations.

2.0 National Retail Trends

2.1 Past national retail trends indicate that expenditure has consistently grown in real terms in the past, generally following a cyclical growth trend. The underlying trend shows consistent growth and is expected to continue in the future. However, the economic downturn post 2008 has caused a slow down of growth and even shrinkage in recent years and is expected to lead to limited growth over the period to 2014 at least.

2.2 In the past, expenditure growth has fuelled the growth in retail floorspace, including major out-of-centre development in the 1980s and 1990s. The economic downturn suggests that growth during the past few years has slowed and a return to previous levels of growth is unlikely to be achieved in the short term. However, the underlying trend over the medium and long term is expected to lead to a need for further retail floorspace. NLP anticipates these national trends will be mirrored in South Lakeland District, at least in the larger centres of Kendal and Ulverston.

2.3 New forms of retailing have emerged in recent years as an alternative to more traditional shopping activity. Home/electronic shopping has emerged with the increasing growth in the use of personal computers and the internet. Smart phone technology, Apps and QR (Quick Response) codes are set to increase the proportion of shopping transactions undertaken remotely. Trends within this sector will have implications for retailing within South Lakeland. The growth in home computing, smart phone usage and interactive TV is likely to lead to a growth in remote shopping and will have further effects on retailing in the high street.

2.4 On-line shopping has experienced rapid growth since the late 1990s. Recent trends suggest strong growth in this sector, which is continuing despite current economic circumstances. However, in proportional terms the latest available data suggests it remains an insignificant percentage of total retail expenditure and there is still uncertainty about its longer-term prospects and the potential extent of effects on the high street. Experian has recognised the potential impact of retailing on the high street and has provided future projections. Experian's Retail Planning Note 2.3D (Dec 2005) (page 1) states:

"The current scale and scope for the expansion of the selling of retail goods over the internet (e-tailing) has increasingly become an issue in retail planning… A major uncertainty, however, concerns projected growth rates…goods sold over the internet may still come from conventional retail outlets (i.e. sales made over the internet may still be taken from shelves of normal shops), so there is an additional uncertainty over e-tailing's precise impact on current and future space requirements."

2.5 This commentary is equally applicable to smart phone technology.

2.6 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. Retailers also responded to stricter planning controls by changing their trading formats. Most major food operators have introduced smaller store formats capable of being accommodated within town centres, such as the Tesco Metro, Sainsbury Local, Little Waitrose, Morrisons 'M' and Marks & Spencer Simply Food formats.

2.7 Tesco announced on the back of poor trading figures at the end of 2011, a move away from its 'Extra' format stores and a concentration on smaller outlets.

2.8 Asda has moved into the smaller store market through the acquisition of Netto and newcomer Morrison's is set to expand its 'M Local' format.

2.9 Food operators have also entered the local convenience store market, for example Tesco Express and convenience stores linked with petrol filling stations.

2.10 The entrance of European discount food operators such as Aldi and Lidl has also been rapid during the last decade, and this trend has been evident within South Lakeland (i.e. Aldi in Kendal).

2.11 Food store operators also have a rolling programme of store extensions and reinvigorating, particularly Tesco and Sainsbury. These operators, faced with limited growth in food expenditure, have, along with Asda, attempted to increase the sale of non-food products within their food stores, including clothing and electrical goods. Asda have also expanded into comparison goods focused stores through their 'Asda Living' outlets, which are primarily located on out of centre retail warehouse parks.

2.12 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. There are now fewer DIY operators, following the acquisition of Do It All, Great Mills and Wickes by Focus DIY (which itself went into administration in May 2011). B&Q has acquired the Focus store at Burton Road, Kendal.

2.13 B&Q and Homebase developed very large 'category killer' retail warehouses (some exceeding 10,000 sq m gross), but more recently have scaled down or closed stores. Other traditional high street retailers have sought large out-of-centre stores, for example Boots, TK Maxx and Poundstretcher. Matalan opened numerous discount clothing stores across the country in the 1990s and early part of the last decade. Sports clothing retail warehouses including JD Sports, JJB Sports and Decathlon have also expanded out-of-centre.

2.14 The economic downturn has had, and is likely to continue to have, an impact on the retail sector, with Habitat, Past Times, Peacocks and TJ Hughes recent notable victims. Many town centre development schemes have been delayed and the demand from traditional retail warehouse operators has also been affected. The strongest arm of the retail sector, the main food store operators, has also seen a reduction in growth; albeit this is expected to be a blip rather than a trend.

2.15 Within town centres, some high street multiple comparison retailers have changed their format. High street national multiples have increasingly sought larger modern shop units (200 sq. m +) with an increasing polarisation of activity into the larger regional and sub-regional centres. The continuation of these trends may also influence future operator requirements in South Lakeland. National multiples may prefer to locate in the sub-regional centres of Carlisle, Lancaster or Preston or regional centres further afield; this would constrain demand in South Lakeland.

2.16 Factory outlet centres (FOCs) have developed across the country as an alternative to fashion shops within town centres. These developments are usually large and will provide 10,000 sq m of comparison retailing typically, focusing primarily on fashion items and clothing and offering designer clothing at discounted prices. A number of FOCs have emerged across Great Britain and draw from a wide catchment area. The K-Village in Kendal is an example of the FOC business model.

3.0 # Planning Policy Context

National Retail Planning Policy

Planning Policy Statement 4 (2009) 'Planning for Sustainable Growth'

3.1 PPS4: Planning for Sustainable Growth was published on 29 December 2009 and sets out the Government's policies for economic development, replacing PPG4, PPG5, PPS6 and parts of PPS7 and PPG13. PPS4 places retail and town centre development in its wider context, as "economic development", which is anything that provides employment opportunities, generates wealth or produces an economic output or product.

3.2 Paragraph 7 of PPS4 identifies main town centre uses as:

- retail (including warehouse clubs and factory outlet centres);
- leisure, entertainment facilities and the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, night-clubs, casinos, health and fitness centres, indoor bowling centres and bingo halls);
- offices; and
- arts, culture and tourism (theatres, museums, galleries and concert halls, hotels and conference facilities).

Using Evidence

3.1 As with its predecessor PPS6, the emphasis of PPS4 is on the "plan-led" approach and the need to base regional and local plan policies on a robust evidence base. The volume and detail of the evidence gathered should be proportionate to the importance of the issue. At the local level, Policy EC1.3 states that the evidence base should:

a be informed by regional assessments*;

b assess the detailed need for land or floorspace for economic development, including for all main town centre uses over the plan period;

c identify any deficiencies in the provision of local convenience shopping and other facilities which serve people's day-to-day needs;

d assess the existing and future supply of land available for economic development, ensuring that existing site allocations for economic development are reassessed against the policies in this PPS, particularly if they are for single or restricted uses. Where possible, any reviews of

* Now overridden by the demise of Regional Strategies.

land available for economic development should be undertaken at the same time as, or combined with, strategic housing land availability assessments; and

e assess the capacity of existing centres to accommodate new town centre development taking account of the role of centres in the hierarchy and identify centres in decline where change needs to be managed.

3.2 Specifically in relation to retail, Policy EC1.4 requires local planning authorities to take account of both the qualitative and quantitative need for additional floorspace for different types of retail developments.

3.3 When assessing quantitative need, relevant market information and economic data should be taken into consideration, including a realistic assessment of existing and forecast population levels, forecast expenditure for specific classes of goods to be sold, within the broad categories of convenience and comparison goods, and forecast improvements in retail sales density.

3.4 In terms of qualitative need, assessments should consider whether there is provision and distribution of shopping and local services, which allow genuine choice to meet the needs of the whole community. In deprived areas, which lack access to a range of services and facilities, additional weight should be given to meeting these qualitative deficiencies. Assessments should also take into account the degree to which shops may be overtrading and whether there is a need to increase competition and retail mix.

Plan Making

3.5 Policy EC2.1 identifies the issues that regional planning bodies and local planning authorities are required to address within their development plan, including:

- setting out a clear economic vision and strategy for their area which positively and proactively encourages sustainable economic growth, identifying priority areas with high levels of deprivation that should be prioritised for regeneration investment;
- seeking to make the most efficient and effective use of land, prioritising previously developed land which is suitable for re-use and reflects the different location requirements of businesses;
- identifying a range of sites, to facilitate a broad range of economic development, including mixed use. Existing site allocations should not be carried forward from one version of the development plan to the next without evidence of the need and reasonable prospect of their take up during the plan period. If there is no reasonable prospect of a site being used for the allocated economic use, the allocation should not be retained, and wider economic uses or alternative uses should be considered;
- encouraging new uses for vacant or derelict buildings, including historic buildings; and

- considering how sites for different business types can be delivered, including by the use of compulsory purchase to assemble sites and other planning tools including area action plans, simplified planning zones and local development orders.

3.6 Specifically in relation to planning for centres, Policy EC3 requires local planning authorities to set a strategy for the management and growth of centres over the plan period. As part of this strategy, LPAs should set flexible policies for their centres, which are able to respond to changing economic circumstances and encourage, where appropriate, high-density development accessible by public transport, walking and cycling.

3.7 LPAs are also required to define a network and hierarchy of centres, to meet the need of their catchments. In addition, at the local level there is a requirement to:

a define the extent of the centre and the primary shopping area, having considered distinguishing between realistically defined primary and secondary frontages in designated centres and set policies that make clear which uses will be permitted in such locations;

b consider setting floorspace thresholds for the scale of edge-of-centre and out-of-centre development which should be subject to an impact assessment and specify the geographic areas these thresholds will apply to;

c define any locally important impacts on centres which should be tested;

d encourage residential or office development above ground floor retail, leisure or other facilities within centres, ensuring that housing in out-of-centre mixed-use developments is not, in itself, used as a reason to justify additional floorspace for main town centre uses in such locations;

e identify sites or buildings within existing centres suitable for development, conversion or change of use; and

f use tools such as local development orders, area action plans, compulsory purchase orders and town centre strategies to address the transport, land assembly, crime prevention, planning and design issues associated with the growth and management of their centres.

3.8 Policy EC4.1 requires LPAs to proactively plan to promote competitive town centre environments and provide consumer choice.

3.9 Policy EC5.1 requires LPAs to identify an appropriate range of sites to accommodate the identified need for main town centre uses, ensuring that sites are capable of accommodating a range of business models in terms of scale, format, car parking provision and scope for disaggregation. The Policy states that an apparent lack of sites of the right size and in the right location should not be a reason for LPAs to avoid planning to meet the identified need for development. In undertaking the site selection process, LPAs should:

a base their approach on the identified need for development;

b identify the appropriate scale of development, ensuring that the scale of the sites identified and the level of travel they generate, are in keeping with the role and function of the centre within the hierarchy of centres and the catchment served;

c apply the sequential approach to site selection;

d assess the impact of sites on existing centres; and

e consider the degree to which other considerations such as any physical regeneration benefits of developing on previously-developed sites, employment opportunities, increased investment in an area or social inclusion, may be material to the choice of appropriate locations for development.

3.10 In relation to the sequential approach to site selection, Policy EC5.2 confirms that LPAs should identify sites that are suitable, available and viable in the following order:

1 locations in appropriate existing centres where sites or buildings for conversion are, or are likely to become, available within the plan period;

2 edge-of-centre locations, with preference given to sites that are or will be well-connected to the centre;

3 out-of-centre sites, with preference given to sites which are or will be well served by a choice of means of transport and which are closest to the centre and have a higher likelihood of forming links with the centre.

3.11 In terms of assessing the impact of proposed locations for development, Policy EC5.4 requires LPAs to take into account the impact considerations set out in Policy EC16 (see Section 9.0), and ensure that proposed sites in a centre which would substantially increase the attraction of that centre and could have an impact on other centres are assessed for their impact on those centres.

3.12 Once sites are identified for development, Policy EC5.5 states that LPAs should allocate sufficient sites in development plan documents to meet at least the first five years identified need, where appropriate including policies for phasing and release of sites.

National Planning Policy Framework

3.13 In advance of the publication of a Draft National Planning Policy Framework (NPPF) Greg Clark MP issued a Ministerial Statement on 'Planning for Growth' in March 2011. The statement established that the default answer to proposals for development and growth should, wherever possible, be 'yes', except where it would compromise key sustainable development principles. The statement highlights the need for local authorities to plan positively for development, by seeking to identify and meet need and responding positively for opportunities for growth. The content of the statement, particularly the need to secure economic growth and employment are to be taken into account in the determination of planning applications.

3.14 The NPPF will provide national planning guidance, once adopted, replacing existing PPG's and PPS's. A draft of the document was published for consultation on 25 July 2011, with consultation occurring until 17 October 2011. Advice from PINS indicates that the draft document can be a material consideration, depending on the context. Weight is only likely to be applied to key areas of change, with the most significant being the presumption in favour of sustainable development. Adoption of the NPPF is expected in 2012.

3.15 The draft NPPF establishes a presumption in favour of sustainable development, stating that the planning system should not act as an impediment but support economic growth. It states that all Local Plans should be prepared on this basis, with clear policies to guide how the presumption will be applied. They should identify the needs of an area and respond positively to opportunities for growth, including allocating sufficient, suitable land for development. Strategic policies for the provision of retail and other commercial development should be included.

3.16 The document stipulates that the evidence base should be used to set quantitative and qualitative requirements for land or floorspace for economic development, including retail uses. Such an assessment should include the role and function of town centres, and the capacity of existing centres to accommodate new town centre development.

3.17 The NPPF requires planning policies to promote positive and competitive town centres. Policies should:-

1. Support the vitality and viability of town centres;
2. Define a network and hierarchy of centres;
3. Set out primary and secondary shopping areas;
4. Encourage town centre residential development;
5. Allocate sites to meet identified needs, both in and on the edge of centres, potentially through town centre expansion and where this is not possible in other accessible locations; and
6. Set specific guidelines for retail proposals that cannot be accommodated in or adjacent to town centres.

3.18 The NPPF reiterates the sequential approach to site assessment. Retail proposals not in accordance with an up to date Local Plan and over 2,500 sq. m, where a local threshold has not been set, are to be assessed for impact on existing, committed and planned investment in centres and the vitality and viability of centres.

Regional Strategy

3.19 In July 2010, Government revoked Regional Strategies outside of London. Government announced the revocation of Regional Strategies in June 2010, after the Core Strategy EiP and prior to the Inspector issuing his report on the Core Strategy. The Inspector requested comments for parties involved in the

EiP regarding the implications of revocation of the Regional Strategy (RS) for the North West and determined the Core Strategy to be sound, in the absence of the Regional Strategy.

3.20 A High Court judgement, following a court case brought by Cala Homes, ruled this to be unlawful and quashed the revocation. The RS for the North West therefore remains part of the Development Plan. The Localism Act (2011) gained Royal Assent in November 2011 and it is the Government's intention to abolish RS through secondary legislation; no further reference to the Regional Strategy is made here.

Cumbria and Lake District Joint Structure Plan (2006)

3.21 A number of policies of the Cumbria and Lake District Joint Structure Plan were 'saved' upon adoption of the Regional Strategy in 2008. The Structure Plan identifies Kendal and Ulverston as key service centres where sustained development is appropriate. Grange over Sands, Kirkby Lonsdale and Milnthorpe are identified as key service centres that are suitable for moderate development that is appropriate to the scale of the town (Policy ST5). The Core Strategy supersedes the Settlement Hierarchy of the Structure Plan. Commentary on the appropriate scale of development in the centres of the District is a consideration, but out of date so far as retail and town centre uses are concerned.

South Lakeland Local Plan and Alterations 2007

3.22 The South Lakeland Local Plan was adopted in September 1997 with further alterations to the document adopted in March 2006. In line with the requirements of the Planning and Compulsory Purchase Act (2004), ahead of the preparation of a Local Development Framework, some policies contained within the Local Plan were saved beyond September 2007 for development control purposes. The adoption of the South Lakeland Core Strategy in October 2010 has superseded some Local Plan policies. Only policies saved following the adoption are referred to below.

3.23 Kendal is identified as the main market and shopping centre for the District. Policies R1, R1a and R2 relate to Kendal town centre. Development for retail uses is encouraged where it would not harm town centre vitality and viability, is of an appropriate scale and respects the conservation area. Out of town retail development is not supported where it would harm vitality and viability of the town centre. Proposals for retail development outside of Kendal town centre must also meet a demonstrable need, meet the sequential test, be restricted to bulky comparison goods, assess impacts on travel patterns, be of a high standard of design and provide adequate parking, servicing and landscaping.

3.24 Policy R1a allocates land behind the Westmoorland Gazette, Strickland Gate, Kendal for retail use incorporating Class A1, A2 and A3 to the ground floor, with office and residential development to the first floor. Development pursuant to this allocation is now implemented and a Booths foodstore and other retail, café and restaurant uses at Wainright's Yard are now operational in this part of the town centre.

3.25 Policy R2 is out-of-step with national planning policy, save for its reference to the sequential approach, but sets out the sequential approach and impact tests that new out-of-centre development must comply with.

3.26 Policies R4 and R5 provide guidance for retail development in and around Ulverston town centre. Policy R4 permits the alteration and extension of existing premises within the shopping area and policy R5 discourages out of centre retail development unless it can be demonstrated that it will not have an adverse impact on town centre health. Out of town retail proposals in Ulverston must meet also meet the requirements for out of centre development set out above for Kendal (para. 3.23).

3.27 Policy R7 favours small-scale retail development in rural settlements or as part of large new housing developments to meet local community needs.

3.28 The retail character of primary shopping areas in Kendal and Ulverston are protected through policy R8. Policy R9 also encourages the development of non-retail uses in the shopping areas of Kirkby Lonsdale, Grange over Sands and Cartmel (a settlement 2km to the west of Grange over Sands) and the secondary retail frontages of Kendal and Ulverston.

Local Development Framework

3.29 South Lakeland District Council is in the process of preparing its Local Development Framework (LDF) in line with the provisions of the Planning and Compulsory Purchase Act 2004. When adopted, the LDF will replace saved policies in the Local Plan as the statutory local planning document.

3.30 The South Lakeland Core Strategy was adopted in October 2010 and supersedes many of the policies set out in the Local Plan. The Core Strategy identifies Kendal and Ulverston as Principal Service Centres and Grange over Sands, Milnthorpe and Kirkby Lonsdale as Key Service Centres (Policy CS1.2). Policy CS2 promotes the role of Kendal as the principal town in the District for shopping and the regeneration of the Canal Head area of Kendal, potentially through a scheme including appropriately scaled retail uses.

3.31 Policy CS3.1 supports retail development in Ulverston town centre whilst seeking to protect and enhance its vitality and viability. Policies CS4 and CS5 state that South Lakeland Council aims to safeguard the roles of Grange over Sands, Kirkby Lonsdale and Milnthorpe Key Service Centres through the development of sites for new retail space.

3.32 Policy CS7.5 identifies Kendal as a Large Town Centre that services the District and beyond, Ulverston as a Medium Town Centre with a wide rural catchment and Grange over Sands, Kirkby Lonsdale and Milnthorpe as Smaller Centres which provide services for local residents and their rural catchment. Local Service Centres are also identified that provide for the everyday local needs of their immediate rural catchment. Retail development in town centres where it is appropriate in scale and in a sustainable location is supported. Consideration of impact on the character centres is important.

3.33 Policy CS7.5 addresses the requirement to enhance local provision to reduce the leakage of expenditure to outside of the District and improve the performance of local centres through enhanced local provision resulting in a ‘claw back’ of expenditure, although strongly resists out of centre retail development.

3.34 The Council is progressing a Land Allocations DPD. A consultation on the Pre-Submission document is programmed for February to April 2012. The Allocation of Land DPD includes a Retail Topic Paper, which proposes a town centre boundary, Primary Shopping Area and identification of retail frontages in the five principal centres of the District.

3.35 South Lakeland Council is also producing an Area Action Plan for the Canal Head area of Kendal. A Revised Preferred Options document was considered by the District Council Cabinet in October 2010. Preparation of the document is currently on hold.

4.0 New Research: 2011 Surveys

Telephone Household Surveys

4.1 In early December 2011 NEMS Market Research carried out a telephone survey of 1,000 households across a study area encompassing the entire District, including the parts of South Lakeland within the Lake District National Park and Yorkshire Dales National Park. The Study Area extends marginally south into Lancaster, west into Copeland and north into Eden local authority areas. The Study Area is divided into ten sub-zones. Zones 1 to 3 cover the Kendal area, Zone 7 is Kendal's rural northern hinterland and land within the Yorkshire Dales National Park, Zones 6 and 10 cover the much of the Lake District National Park that is within South Lakeland and Zones 4, 9 and 8 the south of the District.

Table 4.1 Study Area Survey Zones

Survey Zone	Post Code Sectors
1. Kendal Central and West	LA9/4 and LA9/5
2. Kendal North and North East	LA9/6
3. Kendal South	LA9/7
4. Grange over Sands	LA11/6 and LA11/7
5. Milnthorpe	LA7/7 and LA8/8
6. Windermere	LA22/0, LA22/9, LA23/1, LA23/2 and LA23/3
7. Sedbergh, Grayrigg and Staveley	LA8/0, LA8/9 and LA10/5
8. Arnside, Silverdale, Carnforth and Kirkby Lonsdale	LA5/0, LA5/9, LA6/1, LA6/2 and LA6/3
9. Ulverston	LA12/0, LA12/7, LA12/8 and LA12/9
10. Coniston and Broughton in Furness	LA14/4, LA15/8, LA16/7, LA17/7, LA20/6 and LA21/8

4.2 The 2011 household survey questionnaire is similar to that used in the 2007 Study to allow for comparison of change over time. The survey was undertaken in December 2011 and therefore a caveat was included in questions to ensure that respondents provide details of their normal shopping habits rather than Christmas shopping patterns. Appendix 2 includes the questionnaire and raw results of the household survey. Commentary on the shopping patterns is provided in Section 5.0 and the result of the capacity assessment is at Section 6.0.

5.0 # Retail Performance and the Shopping Hierarchy

The Sub-Region

5.1 The Management Horizons' (MHE) Index of 2008 ranks over 6,000 retail destinations across the UK in terms of the range of goods they provide. The MHE Index ranks Kendal 199th, nationally out of over 6,000, behind Preston (42nd), Carlisle (79th) and Lancaster (158th). Kendal is considered to be a Sub-Regional centre in MHE terminology, which is the same categorisation as Lancaster but lower in the hierarchy than Preston (Major Regional centre) and Carlisle (Regional centre).

5.2 Ulverston is ranked 1,535th by MHE amongst over 6,000 UK centres and is identified as a Local Centre. Kirkby Lonsdale, Grange over Sands and Milnthorpe are all classified as Minor Local Centres and are ranked as 3,525th (Kirkby Lonsdale) and joint 4,666th (Milnthorpe and Grange over Sands) in the UK.

Household Shopping Patterns

5.3 The plan at Appendix 1 illustrates the Study Area adopted and the ten sub-zones. The analysis of the household telephone survey excludes 'internet'/'mail order' responses, except where respondents cited that their primary main food shop was undertaken via the internet. Where this occurred, respondents were asked a supplementary question to establish which retailer they shopped online with and the responses were distributed according to the nearest store to their home post-code operated by the retailer identified. 'Don't know'/'don't buy' answers are excluded from analysis.

5.4 Typical convenience shopping habits result in the utilisation of a number of destinations for convenience goods purchases. The household survey reflects this by querying primary main food destination, secondary main-food destination and top-up shopping destination. The analysis of the household survey assumes that 50% of available expenditure is directed to primary main-food destinations, 20% is directed to secondary main-food destinations and 30% is directed to top-up shopping destinations. The split between main-food and top-up shopping is informed by Experian demographic information and local retail characteristics. There is not a set formula for splitting expenditure by primary, secondary and top-up destinations but the NLP approach is robust and reflective of standard practice in the completion of retail studies and town centre studies.

5.5 The comparison retail spending power of the Study Area is split amongst categories of goods. Comparison retail spending is recorded by questions querying 'last' destination across seven categories of goods. In contrast with the food retail sector, the questions do not query 'main' and 'secondary' destinations. This is because comparison retail spending tends to be divided across a much broader number of stores than convenience retail shopping, where repeat patterns set in, and the 'last' destination question is considered by NLP to be the most reliable in recording comparison retail shopping patterns. The division of comparison goods spending power across the seven categories of goods is:

- Clothing and Footwear – 25%;
- Domestic Electrical Appliances ('White Goods') – 4%;
- Other Electrical Goods including TVs/Music Systems/Computers – 12%;
- Furniture and Floor Coverings – 12%;
- DIY – 11%;
- Health and Beauty – 11%; and
- Books, CDs and Toys – 25%.

5.6 The proportion of expenditure directed to different categories of goods is informed by Experian demographic information. In common with the convenience goods assessment, there is not a set formula for splitting expenditure amongst different categories of goods but the NLP approach is robust and reflective of standard practice in the completion of retail and town centre studies.

5.7 The analysis below is based upon interviewees' responses to detailed questioning about: main food (primary and secondary destinations) and top up food shopping; and comparison shopping across the seven categories of goods. The analysis provides commentary on overall food and non-food shopping patterns.

5.8 The survey results at Appendix 2 provide details of responses to questions querying primary main-food, secondary main-food and top-up shopping patterns and shopping patterns across the seven categories of comparison goods.

5.9 The statistical tables at Appendix 3 combine the main-food and top-up shopping patterns, to arrive at overall convenience shopping patterns in the District. The same approach is adopted for the comparison retail sector, where shopping patterns across goods categories are combined to provide an overall picture of comparison shopping patterns. The approach adopted is consistent with PPS4 and the goods based approach to assessing retail patterns.

5.10 The Study Area is post-code sector based and as such does not follow administrative boundaries precisely. Zones 1 to 3 wholly relate to the South Lakeland LDF area, Zones 6 and 10 largely relate to the area of the District under the planning control of the Lake District National Park, although part of Zone 10 lies outside of the District. Zones 4, 5 and 9 include areas under the control of the District or the Lake District National Park and Zone 7 similarly covers areas that are under the control of the District Council, Lake District National Park and Yorkshire Dales National Park. Zone 8 comprises areas within the District and neighbouring Lancaster.

5.11 In order to assess the proportion of expenditure generated within South Lakeland that is retained within the District, the results for Zone 8 and Zone 10 are interrogated further so as to split the findings proportionally, according to the resident population, between those residents living within the District boundary and those living outside of it.

Comparison Retail Shopping Patterns

5.12 Table 5.1 details the proportion of comparison retail expenditure generated within each sub-zone of the Study Area that is retained within the District (including within those parts of the District that are outside of the LDF area):-

Table 5.1 Retention of Comparison Expenditure within the District

Centre	District Retention		District Leakage	
	£m	%	£m	%
Kendal Central and West (Zone 1)	29.5	88.8	3.7	11.2
Kendal North and North East (Zone 2)	20.3	91.0	2.0	9.0
Kendal South (Zone 3)	26.5	86.0	4.3	14.0
Grange over Sands (Zone 4)	18.4	71.3	7.4	28.7
Milnthorpe (Zone 5)	20.3	82.5	4.3	17.5
Windermere (Zone 6)	33.3	82.8	6.9	17.2
Sedbergh, Grayrigg and Staveley (Zone 7)	24.8	86.5	3.9	13.5
Arnside, Silverdale, Carnforth and Kirkby Lonsdale (Zone 8) [†]	6.9	36.2	12.2	63.8
Ulverston (Zone 9)	20.1	33.1	40.7	66.9
Coniston and Broughton in Furness (Zone 10) [‡]	0.4	5.1	8.0	94.9
South Lakeland Total	**200.5**	**68.2**	**93.4**	**37.8**

Source: NEMS Household Survey December 2011

5.13 The retention rate of comparison expenditure in the District is 68.2%.

5.14 Table 5.2 compares the retention rate of the District with other administrative areas considered by Management Horizons (MHE Shopping Index 2008) to include a principal centre of a similar size to Kendal and with a comparative catchment area population.

5.15 The District is performing better than the Reigate and Banstead, Newcastle under Lyme, Bassetlaw and East Riding administrative areas, which retain a lower proportion of comparison expenditure. This comparison exercise illustrates that retention rates in the District area healthy. The rural nature of South Lakeland means that retention rates should be higher than in urban areas where there is greater competition from other, potentially higher order, centres. That said, a retention rate of 68.2% is high and demonstrates that the centres in the District serve the needs of the local population well.

[†] Relates only to area within the District/based upon Table 16 assuming expenditure from Zone 8 is directed to destinations inside is from within the District.

[‡] Relates only to area within the District/based upon Table 16 assuming expenditure from Zone 10 is directed to destinations inside is from within the District.

Table 5.2 Comparison Market Shares and Retention Rates for Other Similar Districts and Centres

Local Authority	Centre	Centre Market Share (%)	District Retention Rate (%)
Reigate and Banstead Borough	Redhill	9.6	24.3
Newcastle under Lyme Borough	Newcastle	32.2	44.5
Bassetlaw District	Worksop	18.4	50.1
East Riding of Yorkshire	Beverley	12.4	38.7

Source: Reigate and Banstead Retail and Leisure Needs Assessment (2007)
Newcastle under Lyme Retail and Leisure Study (2011)
Bassetlaw Retail Study (2009)
East Riding Town Centres and Retail Study (2009)

5.16 Table 5.3 sets out the proportion of expenditure generated within each area of the District that is directed towards the main town within that area:-

Table 5.3 Retention of Comparison Expenditure within Study Towns in the District

Centre	Study Town Retention		Study Town Leakage	
	£m	%	£m	%
Kendal Area (Zones 1, 2 and 3)	75.4	87.4	10.9	12.6
Ulverston Area (Zone 9)	15.7	25.8	45.1	74.2
Grange over Sands Area (Zone 4)	4.9	19.0	20.9	81.0
Kirkby Lonsdale Area (Zone 8) §	0.4	2.1	18.7	97.9
Milnthorpe Area (Zone 5)	2.4	9.8	22.2	90.2
Study Towns Total	**98.8**		**117.8**	

Source: NEMS Household Survey December 2011

5.17 The comparison retail expenditure retention rate of the principal towns within the LDF area of the District is 45.6%. The market share of Kendal is 34.8%, which is higher than the comparative centres of Redhill, Newcastle-under-Lyme, Worksop and Beverley. The market share recorded suggests that Kendal, in common with the District, is performing well in comparison to similar sized centres elsewhere in the UK.

5.18 A high proportion of the comparison expenditure generated within Kendal is retained within the town (87.4%). The greatest proportion of comparison retail expenditure retained within the District is in Zone 2 (Kendal North and North East at 91.0%). This is a reflection of the higher order nature of the centre, the comparison retail floorspace offer within the town and Kendal's role within the District retail hierarchy as the dominant shopping destination.

5.19 Ulverston experiences a high level of leakage of comparison expenditure to destinations outside of the District, due to its location on the edge of the administrative area. Proximity to Barrow in Furness town centre means that this is not necessarily demonstrative of unsustainable shopping patterns. Two

§ Relates only to area within the District/based upon Table 16 assuming expenditure from Zone 8 is directed to destinations inside is from within the District.

thirds of the comparison retail expenditure generated within the Ulverston area is leaked to destinations outside of the District. Ulverston retains only 25.8% of the comparison retail expenditure generated in the local area.

5.20 The majority of spending on comparison retail goods generated within both Grange over Sands and Milnthorpe is directed to locations within the District. However, the town centres attract a limited proportion of this expenditure (19.0% of comparison retail expenditure originating in the Grange over Sands area is retained within the town and corresponding retention rate in Milnthorpe is 9.8%). Kendal attracts a significant proportion of the expenditure generated within the Grange over Sands and Ulverston areas (53.7% from the Milnthorpe area and 31.4% from the Grange over Sands area).

5.21 A high proportion of comparison retail goods expenditure generated in the Kirkby Lonsdale area is directed to destinations other than the town. 63.8% of the comparison retail expenditure generated within Study Area Zone 8 is directed to destinations outside of the District and the town retains only 2.1%. Out-flow is directed to Lancaster City Centre (35.8%), reflecting Kirkby Lonsdale's location on the boundary of the District, transport connections to Lancaster and employment links with the City. As the Kirkby Lonsdale area is roughly equidistant from Lancaster and Kendal, shopping trips being made to the higher order Lancaster is not necessarily demonstrable of unsustainable shopping patterns.

5.22 The remaining Zones display different characteristics. The majority of comparison goods expenditure generated in Zones 6 and 7 is retained within the District. These are areas of the District from which Kendal is highly accessible a significant proportion of their comparison retail spending power is directed to the town (48.7% from Zone 6 and 54.4% from Zone 7). Zone 10 is further from Kendal, on the western edge of the District and therefore out-flow of comparison expenditure is very high at 95%. The majority (69.7%) is directed to Barrow town centre, which is another example of out-flow that is not necessarily demonstrative of unsustainable shopping patterns.

Convenience Retail Shopping Patterns

5.23 Table 5.4 details the convenience retail expenditure generated within each Study Area sub-zone that is retained within the District:-

Table 5.4 Retention of Convenience Expenditure within the District

Centre	District Retention		District Leakage	
	£m	%	£m	%
Kendal Central and West (Zone 1)	23.4	97.2	0.7	2.8
Kendal North and North East (Zone 2)	15.9	98.8	0.2	1.2
Kendal South (Zone 3)	21.1	97.7	0.5	2.3
Grange over Sands (Zone 4)	17.8	87.7	2.5	12.3
Milnthorpe (Zone 5)	15.1	87.8	2.1	12.2
Windermere (Zone 6)	29.3	96.9	0.9	3.1
Sedbergh, Grayrigg and Staveley (Zone 7)	19.9	98.0	0.4	2.0
Arnside, Silverdale, Carnforth and Kirkby Lonsdale (Zone 8) **	5.7	41.9	7.9	58.1
Ulverston (Zone 9)	27.2	62.8	16.1	37.2
Coniston and Broughton in Furness (Zone 10) ††	0.6	10.2	5.6	89.8
South Lakeland Total	**176.0**	**82.7**	**36.9**	**17.3**

Source: NEMS Household Survey December 2011

5.24 The retention rate of convenience retail expenditure generated in the District is 82.7%, which is considered to be a healthy level of retention.

5.25 Table 5.5 sets out the proportion of expenditure generated within each area of the District that is directed to the main town within that area:-

Table 5.5 Retention of Convenience Expenditure within Study Towns in the District

Centre	Study Town Retention		Study Town Leakage	
	£m	%	£m	%
Kendal Area (Zones 1, 2 and 3)	58.0	94.0	3.7	6.0
Ulverston Area (Zone 9)	25.0	57.7	18.3	42.3
Grange over Sands Area (Zone 4)	6.2	30.5	14.1	69.5
Kirkby Lonsdale Area (Zone 8) ††	1.4	10.3	12.2	89.7
Milnthorpe Area (Zone 5)	3.6	20.9	13.6	79.1
Study Towns Total	**94.2**		**61.9**	

Source: NEMS Household Survey December 2011

5.26 The average convenience expenditure retention rate of the study towns within the District is 60.3%.

5.27 Kendal retains a healthy proportion of convenience retail expenditure (94.0%) generated in the local area, although 72.6% of this expenditure is directed to free-standing stores outside of the town centre.

** Relates only to area within the District/based upon Table 8 assuming expenditure from Zone 8is directed to destinations inside is from within the District.

†† Relates only to area within the District/based upon Table 8 assuming expenditure from Zone 10 is directed to destinations inside is from within the District.

†† Relates only to area within the District/based upon Table 8 assuming expenditure from Zone 8 is directed to destinations inside is from within the District area.

5.28 62.8% of convenience retail expenditure generated within Ulverston is retained within the District and 57.7% of the spending is retained within the Ulverston area. The majority of the retained expenditure (84.4%) is directed to freestanding stores, outside of Ulverston town centre, primarily Booths at Oubas Hill. The leakage of expenditure to Barrow in Furness is allied with travel-to-work patterns, and is not necessarily demonstrative of unsustainable shopping patterns.

5.29 A significant proportion of the convenience expenditure generated in the Zones that include Grange over Sands (Zone 4, 87.7%) and Milnthorpe (Zone 5, 87.8%) is directed to destinations within the District. Free-standing convenience stores in Kendal attracted the highest proportion of this expenditure, with the Asda store at Burton Road being the most popular destination. This is reflected in the proportion of convenience spending retained within the towns of Grange over Sands and Milnthorpe, which is 30.5% and 20.9% respectively.

5.30 The District retains less than half of the convenience retail expenditure generated in the Kirkby Lonsdale area (Zone 8) and Kirkby Lonsdale town retains only 10.3% of the local convenience retail spending power, reflecting the town's location on the edge of the District. The highest proportion of convenience expenditure generated within Zone 8 is directed to Asda, Burton Road, Kendal (15.6% of total convenience expenditure) and therefore is retained within the District.

6.0 # The Need for New Retail Floorspace

Introduction

6.1 This section of the Update explores the quantitative and qualitative scope for new retail floorspace in South Lakeland District over the period to 2025. It provides a quantitative capacity analysis in terms of increases in levels of spending on convenience and comparison goods translated into floorspace capacity, and factors in the extent to which existing floorspace is trading at above expected ('benchmark') levels.

Methodology

Methodology Notes

6.2 Notes clarifying the approach adopted by NLP in completing the retail assessment included at Appendix 4 of the Study. Included at Appendix 4 is explanatory text on: i) Use of Experian rather than Pitney Bowes (MapInfo) expenditure data; ii) Experian data and growth projections; iii) Growth in turnover efficiency; and iv) Growth in Special Forms of Trading (non-store sales) and E-Tailing. The methodology adopted is consistent with the 2009 PPS4 Practice Guidance.

Population and Expenditure Data

6.3 The findings of the household survey are applied to the most up to date population and expenditure data to assess current trading patterns and capacity at 2012 and project forward capacity to 2017, 2022 and 2025 (2025 being the end of the LDF period).

Commitments

6.4 The figures given in the Tables below and at Appendix 3 do not take into account existing commitments. Commitments that come forward will reduce the overall capacity for new floorspace.

Constant Market Share Approach/Modelling Uplift

6.5 The figures assume a constant market share approach.

Expenditure Leakage

6.6 Leakage of expenditure from a locality, and the potential for new floorspace to enact a claw-back of leaked expenditure, can be indicative of additional capacity. This is particularly relevant to the smaller centres in the District, where leakage is greatest. It is not for a District-wide Retail Study to give consideration to claw-back, and the implications of this on capacity, rather for the retail assessment submitted with any planning application to justify how new floorspace would pass the 'impact' test through increasing the retention of expenditure within a locality and clawing back trade leaked to more distant destinations, rather than impacting upon existing floorspace with central area of the subject town.

Floorspace Efficiencies

6.7 An allowance is made for the turnover of existing comparison retail floorspace increasing by 1.7% per annum from 2013, as a result of the more efficient use of floorspace. This is a more modest rate of floorspace efficiency than was adopted commonly prior to the beginning of the economic downturn in 2008 and the reserved approach is a reflection of the continued economic uncertainty. The continued economic uncertainty is also the reasoning behind the adoption in the convenience retail assessment of no increases in floorspace efficiency over the period covered by the Retail Study.

In-Flow of Expenditure

6.8 The extent of the Study Area adopted will affect the extent to which the total turnover of a destination is captured. The Study Area adopted by NLP, and NEMS in undertaking the household survey informing this Study, is based upon the boundary of South Lakeland District, including those areas within the Lake District and Yorkshire Dales National Parks.

6.9 South Lakeland District has a significant tourist population throughout the year, and Oxenholme Lake District, on the outskirts of Kendal, is the principal railway station for arrivals to the Lake District National Park. Parts of the Lake District National Park and Yorkshire Dales National Park are located within the District, which have a significant tourist draw that brings the spending power of the part of the District that lies between the National Parks, as well as for the centres within them.

6.10 The 2012 Study focuses on the area outside of the National Parks, which is South Lakeland District for the purposes of planning policy formulation and control (South Lakeland LDF area). It is considered that a significant proportion of spending on convenience and comparison goods within the LDF area will be derived from tourists. Tourist expenditure will not be picked up through the household survey analysis and therefore an adjustment is required to ensure this expenditure is incorporated into the capacity assessment. The proportion of tourist expenditure is calculated based on an assessment of tourist spending on 'shopping' in the District (STEAM data) distributed proportionally by the proportion of tourists to the South Lakeland LDF area. This robust approach uses data from STEAM (obtained from Global Tourism Solutions Ltd) and local Tourist Information Centres. The STEAM data and TIC data are included at **Appendix 5**.

6.11 The 2011 Household Survey indicates that convenience stores in Kirkby Lonsdale are trading significantly below expected levels, as illustrated by Table

13 at Appendix 3. Kirkby Lonsdale and Ulverston are located near to the boundary of the District and therefore an assessment of neighbouring authorities' Retail Studies was undertaken to assess the likely levels of in-flow of expenditure. The Retail Studies for both Lancaster (February 2006) and Barrow in Furness (October 2006) local administrative areas provide details of in-flow to the District from surrounding areas. Lancaster City Council commissioned an update to its Retail Study in 2009, but both studies are based upon the same 2005 empirical research.

6.12 The 2009 Lancaster Retail Study indicates that a proportion of the turnover of convenience stores in Kirkby Lonsdale and Ulverston is derived from areas outside of the District and outside of the Study Area adopted for the 2012 Update. This expenditure was not picked up through the NEMS 2011 Household Survey and therefore an allowance for in-flow of turnover is made for the primary stores within these centres. The Lancaster Retail Study indicates that approximately 5% of the turnover of principal convenience stores in these centres derives from outside of the District. The effect in Ulverston is to exacerbate the extent to which convenience retail floorspace is trading at above expected levels. Whilst in-flow improves the performance of convenience retail floorspace in Kirkby Lonsdale, Table 12 at Appendix 3 illustrates that this remains significantly below expected levels.

District Quantitative Capacity

Convenience Goods

6.13 Growth in the convenience goods spending power of the Study Area adopted, is £7.4m to 2017, £20.9m to 2022 and £29.1m to 2025 (Table 3a at Appendix 3 provides full details). Growth in the convenience goods spending power of the District (assuming 25% of spending power in Zone 8 and 14% of spending power in Zone 10 is within the District, proportionate to the population) is £5.2m to 2017, £14.9m to 2022 and £20.8m to 2025.

6.14 The NLP capacity assessment follows an accepted methodology of applying this capacity pro-rata to the market shares of destinations. It is also appropriate to take into account the performance of existing retail floorspace, compared with expected levels of performance. In circumstances where existing floorspace is assessed to be under-performing, it is appropriate for organic growth in spending to be first absorbed by this underperforming floorspace. Conversely, where existing floorspace is assessed to be over-performing this can add to the identified capacity for new retail floorspace.

Comparison Goods

6.15 Growth in the comparison goods spending power of the Study Area adopted is £82.6m to 2017, £212.6m to 2022 and £307.5m to 2025 (Table 3b at Appendix 3 provides full details). Growth in the comparison goods spending power of the District assuming 25% of spending power in Zone 8 and 14% of spending power in Zone 10 is within the District[§§] is £59.9m to 2017, £154.4m to 2022 and £223.2m to 2025.

6.16 Paragraph 6.14 applies to the approach adopted in the calculation of comparison capacity.

Quantifying Capacity

6.17 The following section details the capacity for additional convenience and comparison retail floorspace in Kendal, Ulverston, Grange over Sands, Kirkby Lonsdale and Milnthorpe. For each centre, capacity is calculated by dividing the expenditure capacity generated by a typical sales density. The sales densities adopted vary by centre, given the varying scales of centre and format of retailing that is likely to be attracted. Capacity is presented as net sales area figures, as it is the net sales area that is relevant to PPS4 Retail Impact Assessments. The gross floorspace of retail developments will always be greater than the net trading area, but the ratio between net and gross floorspace varies greatly. The net sales area in a corner shop might be up to 90% of the gross whereas the equivalent figure for a large format foodstore might be as little as 60%.

6.18 There are references in the following section to floorspace trading at above or below expected levels. Tables 12 (convenience) and 20 (comparison) at Appendix 3 compare the survey derived turnover of destinations in the District with expected (benchmark) turnover levels. The expected turnover of a destination is the turnover it would achieve were it to trade at either company average (for foodstores) or typical (for other floorspace) sales densities. Comparing survey derived turnover with benchmark turnover gives an indication as to whether destinations are trading above or below what might be expected. Floorspace data is derived from a number of sources, including GOAD data, and appropriate notes are include at the foot of retail assessment table at Appendix 3. GOAD Summary Reports for the five principal centres in the LDF area are included at Appendix 6.

Kendal

6.19 Table 6.1 sets out the current convenience and comparison retail capacity in Kendal and the capacity over the periods to 2017, 2022 and 2025. An allowance is made for existing comparison retail floorspace increasing its efficiency by 1.7% per annum from 2013.

[§§] Proportionate to the population inside and outside of the District.

Table 6.1 Quantitative Capacity – Kendal

YEAR	CONVENIENCE		COMPARISON	
	£(m)	sq. m (net)	£(m)^	sq. m (net)^
AT 2012*	31.3	2,408	19.2	3,204
BY 2017	34.6	2,663	44.2	6,892
BY 2022	40.7	3,129	86.8	12,427
BY 2025	44.4	3,413	118.9	16,191

**Convenience sales density of £13,000 sq. m for Kendal equivalent to an average of Asda, Morrisons, Sainsbury's and Tesco food superstore. Convenience sales density is retained to 2025.*

Comparison sales density of £6,000 per sq. m at 2012 increased by floorspace efficiencies from 2013 to 2025 of 1.7% per annum.

^2017, 2022 and 2025 comparison retail capacity assumes constant Kendal market share (in the District).

Capacity figures do not account for commitments. Commitments coming forward will reduce the capacity for additional new floorspace.

Kendal Quantitative Capacity - Convenience

6.20 Existing convenience retail floorspace within the Kendal urban area is trading at above expected levels, and this position is exacerbated once an adjustment is made to include tourist expenditure; tourist expenditure is based upon STEAM data, included in Table 6.1 and quantified at Appendix 3 (Table 7 onwards). The implication of the current strong performance across the convenience retail sector in Kendal is that there is immediate capacity for additional convenience retail floorspace in Kendal, and that capacity is set to increase over the five years to 2017 and beyond.

6.21 The immediate capacity identified of 2,408 sq. m is sufficient to support a large format foodstore capable of meeting bulk food shopping needs and operated by one of the main convenience superstore operators. Asda and Morrisons operate stores from Kendal, and it is most likely that either Sainsbury's or Tesco will enter the market as a third operator providing increased competition. A modern large format foodstore with approximately 2,500 sq. m net convenience sales would also be likely to include a significant proportion of comparison sales floorspace (approximately 1,500 sq. m), which can be supported through the comparison capacity identified. A store with a 4,000 sq. m sales area would be likely to have a gross floorspace in the order of 7,000 sq. m. There is, of course, scope for foodstores with a lesser convenience retail sales area but the capacity identified is not sufficient to support two additional large format foodstores in the town.

6.22 If a large-format foodstore does come forward, then, in the longer term, the convenience capacity identified could also support a smaller format foodstore, such as Aldi/Lidl/Tesco Metro (of approximately 1,000 sq. m net) or a number of Tesco Express/Sainsbury's Local or equivalent at stores 100 - 300 sq. m net.

6.23 An assessment of sites that offer the potential to accommodate this growth is included at Section 7.0 (Further details at **Appendix 7**).

Kendal Quantitative Capacity – Comparison

6.24 Table 20 at Appendix 3 summarises the current comparison retail performance of Kendal, in context with expected benchmark performance. Table 20 records the survey derived turnover of the town, once an allowance is made for tourist spend, as £196.92m at 2012. This compares with an expected turnover level of £177.7m, suggesting that existing town centre comparison retail floorspace is trading at £19.2m (11%) above expected levels. Existing floorspace trading at above expected levels generates immediate capacity for new comparison retail floorspace of 3,204 sq. m net comparison sales area, which would allow for a sizable uplift in town centre floorspace. The capacity identified increases to 6,892 sq. m by 2017, 12,427 sq. m by 2022 and 16,191 sq. m by 2025.

6.25 The additional comparison capacity identified is very significant. In the short term it could increase the comparison retail floorspace of Kendal town centre by over 30% (to 2017) and in the long term by over 50% (to 2022) and over 70% by 2025. The quantum of floorspace supported could deliver a substantial extension to the comparison retail offer of the town centre.

6.26 Should a proposal for a large format foodstore come forward in the short term, it is likely that approximately half of the identified immediate (2012) comparison capacity would be absorbed.

6.27 An assessment of sites that offer the potential to accommodate this growth is included at Section 7.0 (Further details at Appendix 7).

Commitments

6.28 Commitments are not taken into account in the statistical assessment of capacity. Retail commitments in Kendal comprise the following:-

1. 2,139 sq. m retail floorspace is committed at the existing Marks and Spencer store, Library Road, approved July 2009 and expires July 2014 (ref: SL/2009/0306). The composition of the retail floorspace is not specified through the application and could be all convenience, all comparison or a mix of both (a comparison dominant mix is most likely);
2. An application for a 118 sq. m retail unit at the Bowman Pub, Highgate was approved November 2009 and expires on November 2012 (ref: SL/2007/1012).

6.29 In addition to the above commitments, a mixed use development comprising sheltered accommodation and a 371 sq. m (gross) convenience store is under construction currently at the site of Stoker's Garage, Kirkland.

6.30 It is understood that the Marks and Spencer's commitment is to facilitate reconfiguration of the store across two floors. It is considered likely that the 2,139 sq. m will be split between comparison and convenience expenditure, although the proportions are unknown. Should this commitment be implemented it will absorb a proportion of the immediate comparison and convenience capacity identified for Kendal but there will still be expenditure to allow further development to come forward in the short term.

Ulverston

6.31 Table 6.2 sets out the current convenience and comparison retail capacity in Ulverston and the capacity over the periods to 2017, 2022 and 2025. An allowance is made for existing comparison retail floorspace increasing its efficiency by 1.7% per annum from 2013.

Table 6.2 Quantitative Capacity - Ulverston

YEAR	CONVENIENCE		COMPARISON	
	£(m)	sq. m (net)	£(m)^	sq. m (net)^
AT 2012*	10.6	1,063	7.5	2,140
BY 2017	11.4	1,141	10.3	2,677
BY 2022	12.9	1,289	15.1	3,534
BY 2025	13.8	1,378	18.6	4,105

**Convenience sales density of £10,000 adopted. Convenience sales density is retained to 2025.*

Comparison sales density of £3,500 per sq. m at 2012 increased by floorspace efficiencies from 2013 to 2025 of 1.7% per annum.

^2017, 2022 and 2025 comparison retail capacity assumes constant Ulverston market share (in the District).

Capacity figures do not account for commitments. Commitments coming forward will reduce the capacity for additional new floorspace.

Ulverston Quantitative Capacity – Convenience

6.32 Existing convenience retail floorspace in Ulverston is trading at above expected levels, which is exacerbated by an allowance for in-flow from outside of the District (5% of turnover) and the inclusion of tourist spend based upon STEAM data (Table 7 onwards at Appendix 3). These factors create a surplus of convenience expenditure in Ulverston, which translates to capacity for additional convenience retail floorspace.

6.33 Immediate convenience capacity of 1,063 sq. m could accommodate a medium sized foodstore operated by one of the 'Big 4' or a store operated by one of the discount retailers (Aldi or Lidl). Additional capacity to 2025 allows for a number of small format foodstores or an extension to an existing foodstore, to enhance the convenience retail offer.

Ulverston Quantitative Capacity - Comparison

6.34 Table 20 at Appendix 3 sets out the surplus expenditure for comparison goods in Ulverston, once the difference between expected and survey derived turnover of existing floorspace is calculated. The surplus expenditure identified at Table 20 is translated into capacity for additional floorspace. Immediate capacity for 2,140 sq. m of comparison retail floorspace is identified. This represents a 50% increase on existing town centre comparison retail floorspace, which could significantly enhance the comparison offer and role of the town centre. Capacity identified could increase town centre comparison retail floorspace to some 95% above existing levels by 2025.

6.35 Sites that offer potential to accommodate the identified growth are assessed in Section 7.0, with further details provided at Appendix 7.

Commitments

6.36 Commitments are not included within the assessment of capacity. There are no existing commitments for retail development within Ulverston. A planning application was submitted in July 2011 to redevelop the former brewery, 4-6 Brewery Street, Ulverston for a supermarket of 1,710 net convenience retail floorspace and 190 sq. m net comparison sales floorspace. This application is yet to be determined but should it be approved it will absorb all of the convenience capacity identified for Ulverston over the LDF period.

Grange over Sands

6.37 The current convenience and comparison retail capacity for Grange over Sands and the capacity over the periods to 2017, 2022 and 2025 are set out in Table 6.3. An allowance is made for existing comparison retail floorspace increasing its efficiency by 1.7% per annum from 2013.

Table 6.3 Quantitative Capacity - Grange over Sands

YEAR	CONVENIENCE		COMPARISON	
	£(m)	sq. m (net)	£(m)^	sq. m (net)^
AT 2012*	2.5	307	-4.1	-
BY 2017	2.6	328	-3.7	-
BY 2022	2.9	368	-2.8	-
BY 2025	3.1	393	-2.0	-

**Convenience sales density of £8,000 adopted. Convenience sales density is retained to 2025.*

Comparison sales density of £3,500 per sq. m at 2012 increased by floorspace efficiencies from 2013 to 2025 of 1.7% per annum.

^2017, 2022 and 2025 comparison retail capacity assumes constant Grange over Sands market share (in the District).

Capacity figures do not account for commitments. Commitments coming forward will reduce the capacity for additional new floorspace.

Grange over Sands Quantitative Capacity – Convenience

6.38 Table 12 at Appendix 3 sets out the current convenience retail performance of Grange over Sands, in context with benchmark turnover levels. These figures include an allowance for tourist spend based upon STEAM data (Table 7, Appendix 3). Existing convenience retail floorspace in Grange over Sands is performing strongly, and exceeding expected turnover levels by £2.46m. This turnover, in excess of benchmark levels, generates capacity for additional convenience retail floorspace immediately.

6.39 Immediate capacity for 307 sq. m additional convenience retail floorspace is identified (2012), increasing marginally to 393 sq. m by 2025. The capacity identified is sufficient to support one or two small format foodstores of the size traded under the Tesco Express and Sainsbury's Local banners, which provides an opportunity to enhance the convenience offer of the town centre. Alternatively this floorspace capacity could be taken up by a number of smaller outlets, to enhance the local independent convenience offer.

6.40 Sites that offer potential to accommodate the identified growth are assessed in Section 7.0, with further details provided at Appendix 7.

Grange over Sands Quantitative Capacity - Comparison

6.41 The assessment did not identify any capacity for additional comparison retail floorspace in Grange over Sands. Existing comparison retail floorspace is trading at below benchmark levels. In such situations it is appropriate for organic growth in spending to be first absorbed by this under-performing floorspace before provision is made for any new floorspace. In Grange over Sands, the existing under trading floorspace has the potential to absorb all of the organic growth in expenditure to 2025.

Commitments

6.42 The quantitative capacity assessment does not include retail commitments. There is a commitment for a Booths supermarket of 929 sq. m net convenience retail floorspace (ref: SL/2008/1173), which was approved April 2009. It is understood that an application (ref: SL/2011/1034) has been submitted to extend the life of this permission, although at the time of publication this application remains undetermined.

6.43 The retention rate of locally generated convenience retail expenditure (30.5% as illustrated by Table 5.5 above) is low and is demonstrative of a significant leakage of expenditure to other destinations and principally Kendal. The planned Booths store has the potential to increase significantly expenditure retention rates in Grange over Sands through reducing leakage to other higher order centres. The planned Booths store would increase competition and choice, addressing and identifiable qualitative need, and has the potential to result in more sustainable patterns of shopping.

6.44 Whilst at the time of publication the application to extend the life of the Booths permission remained undetermined, a fall back position is implementation. Whilst there is no certainty as of March 2012 that the store will be built out, NLP considers it to be very likely that the store will come forward.

Kirkby Lonsdale

6.45 The current convenience and comparison retail capacity in Kirkby Lonsdale and the capacity over the periods to 2017, 2022 and 2025 are set out in Table 6.4. An allowance is made for existing comparison retail floorspace increasing its efficiency by 1.7% per annum from 2013.

Table 6.4 Quantitative Capacity - Kirkby Lonsdale

YEAR	CONVENIENCE		COMPARISON	
	£(m)	sq. m (net)	£(m)^	sq. m (net)^
AT 2012*	-2.1	-	-2.6	-
BY 2017	-1.9	-	-2.7	-
BY 2022	-1.6	-	-3.0	-
BY 2025	-1.4	-	-2.7	-

** Convenience sales density of £8,000 adopted. Convenience sales density is retained to 2025.*

Comparison sales density of £3,500 per sq. m at 2012 increased by floorspace efficiencies from 2013 to 2025 of 1.7% per annum.

^2017, 2022 and 2025 comparison retail capacity assumes constant Kirkby Lonsdale market share (in the District).

Capacity figures do not account for commitments. Commitments coming forward will reduce the capacity for additional new floorspace.

Kirkby Lonsdale Quantitative Capacity – Convenience

6.46 Convenience retail floorspace at 2012 is performing at below expected levels by some £2.1m. This is despite an allowance for the in-flow of expenditure from outside of the District and the incorporation of tourist expenditure; tourist expenditure based upon an analysis of STEAM data at Appendix 3 (included from Table 7 onwards). Organic growth in expenditure does not bridge the gap between benchmark and survey derived turnover to 2025 and therefore there is not any capacity for additional convenience retail floorspace in Kirkby Lonsdale within the plan period.

Kirkby Lonsdale Quantitative Capacity – Comparison

6.47 There is not any capacity for additional comparison retail floorspace in Kirkby Lonsdale identified over the period 2025. Comparison retail floorspace in Kirkby Lonsdale is performing at significantly below benchmark levels at 2012. The difference between expected and survey derived turnover is £2.6m in 2012 increasing to £3.0m by 2022 and decreasing to a deficit of £2.7m by 2025.

6.48 In qualitative terms the increasing difference between benchmark and survey derived turnovers is cause for concern, suggesting a struggling centre. The District should consider action to enhance the offer of existing comparison provision, to help the centre in attracting a greater proportion of the area's comparison spending.

Commitments

6.49 An extant planning permission (ref: SL/2010/0781) for an extension of 344 sq. m net floorspace to the existing Booths store in Kirkby Lonsdale was approved November 2010. There is no identified capacity for additional convenience retail floorspace within Kirkby Lonsdale to 2025 and if this planning permission is implemented it further extends the period over which there is any surplus spending to support any additional convenience retail floorspace in Kirkby Lonsdale.

Milnthorpe

6.50 Table 6.5 sets out the current convenience and comparison retail capacity in Milnthorpe and the capacity over the periods to 2017, 2022 and 2025. An allowance is made for existing comparison retail floorspace increasing its efficiency by 1.7% per annum from 2013.

Table 6.5 Quantitative Capacity ~ Milnthorpe

YEAR	CONVENIENCE		COMPARISON	
	£(m)	sq. m (net)	£(m)^	sq. m (net)^
AT 2012*	2.2	271	-1.4	-
BY 2017	2.3	284	-1.0	-
BY 2022	2.5	308	-0.4	-
BY 2025	2.6	323	0.1	25

** Convenience sales density of £8,000 adopted. Convenience sales density is retained to 2025.*

Comparison sales density of £3,500 per sq. m at 2012 increased by floorspace efficiencies from 2013 to 2025 of 1.7% per annum.

^2017, 2022 and 2025 comparison retail capacity assumes constant Milnthorpe market share (in the District).

Capacity figures do not account for commitments. Commitments coming forward will reduce the capacity for additional new floorspace.

Milnthorpe Quantitative Capacity – Convenience

6.51 As set out in Table 12 of Appendix 3, existing convenience retail floorspace in Milnthorpe is trading at above expected turnover levels by £2.17m; this includes an allowance (from Table 7 of Appendix 3 onwards) for tourist expenditure. The successful trading characteristics of existing convenience retail floorspace in Milnthorpe, generates immediate capacity for additional convenience retail floorspace. At 2012, there is capacity for up to 271 sq. m of additional convenience retail floorspace, increasing to 323 sq. m by 2025.

6.52 The capacity identified could support a larger version of a small format foodstore, such as a Tesco Express/Sainsbury's Local/Co-operative. Such a store would enhance and diversify existing convenience provision whilst remaining in context with the scale of existing units in the centre.

Milnthorpe Quantitative Capacity – Comparison

6.53 Comparison retail floorspace in Milnthorpe is currently trading at below expected levels and this trend continues to continue beyond 2022. Organic growth in comparison spending power will be absorbed by existing comparison floorspace. Between 2022 and 2025, organic growth in comparison expenditure turnover is set to result in a surplus expenditure of £0.1m with existing floorspace having reached benchmark levels. This surplus at 2025 translates to 25 sq. m of comparison retail floorspace. It entirely possible that this limited amount of comparison retail floorspace will be taken up through extensions to existing premises or comparison retail floorspace in any foodstore that comes forward. In this regard, there is not any need to plan for additional comparison retail floorspace in Milnthorpe.

Commitments

6.54 An assessment of the turnover of commitments is not included in the capacity assessment. Planning permission (ref: SL/2011/0180 and SL/2010/0643) was obtained for a 1,000 sq. m net sales area Booths store in Milnthorpe (Approved November 2010/August 2011). The turnover of the committed Booths store significantly exceeds the capacity for convenience retail floorspace identified, but will assist in increasing the retention in Milnthorpe of locally generated convenience retail expenditure. Work started on site in early 2012 and once trading, the new store will absorb capacity for convenience retail floorspace in Milnthorpe over the period to 2025 and increase the qualitative offer in the convenience retail sector of the town.

6.55 In addition to the Booths store, the convenience retail offer of Milnthorpe will be extended further by the relocation and extension of the town centre Spar to a new site at Beetham Road. Redevelopment of the former Fawcetts Garage as a foodstore and petrol filling station commenced in early 2012, and will include a convenience retail store of 704 sq. m gross/280 sq. m net.

7.0 Accommodating Growth: Development Sites

7.1 NLP has reviewed potential commercial development sites identified by South Lakeland District Council in Kendal, Ulverston, Grange over Sands, Milnthorpe and Kirkby Lonsdale town centres. The feasibility of accommodating future retail floorspace on the identified sites is assessed against these factors:

- existing land uses and availability, categorised as follows:
  a) short term – up to 2017
  b) medium term – up to 2022
  c) long term – likely to be completed after 2025
- commercial potential for retail development and the most likely form of development;
- potential scope to accommodate additional retail floorspace (net increase), categorised as follows:
  a) small scale - under 1,000 sq. m gross floorspace;
  b) medium scale – 1,000 to 5,000 sq. m gross floorspace;
  c) large scale - over 5,000 sq. m gross floorspace;
- potential development constraints; and
- possible alternative uses.

7.2 The overall development prospects of each opportunity, taking on board all of the factors listed above, is categorised as:

- Good - development sites that have good prospects for providing additional retail floorspace, and should be considered for implementation in the short to medium term; or
- Reasonable - development sites which are well located and may provide potential for additional floorspace, although obstacles to development will need to be overcome, but implementation may only be achieved in the long term; or
- Poor - development sites that may be unattractive or unsuitable for retail development or where their delivery is uncertain.

7.3 The overall rating afforded to each site is based on an initial evaluation by NLP. The level of analysis undertaken at this stage is limited, i.e. detailed appraisals of development constraints, land ownership and potential development costs have not been undertaken. More detailed examinations of each site will need to be undertaken before sites can be brought forward for development or ruled out as not viable options. The evaluations undertaken for each opportunity are not detailed planning appraisals and they do not imply that planning permission should be granted or refused for retail development on any site. However, the evaluation is expected to identify potentially suitable development opportunities that may be worthy of further consideration by the Council. This evaluation provides a framework within which the Council can consider the implementation of a development strategy for each centre.

Evaluation of Potential Development Sites

7.4 Each of the opportunity sites identified by South Lakeland District Council has been evaluated based on the factors set out above. An assessment of each site is provided in Appendix 7. The sites that are considered to offer the greatest potential for convenience and comparison retail development are summarised below.

Kendal

7.5 As set out in Section 6.0, the capacity identified for Kendal is sufficient to support a large scale comparison development of up to 16,191 sq. m (assuming constant market share). Convenience retail capacity rises to 3,413 sq. m (assuming constant market share) to 2025.

7.6 A proposal to build a large-format foodstore and a bulky goods retail park on the site of Kendal Rugby Union Football Club (KRUFC), which is in an out-of-centre location on Shap Road, is the subject of an Appeal against the refusal of planning permission by the District Council; a previous Appeal was dismissed in 2010. The edge-of-centre Canal Head area of the town is a regeneration priority of the Council, has policy support through the Core Strategy and is the subject of a Masterplan for mixed use development including a large-format foodstore. A planning application for a mixed use scheme is expected in Spring/Summer 2012.

7.7 The outcome of the KRUFC Appeal is likely to determine the future of Canal Head, in that there is identified capacity for one large-format foodstore only. The conclusions reached regarding the capacity in Kendal for additional convenience retail floorspace, identified by this 2012 Update, are mirrored by the reality of commercial capacity that there is scope for one additional foodstore. If the KRUFC Appeal is allowed, it is a probability that a foodstore at Canal Head will not come forward. Conversely, if the Appeal is dismissed then a foodstore could be delivered at Canal Head and there would still be scope for additional bulky goods floorspace on the site of KRUFC.

7.8 The Woolpack Yard comprises land between Booths and M&S, currently occupied by a miscellany of uses including B Class uses, retail premises, service outlets and dwellings, all in small scale units. It is in an edge of centre location, adjacent to the western boundary of the Primary Shopping Area. The draft Allocation of Land DPD proposes an extension to the Primary Shopping Area boundary, to include the Woolpack Yard. The site is considered to have reasonable potential to come forward for small/medium scale comparison retail development given its relationship to existing shopping areas. However, this site is constrained by its shape, tight boundaries and potentially land assembly, as a result of the multiple occupiers. As an edge of site, any retail development in this location would be subject to the PPS4 tests.

7.9 South Lakeland Council has identified under-occupancy of retail units at K-Village factory outlet as needing to be addressed. This is an out of centre retail location, to the south of Kendal town centre. Capacity for additional comparison retail floorspace in Kendal is identified and therefore the under-occupancy suggests a qualitative deficiency in the retail environment at K-Village. NLP believes that improving the shopping environment and linkages between the town centre and K-Village would enhance K-Village as a shopping destination that is complementary to the town centre, and the success of Canal Head (which lies between the town centre and K-Village) could be pivotal in achieving these linkages. South Lakeland could also consider releasing some more of the retail floorspace fronting the River Kent to service, leisure and cultural uses in order to create a riverside attraction which will bring additional expenditure to K-Village, to the benefit of the remaining retail occupiers.

Ulverston

7.10 NLP has identified a number of sites with potential to accommodate new retail floorspace. None of these sites are in-centre in PPS4 terms, or have policy support in an up-to-date development plan, and therefore any retail proposal put forward for these sites would be subject to sequential approach and impact tests.

7.11 Of the identified sites, the Brewery Street site is considered to have strong potential. It is in an edge of centre location, and a prominent location, at a major road junction. This is sequentially the most preferable site for retail development identified by the Council and could provide a significant proportion of retail floorspace, subject to constraints relating to topography and neighbouring uses being overcome. This site could potentially absorb all of the capacity for convenience retail floorspace to 2025.

7.12 The regeneration area at Canal Head may offer some opportunity for retail development as part of a comprehensive regeneration scheme, which could deliver employment, housing and commercial uses and could achieve improved linkages between Canal Head and the town centre. Canal Head in an out of centre location, situated adjacent to an existing Booths foodstore and in a prominent location on the A590 which links to the town centre. NLP considers that any development at Canal Head should be brought forward as part of a comprehensive scheme, incorporating a mix of uses as detailed above. Out of centre retail development should be restricted in terms of the goods sold in order to minimise impacts on the vitality and viability of Ulverston town centre. Any proposal that comes forward must demonstrate compliance with the ‘sequential approach’ test and ‘impact’ tests, saved policies of the local plan and the Core Strategy.

7.13 Land bound by A590 and the railway line to the south (Lightburn road site) is identified as being a poor location for retail development. It is an out of centre, greenfield location, on the edge of the urban area, with no visual connections to the town centre. Should this site come forward it would be likely to be for a large format foodstore. The Brewery Street site is sequentially preferable in

PPS4 terms and could accommodate all of the identified convenience capacity for Ulverston.

7.14 There is considered to be scope for retail development in association with the proposed residential extension to the south of Croftlands, Ulverston (as indicated in the Pre-submission draft of the Land Allocations DPD, February 2012). A small scale convenience store to meet the day to day needs of residents is appropriate as part of a new village centre. However, this location is not appropriate for retail development should the residential development not come forward. Any convenience retail floorspace directed to the residential extension would have to be deducted from the capacity available for town centre/edge of centre retail development and as an out of centre location, any proposal for retail development would be subject to the tests set out in PPS4.

Grange over Sands

7.15 As set out in Section 6.0 there is capacity within Grange over Sands for 393 sq. m additional convenience retail floorspace to 2025 (assuming constant market share) but not any additional comparison retail floorspace. A site currently occupied by Batemans Toyota, at the junction of Windermere Road/Main Street, is considered to have reasonable potential to accommodate the identified capacity through the development of a small format foodstore. It is a relatively high profile site in close proximity to some existing retail and service uses on Main Street.

7.16 A Retail Topic Paper, which forms part of the draft Allocation of Land DPD (Pre-Submission Consultation, February to April 2012), proposes a town centre boundary, Primary Shopping Area and identification of retail frontages in Grange over Sands. NLP considers that this will provide an important clarification of boundaries, given that Grange over Sands has a linear commercial area, which spreads out over 1.0km, and comprises a series of shops in clusters on Main Street and Kent's Bank Road. Until the adoption of a town centre boundary for Grange over Sands, linkages to the existing shopping environment should be a key consideration for any proposal for retail development within the town.

Kirkby Lonsdale

7.17 As set out in Section 6.0 there is no identified capacity for convenience or comparison retail floorspace in Kirkby Lonsdale to 2025 (assuming constant market share) and therefore there is no scope for sites to come forward for retail development in the town within the plan period.

Milnthorpe

7.18 323 sq. m convenience retail floorspace and 25 sq. m comparison retail floorspace capacity is identified (assuming constant market share) for Milnthorpe to 2025.

7.19 A site comprising land to the rear of Park Road and Church Street is considered to have reasonable potential for accommodating the identified convenience capacity, subject to a frontage to either Park Street or Church Street being delivered as part of a scheme. This will raise the profile of the site and ensure that it forms a continuous part of the town centre retail frontage in Milnthorpe. It is important that any proposal addresses connectivity with the existing town centre commercial uses. The 25 sq. m of comparison capacity identified is likely to be absorbed by any foodstore proposal that comes forward.

7.20 Consideration is being given to the lack of a defined town centre boundary in Milnthorpe through the draft Allocation of Land DPD (Pre-Submission Consultation, February to April 2012) Retail Topic Paper. Until the adoption of a town centre boundary for Milnthorpe, it is important to ensure pedestrian linkages between any proposal and the main shopping area are achieved.

8.0 # Food Deserts

8.1 NLP has undertaken an assessment of potential for 'food deserts' in South Lakeland. A 'food desert' is an area of population, which is under provided for in terms of foodstore provision, and particularly 'bulk-food' provision. In order to identify such areas, NLP has adopted catchment areas for different sized foodstores in the District. The catchment areas adopted are based upon a guideline of the distance that it is considered both reasonable and sustainable to travel for main food and top-up shopping.

8.2 Catchment areas were adapted to accord with the rural character of South Lakeland District, as it is considered that the distance that people can be expected to travel for convenience shopping is extended in less populated area. The following catchment areas are adopted, for foodstores in different ranges:-

- Between 0 and 300 sq. m – 1 mile catchment area;
- Between 301 and 800 sq. m – 2 mile catchment area;
- Between 801 and 2,000 sq. m – 4 mile catchment area; and
- More than 2,001 sq. m – 6 mile catchment area.

8.3 The above catchment areas are applied to convenience stores within South Lakeland and those stores that are outside of the District where the household survey indicates that the catchment area overlaps part of South Lakeland. The plan at Appendix 8 illustrates concentrations of population within South Lakeland and the catchment areas of stores. The plan at Appendix 8 includes the likely catchment areas of commitments within the District, to illustrate how any current 'food desert' could be addressed if commitments come forward.

8.4 The stores included within the assessment are main food shopping destinations and key top-up shopping destinations operated by multiple retailers. Independent retailers, operating small food the smallest format foodstores, are not identified on the plan, as their presence does not overcome the problem of food deserts.

Evaluation of Food Deserts

8.5 The plan at Appendix 8 highlights that Kendal, Ulverston, Kirkby Lonsdale and the rural areas immediately surrounding these towns are well provided for in terms of main food and top-up shopping destinations.

8.6 Grange over Sands, Cartmel, Cark and Flookburgh (Cartmel Peninsula) are within the catchment areas of top-up shopping destinations (Spar, Cartmel, Spar, Grange over Sands, Co-op, Grange over Sands and Londis, Cark) but are located outside of the catchment areas for the District's main food shopping destinations. This suggests that this part of the District is qualitatively deficient in main food shopping provision, and there is a Grange over Sands 'food desert'.

8.7 The Grange over Sands 'food desert' will be addressed if the planned Booths store in the town comes forward. The likelihood of this committed scheme coming forward is considered in Section 7.0, and it is concluded that, given the fall back position of implementation, notwithstanding the submission of a planning application to extend the time limits of the original planning permission, it is likely that this store will come forward. If the planned Booths store does come forward, then no further intervention regarding the Grange over Sands food desert is required. If the Booths store does not come forward, then the lack of a bulk food shopping destination in Grange over Sands should be a retail priority for the Council.

8.8 Smaller settlements in the rural area to the south of Milnthorpe, including Arnside, Holme and Storth, are outside of the current catchment areas for main food shopping destinations and top-up shopping destinations and therefore this area is identified as a significant 'food desert'. Nisa and Premier convenience stores are located in Arnside and each of the settlements are served by small-scale local retail destinations including: Holme, which includes a Post Office/newsagent; Storth, which has a Post Office/newsagent; and Arnside, which has a Post Office/newsagent and bakery in addition to the convenience stores listed. The ability of stores within these smaller centres to meet residents' top-up shopping requirements is questionable, and the facilities are certainly too small to meet main food shopping needs. The population of these areas must therefore travel currently an unreasonable and unsustainable distance to satisfy both main food and top-up shopping needs, rendering the area a 'food desert'.

8.9 The plan at Appendix 8 illustrates that the current 'food desert' identified in the Arnside, Holme and Storth area of the District will be addressed by the planned Booths foodstore in Milnthorpe. Construction of the Milnthorpe Booths commenced in early 2012, and on this basis NLP concludes that there is not a requirement to make further intervention in the Arnside, Holme and Storth area. More sustainable bulk-food shopping trips will be possible for residents of the area between Milnthorpe and Grange over Sands once Booths in Milnthorpe and, potentially, Booths in Grange over Sands are trading.

8.10 Rural areas to the north-west of Ulverston and to the north-east of Kirkby Lonsdale are outside of the catchment areas of any of the identified foodstores. The population in these areas is dispersed and there are no points of population concentration that would justify provision of a convenience store serving anything other than local top-up needs. In such areas it is considered reasonable for people to travel further for food shopping and the limited population restricts the number of unsustainable shopping trips made. There is potential for shopping trips from the most rural areas to be linked with other activities, as those living in the remotest parts of the District have to travel to centres for other services and employment opportunities. Accordingly these areas are not defined as 'food deserts'.

9.0 Impact Tests

Local Impact Tests by Centre

9.1 Major retail and town centre development, intended to serve all or a significant proportion of residents of the District should be located within Kendal town centre. This is the largest centre and should continue to act as the principal centre within the District. Ulverston town centre should complement Kendal by providing for the bulk-food shopping and day-to-day comparison goods shopping needs of the population in the west of the District. Shopping facilities in the smaller centres of Milnthorpe, Grange over Sands and Kirkby Lonsdale should cater for top-up food and ancillary comparison shopping and services.

9.2 PPS4 suggests the impact of retail developments of 2,500 sq. m gross and above should be considered. However, reflecting the divergent nature of local circumstances Policy EC3.1.d states that:

'(LPAs should) at the local level, consider setting floorspace thresholds for the scale of edge-of-centre and out-of-centre development which should be subject to an impact assessment under (EC16.1) and specify the geographic areas these thresholds will apply to'.

9.3 Based upon the scale and role of centres within South Lakeland District and the retail floorspace projections within this report, NLP considers that the impact of smaller development proposals could raise concerns. A development of 2,500 sq. m gross will exceed or account for a significant proportion of the projected capacity for retail floorspace in Kendal and Ulverston town centres up to 2017 and significantly greater than the capacity identified in Milnthorpe, Grange over Sands and Kirkby Lonsdale. The projections suggest that retail developments of less than 2,500 sq. m gross could have a significant impact on the District's town centres and the PPS4 threshold is not appropriate to local circumstances in South Lakeland.

9.4 NLP believes that the impact of edge-of-centre and out-of-centre retail proposals should be assessed having regard to these floorspace thresholds:

- Kendal – 2,000 sq. m gross and above;
- Ulverston – 1,000 sq. m gross and above; and
- Milnthorpe, Grange over Sands and Kirkby Lonsdale – 500 sq. m gross and above.

9.5 The Council should include these local impact thresholds within the LDF.

9.6 The sequential approach requires that town, district and local centres are the preferred location for new retail development. Some forms of development may be more appropriate in neighbourhood centres, villages or shopping parades, if there are localised areas of deficiency. The key issues are the nature and scale of development proposed and the catchment area that the development seeks to serve.

9.7 In general, development within local and village centres, should primarily serve the village/settlement within which it is located, and perhaps smaller nearby settlements which do not have a retail offer. Neighbourhood centres and shopping parades should primarily serve walk-in catchment areas.

Locally Important Impacts

Regeneration Priorities

9.8 The adopted South Lakeland Core Strategy (2010) identifies priority regeneration sites for Kendal, Ulverston and Grange over Sands. The redevelopment of these sites is critical to the future health and performance of the town centres and the Council should ensure that any proposal for development that is on the edge or in an out of centre location in Kendal, Ulverston or Grange over Sands, or that has the potential to impact upon the town centres and the delivery of development on identified priority regeneration sites considers the potential impact upon the deliverability and viability of development on the following sites:-

1. Canal Head, Kendal (allocated for retail amongst other uses);
2. Canal Head, Ulverston (identified for development that will complement the town centre); and
3. Berners site, Grange over Sands (allocated for mixed uses including commercial uses).

Heritage Assets

9.9 Town centres within South Lakeland District have a historic character, which influences their street pattern, architecture and the prevalence of small scale retail units. The historic character of the town centres is integral to their potential to attract tourist expenditure and therefore their viability. Kendal, Ulverston, Grange over Sands, Milnthorpe and Kirkby Lonsdale include designated conservation areas, which highlight areas of historic character. Core Strategy Policy CS8.6 provides protection for heritage assets, requiring the safeguarding of the historic environment where this contributes to a sense of distinctiveness. Where proposals have the potential to affect the historic character of a town, consideration of impact should extend to a consideration of conformity with Policy CS8.6 and national planning policy on heritage as set out in PPS5.

The Natural Environment

9.10 The natural environment within South Lakeland is an important asset that is crucial to the local economy. The Council should consider the inclusion of a requirement in the LDF for proposals for edge or out of centre retail development, to assess the impact on the natural environment. This is particularly relevant for development on greenfield sites, on the edge of an urban area or within close proximity to protected natural assets.

10.0 Conclusions

10.1 South Lakeland District Council has commissioned this Study from Nathaniel Lichfield & Partners (NLP) to advise on the retail strategy for the five principal towns in the LDF area of the District: Kendal, Ulverston, Milnthorpe, Kirkby Lonsdale and Grange over Sands. It is a 2012 Retail Study Update, updating the findings of the previous 2007 South Lakeland District Retail Study.

10.2 The 2012 Update informs development plan preparation and is intended to be part of the South Lakeland Local Development Framework evidence base.

10.3 The Study is informed by a telephone survey of 1,000 residents in a Survey Area extending across South Lakeland District, including the areas within the Lake District and Yorkshire Dales National Park, and extending into Copeland, Eden and Lancaster administrative areas. The telephone survey is undertaken across a number of sub-zones that are based upon postcode sectors.

Shopping Patterns 2012

10.4 South Lakeland District retains over two thirds (68.2%) of comparison retail spending power in the District. 88.6% (average of three zones) of the expenditure generated within the Kendal area is retained within the District, which is the highest proportion of retention across the LDF area. A significant proportion of expenditure generated within Milnthorpe and Grange over Sands is also retained within the District (82.5% and 71.3% respectively).

10.5 The five study towns (Kendal, Ulverston, Milnthorpe, Grange over Sands and Kirkby Lonsdale) retain just under half (45.6%) of the comparison expenditure generated within their immediate areas. This rate hides significant differences between centres; Kendal performs well, with an 87.4% retention rate, compared with Kirkby Lonsdale retaining only 2.1% of the comparison retail expenditure generated in the local area. Both Kirkby Lonsdale and Ulverston demonstrate high levels of leakage to destinations outside of the District, with 35.8% of the comparison expenditure generated within the Kirkby Lonsdale area directed to Lancaster (63.7% of total comparison retail expenditure generated in the Kirkby Lonsdale area is directed to destinations outside of the District) and 52.6% of the Ulverston area comparison retail spending power directed to Barrow in Furness (74.2% of total comparison retail expenditure generated in the Kirkby Ulverston area is directed to destinations outside of the District).

10.6 Retention of convenience shopping expenditure within the District is at a healthy level, of 82.7%. Kendal is again most successful at retaining expenditure generated in its immediate area, with 97.9% of convenience expenditure retained within the District and 94.0% retained within the town itself. 72.6% of the convenience expenditure retained within Kendal is directed to freestanding stores outside of the town centre.

Retail Capacity Assessment

10.7 The retail capacity assessment assumes a constant market share, projecting forward shopping patterns recorded by the 2011 Household Survey. NLP comments at Section 6.0 that the leakage of expenditure from a locality, and the potential for new floorspace to enact a claw-back of leaked expenditure, can be indicative of additional capacity. This is particularly relevant to the smaller centres in the District. It is not for a District-wide Retail Study to give consideration to claw-back, and the implications of this on capacity, rather for the retail assessment submitted with any planning application to justify how the potential for new floorspace to increase the retention of expenditure within a locality assists with its satisfying of the ‘impact’ tests.

10.8 The consideration of uplift in retention rates is important as perpetuation of current market shares will not improve the retail offer or retention rates of lower order centres. There is a sustainability argument behind encouraging the upgrading of convenience and comparison retail provision in centres where retention rates are low, as this has the potential to enhance retail provision across the smaller centres of the District and retain expenditure locally.

10.9 The Core Strategy promotes retail development of a scale appropriate to centres and catchment populations intended to be served. This is on the basis of a sustainable distribution of expenditure, with the overall aim of increasing the health of town centres. Whilst this Study is a capacity update only and does not address in detail the vitality and viability of town centres, it is appropriate to make reference to the importance of qualitative improvements in provision. Improving the quality of provision has the potential to increase retention rates and reduce leakage, leading to a more measured distribution of retail floorspace across the District. The Core Strategy is supportive of appropriate additional retail floorspace in the higher order centres of Kendal and Ulverston, but this should not be at the expense of new floorspace coming forward in the smaller centres as this would only serve to reinforce current unsustainable shopping patterns.

10.10 The ‘food deserts’ analysis at Section 8.0 identified good coverage across the District, provided that new Booths stores in Milnthorpe (under construction as of early 2012) and Grange over Sands come forward. The convenience and comparison retail retention rates in Kirkby Lonsdale, which are the lowest of the five centres in the District, suggest a need for positive intervention to improve the ability of the centre in meeting local shopping needs.

10.11 Tables 10.1 and 10.2 summarise respectively the capacity for additional convenience and comparison retail floorspace in the five town centres. Capacity beyond 2017 should be viewed with caution as there can be little certainty over long term economic performance and prosperity.

Table 10.1 Convenience Retail Capacity by Centre

CENTRE	CONVENIENCE CAPACITY			
	AT 2012	BY 2017	BY 2022	BY 2025
	sq. m (net)	sq. m (net)	sq. m (net)	sq. m (net)
Kendal	2,408	2,663	3,129	3,413
Ulverston	1,063	1,141	1,289	1,378
Grange over Sands	307	328	368	393
Milnthorpe	271	284	308	323
Kirkby Lonsdale	-	-	-	-

Table 10.2 Comparison Retail Capacity by Centre

CENTRE	COMPARISON CAPACITY			
	AT 2012	BY 2017	BY 2022	BY 2025
	sq. m (net)	sq. m (net)	sq. m (net)	sq. m (net)
Kendal	3,204	6,892	12,427	16,191
Ulverston	2,140	2,677	3,534	4,105
Grange over Sands	-	-	-	-
Milnthorpe	-	-	-	25
Kirkby Lonsdale	-	-	-	-

Advice by Centre

Kendal

10.12 Kendal is the principal and dominant retail destination in the District. It has a historic character and acts as a focus for residents of the District and tourists to South Lakeland. Stricklandgate and the streets immediately to the east and west provide the main focus for comparison retail floorspace in the town centre. The town centre includes a Booths store which acts as a main food shopping destination but the majority of convenience retail floorspace is located out of centre (Asda, Burton Road and Morrisons, Queen Katherine Avenue). The capacity for additional convenience and comparison retail floorspace identified in Section 6.0 is sufficient to support a significant extension to the town centre. The Canal Head site is edge of centre in PPS4 terms and a regeneration priority for South Lakeland Council. This would present a suitable location to accommodate some of this floorspace, subject to compliance with the PPS4 tests. There may be scope for bulky goods retail floorspace outside of the town. Proposals for retail floorspace in excess of 2,000 sq. m in edge or out of centre locations in Kendal should be assessed against PPS4 impact tests.

Ulverston

10.13 Ulverston is the second largest centre in the District. The capacity identified in Section 6.0 could support a significant town centre extension. The retention of locally-generated convenience retail expenditure in Ulverston (57.7%) is reasonably healthy for a centre of its scale. The retention rate of locally-generated comparison retail expenditure is less healthy, at 25.8%, which suggests potential for qualitative improvement of existing provision to increase retention levels. An increase in retention levels generates theoretically additional capacity for new retail floorspace and this is a relevant consideration for a Retail Impact Assessment submitted within any planning application for new retail floorspace.

10.14 The former Brewery site at Brewery Street is in an edge of centre location and offers the potential to accommodate floorspace taking up some of the capacity identified, subject to their being no suitable town centre sites. Canal Head in Ulverston is out of centre in PPS4 terms but is identified as a regeneration priority in the Core Strategy. The site may offer potential to support some of the retail capacity that cannot be accommodated at in or edge of centre locations, potentially as part of a mixed use scheme. It is considered that proposals for edge or out of centre retail development in excess of 1,000 sq. m could potentially impact upon Ulverston town centre and therefore should be assessed against the provisions set out in PPS4.

Grange over Sands

10.15 Grange over Sands acts as a key service centre, providing for the retail needs of residents of the Cartmel Peninsula. The capacity assessment identifies scope for a small amount of convenience retail floorspace, which will be absorbed by the planned Booths foodstore should this come forward. If the Booths foodstore is built, it is likely that an additional bulk-food shopping destinations will reduce the leakage out of Grange over Sands of locally-generated convenience retail expenditure (leakage is currently 69.5% of local convenience retail expenditure). It is not possible until such time as the new store, if it comes forward, has reached a settled pattern of trading to assess uplift in retention of convenience retail expenditure. Only then, would it be possible to assess whether there is scope for further uplift in retention levels. NLP considers it likely that the Booths foodstore, if built, will increase significantly retention of convenience retail expenditure and the scope for additional new retail floorspace will be diminished considerably.

10.16 Any further new retail floorspace, which is justified in terms of the ‘sequential approach’ and ‘impact’ tests is most likely to prove acceptable if it is accommodated within close proximity to existing services. Grange over Sands does not have a defined town centre currently, but a Retail Topic Paper, which forms part of the forthcoming Allocation of Land DPD (Pre-Submission Consultation, February to April 2012), proposes a town centre boundary, Primary Shopping Area and the identification of retail frontages in the town. Future adoption of the Allocation of Land DPD will clarify the extent of the town centre and edge-of-centre area in Grange over Sands and assist with development control decisions regarding proposals for new retail floorspace.

10.17 It is considered that edge of centre or out of centre retail development in excess of 500 sq. m has the potential to impact upon existing shopping areas and should be assessed against the PPS4 impact tests.

Kirkby Lonsdale

10.18 Kirkby Lonsdale is located on the edge of the District. A significant proportion of expenditure generated within the town is leaked outside of District and the town itself retains a low proportion of convenience and comparison expenditure. Retention of locally-generated comparison retail expenditure is recorded as 2.1% and the corresponding proportion of convenience retail expenditure is 10.3%. No capacity for additional floorspace within the town is identified within the LDF period. However, it is suggested that qualitative improvements to existing retail provision are required to increase retention rates and ensure the centre does not enter a spiral of decline.

10.19 This Study does not consider the capacity for new retail floorspace that might be justified by uplift in the retention rate of convenience and/or comparison retail expenditure, from the current very low levels. Whilst the leakage to Kendal and Lancaster of a significant proportion of comparison retail expenditure is understandable, given proximity and the higher order nature of these centres, the leakage of the majority of locally-generated convenience retail expenditure is demonstrative of potentially unsustainable shopping patterns.

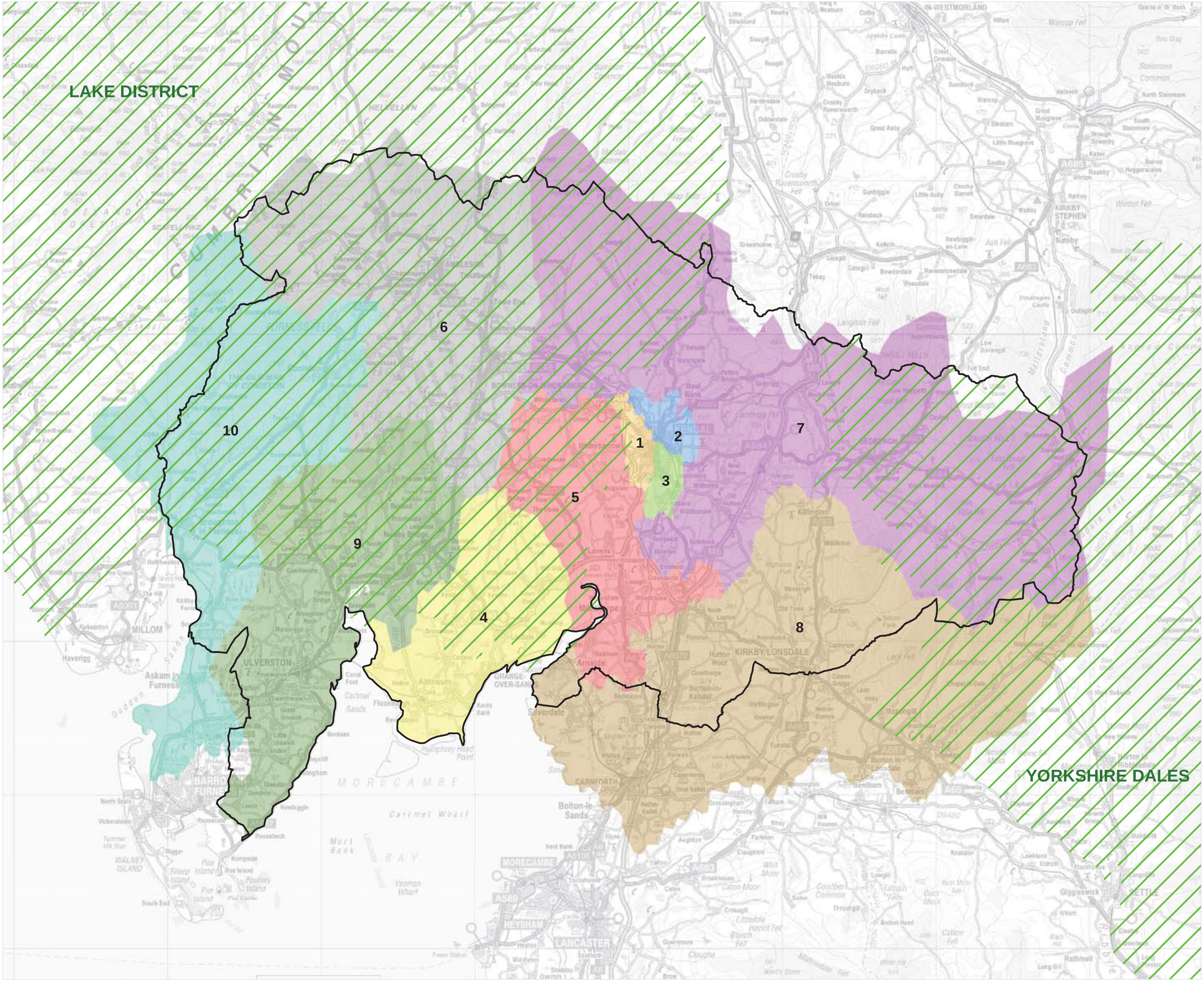
10.20 The planned extension to the Booths store (344 sq. m granted in November 2010) could increase expenditure retention rates in the town. It is possible that a more significant addition to convenience retail floorspace will be required if the current outflow of expenditure is to be address. In the absence of any quantitative capacity for new retail floorspace based upon organic growth, it is for a retail assessment submitted with any planning application that comes forward to demonstrate that additional floorspace has the potential to increase retention of expenditure, resulting theoretically in the capacity for additional floorspace, which will assist in satisfying the 'impact' test. Retail proposals in excess of the 500 sq. m in edge or out of centre locations in Kirkby Lonsdale should be subject to the PPS4 tests to ensure that they will not have an adverse impact to the detriment of existing retail uses.

Milnthorpe

10.21 Milnthorpe is a key service centre that provides for the day to day needs of the town and surrounding rural population but looks towards Kendal for high street comparison and main food shopping provision. A small amount of convenience capacity is identified for the town, and this will be absorbed by the new Booths foodstore (construction commenced in early 2012).

10.22 The Booths store will most likely increase the retention of locally generated convenience retail expenditure (currently a 20.9% retention rate). Only once it has established a settled pattern of trading will it be possible to assess the effect of the new store on retention rates. The Booths store is unlikely to have a material effect on the retention of comparison retail expenditure and this suggests that further intervention in Milnthorpe, to reduce the current leakage of over 90% of locally generated comparison retail expenditure, will be required. Any proposals for new retail floorspace in Milnthorpe will be dependent upon a

Appendix 1 Study Area (Household Survey)



Key

- South Lakeland District
- National Park
- Zone 1. Kendal Central and West
- Zone 2. Kendal North and North East
- Zone 3. Kendal South
- Zone 4. Grange-over-Sands
- Zone 5. Milnthorpe
- Zone 6. Windermere
- Zone 7. Sedbergh, Grayrigg and Staveley
- Zone 8. Arnside, Silverdale, Carnforth and Kirkby Lonsdale
- Zone 9. Ulverston
- Zone 10. Coniston and Broughton in Furness

Nathaniel Lichfield & Partners
Planning. Design. Economics.

Project	South Lakeland Retail Study Update 2012
Title	Study Area adopted for the Household Survey
Client	South Lakeland District Council
Date	08.02.2012
Scale	1 : 225,000 @ A3
Drawn by	MAr
Drg. No	GIS41056-004

N

GIS Reference: S:\MA41056 - South Lakeland Retail Study\MA41056 - South Lakeland Retail Study - Proposed Study Area for 2011 Retail Study (v3) - 06.12.2011.mxd

Appendix 2 Household Survey Questionnaire and Raw Data Results

NEMS market research
22-23 Manor Way
Belasis Hall Technology Park
Billingham
TS23 4HN
Tel 01642 37 33 55
www.nemsmr.co.uk

South Lakeland Household Survey for Nathaniel Lichfield & Partners

December 2011

Job Ref: 111211

Appendix 1:

Data Tabulations

By Zone

Q01 Thinking about your normal shopping habits, rather than Christmas shopping, at which store or shop did you do your household's last main food and grocery shopping ?

	Total		Kendal Central and West		Kendal North and North East		Kendal South		Grange-over-Sands		Milnthorpe		Windermere		Sedbergh, Grayrigg and Staveley		Arnside, Silverdale, Carnforth and Kirkby Lonsdale		Ulverston		Coniston and Broughton in Furness	
Aldi, Appleby Road, Kendal	3.2%	32	7.0%	7	4.0%	4	4.0%	4	5.0%	5	1.0%	1	3.0%	3	7.0%	7	1.0%	1	0.0%	0	0.0%	0
Asda, Barrow in Furness	7.7%	77	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	26.0%	26	48.5%	49
Asda, Burton Road, Kendal	25.7%	258	27.0%	27	19.8%	20	56.0%	56	39.0%	39	43.6%	44	18.0%	18	31.0%	31	22.0%	22	1.0%	1	0.0%	0
Booths, Carnforth	1.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	7.0%	7	0.0%	0	0.0%	0
Booths, Kendal	4.6%	46	17.0%	17	5.0%	5	8.0%	8	2.0%	2	7.9%	8	0.0%	0	5.0%	5	0.0%	0	1.0%	1	0.0%	0
Booths, Kirkby Lonsdale	1.7%	17	0.0%	0	0.0%	0	0.0%	0	1.0%	1	3.0%	3	0.0%	0	4.0%	4	9.0%	9	0.0%	0	0.0%	0
Booths, Penrith	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Booths, Ulverston	4.7%	47	0.0%	0	0.0%	0	0.0%	0	7.0%	7	0.0%	0	1.0%	1	0.0%	0	0.0%	0	35.0%	35	4.0%	4
Booths, Windermere	3.6%	36	4.0%	4	0.0%	0	1.0%	1	0.0%	0	2.0%	2	26.0%	26	2.0%	2	0.0%	0	1.0%	1	0.0%	0
Co-operative, Ambleside	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-operative, Dalton in Furness	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	3.0%	3
Co-operative, Grange over Sands	0.8%	8	0.0%	0	0.0%	0	0.0%	0	8.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-operative, Priory Road, Ulverston	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.0%	7	0.0%	0
Iceland, Kendal	0.5%	5	1.0%	1	2.0%	2	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks and Spencer, Kendal	1.3%	13	2.0%	2	2.0%	2	1.0%	1	0.0%	0	4.0%	4	1.0%	1	1.0%	1	2.0%	2	0.0%	0	0.0%	0
Morrisons, Barrow in Furness	2.5%	25	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.0%	8	13.9%	14
Morrisons, Katherine Avenue, Kendal	24.2%	243	38.0%	38	65.3%	66	26.0%	26	11.0%	11	13.9%	14	35.0%	35	44.0%	44	9.0%	9	0.0%	0	0.0%	0
Morrisons, Penrith	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1
Sainsburys, Lancaster	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	4.0%	4	0.0%	0	0.0%	0
Spar, Ambleside	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Grange over Sands	0.2%	2	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Kirkby Lonsdale	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Spar, Milnthorpe	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Barrow in Furness	4.4%	44	1.0%	1	0.0%	0	0.0%	0	6.0%	6	1.0%	1	0.0%	0	0.0%	0	0.0%	0	11.0%	11	24.8%	25
Tesco, Carnforth	3.3%	33	1.0%	1	0.0%	0	1.0%	1	0.0%	0	7.9%	8	0.0%	0	0.0%	0	23.0%	23	0.0%	0	0.0%	0
Other shops, Ambleside	0.3%	3	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other shops, Kendal	0.2%	2	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other shops, Milnthorpe	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other shops, Ulverston	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0
Internet	3.0%	30	0.0%	0	1.0%	1	1.0%	1	10.0%	10	5.9%	6	5.0%	5	2.0%	2	1.0%	1	3.0%	3	1.0%	1
Aldi, Morecambe Road, Lancaster	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Booths, Tithebarn Street, Keswick	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-Op, Ainslie Street, Barrow in Furness	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Co-Op, Langdale	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-Op, Market Street,	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0

	Total	Kendal Central and West	Kendal North and North East	Kendal South	Grange-over-Sands	Milnthorpe	Windermere	Sedbergh, Grayrigg and Staveley	Arnside, Silverdale, Carnforth and Kirkby Lonsdale	Ulverston	Coniston and Broughton in Furness
Carnforth											
Lidl, Barrow in Furness	0.1% 1	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	1.0% 1
Lidl, Morecambe	0.1% 1	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	1.0% 1	0.0% 0	0.0% 0
Local shops, Arnside	0.1% 1	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	1.0% 1	0.0% 0	0.0% 0
Local shops, Backbarrow	0.1% 1	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	1.0% 1	0.0% 0
Local shops, Cark in Cartmel	0.1% 1	0.0% 0	0.0% 0	0.0% 0	1.0% 1	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0
Marks and Spencers, Dalton Road, Barrow in Furness	0.2% 2	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	2.0% 2
Morrisons, Central Drive, Morecambe	1.2% 12	0.0% 0	0.0% 0	0.0% 0	0.0% 0	2.0% 2	0.0% 0	0.0% 0	10.0% 10	0.0% 0	0.0% 0
Sainsburys, Lancaster Road, Morecambe	0.7% 7	1.0% 1	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	1.0% 1	5.0% 5	0.0% 0	0.0% 0
Sainsburys, Longridge, Preston	0.1% 1	0.0% 0	1.0% 1	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0
Spar, Sedbergh	0.2% 2	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	2.0% 2	0.0% 0	0.0% 0	0.0% 0
(Don't know / can't remember)	0.3% 3	0.0% 0	0.0% 0	0.0% 0	1.0% 1	0.0% 0	0.0% 0	0.0% 0	1.0% 1	1.0% 1	0.0% 0
Base:	1003	100	101	100	100	101	100	100	100	100	101

Q01AWhich retailer do you shop online with?

Those who said "Internet" at Q01

	Total	Kendal Central and West	Kendal North and North East	Kendal South	Grange-over-Sands	Milnthorpe	Windermere	Sedbergh, Grayrigg and Staveley	Arnside, Silverdale, Carnforth and Kirkby Lonsdale	Ulverston	Coniston and Broughton in Furness
Asda	33.3% 10	0.0% 0	0.0% 0	0.0% 0	10.0% 1	83.3% 5	40.0% 2	50.0% 1	0.0% 0	0.0% 0	100.0% 1
Waitrose	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0
Ocado	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0
Sainsbury's	3.3% 1	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	100.0% 1	0.0% 0	0.0% 0
Tesco	63.3% 19	0.0% 0	100.0% 1	100.0% 1	90.0% 9	16.7% 1	60.0% 3	50.0% 1	0.0% 0	100.0% 3	0.0% 0
Other	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0
Base:	30	0	1	1	10	6	5	2	1	3	1

Q02 While you were on your last main food shop at (answer to Q01) did you, (or anyone else with you) carry out any of the following activities?

	Total		Kendal Central and West		Kendal North and North East		Kendal South		Grange-over-Sands		Milnthorpe		Windermere		Sedbergh, Grayrigg and Staveley		Arnside, Silverdale, Carnforth and Kirkby Lonsdale		Ulverston		Coniston and Broughton in Furness	
Go to Bank, Post Office, Building Society or Cash Point	22.4%	225	29.0%	29	23.8%	24	22.0%	22	16.0%	16	17.8%	18	14.0%	14	25.0%	25	27.0%	27	26.0%	26	23.8%	24
Get Petrol	26.0%	261	21.0%	21	28.7%	29	18.0%	18	37.0%	37	15.8%	16	26.0%	26	21.0%	21	23.0%	23	33.0%	33	36.6%	37
Go shopping for other food items	27.8%	279	34.0%	34	31.7%	32	39.0%	39	30.0%	30	17.8%	18	34.0%	34	22.0%	22	18.0%	18	25.0%	25	26.7%	27
Go shopping for non food items	30.8%	309	29.0%	29	25.7%	26	49.0%	49	43.0%	43	18.8%	19	26.0%	26	30.0%	30	25.0%	25	32.0%	32	29.7%	30
Go window shopping / browsing	12.8%	128	11.0%	11	8.9%	9	21.0%	21	17.0%	17	5.0%	5	11.0%	11	16.0%	16	16.0%	16	10.0%	10	11.9%	12
Go to hairdressers, dry cleaners, or other service	5.8%	58	4.0%	4	6.9%	7	10.0%	10	5.0%	5	7.9%	8	7.0%	7	2.0%	2	5.0%	5	4.0%	4	5.9%	6
Use sports / leisure, entertainment or arts and cultural facilities (including library, cafe etc)	0.2%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Accessed health related service (Doctor / dentist etc)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Commuting	0.4%	4	1.0%	1	0.0%	0	1.0%	1	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cultural facilities (arts centre / museums / theatre etc)	0.2%	2	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Go to café / restaurants	2.2%	22	1.0%	1	3.0%	3	2.0%	2	2.0%	2	3.0%	3	1.0%	1	8.0%	8	0.0%	0	2.0%	2	0.0%	0
Sports facilities (e.g. gym / swimming pool etc)	1.1%	11	0.0%	0	1.0%	1	3.0%	3	2.0%	2	0.0%	0	1.0%	1	2.0%	2	0.0%	0	1.0%	1	1.0%	1
Use recycling facilities	0.4%	4	0.0%	0	1.0%	1	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Visit friends / family	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Visit library	0.7%	7	0.0%	0	1.0%	1	1.0%	1	2.0%	2	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	1.0%	1
Visit the cinema	0.2%	2	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Anything Else	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Nothing else)	35.8%	359	38.0%	38	25.7%	26	29.0%	29	27.0%	27	49.5%	50	41.0%	41	36.0%	36	41.0%	41	38.0%	38	32.7%	33
Base:		1003		100		101		100		100		101		100		100		100		100		101

South Lakeland District Telephone Household Survey
for Nathaniel Lichfield & Partners

Q03 Thinking about your normal shopping habits, rather than Christmas shopping, is there any other store or shop at which you do your main food and grocery shopping ?

	Total		Kendal Central and West		Kendal North and North East		Kendal South		Grange-over-Sands		Milnthorpe		Windermere		Sedbergh, Grayrigg and Staveley		Arnside, Silverdale, Carnforth and Kirkby Lonsdale		Ulverston		Coniston and Broughton in Furness	
Aldi, Appleby Road, Kendal	6.5%	65	8.0%	8	8.9%	9	10.0%	10	6.0%	6	5.9%	6	14.0%	14	7.0%	7	2.0%	2	2.0%	2	1.0%	1
Aldi, Penrith	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Asda, Barrow in Furness	4.0%	40	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.0%	10	27.7%	28
Asda, Burton Road, Kendal	12.9%	129	19.0%	19	19.8%	20	12.0%	12	13.0%	13	16.8%	17	12.0%	12	24.0%	24	10.0%	10	1.0%	1	1.0%	1
Booths, Carnforth	1.3%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	11.0%	11	0.0%	0	0.0%	0
Booths, Kendal	4.9%	49	13.0%	13	6.9%	7	11.0%	11	3.0%	3	6.9%	7	2.0%	2	3.0%	3	3.0%	3	0.0%	0	0.0%	0
Booths, Kirkby Lonsdale	0.7%	7	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	3.0%	3	2.0%	2	0.0%	0	0.0%	0
Booths, Ulverston	3.3%	33	0.0%	0	0.0%	0	0.0%	0	6.0%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	21.0%	21	5.9%	6
Booths, Windermere	2.6%	26	5.0%	5	0.0%	0	1.0%	1	1.0%	1	1.0%	1	17.0%	17	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Co-operative, Dalton in Furness	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	1.0%	1
Co-operative, Grange over Sands	0.8%	8	0.0%	0	0.0%	0	0.0%	0	8.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-operative, Ingleton	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Co-operative, Priory Road, Ulverston	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4	0.0%	0
Iceland, Kendal	1.1%	11	8.0%	8	2.0%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Market, Kendal	0.2%	2	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks and Spencer, Kendal	4.8%	48	10.0%	10	6.9%	7	6.0%	6	7.0%	7	6.9%	7	4.0%	4	1.0%	1	5.0%	5	0.0%	0	1.0%	1
Morrisons, Barrow in Furness	2.7%	27	0.0%	0	0.0%	0	0.0%	0	2.0%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0	10.0%	10	13.9%	14
Morrisons, Katherine Avenue, Kendal	13.0%	130	16.0%	16	14.9%	15	22.0%	22	15.0%	15	12.9%	13	17.0%	17	23.0%	23	7.0%	7	2.0%	2	0.0%	0
Sainsburys, Lancaster	0.2%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Spar, Ambleside	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.0%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Grange over Sands	0.4%	4	0.0%	0	0.0%	0	0.0%	0	4.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Sandylands Avenue, Kendal	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Kirkby Lonsdale	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Spar, Milnthorpe	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Staveley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Tesco, Barrow in Furness	3.0%	30	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.0%	10	17.8%	18
Tesco, Carnforth	3.1%	31	0.0%	0	0.0%	0	1.0%	1	1.0%	1	9.9%	10	0.0%	0	1.0%	1	18.0%	18	0.0%	0	0.0%	0
Local shops, Sedbergh	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Other shops, Ambleside	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other shops, Grange over Sands	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other shops, Kendal	0.3%	3	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other shops, Milnthorpe	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Other shops, Ulverston	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4	0.0%	0
Internet	1.6%	16	0.0%	0	2.0%	2	1.0%	1	1.0%	1	0.0%	0	6.0%	6	1.0%	1	3.0%	3	2.0%	2	0.0%	0
Aldi, Morecambe Road, Lancaster	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	5	0.0%	0	0.0%	0

	Total		Kendal Central and West		Kendal North and North East		Kendal South		Grange-over-Sands		Milnthorpe		Windermere		Sedbergh, Grayrigg and Staveley		Arnside, Silverdale, Carnforth and Kirkby Lonsdale		Ulverston		Coniston and Broughton in Furness	
Asda, Ovangle Road, Lancaster	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Co-Op, Redmayne Road, Kirkby Stephen	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Iceland, Barrow in Furness	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Lidl, Barrow in Furness	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Lidl, Morecambe	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Local shops, Barrow in Furness	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Local shops, Kirkgate	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Local shops, Sizergh	0.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Windermere	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks and Spencers, Dalton Road, Barrow in Furness	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	2.0%	2
Marks and Spencers, Handforth Dean, Wilmslow	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Marks and Spencers, Penny Street, Lancaster	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Morrisons, Central Drive, Morecambe	0.6%	6	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	5	0.0%	0	0.0%	0
Sainsburys, Lancaster Road, Morecambe	0.2%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Tesco, Lancashire Road, Millom	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
(Don’t know / can't remember)	1.4%	14	2.0%	2	1.0%	1	1.0%	1	2.0%	2	0.0%	0	3.0%	3	0.0%	0	0.0%	0	4.0%	4	1.0%	1
(Don't do this type of shopping / Nowhere else)	24.8%	249	16.0%	16	35.6%	36	29.0%	29	26.0%	26	32.7%	33	13.0%	13	33.0%	33	18.0%	18	25.0%	25	19.8%	20
Base:		1003		100		101		100		100		101		100		100		100		100		101

Q03AWhich retailer do you shop online with?
Those who said "Internet" at Q03

	Total		Kendal Central and West		Kendal North and North East		Kendal South		Grange-over-Sands		Milnthorpe		Windermere		Sedbergh, Grayrigg and Staveley		Arnside, Silverdale, Carnforth and Kirkby Lonsdale		Ulverston		Coniston and Broughton in Furness	
Asda	25.0%	4	0.0%	0	0.0%	0	0.0%	0	100.0%	1	0.0%	0	16.7%	1	0.0%	0	66.7%	2	0.0%	0	0.0%	0
Waitrose	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ocado	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's	6.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	33.3%	1	0.0%	0	0.0%	0
Tesco	68.8%	11	0.0%	0	100.0%	2	100.0%	1	0.0%	0	0.0%	0	83.3%	5	100.0%	1	0.0%	0	100.0%	2	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Base:		16		0		2		1		1		0		6		1		3		2		0

South Lakeland District Telephone Household Survey for Nathaniel Lichfield & Partners

	Total		Kendal Central and West		Kendal North and North East		Kendal South		Grange-over-Sands		Milnthorpe		Windermere		Sedbergh, Grayrigg and Staveley		Arnside, Silverdale, Carnforth and Kirkby Lonsdale		Ulverston		Coniston and Broughton in Furness	
Q04 How do you normally travel to do your main food shopping?																						
Car-driver	76.6%	768	67.0%	67	69.3%	70	77.0%	77	66.0%	66	84.2%	85	83.0%	83	80.0%	80	77.0%	77	78.0%	78	84.2%	85
Car-passenger	12.2%	122	10.0%	10	19.8%	20	10.0%	10	17.0%	17	10.9%	11	2.0%	2	15.0%	15	10.0%	10	12.0%	12	14.9%	15
Bus / coach	2.8%	28	5.0%	5	2.0%	2	2.0%	2	4.0%	4	0.0%	0	5.0%	5	2.0%	2	2.0%	2	5.0%	5	1.0%	1
Train	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Taxi	0.4%	4	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Walk	5.5%	55	18.0%	18	4.0%	4	9.0%	9	5.0%	5	1.0%	1	7.0%	7	1.0%	1	7.0%	7	3.0%	3	0.0%	0
Bicycle	0.3%	3	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Use internet / get it delivered	2.0%	20	0.0%	0	2.0%	2	1.0%	1	8.0%	8	3.0%	3	1.0%	1	2.0%	2	1.0%	1	2.0%	2	0.0%	0
Other	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Base:		1003		100		101		100		100		101		100		100		100		100		101
Q05 Where do you normally start your main food shopping trip from?																						
Home	90.2%	905	90.0%	90	96.0%	97	91.0%	91	87.0%	87	89.1%	90	88.0%	88	89.0%	89	89.0%	89	91.0%	91	92.1%	93
Work	5.6%	56	9.0%	9	3.0%	3	6.0%	6	6.0%	6	4.0%	4	7.0%	7	5.0%	5	7.0%	7	3.0%	3	5.9%	6
School	0.6%	6	0.0%	0	0.0%	0	0.0%	0	1.0%	1	2.0%	2	0.0%	0	2.0%	2	0.0%	0	1.0%	1	0.0%	0
Leisure Activity	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Kendal	0.8%	8	1.0%	1	0.0%	0	2.0%	2	2.0%	2	0.0%	0	1.0%	1	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Milnthorpe	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kirkby Lonsdale	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Grange over Sands	0.2%	2	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ulverston	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Elsewhere	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	1.0%	1	2.0%	2	0.0%	0	2.0%	2
Don't know / varies	1.2%	12	0.0%	0	1.0%	1	1.0%	1	1.0%	1	4.0%	4	1.0%	1	0.0%	0	0.0%	0	4.0%	4	0.0%	0
Base:		1003		100		101		100		100		101		100		100		100		100		101

Q06 In addition to your main food shopping, which store or shop did you last visit for small scale / top-up shopping for things like bread, milk or newspapers?

	Total		Kendal Central and West		Kendal North and North East		Kendal South		Grange-over-Sands		Milnthorpe		Windermere		Sedbergh, Grayrigg and Staveley		Arnside, Silverdale, Carnforth and Kirkby Lonsdale		Ulverston		Coniston and Broughton in Furness	
Aldi, Appleby Road, Kendal	1.3%	13	1.0%	1	5.0%	5	1.0%	1	1.0%	1	1.0%	1	2.0%	2	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Asda, Barrow in Furness	1.2%	12	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.9%	11
Asda, Burton Road, Kendal	7.7%	77	17.0%	17	7.9%	8	31.0%	31	0.0%	0	5.0%	5	2.0%	2	8.0%	8	5.0%	5	0.0%	0	1.0%	1
Booths, Carnforth	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.0%	8	0.0%	0	0.0%	0
Booths, Kendal	5.5%	55	21.0%	21	5.9%	6	17.0%	17	0.0%	0	5.0%	5	0.0%	0	6.0%	6	0.0%	0	0.0%	0	0.0%	0
Booths, Kirkby Lonsdale	1.1%	11	0.0%	0	1.0%	1	0.0%	0	0.0%	0	2.0%	2	0.0%	0	1.0%	1	7.0%	7	0.0%	0	0.0%	0
Booths, Ulverston	2.7%	27	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	22.0%	22	4.0%	4
Booths, Windermere	4.6%	46	10.0%	10	0.0%	0	0.0%	0	0.0%	0	2.0%	2	32.0%	32	0.0%	0	0.0%	0	1.0%	1	1.0%	1
Co-operative, Ambleside	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	5	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Co-operative, Askam	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.9%	8
Co-operative, Bentham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Co-operative, Bowness	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Co-operative, Dalton in Furness	2.7%	27	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	24.8%	25
Co-operative, Grange over Sands	3.5%	35	0.0%	0	0.0%	0	0.0%	0	34.0%	34	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Co-operative, Grasmere	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-operative, Ingleton	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4	0.0%	0	0.0%	0
Co-operative, Priory Road, Ulverston	2.7%	27	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	26.0%	26	1.0%	1
Iceland, Kendal	1.6%	16	7.0%	7	4.0%	4	4.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Market, Kendal	0.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks and Spencer, Kendal	2.1%	21	4.0%	4	5.0%	5	5.0%	5	0.0%	0	2.0%	2	0.0%	0	3.0%	3	0.0%	0	1.0%	1	1.0%	1
Morrisons, Barrow in Furness	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Morrisons, Katherine Avenue, Kendal	4.3%	43	8.0%	8	19.8%	20	7.0%	7	0.0%	0	1.0%	1	0.0%	0	7.0%	7	0.0%	0	0.0%	0	0.0%	0
Morrisons, Penrith	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Sainsburys, Lancaster	0.2%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Spar, Ambleside	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	7.0%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Cartmel	0.4%	4	0.0%	0	0.0%	0	0.0%	0	4.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Grange over Sands	0.8%	8	0.0%	0	0.0%	0	0.0%	0	8.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Holme	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Spar, Hayfell Avenue, Kendal	0.6%	6	0.0%	0	0.0%	0	6.0%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Sandylands Avenue, Kendal	2.0%	20	0.0%	0	16.8%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0
Spar, Kirkby Lonsdale	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0
Spar, Milnthorpe	3.4%	34	0.0%	0	0.0%	0	0.0%	0	0.0%	0	31.7%	32	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0
Spar, Staveley	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	4.0%	4	0.0%	0	0.0%	0	0.0%	0
Spar, Central Drive, Ulverston	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.0%	6	0.0%	0
Tesco, Barrow in Furness	1.4%	14	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	10.9%	11

	Total		Kendal Central and West		Kendal North and North East		Kendal South		Grange-over-Sands		Milnthorpe		Windermere		Sedbergh, Grayrigg and Staveley		Arnside, Silverdale, Carnforth and Kirkby Lonsdale		Ulverston		Coniston and Broughton in Furness	
Tesco, Carnforth	1.7%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	17.0%	17	0.0%	0	0.0%	0
Local shops, Coniston	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Local shops, Dalton in Furness	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Local shops, Greenodd	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Local shops, Oxenholme	0.4%	4	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, Sedbergh	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.0%	7	0.0%	0	0.0%	0	0.0%	0
Other shops, Ambleside	1.3%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.0%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other shops, Grange over Sands	1.0%	10	0.0%	0	0.0%	0	0.0%	0	9.0%	9	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other shops, Kendal	2.0%	20	2.0%	2	6.9%	7	6.0%	6	0.0%	0	0.0%	0	0.0%	0	1.0%	1	4.0%	4	0.0%	0	0.0%	0
Other shops, Milnthorpe	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other shops, Ulverston	2.0%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	17.0%	17	2.0%	2
Asda, Ovangle Road, Lancaster	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Booths, Tithebarn Street, Keswick	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-Op, Ainslie Street, Barrow in Furness	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.9%	6
Co-Op, Market Street, Carnforth	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4	0.0%	0	0.0%	0
Co-Op, Shap	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-Op, Silverdale	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4	0.0%	0	0.0%	0
Local shops, Arnside	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	5.0%	5	0.0%	0	0.0%	0
Local shops, Broughton in Furness	0.4%	4	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3
Local shops, Cark in Cartmel	0.3%	3	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Carnforth	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Local shops, Dent Village	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4	0.0%	0	0.0%	0	0.0%	0
Local shops, Endmoor	0.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.0%	9	0.0%	0	0.0%	0	0.0%	0
Local shops, Flockburgh	0.7%	7	0.0%	0	0.0%	0	0.0%	0	7.0%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Heathwait	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Hornby	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Local shops, Kirkby Lonsdale	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Local shops, Kirkland	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Lindale	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Skelmersdale	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Staveley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, Storth Village	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Windermere	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Witherslack	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks and Spencers, Dalton Road, Barrow in Furness	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Morrisons, Central Drive,	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0

	Total		Kendal Central and West		Kendal North and North East		Kendal South		Grange-over-Sands		Milnthorpe		Windermere		Sedbergh, Grayrigg and Staveley		Arnside, Silverdale, Carnforth and Kirkby Lonsdale		Ulverston		Coniston and Broughton in Furness	
Morecambe																						
Spar, Hawes	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Spar, Highfield Road, Carnforth	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4	0.0%	0	0.0%	0
Spar, Sedbergh	1.9%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	19.0%	19	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Bowness on Windermere	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don’t know / can't remember)	3.2%	32	8.0%	8	2.0%	2	2.0%	2	2.0%	2	3.0%	3	2.0%	2	1.0%	1	4.0%	4	6.0%	6	2.0%	2
(Don't do this type of shopping / Nowhere else)	21.5%	216	19.0%	19	24.8%	25	16.0%	16	28.0%	28	37.6%	38	15.0%	15	21.0%	21	22.0%	22	14.0%	14	17.8%	18
Base:		1003		100		101		100		100		101		100		100		100		100		101

Q07 Thinking about your normal shopping habits, rather than Christmas shopping, in which town or location do you buy most of your household's non-food shopping?

	Total		Kendal Central and West		Kendal North and North East		Kendal South		Grange-over-Sands		Milnthorpe		Windermere		Sedbergh, Grayrigg and Staveley		Arnside, Silverdale, Carnforth and Kirkby Lonsdale		Ulverston		Coniston and Broughton in Furness	
Asda, Kendal	2.6%	26	4.0%	4	2.0%	2	9.0%	9	3.0%	3	4.0%	4	0.0%	0	1.0%	1	3.0%	3	0.0%	0	0.0%	0
Morrisons, Kendal	1.3%	13	2.0%	2	3.0%	3	1.0%	1	2.0%	2	0.0%	0	4.0%	4	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Retail warehousing, Kendal	1.0%	10	1.0%	1	4.0%	4	1.0%	1	0.0%	0	0.0%	0	4.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other shops Kendal town centre	52.0%	522	72.0%	72	79.2%	80	76.0%	76	50.0%	50	70.3%	71	56.0%	56	77.0%	77	31.0%	31	4.0%	4	5.0%	5
Morrisons, Barrow in Furness	0.3%	3	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Asda, Barrow in Furness	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	4.0%	4
Tesco, Barrow in Furness	0.3%	3	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Barrow in Furness town centre	13.0%	130	0.0%	0	1.0%	1	0.0%	0	8.0%	8	2.0%	2	3.0%	3	0.0%	0	0.0%	0	48.0%	48	67.3%	68
Ambleside town centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Carlisle	0.7%	7	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	2.0%	2	2.0%	2	1.0%	1	0.0%	0	1.0%	1
Carnforth	0.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	8.0%	8	0.0%	0	0.0%	0
Dalton in Furness	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Grange over Sands town centre	1.2%	12	0.0%	0	0.0%	0	0.0%	0	12.0%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Grasmere	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kirkby Lonsdale district centre	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.0%	7	0.0%	0	0.0%	0
Lancaster	5.7%	57	3.0%	3	1.0%	1	2.0%	2	1.0%	1	5.9%	6	1.0%	1	8.0%	8	34.0%	34	1.0%	1	0.0%	0
Manchester	1.9%	19	3.0%	3	0.0%	0	3.0%	3	4.0%	4	0.0%	0	0.0%	0	0.0%	0	1.0%	1	2.0%	2	5.9%	6
Milnthorpe town centre	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Preston	1.4%	14	1.0%	1	2.0%	2	0.0%	0	0.0%	0	2.0%	2	2.0%	2	2.0%	2	4.0%	4	0.0%	0	1.0%	1
Sedbergh local centre	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4	0.0%	0	0.0%	0	0.0%	0
Internet / mail order / catalogue	5.7%	57	8.0%	8	3.0%	3	4.0%	4	9.0%	9	5.9%	6	8.0%	8	5.0%	5	4.0%	4	6.0%	6	4.0%	4
Arnside	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Birmingham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Blackpool	0.2%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Cark Cartmel	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Edinburgh	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Flookburgh	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glasgow	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Haworth Village	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hollywood Park, Barrow	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Metro Centre, Newcastle	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Middlebrook Retail Park, Horwich	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morecambe	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	4.0%	4	0.0%	0	1.0%	1
Ulverston	3.5%	35	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	31.0%	31	2.0%	2
Windermere	1.3%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	12.0%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	1.5%	15	2.0%	2	4.0%	4	1.0%	1	2.0%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	3.0%	3	2.0%	2

	Total		Kendal Central and West		Kendal North and North East		Kendal South		Grange-over-Sands		Milnthorpe		Windermere		Sedbergh, Grayrigg and Staveley		Arnside, Silverdale, Carnforth and Kirkby Lonsdale		Ulverston		Coniston and Broughton in Furness	
(Don't buy this type of goods)	1.2%	12	3.0%	3	0.0%	0	1.0%	1	2.0%	2	1.0%	1	3.0%	3	0.0%	0	1.0%	1	0.0%	0	1.0%	1
Base:		1003		100		101		100		100		101		100		100		100		100		101

Q08 While you were on your last shopping trip for non-food items at (answer to Q07) did you, (or anyone else with you) carry out any of the following activities?

	Total		Kendal Central and West		Kendal North and North East		Kendal South		Grange-over-Sands		Milnthorpe		Windermere		Sedbergh, Grayrigg and Staveley		Arnside, Silverdale, Carnforth and Kirkby Lonsdale		Ulverston		Coniston and Broughton in Furness	
Go to Bank, Post Office, Building Society or Cash Point	40.7%	408	44.0%	44	61.4%	62	56.0%	56	30.0%	30	28.7%	29	25.0%	25	40.0%	40	48.0%	48	34.0%	34	39.6%	40
Get Petrol	17.4%	175	12.0%	12	8.9%	9	18.0%	18	28.0%	28	6.9%	7	18.0%	18	14.0%	14	22.0%	22	17.0%	17	29.7%	30
Go shopping for other food items	26.1%	262	29.0%	29	21.8%	22	29.0%	29	35.0%	35	14.9%	15	29.0%	29	21.0%	21	34.0%	34	23.0%	23	24.8%	25
Go shopping for non food items	34.4%	345	33.0%	33	40.6%	41	37.0%	37	39.0%	39	15.8%	16	30.0%	30	29.0%	29	45.0%	45	45.0%	45	29.7%	30
Go window shopping / browsing	25.2%	253	25.0%	25	20.8%	21	36.0%	36	30.0%	30	11.9%	12	26.0%	26	21.0%	21	36.0%	36	17.0%	17	28.7%	29
Go to hairdressers, dry cleaners, or other service	7.5%	75	10.0%	10	8.9%	9	17.0%	17	9.0%	9	5.0%	5	5.0%	5	5.0%	5	8.0%	8	5.0%	5	2.0%	2
Use sports / leisure, entertainment or arts and cultural facilities (including library, cafe etc)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Accessed health related service (Doctor / dentist etc)	0.4%	4	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1
Commuting	1.1%	11	0.0%	0	1.0%	1	1.0%	1	0.0%	0	4.0%	4	0.0%	0	1.0%	1	4.0%	4	0.0%	0	0.0%	0
Cultural facilities (arts centre / museums / theatre etc)	0.7%	7	2.0%	2	0.0%	0	2.0%	2	1.0%	1	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Go to café / restaurants	6.7%	67	5.0%	5	3.0%	3	5.0%	5	10.0%	10	11.9%	12	3.0%	3	12.0%	12	4.0%	4	9.0%	9	4.0%	4
Sports facilities (e.g. gym / swimming pool etc)	1.2%	12	0.0%	0	3.0%	3	2.0%	2	2.0%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	3.0%	3
Use recycling facilities	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Visit friends / family	0.8%	8	0.0%	0	0.0%	0	1.0%	1	0.0%	0	4.0%	4	0.0%	0	0.0%	0	1.0%	1	1.0%	1	1.0%	1
Visit library	1.5%	15	2.0%	2	3.0%	3	3.0%	3	1.0%	1	3.0%	3	0.0%	0	1.0%	1	0.0%	0	2.0%	2	0.0%	0
Visit the cinema	0.6%	6	0.0%	0	1.0%	1	2.0%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Anything Else	0.4%	4	0.0%	0	0.0%	0	1.0%	1	3.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Nothing else)	29.9%	300	35.0%	35	21.8%	22	26.0%	26	23.0%	23	41.6%	42	37.0%	37	31.0%	31	23.0%	23	28.0%	28	32.7%	33
Base:		1003		100		101		100		100		101		100		100		100		100		101

Q09 How do you normally travel to do your non-food shopping?

	Total		Kendal Central and West		Kendal North and North East		Kendal South		Grange-over-Sands		Milnthorpe		Windermere		Sedbergh, Grayrigg and Staveley		Arnside, Silverdale, Carnforth and Kirkby Lonsdale		Ulverston		Coniston and Broughton in Furness	
Car-driver	62.3%	625	40.0%	40	41.6%	42	49.0%	49	58.0%	58	74.3%	75	72.0%	72	74.0%	74	72.0%	72	66.0%	66	76.2%	77
Car-passenger	7.8%	78	10.0%	10	10.9%	11	1.0%	1	15.0%	15	7.9%	8	2.0%	2	8.0%	8	6.0%	6	8.0%	8	8.9%	9
Bus / coach	7.9%	79	4.0%	4	10.9%	11	11.0%	11	10.0%	10	5.9%	6	5.0%	5	10.0%	10	8.0%	8	8.0%	8	5.9%	6
Train	1.3%	13	1.0%	1	1.0%	1	3.0%	3	2.0%	2	1.0%	1	2.0%	2	0.0%	0	3.0%	3	0.0%	0	0.0%	0
Taxi	0.2%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Walk	12.4%	124	31.0%	31	27.7%	28	27.0%	27	4.0%	4	3.0%	3	10.0%	10	2.0%	2	4.0%	4	11.0%	11	4.0%	4
Bicycle	0.7%	7	0.0%	0	1.0%	1	4.0%	4	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0
Use internet / get it delivered	4.2%	42	2.0%	2	3.0%	3	4.0%	4	9.0%	9	5.0%	5	2.0%	2	5.0%	5	2.0%	2	6.0%	6	4.0%	4
Other	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don’t know / varies)	3.2%	32	12.0%	12	2.0%	2	1.0%	1	2.0%	2	2.0%	2	7.0%	7	0.0%	0	4.0%	4	1.0%	1	1.0%	1
Base:		1003		100		101		100		100		101		100		100		100		100		101

Q10 Excluding shopping for Christmas presents, at which town or location did your household last buy clothes or shoes?

	Total	Kendal Central and West	Kendal North and North East	Kendal South	Grange-over-Sands	Milnthorpe	Windermere	Sedbergh, Grayrigg and Staveley	Arnside, Silverdale, Carnforth and Kirkby Lonsdale	Ulverston	Coniston and Broughton in Furness
Asda, Kendal	2.9% 29	3.0% 3	2.0% 2	3.0% 3	4.0% 4	8.9% 9	2.0% 2	3.0% 3	2.0% 2	1.0% 1	0.0% 0
Retail warehousing, Kendal	1.2% 12	0.0% 0	4.0% 4	1.0% 1	0.0% 0	2.0% 2	5.0% 5	0.0% 0	0.0% 0	0.0% 0	0.0% 0
Other shops Kendal town centre	45.5% 456	64.0% 64	68.3% 69	71.0% 71	39.0% 39	48.5% 49	55.0% 55	63.0% 63	26.0% 26	13.0% 13	6.9% 7
Asda, Barrow in Furness	0.5% 5	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	1.0% 1	4.0% 4
Tesco, Barrow in Furness	0.1% 1	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	1.0% 1
Barrow in Furness town centre	10.6% 106	0.0% 0	0.0% 0	0.0% 0	6.0% 6	2.0% 2	3.0% 3	0.0% 0	0.0% 0	44.0% 44	50.5% 51
Ambleside town centre	0.5% 5	0.0% 0	1.0% 1	0.0% 0	0.0% 0	1.0% 1	2.0% 2	0.0% 0	0.0% 0	1.0% 1	0.0% 0
Carlisle	2.8% 28	5.0% 5	1.0% 1	4.0% 4	3.0% 3	3.0% 3	3.0% 3	5.0% 5	1.0% 1	1.0% 1	2.0% 2
Dalton in Furness	0.1% 1	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	1.0% 1
Grange over Sands town centre	1.1% 11	0.0% 0	1.0% 1	0.0% 0	6.0% 6	2.0% 2	0.0% 0	0.0% 0	0.0% 0	2.0% 2	0.0% 0
Ingleton Village	0.1% 1	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	1.0% 1	0.0% 0	0.0% 0
Kirkby Lonsdale district centre	0.3% 3	0.0% 0	0.0% 0	0.0% 0	0.0% 0	2.0% 2	0.0% 0	0.0% 0	1.0% 1	0.0% 0	0.0% 0
Lancaster	5.2% 52	2.0% 2	0.0% 0	2.0% 2	5.0% 5	4.0% 4	3.0% 3	7.0% 7	27.0% 27	2.0% 2	0.0% 0
Manchester	5.9% 59	8.0% 8	3.0% 3	8.0% 8	11.0% 11	2.0% 2	4.0% 4	2.0% 2	8.0% 8	5.0% 5	7.9% 8
Milnthorpe town centre	0.1% 1	0.0% 0	0.0% 0	0.0% 0	0.0% 0	1.0% 1	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0
Newcastle-upon-Tyne	0.8% 8	1.0% 1	0.0% 0	0.0% 0	0.0% 0	2.0% 2	0.0% 0	1.0% 1	3.0% 3	0.0% 0	1.0% 1
Penrith	0.1% 1	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	1.0% 1	0.0% 0	0.0% 0	0.0% 0
Preston	3.1% 31	3.0% 3	2.0% 2	1.0% 1	2.0% 2	4.0% 4	6.0% 6	3.0% 3	6.0% 6	1.0% 1	3.0% 3
Internet / mail order / catalogue	7.2% 72	5.0% 5	7.9% 8	1.0% 1	10.0% 10	8.9% 9	8.0% 8	10.0% 10	4.0% 4	10.0% 10	6.9% 7
Arnside	0.1% 1	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	1.0% 1	0.0% 0	0.0% 0
Birmingham	0.1% 1	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	1.0% 1	0.0% 0	0.0% 0
Blackpool	1.1% 11	0.0% 0	3.0% 3	2.0% 2	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	5.9% 6
Bristol	0.1% 1	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	1.0% 1	0.0% 0
Cambridge	0.1% 1	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	1.0% 1	0.0% 0	0.0% 0	0.0% 0
Cheshire Oaks, Ellesmere Port	0.1% 1	0.0% 0	0.0% 0	1.0% 1	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0
Chester	0.3% 3	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	1.0% 1	1.0% 1	1.0% 1
Clitheroe	0.1% 1	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	1.0% 1	0.0% 0	0.0% 0	0.0% 0
Cockermouth	0.1% 1	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	1.0% 1	0.0% 0
Colne	0.1% 1	1.0% 1	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0
Cornwall	0.1% 1	0.0% 0	0.0% 0	0.0% 0	0.0% 0	1.0% 1	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0
Eastbourne	0.1% 1	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	1.0% 1	0.0% 0	0.0% 0
Edinburgh	0.3% 3	1.0% 1	0.0% 0	0.0% 0	0.0% 0	1.0% 1	0.0% 0	0.0% 0	1.0% 1	0.0% 0	0.0% 0
Fleetwood	0.1% 1	0.0% 0	0.0% 0	1.0% 1	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0
Glasgow	0.5% 5	0.0% 0	1.0% 1	0.0% 0	0.0% 0	0.0% 0	2.0% 2	0.0% 0	0.0% 0	1.0% 1	1.0% 1
Gretna	0.1% 1	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	1.0% 1	0.0% 0	0.0% 0	0.0% 0	0.0% 0
Halifax	0.1% 1	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	1.0% 1	0.0% 0
Hellifield	0.1% 1	0.0% 0	0.0% 0	0.0% 0	1.0% 1	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0

	Total		Kendal Central and West		Kendal North and North East		Kendal South		Grange-over-Sands		Milnthorpe		Windermere		Sedbergh, Grayrigg and Staveley		Arnside, Silverdale, Carnforth and Kirkby Lonsdale		Ulverston		Coniston and Broughton in Furness	
Hollywood Park, Barrow	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ipswich	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Isle of Man	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Leeds	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0	1.0%	1
Liverpool	0.5%	5	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	2.0%	2
London	0.5%	5	1.0%	1	1.0%	1	0.0%	0	1.0%	1	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks and Spencers, Handforth Dean	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Metro Centre, Newcastle	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Middlebrook Retail Park, Horwich	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morecambe	0.4%	4	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Nottingham	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Oxford	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0
Sainsburys, Morecambe	0.2%	2	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shap	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Skipton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
St Helens	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stockport	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Telford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Ulverston	1.2%	12	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.0%	10	1.0%	1
Warrington	0.2%	2	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Windermere	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
(Don't know / varies)	2.0%	20	0.0%	0	2.0%	2	0.0%	0	5.0%	5	2.0%	2	1.0%	1	1.0%	1	4.0%	4	3.0%	3	2.0%	2
(Don't buy this type of goods)	1.5%	15	5.0%	5	1.0%	1	0.0%	0	4.0%	4	2.0%	2	1.0%	1	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Base:		1003		100		101		100		100		101		100		100		100		100		101

Q11 Excluding Christmas shopping, at which town or location did your household last buy domestic electric appliances (e.g. fridges and kitchen items)?

	Total		Kendal Central and West		Kendal North and North East		Kendal South		Grange-over-Sands		Milnthorpe		Windermere		Sedbergh, Grayrigg and Staveley		Arnside, Silverdale, Carnforth and Kirkby Lonsdale		Ulverston		Coniston and Broughton in Furness	
Asda, Kendal	1.2%	12	1.0%	1	2.0%	2	1.0%	1	1.0%	1	2.0%	2	0.0%	0	3.0%	3	2.0%	2	0.0%	0	0.0%	0
Morrisons, Kendal	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Retail warehousing, Kendal	21.7%	218	44.0%	44	52.5%	53	31.0%	31	8.0%	8	12.9%	13	25.0%	25	30.0%	30	14.0%	14	0.0%	0	0.0%	0
Other shops Kendal town centre	18.6%	187	25.0%	25	21.8%	22	32.0%	32	9.0%	9	33.7%	34	36.0%	36	18.0%	18	10.0%	10	1.0%	1	0.0%	0
Asda, Barrow in Furness	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3
Tesco, Barrow in Furness	0.6%	6	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	3.0%	3
Barrow in Furness town centre	13.3%	133	1.0%	1	1.0%	1	0.0%	0	11.0%	11	0.0%	0	6.0%	6	0.0%	0	0.0%	0	56.0%	56	57.4%	58
Ambleside town centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bowness town centre	0.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Carlisle	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Carnforth	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Dalton in Furness	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Grange over Sands town centre	3.0%	30	0.0%	0	0.0%	0	0.0%	0	29.0%	29	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Ingleton Village	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	4.0%	4	0.0%	0	0.0%	0
Lancaster	5.5%	55	1.0%	1	0.0%	0	0.0%	0	1.0%	1	6.9%	7	1.0%	1	4.0%	4	41.0%	41	0.0%	0	0.0%	0
Manchester	0.3%	3	0.0%	0	0.0%	0	0.0%	0	2.0%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Milnthorpe town centre	1.4%	14	0.0%	0	0.0%	0	1.0%	1	1.0%	1	10.9%	11	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Penrith	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Preston	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Sedbergh local centre	1.5%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	15.0%	15	0.0%	0	0.0%	0	0.0%	0
Internet / mail order / catalogue	17.5%	176	15.0%	15	11.9%	12	22.0%	22	21.0%	21	14.9%	15	21.0%	21	17.0%	17	16.0%	16	14.0%	14	22.8%	23
B&Q, Barrow	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1
Blackpool	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Comet, Hollywood Park, Barrow	0.3%	3	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0
Endmoor	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Halifax	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Haverthwaite	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Hawes	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Heversham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hollywood Park, Barrow	1.2%	12	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4	6.9%	7
John Lewis, Handforth Dean	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
London	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morecambe	0.8%	8	0.0%	0	0.0%	0	3.0%	3	1.0%	1	0.0%	0	1.0%	1	0.0%	0	3.0%	3	0.0%	0	0.0%	0
Morrisons, Morecambe	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Ulverston	1.2%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.0%	12	0.0%	0
Warrington	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Windermere	0.3%	3	1.0%	1	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	2.5%	25	1.0%	1	2.0%	2	3.0%	3	3.0%	3	3.0%	3	2.0%	2	3.0%	3	1.0%	1	4.0%	4	3.0%	3

	Total		Kendal Central and West		Kendal North and North East		Kendal South		Grange-over-Sands		Milnthorpe		Windermere		Sedbergh, Grayrigg and Staveley		Arnside, Silverdale, Carnforth and Kirkby Lonsdale		Ulverston		Coniston and Broughton in Furness	
(Don't buy this type of goods)	6.0%	60	10.0%	10	7.9%	8	6.0%	6	7.0%	7	9.9%	10	4.0%	4	4.0%	4	6.0%	6	3.0%	3	2.0%	2
Base:		1003		100		101		100		100		101		100		100		100		100		101

Q12 Thinking about your normal shopping habits, rather than Christmas shopping, at which town or location did your household last buy other kinds of electric goods such as TV / Hi-Fi and computers?

	Total		Kendal Central and West		Kendal North and North East		Kendal South		Grange-over-Sands		Milnthorpe		Windermere		Sedbergh, Grayrigg and Staveley		Arnside, Silverdale, Carnforth and Kirkby Lonsdale		Ulverston		Coniston and Broughton in Furness	
Asda, Kendal	1.1%	11	2.0%	2	0.0%	0	1.0%	1	2.0%	2	3.0%	3	0.0%	0	2.0%	2	1.0%	1	0.0%	0	0.0%	0
Morrisons, Kendal	0.4%	4	2.0%	2	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Retail warehousing, Kendal	17.9%	180	35.0%	35	40.6%	41	22.0%	22	9.0%	9	15.8%	16	19.0%	19	27.0%	27	11.0%	11	0.0%	0	0.0%	0
Other shops Kendal town centre	19.6%	197	29.0%	29	24.8%	25	35.0%	35	4.0%	4	36.6%	37	33.0%	33	25.0%	25	7.0%	7	2.0%	2	0.0%	0
Asda, Barrow in Furness	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Tesco, Barrow in Furness	1.3%	13	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	1.0%	1	0.0%	0	0.0%	0	3.0%	3	6.9%	7
Barrow in Furness town centre	13.4%	134	0.0%	0	0.0%	0	0.0%	0	13.0%	13	1.0%	1	8.0%	8	1.0%	1	0.0%	0	57.0%	57	53.5%	54
Ambleside town centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bowness town centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Carlisle	0.3%	3	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Carnforth	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Grange over Sands town centre	2.7%	27	0.0%	0	0.0%	0	0.0%	0	26.0%	26	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Ingleton Village	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	6.0%	6	0.0%	0	0.0%	0
Lancaster	5.7%	57	1.0%	1	2.0%	2	3.0%	3	2.0%	2	5.9%	6	2.0%	2	3.0%	3	38.0%	38	0.0%	0	0.0%	0
Manchester	0.6%	6	0.0%	0	1.0%	1	0.0%	0	0.0%	0	2.0%	2	1.0%	1	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Milnthorpe town centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Penrith	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Preston	0.6%	6	0.0%	0	0.0%	0	1.0%	1	0.0%	0	2.0%	2	0.0%	0	2.0%	2	1.0%	1	0.0%	0	0.0%	0
Sedbergh local centre	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4	0.0%	0	0.0%	0	0.0%	0
Staveley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Internet / mail order / catalogue	18.5%	186	15.0%	15	12.9%	13	24.0%	24	19.0%	19	13.9%	14	21.0%	21	23.0%	23	19.0%	19	18.0%	18	19.8%	20
Arnside	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Morecambe	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bolton le Sands	0.3%	3	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Comet, Hollywood Park, Barrow	0.5%	5	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	3.0%	3
Dundee	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Halifax	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Harrogate	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Hawes	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Hollywood Park, Barrow	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	6.9%	7
Kirkland	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Liverpool	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morecambe	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Morrisons, Morecambe	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Ulverston	1.1%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.0%	11	0.0%	0
Windermere	0.5%	5	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	1.0%	1	0.0%	0
York	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
(Don't know / varies)	2.4%	24	2.0%	2	2.0%	2	1.0%	1	5.0%	5	0.0%	0	4.0%	4	3.0%	3	1.0%	1	4.0%	4	2.0%	2

	Total		Kendal Central and West		Kendal North and North East		Kendal South		Grange-over-Sands		Milnthorpe		Windermere		Sedbergh, Grayrigg and Staveley		Arnside, Silverdale, Carnforth and Kirkby Lonsdale		Ulverston		Coniston and Broughton in Furness	
(Don't buy this type of goods)	9.1%	91	12.0%	12	14.9%	15	8.0%	8	17.0%	17	11.9%	12	6.0%	6	3.0%	3	11.0%	11	1.0%	1	5.9%	6
Base:		1003		100		101		100		100		101		100		100		100		100		101

Q13 Excluding Christmas shopping, at which town or location did your household last buy furniture, soft furnishings or floor-coverings?

	Total		Kendal Central and West		Kendal North and North East		Kendal South		Grange-over-Sands		Milnthorpe		Windermere		Sedbergh, Grayrigg and Staveley		Arnside, Silverdale, Carnforth and Kirkby Lonsdale		Ulverston		Coniston and Broughton in Furness	
Asda, Kendal	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Kendal	0.2%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Retail warehousing, Kendal	7.0%	70	8.0%	8	16.8%	17	7.0%	7	5.0%	5	7.9%	8	12.0%	12	11.0%	11	2.0%	2	0.0%	0	0.0%	0
Other shops Kendal town centre	21.5%	216	40.0%	40	37.6%	38	40.0%	40	6.0%	6	20.8%	21	27.0%	27	35.0%	35	6.0%	6	2.0%	2	1.0%	1
Morrisons, Barrow in Furness	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Tesco, Barrow in Furness	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Barrow in Furness town centre	18.5%	186	5.0%	5	4.0%	4	7.0%	7	25.0%	25	6.9%	7	14.0%	14	2.0%	2	1.0%	1	49.0%	49	71.3%	72
Ambleside town centre	0.6%	6	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	5.0%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bowness town centre	0.3%	3	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Carlisle	1.5%	15	2.0%	2	2.0%	2	1.0%	1	1.0%	1	1.0%	1	4.0%	4	3.0%	3	0.0%	0	0.0%	0	1.0%	1
Carnforth	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Dalton in Furness	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Grange over Sands town centre	1.6%	16	0.0%	0	0.0%	0	0.0%	0	15.0%	15	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kirkby Lonsdale district centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lancaster	4.9%	49	4.0%	4	3.0%	3	6.0%	6	2.0%	2	5.0%	5	2.0%	2	5.0%	5	22.0%	22	0.0%	0	0.0%	0
Manchester	1.4%	14	1.0%	1	0.0%	0	1.0%	1	3.0%	3	0.0%	0	0.0%	0	3.0%	3	6.0%	6	0.0%	0	0.0%	0
Milnthorpe town centre	1.1%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.9%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Penrith	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Preston	2.8%	28	3.0%	3	1.0%	1	4.0%	4	1.0%	1	4.0%	4	3.0%	3	3.0%	3	5.0%	5	1.0%	1	3.0%	3
Sedbergh local centre	0.4%	4	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0
Staveley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / mail order / catalogue	6.5%	65	7.0%	7	6.9%	7	7.0%	7	6.0%	6	9.9%	10	1.0%	1	9.0%	9	8.0%	8	3.0%	3	6.9%	7
Accrington	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&Q, Kendal	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Balderstone	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Barnard Castle	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Blackburn	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bolton le Sands	1.1%	11	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	2.0%	2	3.0%	3	3.0%	3	1.0%	1	0.0%	0
Cheadle	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chorley	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dunelm Mill, Morecambe	0.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Harveys, Morecambe	0.2%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Hollywood Park, Barrow	0.7%	7	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	4.0%	4	1.0%	1
Ikea, Warrington	0.4%	4	0.0%	0	1.0%	1	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
John Lewis, Handforth Dean	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kent	0.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kirkborough	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Kendal Central and West		Kendal North and North East		Kendal South		Grange-over-Sands		Milnthorpe		Windermere		Sedbergh, Grayrigg and Staveley		Arnside, Silverdale, Carnforth and Kirkby Lonsdale		Ulverston		Coniston and Broughton in Furness	
Kirkby in Furness	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Leeds	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Liverpool	0.3%	3	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
London	0.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Middlebrook Retail Park, Horwich	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morecambe	1.7%	17	1.0%	1	4.0%	4	4.0%	4	0.0%	0	1.0%	1	0.0%	0	0.0%	0	7.0%	7	0.0%	0	0.0%	0
Oxford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Skipton	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Ulverston	2.5%	25	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	23.0%	23	0.0%	0
Warrington	0.5%	5	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	2.0%	2	1.0%	1	0.0%	0
Windermere	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	5	0.0%	0	0.0%	0	1.0%	1	0.0%	0
(Don't know / varies)	6.1%	61	4.0%	4	5.0%	5	4.0%	4	9.0%	9	3.0%	3	8.0%	8	8.0%	8	9.0%	9	7.0%	7	4.0%	4
(Don't buy this type of goods)	14.7%	147	17.0%	17	14.9%	15	10.0%	10	22.0%	22	22.8%	23	9.0%	9	12.0%	12	26.0%	26	5.0%	5	7.9%	8
Base:		1003		100		101		100		100		101		100		100		100		100		101

Q14 Thinking about your normal shopping habits, rather than Christmas shopping, at which town or location did your household last buy DIY / hardware items and garden items?

	Total		Kendal Central and West		Kendal North and North East		Kendal South		Grange-over-Sands		Milnthorpe		Windermere		Sedbergh, Grayrigg and Staveley		Arnside, Silverdale, Carnforth and Kirkby Lonsdale		Ulverston		Coniston and Broughton in Furness	
Asda, Kendal	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Kendal	0.2%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Retail warehousing, Kendal	22.8%	229	41.0%	41	35.6%	36	38.0%	38	18.0%	18	19.8%	20	19.0%	19	45.0%	45	11.0%	11	0.0%	0	1.0%	1
Other shops Kendal town centre	24.9%	250	35.0%	35	36.6%	37	47.0%	47	17.0%	17	36.6%	37	33.0%	33	22.0%	22	20.0%	20	1.0%	1	1.0%	1
Barrow in Furness town centre	13.4%	134	0.0%	0	0.0%	0	0.0%	0	6.0%	6	1.0%	1	0.0%	0	0.0%	0	0.0%	0	54.0%	54	72.3%	73
Ambleside town centre	1.7%	17	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	10.0%	10	2.0%	2	0.0%	0	2.0%	2	0.0%	0
Bowness town centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Carlisle	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Carnforth	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.0%	8	0.0%	0	0.0%	0
Dalton in Furness	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	1.0%	1
Grange over Sands town centre	2.2%	22	0.0%	0	0.0%	0	0.0%	0	21.0%	21	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Grasmere	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Kirkby Lonsdale district centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Lancaster	3.0%	30	2.0%	2	0.0%	0	0.0%	0	1.0%	1	3.0%	3	1.0%	1	1.0%	1	21.0%	21	1.0%	1	0.0%	0
Manchester	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Milnthorpe town centre	2.4%	24	0.0%	0	1.0%	1	0.0%	0	1.0%	1	15.8%	16	0.0%	0	2.0%	2	4.0%	4	0.0%	0	0.0%	0
Preston	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Sedbergh local centre	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.0%	7	0.0%	0	0.0%	0	0.0%	0
Internet / mail order / catalogue	3.0%	30	2.0%	2	2.0%	2	2.0%	2	4.0%	4	4.0%	4	2.0%	2	2.0%	2	4.0%	4	3.0%	3	5.0%	5
Arnside	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&Q, Barrow	1.5%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.0%	9	5.9%	6
B&Q, Kendal	1.6%	16	1.0%	1	3.0%	3	5.0%	5	1.0%	1	2.0%	2	0.0%	0	4.0%	4	0.0%	0	0.0%	0	0.0%	0
Balderstone	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Beetham	0.4%	4	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0
Beetham Garden Centre	0.2%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Bolton le Sands	0.2%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Cark Cartmel	0.2%	2	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Flookburgh	0.4%	4	0.0%	0	0.0%	0	0.0%	0	4.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hayes	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hollywood Park, Barrow	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3
Homebase, Morecambe	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Morecambe	1.3%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1	11.0%	11	0.0%	0	0.0%	0
Ulverston	1.8%	18	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	16.0%	16	1.0%	1
Whitehaven	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Windermere	1.3%	13	1.0%	1	0.0%	0	1.0%	1	0.0%	0	1.0%	1	10.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	2.3%	23	2.0%	2	4.0%	4	0.0%	0	4.0%	4	1.0%	1	6.0%	6	2.0%	2	1.0%	1	2.0%	2	1.0%	1
(Don't buy this type of goods)	11.5%	115	15.0%	15	13.9%	14	3.0%	3	18.0%	18	11.9%	12	18.0%	18	8.0%	8	11.0%	11	8.0%	8	7.9%	8

	Total	Kendal Central and West	Kendal North and North East	Kendal South	Grange-over-Sands	Milnthorpe	Windermere	Sedbergh, Grayrigg and Staveley	Arnside, Silverdale, Carnforth and Kirkby Lonsdale	Ulverston	Coniston and Broughton in Furness
Base:	1003	100	101	100	100	101	100	100	100	100	101

Q15 At which town or location did your household last buy health, beauty and chemist items, excluding shopping for Christmas presents?

	Total		Kendal Central and West		Kendal North and North East		Kendal South		Grange-over-Sands		Milnthorpe		Windermere		Sedbergh, Grayrigg and Staveley		Arnside, Silverdale, Carnforth and Kirkby Lonsdale		Ulverston		Coniston and Broughton in Furness	
Asda, Kendal	7.5%	75	7.0%	7	7.9%	8	22.0%	22	7.0%	7	11.9%	12	3.0%	3	11.0%	11	5.0%	5	0.0%	0	0.0%	0
Morrisons, Kendal	1.8%	18	2.0%	2	8.9%	9	1.0%	1	1.0%	1	1.0%	1	1.0%	1	3.0%	3	0.0%	0	0.0%	0	0.0%	0
Retail warehousing, Kendal	0.9%	9	1.0%	1	1.0%	1	0.0%	0	1.0%	1	0.0%	0	6.0%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other shops Kendal town centre	39.6%	397	81.0%	81	75.2%	76	71.0%	71	30.0%	30	41.6%	42	27.0%	27	46.0%	46	21.0%	21	3.0%	3	0.0%	0
Morrisons, Barrow in Furness	0.4%	4	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3
Asda, Barrow in Furness	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	3.0%	3
Tesco, Barrow in Furness	0.7%	7	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	5
Barrow in Furness town centre	8.4%	84	0.0%	0	0.0%	0	0.0%	0	2.0%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0	15.0%	15	65.3%	66
Ambleside town centre	1.9%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	19.0%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bowness town centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Carnforth	3.2%	32	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	31.0%	31	0.0%	0	0.0%	0
Dalton in Furness	1.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	7.9%	8
Grange over Sands town centre	3.0%	30	0.0%	0	0.0%	0	0.0%	0	30.0%	30	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Grasmere	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ingleton Village	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Kirkby Lonsdale district centre	1.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	9.0%	9	0.0%	0	0.0%	0
Lancaster	2.0%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1	16.0%	16	2.0%	2	0.0%	0
Manchester	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Milnthorpe town centre	4.0%	40	0.0%	0	0.0%	0	0.0%	0	0.0%	0	32.7%	33	0.0%	0	4.0%	4	3.0%	3	0.0%	0	0.0%	0
Penrith	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Preston	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Sedbergh local centre	2.4%	24	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	24.0%	24	0.0%	0	0.0%	0	0.0%	0
Staveley	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.0%	6	0.0%	0	0.0%	0	0.0%	0
Internet / mail order / catalogue	2.2%	22	1.0%	1	1.0%	1	1.0%	1	5.0%	5	4.0%	4	1.0%	1	1.0%	1	2.0%	2	3.0%	3	3.0%	3
Arnside	0.7%	7	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	5.0%	5	0.0%	0	0.0%	0
Askham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Blackpool	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Booths, Ulverston	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Cark Cartmel	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Flookburgh	0.6%	6	0.0%	0	0.0%	0	0.0%	0	6.0%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hawkshead Village	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Silverdale	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Ulverston	7.4%	74	0.0%	0	0.0%	0	0.0%	0	5.0%	5	0.0%	0	1.0%	1	0.0%	0	0.0%	0	62.0%	62	5.9%	6
Windermere	3.0%	30	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1	28.0%	28	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	0.8%	8	1.0%	1	0.0%	0	1.0%	1	2.0%	2	0.0%	0	2.0%	2	0.0%	0	0.0%	0	2.0%	2	0.0%	0
(Don't buy this type of goods)	4.7%	47	6.0%	6	5.9%	6	3.0%	3	7.0%	7	4.0%	4	4.0%	4	2.0%	2	5.0%	5	6.0%	6	4.0%	4

	Total	Kendal Central and West	Kendal North and North East	Kendal South	Grange-over-Sands	Milnthorpe	Windermere	Sedbergh, Grayrigg and Staveley	Arnside, Silverdale, Carnforth and Kirkby Lonsdale	Ulverston	Coniston and Broughton in Furness
Base:	1003	100	101	100	100	101	100	100	100	100	101

South Lakeland District Telephone Household Survey for Nathaniel Lichfield & Partners

Q16 Thinking about your normal shopping habits, rather than Christmas shopping, at which town or location did your household last buy other non-food items such as books, CDs, toys and gifts?

	Total		Kendal Central and West		Kendal North and North East		Kendal South		Grange-over-Sands		Milnthorpe		Windermere		Sedbergh, Grayrigg and Staveley		Arnside, Silverdale, Carnforth and Kirkby Lonsdale		Ulverston		Coniston and Broughton in Furness	
Asda, Kendal	6.8%	68	13.0%	13	9.9%	10	11.0%	11	10.0%	10	6.9%	7	6.0%	6	8.0%	8	3.0%	3	0.0%	0	0.0%	0
Morrisons, Kendal	0.7%	7	1.0%	1	2.0%	2	1.0%	1	1.0%	1	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Retail warehousing, Kendal	0.2%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Other shops Kendal town centre	27.4%	275	39.0%	39	45.5%	46	42.0%	42	20.0%	20	36.6%	37	32.0%	32	41.0%	41	17.0%	17	1.0%	1	0.0%	0
Asda, Barrow in Furness	1.3%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4	8.9%	9
Tesco, Barrow in Furness	0.3%	3	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Barrow in Furness town centre	6.6%	66	0.0%	0	0.0%	0	0.0%	0	6.0%	6	0.0%	0	2.0%	2	0.0%	0	0.0%	0	27.0%	27	30.7%	31
Ambleside town centre	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bowness town centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Carlisle	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Carnforth	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	5.0%	5	0.0%	0	0.0%	0
Dalton in Furness	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Grange over Sands town centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Grasmere	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kirkby Lonsdale district centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Lancaster	2.7%	27	1.0%	1	1.0%	1	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	21.0%	21	1.0%	1	0.0%	0
Manchester	0.5%	5	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	2.0%	2	0.0%	0
Milnthorpe town centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Preston	0.8%	8	0.0%	0	1.0%	1	1.0%	1	2.0%	2	0.0%	0	1.0%	1	1.0%	1	2.0%	2	0.0%	0	0.0%	0
Sedbergh local centre	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.0%	6	0.0%	0	0.0%	0	0.0%	0
Internet / mail order / catalogue	31.2%	313	27.0%	27	25.7%	26	36.0%	36	29.0%	29	30.7%	31	23.0%	23	33.0%	33	35.0%	35	29.0%	29	43.6%	44
Blackpool	0.2%	2	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Cark Cartmel	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chester	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Edinburgh	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gateshead	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Harrogate	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hawkshead Village	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hayes	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Leeds	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
London	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Matalan, Morecambe	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Oxford	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Ulverston	2.1%	21	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	16.0%	16	3.0%	3
Windermere	0.9%	9	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	7.0%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	2.0%	20	0.0%	0	0.0%	0	1.0%	1	4.0%	4	2.0%	2	2.0%	2	2.0%	2	3.0%	3	4.0%	4	2.0%	2
(Don't buy this type of goods)	12.8%	128	18.0%	18	11.9%	12	5.0%	5	20.0%	20	16.8%	17	17.0%	17	7.0%	7	11.0%	11	14.0%	14	6.9%	7

	Total		Kendal Central and West		Kendal North and North East		Kendal South		Grange-over-Sands		Milnthorpe		Windermere		Sedbergh, Grayrigg and Staveley		Arnside, Silverdale, Carnforth and Kirkby Lonsdale		Ulverston		Coniston and Broughton in Furness	
Base:		1003		100		101		100		100		101		100		100		100		100		101

Q17 At which of the following town centres do you visit the shops, services or markets?

	Total		Kendal Central and West		Kendal North and North East		Kendal South		Grange-over-Sands		Milnthorpe		Windermere		Sedbergh, Grayrigg and Staveley		Arnside, Silverdale, Carnforth and Kirkby Lonsdale		Ulverston		Coniston and Broughton in Furness	
Kendal	84.4%	847	93.0%	93	99.0%	100	97.0%	97	92.0%	92	97.0%	98	87.0%	87	96.0%	96	74.0%	74	59.0%	59	50.5%	51
Kirkby Lonsdale	24.2%	243	19.0%	19	11.9%	12	23.0%	23	22.0%	22	37.6%	38	10.0%	10	49.0%	49	46.0%	46	17.0%	17	6.9%	7
Milnthorpe	19.7%	198	8.0%	8	5.9%	6	12.0%	12	14.0%	14	94.1%	95	2.0%	2	22.0%	22	34.0%	34	4.0%	4	1.0%	1
Grange over Sands	21.7%	218	10.0%	10	9.9%	10	13.0%	13	88.0%	88	28.7%	29	8.0%	8	14.0%	14	10.0%	10	23.0%	23	12.9%	13
Ulverston	28.5%	286	7.0%	7	9.9%	10	7.0%	7	60.0%	60	7.9%	8	14.0%	14	12.0%	12	1.0%	1	98.0%	98	68.3%	69
None of these centres	6.3%	63	4.0%	4	1.0%	1	1.0%	1	2.0%	2	1.0%	1	13.0%	13	4.0%	4	16.0%	16	1.0%	1	19.8%	20
Base:		1003		100		101		100		100		101		100		100		100		100		101

Meanscore: [Visits per week]

Q18 How often do you visit shops, services or markets in Kendal?
Those who said "Kendal" at Q17

	Total		Kendal Central and West		Kendal North and North East		Kendal South		Grange-over-Sands		Milnthorpe		Windermere		Sedbergh, Grayrigg and Staveley		Arnside, Silverdale, Carnforth and Kirkby Lonsdale		Ulverston		Coniston and Broughton in Furness	
Everyday	5.9%	50	16.1%	15	14.0%	14	10.3%	10	1.1%	1	5.1%	5	2.3%	2	1.0%	1	2.7%	2	0.0%	0	0.0%	0
2-3 times a week	19.0%	161	45.2%	42	30.0%	30	41.2%	40	4.3%	4	13.3%	13	6.9%	6	17.7%	17	10.8%	8	1.7%	1	0.0%	0
Once a week	29.6%	251	22.6%	21	36.0%	36	34.0%	33	30.4%	28	54.1%	53	27.6%	24	39.6%	38	18.9%	14	1.7%	1	5.9%	3
Once a fortnight	13.1%	111	6.5%	6	8.0%	8	7.2%	7	22.8%	21	9.2%	9	21.8%	19	16.7%	16	23.0%	17	11.9%	7	2.0%	1
Once a month	15.6%	132	5.4%	5	7.0%	7	6.2%	6	26.1%	24	11.2%	11	25.3%	22	13.5%	13	23.0%	17	28.8%	17	19.6%	10
Less than once a month	16.2%	137	3.2%	3	5.0%	5	1.0%	1	13.0%	12	7.1%	7	16.1%	14	10.4%	10	21.6%	16	55.9%	33	70.6%	36
Don't know	0.6%	5	1.1%	1	0.0%	0	0.0%	0	2.2%	2	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	2.0%	1
Refused	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*1.32*		*2.56*		*2.16*		*2.15*		*0.71*		*1.32*		*0.81*		*1.06*		*0.85*		*0.26*		*0.20*
Base:		847		93		100		97		92		98		87		96		74		59		51

Q19 What if anything would make you visit Kendal town centre more often?
Those who said "Kendal" at Q17

	Total		Kendal Central and West		Kendal North and North East		Kendal South		Grange-over-Sands		Milnthorpe		Windermere		Sedbergh, Grayrigg and Staveley		Arnside, Silverdale, Carnforth and Kirkby Lonsdale		Ulverston		Coniston and Broughton in Furness	
Nothing	37.5%	318	32.3%	30	22.0%	22	30.9%	30	47.8%	44	26.5%	26	51.7%	45	27.1%	26	44.6%	33	50.8%	30	62.7%	32
Better choice of clothing shops	5.1%	43	10.8%	10	10.0%	10	5.2%	5	2.2%	2	3.1%	3	3.4%	3	5.2%	5	5.4%	4	1.7%	1	0.0%	0
Better choice of shops in general	12.8%	108	21.5%	20	22.0%	22	21.6%	21	4.3%	4	12.2%	12	8.0%	7	13.5%	13	8.1%	6	3.4%	2	2.0%	1
Better maintenance / cleanliness	0.9%	8	4.3%	4	1.0%	1	2.1%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better quality shops	3.4%	29	5.4%	5	0.0%	0	7.2%	7	3.3%	3	2.0%	2	3.4%	3	0.0%	0	9.5%	7	1.7%	1	2.0%	1
Better market	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	2.0%	1
Better sport/leisure, entertainment or arts and cultural facilities	0.2%	2	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Improved bus services	1.2%	10	1.1%	1	0.0%	0	0.0%	0	1.1%	1	4.1%	4	1.1%	1	1.0%	1	1.4%	1	0.0%	0	2.0%	1
More car parking	22.9%	194	22.6%	21	16.0%	16	28.9%	28	20.7%	19	23.5%	23	21.8%	19	32.3%	31	27.0%	20	18.6%	11	11.8%	6
More food supermarkets	0.6%	5	1.1%	1	0.0%	0	2.1%	2	1.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More large shops	2.0%	17	2.2%	2	3.0%	3	3.1%	3	2.2%	2	2.0%	2	0.0%	0	3.1%	3	2.7%	2	0.0%	0	0.0%	0
More traffic free areas / pedestrianisation	5.0%	42	6.5%	6	9.0%	9	7.2%	7	1.1%	1	5.1%	5	1.1%	1	7.3%	7	5.4%	4	1.7%	1	2.0%	1
Better / more cheap / free parking provision	13.5%	114	10.8%	10	12.0%	12	19.6%	19	13.0%	12	23.5%	23	10.3%	9	17.7%	17	8.1%	6	8.5%	5	2.0%	1
Better / more provision for the disabled	1.7%	14	1.1%	1	4.0%	4	0.0%	0	3.3%	3	3.1%	3	0.0%	0	2.1%	2	0.0%	0	0.0%	0	2.0%	1
Better / more public amenities	2.5%	21	2.2%	2	3.0%	3	6.2%	6	1.1%	1	3.1%	3	0.0%	0	4.2%	4	2.7%	2	0.0%	0	0.0%	0
Better department store	0.9%	8	0.0%	0	2.0%	2	1.0%	1	0.0%	0	3.1%	3	1.1%	1	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Don't change the New Street car-park	0.5%	4	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	1.7%	1	0.0%	0
Ease of access	0.7%	6	3.2%	3	0.0%	0	1.0%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0
Fill the empty shops	1.4%	12	1.1%	1	1.0%	1	4.1%	4	0.0%	0	4.1%	4	1.1%	1	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Get rid of Kvillage	0.5%	4	0.0%	0	0.0%	0	2.1%	2	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Get rid of the poor quality / down market shops (bookies, charity shops, pound shops etc.)	0.9%	8	0.0%	0	2.0%	2	1.0%	1	1.1%	1	3.1%	3	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Improve traffic control measures (Get rid of one way system, get congestion under control etc.)	7.2%	61	5.4%	5	8.0%	8	5.2%	5	9.8%	9	12.2%	12	1.1%	1	8.3%	8	1.4%	1	15.3%	9	5.9%	3
Improved appearance (modernized, redecorated etc.)	0.5%	4	1.1%	1	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0

	Total		Kendal Central and West		Kendal North and North East		Kendal South		Grange-over-Sands		Milnthorpe		Windermere		Sedbergh, Grayrigg and Staveley		Arnside, Silverdale, Carnforth and Kirkby Lonsdale		Ulverston		Coniston and Broughton in Furness	
Less roadworks	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0
More restaurants / café's etc	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More small independent shops	1.3%	11	0.0%	0	3.0%	3	2.1%	2	1.1%	1	2.0%	2	0.0%	0	2.1%	2	1.4%	1	0.0%	0	0.0%	0
Retail provision for children / youths	0.8%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	3.1%	3	2.7%	2	1.7%	1	0.0%	0
Other	1.9%	16	2.2%	2	5.0%	5	0.0%	0	1.1%	1	6.1%	6	0.0%	0	0.0%	0	2.7%	2	0.0%	0	0.0%	0
(Don't know)	3.8%	32	3.2%	3	10.0%	10	0.0%	0	3.3%	3	0.0%	0	5.7%	5	2.1%	2	0.0%	0	6.8%	4	9.8%	5
Base:		847		93		100		97		92		98		87		96		74		59		51

Meanscore: [Visits per week]

Q20 How often do you visit shops, services or markets in Kirkby Lonsdale?
Those who said "Kirkby Lonsdale" at Q17

	Total		Kendal Central and West		Kendal North and North East		Kendal South		Grange-over-Sands		Milnthorpe		Windermere		Sedbergh, Grayrigg and Staveley		Arnside, Silverdale, Carnforth and Kirkby Lonsdale		Ulverston		Coniston and Broughton in Furness	
Everyday	2.5%	6	0.0%	0	0.0%	0	0.0%	0	4.5%	1	2.6%	1	0.0%	0	0.0%	0	8.7%	4	0.0%	0	0.0%	0
2-3 times a week	4.9%	12	0.0%	0	0.0%	0	4.3%	1	0.0%	0	0.0%	0	0.0%	0	2.0%	1	21.7%	10	0.0%	0	0.0%	0
Once a week	4.9%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.9%	3	0.0%	0	6.1%	3	13.0%	6	0.0%	0	0.0%	0
Once a fortnight	9.9%	24	15.8%	3	8.3%	1	13.0%	3	4.5%	1	15.8%	6	0.0%	0	12.2%	6	6.5%	3	5.9%	1	0.0%	0
Once a month	21.8%	53	36.8%	7	8.3%	1	30.4%	7	18.2%	4	21.1%	8	20.0%	2	30.6%	15	17.4%	8	5.9%	1	0.0%	0
Less than once a month	55.1%	134	47.4%	9	83.3%	10	52.2%	12	72.7%	16	50.0%	19	70.0%	7	49.0%	24	32.6%	15	88.2%	15	100.0%	7
Don't know	0.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	1	10.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Refused	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*0.52*		*0.24*		*0.15*		*0.32*		*0.47*		*0.47*		*0.14*		*0.31*		*1.40*		*0.14*		*0.10*
Base:		243		19		12		23		22		38		10		49		46		17		7

Q21 What if anything would make you visit Kirkby Lonsdale town centre more often?
Those who said "Kirkby Lonsdale" at Q17

	Total		Kendal Central and West		Kendal North and North East		Kendal South		Grange-over-Sands		Milnthorpe		Windermere		Sedbergh, Grayrigg and Staveley		Arnside, Silverdale, Carnforth and Kirkby Lonsdale		Ulverston		Coniston and Broughton in Furness	
Nothing	78.6%	191	63.2%	12	66.7%	8	78.3%	18	77.3%	17	86.8%	33	80.0%	8	91.8%	45	76.1%	35	70.6%	12	42.9%	3
Better choice of clothing shops	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	1	0.0%	0	0.0%	0
Better choice of shops in general	2.9%	7	5.3%	1	0.0%	0	4.3%	1	0.0%	0	2.6%	1	0.0%	0	0.0%	0	6.5%	3	0.0%	0	14.3%	1
Better maintenance / cleanliness	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better quality shops	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	1	0.0%	0	0.0%	0
Better market	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better sport/leisure, entertainment or arts and cultural facilities	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improved bus services	0.8%	2	0.0%	0	0.0%	0	4.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	1	0.0%	0	0.0%	0
More car parking	7.8%	19	26.3%	5	8.3%	1	0.0%	0	9.1%	2	2.6%	1	0.0%	0	6.1%	3	10.9%	5	11.8%	2	0.0%	0
More food supermarkets	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More large shops	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More traffic free areas / pedestrianisation	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better / more cheap / free parking provision	4.1%	10	5.3%	1	0.0%	0	4.3%	1	9.1%	2	2.6%	1	0.0%	0	0.0%	0	4.3%	2	11.8%	2	14.3%	1
Better / more provision for the disabled	0.4%	1	0.0%	0	0.0%	0	4.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better / more public amenities	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better department store	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Don't change the New Street car-park	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ease of access	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fill the empty shops	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Get rid of Kvillage	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Get rid of the poor quality / down market shops (bookies, charity shops, pound shops etc.)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improve traffic control measures (Get rid of one way system, get congestion under control etc.)	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0
Improved appearance (modernized, redecorated etc.)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Kendal Central and West		Kendal North and North East		Kendal South		Grange-over-Sands		Milnthorpe		Windermere		Sedbergh, Grayrigg and Staveley		Arnside, Silverdale, Carnforth and Kirkby Lonsdale		Ulverston		Coniston and Broughton in Furness	
Less roadworks	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More restaurants / café's etc	0.4%	1	0.0%	0	0.0%	0	4.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More small independent shops	1.6%	4	5.3%	1	0.0%	0	0.0%	0	4.5%	1	2.6%	1	0.0%	0	0.0%	0	0.0%	0	5.9%	1	0.0%	0
Retail provision for children / youths	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	1.2%	3	0.0%	0	0.0%	0	8.7%	2	0.0%	0	2.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know)	4.5%	11	0.0%	0	25.0%	3	0.0%	0	13.6%	3	0.0%	0	20.0%	2	0.0%	0	0.0%	0	5.9%	1	28.6%	2
Base:		243		19		12		23		22		38		10		49		46		17		7

Meanscore: [Visits per week]

Q22 How often do you visit shops, services or markets in Milnthorpe?
Those who said "Milnthorpe" at Q17

	Total		Kendal Central and West		Kendal North and North East		Kendal South		Grange-over-Sands		Milnthorpe		Windermere		Sedbergh, Grayrigg and Staveley		Arnside, Silverdale, Carnforth and Kirkby Lonsdale		Ulverston		Coniston and Broughton in Furness	
Everyday	13.6%	27	0.0%	0	0.0%	0	0.0%	0	0.0%	0	24.2%	23	50.0%	1	0.0%	0	8.8%	3	0.0%	0	0.0%	0
2-3 times a week	11.6%	23	12.5%	1	0.0%	0	8.3%	1	0.0%	0	17.9%	17	0.0%	0	4.5%	1	8.8%	3	0.0%	0	0.0%	0
Once a week	27.3%	54	25.0%	2	0.0%	0	8.3%	1	14.3%	2	34.7%	33	0.0%	0	18.2%	4	35.3%	12	0.0%	0	0.0%	0
Once a fortnight	8.6%	17	0.0%	0	33.3%	2	8.3%	1	0.0%	0	9.5%	9	0.0%	0	13.6%	3	5.9%	2	0.0%	0	0.0%	0
Once a month	11.1%	22	0.0%	0	0.0%	0	8.3%	1	21.4%	3	4.2%	4	0.0%	0	27.3%	6	17.6%	6	50.0%	2	0.0%	0
Less than once a month	26.3%	52	62.5%	5	66.7%	4	66.7%	8	57.1%	8	8.4%	8	50.0%	1	31.8%	7	23.5%	8	50.0%	2	100.0%	1
Don't know	1.5%	3	0.0%	0	0.0%	0	0.0%	0	7.1%	1	1.1%	1	0.0%	0	4.5%	1	0.0%	0	0.0%	0	0.0%	0
Refused	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*1.65*		*0.63*		*0.23*		*0.43*		*0.28*		*2.59*		*3.55*		*0.50*		*1.30*		*0.20*		*0.10*
Base:		198		8		6		12		14		95		2		22		34		4		1

Q23 What if anything would make you visit Milnthorpe town centre more often?
Those who said "Milnthorpe" at Q17

	Total		Kendal Central and West		Kendal North and North East		Kendal South		Grange-over-Sands		Milnthorpe		Windermere		Sedbergh, Grayrigg and Staveley		Arnside, Silverdale, Carnforth and Kirkby Lonsdale		Ulverston		Coniston and Broughton in Furness	
Nothing	69.7%	138	75.0%	6	33.3%	2	83.3%	10	71.4%	10	66.3%	63	100.0%	2	72.7%	16	70.6%	24	100.0%	4	100.0%	1
Better choice of clothing shops	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better choice of shops in general	4.5%	9	0.0%	0	0.0%	0	8.3%	1	7.1%	1	5.3%	5	0.0%	0	0.0%	0	5.9%	2	0.0%	0	0.0%	0
Better maintenance / cleanliness	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better quality shops	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	1	0.0%	0	0.0%	0
Better market	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better sport/leisure, entertainment or arts and cultural facilities	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improved bus services	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More car parking	14.6%	29	25.0%	2	16.7%	1	8.3%	1	7.1%	1	12.6%	12	0.0%	0	27.3%	6	17.6%	6	0.0%	0	0.0%	0
More food supermarkets	1.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More large shops	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More traffic free areas / pedestrianisation	1.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	2.9%	1	0.0%	0	0.0%	0
Better / more cheap / free parking provision	3.0%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.3%	5	0.0%	0	0.0%	0	2.9%	1	0.0%	0	0.0%	0
Better / more provision for the disabled	0.5%	1	0.0%	0	0.0%	0	0.0%	0	7.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better / more public amenities	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better department store	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Don't change the New Street car-park	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ease of access	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fill the empty shops	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Get rid of Kvillage	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Get rid of the poor quality / down market shops (bookies, charity shops, pound shops etc.)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improve traffic control measures (Get rid of one way system, get congestion under control etc.)	2.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improved appearance (modernized, redecorated etc.)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Kendal Central and West		Kendal North and North East		Kendal South		Grange-over-Sands		Milnthorpe		Windermere		Sedbergh, Grayrigg and Staveley		Arnside, Silverdale, Carnforth and Kirkby Lonsdale		Ulverston		Coniston and Broughton in Furness	
Less roadworks	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More restaurants / café's etc	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More small independent shops	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Retail provision for children / youths	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	1.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know)	4.5%	9	0.0%	0	50.0%	3	0.0%	0	7.1%	1	4.2%	4	0.0%	0	0.0%	0	2.9%	1	0.0%	0	0.0%	0
Base:		198		8		6		12		14		95		2		22		34		4		1

Meanscore: [Visits per week]

Q24 How often do you visit shops, services or markets in Grange over Sands?
Those who said "Grange over Sands" at Q17

	Total		Kendal Central and West		Kendal North and North East		Kendal South		Grange-over-Sands		Milnthorpe		Windermere		Sedbergh, Grayrigg and Staveley		Arnside, Silverdale, Carnforth and Kirkby Lonsdale		Ulverston		Coniston and Broughton in Furness	
Everyday	13.8%	30	0.0%	0	0.0%	0	0.0%	0	34.1%	30	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
2-3 times a week	9.6%	21	0.0%	0	0.0%	0	0.0%	0	22.7%	20	0.0%	0	0.0%	0	0.0%	0	10.0%	1	0.0%	0	0.0%	0
Once a week	14.7%	32	10.0%	1	10.0%	1	7.7%	1	29.5%	26	3.4%	1	0.0%	0	0.0%	0	0.0%	0	8.7%	2	0.0%	0
Once a fortnight	1.8%	4	10.0%	1	0.0%	0	0.0%	0	3.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a month	13.3%	29	20.0%	2	0.0%	0	7.7%	1	4.5%	4	37.9%	11	12.5%	1	21.4%	3	0.0%	0	21.7%	5	15.4%	2
Less than once a month	45.4%	99	60.0%	6	80.0%	8	84.6%	11	3.4%	3	58.6%	17	87.5%	7	78.6%	11	90.0%	9	69.6%	16	84.6%	11
Don't know	1.4%	3	0.0%	0	10.0%	1	0.0%	0	2.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Refused	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*1.47*		*0.27*		*0.20*		*0.18*		*3.36*		*0.21*		*0.13*		*0.14*		*0.34*		*0.22*		*0.13*
Base:		218		10		10		13		88		29		8		14		10		23		13

Q25 What if anything would make you visit Grange over Sands town centre more often?
Those who said "Grange over Sands" at Q17

	Total		Kendal Central and West		Kendal North and North East		Kendal South		Grange-over-Sands		Milnthorpe		Windermere		Sedbergh, Grayrigg and Staveley		Arnside, Silverdale, Carnforth and Kirkby Lonsdale		Ulverston		Coniston and Broughton in Furness	
Nothing	69.7%	152	80.0%	8	50.0%	5	76.9%	10	56.8%	50	75.9%	22	75.0%	6	92.9%	13	100.0%	10	78.3%	18	76.9%	10
Better choice of clothing shops	0.9%	2	10.0%	1	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better choice of shops in general	3.2%	7	0.0%	0	0.0%	0	0.0%	0	3.4%	3	3.4%	1	0.0%	0	0.0%	0	0.0%	0	4.3%	1	15.4%	2
Better maintenance / cleanliness	0.5%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better quality shops	1.4%	3	0.0%	0	0.0%	0	0.0%	0	3.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better market	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better sport/leisure, entertainment or arts and cultural facilities	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improved bus services	0.9%	2	0.0%	0	0.0%	0	7.7%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More car parking	8.7%	19	0.0%	0	0.0%	0	0.0%	0	17.0%	15	6.9%	2	0.0%	0	0.0%	0	0.0%	0	8.7%	2	0.0%	0
More food supermarkets	6.4%	14	10.0%	1	0.0%	0	0.0%	0	13.6%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	1	0.0%	0
More large shops	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More traffic free areas / pedestrianisation	0.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.5%	1	0.0%	0	0.0%	0	4.3%	1	0.0%	0
Better / more cheap / free parking provision	3.7%	8	0.0%	0	0.0%	0	0.0%	0	8.0%	7	3.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better / more provision for the disabled	1.4%	3	0.0%	0	0.0%	0	0.0%	0	2.3%	2	3.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better / more public amenities	0.9%	2	0.0%	0	0.0%	0	0.0%	0	1.1%	1	3.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better department store	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Don't change the New Street car-park	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ease of access	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fill the empty shops	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Get rid of Kvillage	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Get rid of the poor quality / down market shops (bookies, charity shops, pound shops etc.)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improve traffic control measures (Get rid of one way system, get congestion under control etc.)	0.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	1	0.0%	0	7.1%	1	0.0%	0	0.0%	0	0.0%	0
Improved appearance (modernized, redecorated etc.)	0.5%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Kendal Central and West		Kendal North and North East		Kendal South		Grange-over-Sands		Milnthorpe		Windermere		Sedbergh, Grayrigg and Staveley		Arnside, Silverdale, Carnforth and Kirkby Lonsdale		Ulverston		Coniston and Broughton in Furness	
Less roadworks	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More restaurants / café's etc	0.9%	2	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	1	0.0%	0
More small independent shops	0.5%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Retail provision for children / youths	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.5%	1	0.0%	0	0.0%	0	7.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know)	6.4%	14	10.0%	1	50.0%	5	7.7%	1	3.4%	3	3.4%	1	12.5%	1	0.0%	0	0.0%	0	4.3%	1	7.7%	1
Base:		218		10		10		13		88		29		8		14		10		23		13

Meanscore: [Visits per week]

Q26 How often do you visit shops, services or markets in Ulverston?
Those who said "Ulverston" at Q17

	Total		Kendal Central and West		Kendal North and North East		Kendal South		Grange-over-Sands		Milnthorpe		Windermere		Sedbergh, Grayrigg and Staveley		Arnside, Silverdale, Carnforth and Kirkby Lonsdale		Ulverston		Coniston and Broughton in Furness	
Everyday	5.2%	15	0.0%	0	10.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.2%	12	2.9%	2
2-3 times a week	15.7%	45	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	7.1%	1	0.0%	0	0.0%	0	39.8%	39	5.8%	4
Once a week	21.0%	60	0.0%	0	0.0%	0	0.0%	0	13.3%	8	0.0%	0	21.4%	3	0.0%	0	0.0%	0	36.7%	36	18.8%	13
Once a fortnight	10.8%	31	14.3%	1	0.0%	0	0.0%	0	18.3%	11	25.0%	2	0.0%	0	0.0%	0	0.0%	0	5.1%	5	17.4%	12
Once a month	18.5%	53	14.3%	1	30.0%	3	28.6%	2	28.3%	17	37.5%	3	14.3%	2	33.3%	4	0.0%	0	3.1%	3	26.1%	18
Less than once a month	28.0%	80	71.4%	5	60.0%	6	71.4%	5	38.3%	23	37.5%	3	57.1%	8	66.7%	8	100.0%	1	1.0%	1	29.0%	20
Don't know	0.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0
Refused	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*1.12*		*0.19*		*0.85*		*0.16*		*0.39*		*0.28*		*0.49*		*0.17*		*0.10*		*2.30*		*0.73*
Base:		286		7		10		7		60		8		14		12		1		98		69

Q27 What if anything would make you visit Ulverston town centre more often?
Those who said "Ulverston" at Q17

	Total		Kendal Central and West		Kendal North and North East		Kendal South		Grange-over-Sands		Milnthorpe		Windermere		Sedbergh, Grayrigg and Staveley		Arnside, Silverdale, Carnforth and Kirkby Lonsdale		Ulverston		Coniston and Broughton in Furness	
Nothing	55.2%	158	71.4%	5	70.0%	7	71.4%	5	71.7%	43	100.0%	8	71.4%	10	83.3%	10	100.0%	1	32.7%	32	53.6%	37
Better choice of clothing shops	3.5%	10	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.1%	7	2.9%	2
Better choice of shops in general	7.7%	22	0.0%	0	0.0%	0	14.3%	1	1.7%	1	0.0%	0	7.1%	1	0.0%	0	0.0%	0	15.3%	15	5.8%	4
Better maintenance / cleanliness	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Better quality shops	1.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	3	0.0%	0
Better market	3.5%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	3	10.1%	7
Better sport/leisure, entertainment or arts and cultural facilities	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improved bus services	0.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.4%	1
More car parking	10.5%	30	14.3%	1	0.0%	0	0.0%	0	8.3%	5	0.0%	0	0.0%	0	8.3%	1	0.0%	0	16.3%	16	10.1%	7
More food supermarkets	2.1%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.1%	5	1.4%	1
More large shops	1.0%	3	14.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0
More traffic free areas / pedestrianisation	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Better / more cheap / free parking provision	12.6%	36	0.0%	0	0.0%	0	0.0%	0	6.7%	4	0.0%	0	7.1%	1	8.3%	1	0.0%	0	21.4%	21	13.0%	9
Better / more provision for the disabled	1.4%	4	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	1.4%	1
Better / more public amenities	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better department store	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Don't change the New Street car-park	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ease of access	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fill the empty shops	1.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	3	0.0%	0
Get rid of Kvillage	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Get rid of the poor quality / down market shops (bookies, charity shops, pound shops etc.)	1.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	3	0.0%	0
Improve traffic control measures (Get rid of one way system, get congestion under control etc.)	0.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.3%	1	0.0%	0	0.0%	0	1.4%	1
Improved appearance (modernized, redecorated etc.)	0.7%	2	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	7.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Kendal Central and West		Kendal North and North East		Kendal South		Grange-over-Sands		Milnthorpe		Windermere		Sedbergh, Grayrigg and Staveley		Arnside, Silverdale, Carnforth and Kirkby Lonsdale		Ulverston		Coniston and Broughton in Furness	
Less roadworks	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More restaurants / café's etc	0.4%	1	0.0%	0	0.0%	0	14.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More small independent shops	1.0%	3	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0
Retail provision for children / youths	1.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	3	0.0%	0
Other	0.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	2
(Don't know)	5.2%	15	0.0%	0	30.0%	3	0.0%	0	10.0%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.1%	4	2.9%	2
Base:		286		7		10		7		60		8		14		12		1		98		69

Q28 What things, if any, do you regularly buy on the internet?

	Total		Kendal Central and West		Kendal North and North East		Kendal South		Grange-over-Sands		Milnthorpe		Windermere		Sedbergh, Grayrigg and Staveley		Arnside, Silverdale, Carnforth and Kirkby Lonsdale		Ulverston		Coniston and Broughton in Furness	
Nothing	35.5%	356	49.0%	49	25.7%	26	29.0%	29	40.0%	40	31.7%	32	39.0%	39	42.0%	42	34.0%	34	36.0%	36	28.7%	29
Groceries	6.5%	65	2.0%	2	3.0%	3	3.0%	3	9.0%	9	9.9%	10	9.0%	9	6.0%	6	8.0%	8	9.0%	9	5.9%	6
Clothes and Shoes	21.2%	213	13.0%	13	15.8%	16	24.0%	24	19.0%	19	27.7%	28	18.0%	18	25.0%	25	19.0%	19	23.0%	23	27.7%	28
Domestic electrical appliances	10.2%	102	10.0%	10	6.9%	7	14.0%	14	12.0%	12	17.8%	18	6.0%	6	12.0%	12	11.0%	11	6.0%	6	5.9%	6
Electrical TV, Hi-Fi and computers	17.7%	178	16.0%	16	13.9%	14	24.0%	24	19.0%	19	26.7%	27	16.0%	16	13.0%	13	20.0%	20	16.0%	16	12.9%	13
Furniture, soft furnishings and floor coverings	6.3%	63	4.0%	4	6.9%	7	8.0%	8	4.0%	4	7.9%	8	8.0%	8	9.0%	9	9.0%	9	3.0%	3	3.0%	3
DIY, hardware and homewares	7.8%	78	3.0%	3	5.0%	5	8.0%	8	8.0%	8	11.9%	12	6.0%	6	13.0%	13	12.0%	12	4.0%	4	6.9%	7
Health and beauty, chemist items	4.4%	44	4.0%	4	3.0%	3	5.0%	5	7.0%	7	5.9%	6	2.0%	2	4.0%	4	3.0%	3	5.0%	5	5.0%	5
Books, CDs, toys etc.	41.2%	413	30.0%	30	37.6%	38	56.0%	56	33.0%	33	45.5%	46	31.0%	31	43.0%	43	48.0%	48	37.0%	37	50.5%	51
Travel goods (tickets, holidays etc)	7.3%	73	4.0%	4	7.9%	8	10.0%	10	7.0%	7	5.0%	5	7.0%	7	10.0%	10	4.0%	4	15.0%	15	3.0%	3
Computer software / electronic games	7.2%	72	3.0%	3	8.9%	9	11.0%	11	7.0%	7	8.9%	9	3.0%	3	11.0%	11	3.0%	3	11.0%	11	5.0%	5
Gift items	0.7%	7	1.0%	1	0.0%	0	2.0%	2	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	2.0%	2	0.0%	0
Motoring goods	0.9%	9	0.0%	0	3.0%	3	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	2.0%	2	0.0%	0	2.0%	2
Musical instruments	0.3%	3	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Specialist hobby items	0.6%	6	0.0%	0	0.0%	0	1.0%	1	1.0%	1	1.0%	1	0.0%	0	2.0%	2	0.0%	0	0.0%	0	1.0%	1
Sporting goods	1.8%	18	2.0%	2	5.0%	5	2.0%	2	0.0%	0	3.0%	3	0.0%	0	0.0%	0	2.0%	2	2.0%	2	2.0%	2
Other	0.9%	9	0.0%	0	2.0%	2	0.0%	0	2.0%	2	2.0%	2	2.0%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0
(Don't know / can't remember / varies)	5.0%	50	8.0%	8	17.8%	18	0.0%	0	8.0%	8	3.0%	3	4.0%	4	1.0%	1	0.0%	0	4.0%	4	4.0%	4
Base:		1003		100		101		100		100		101		100		100		100		100		101

	Total		Kendal Central and West		Kendal North and North East		Kendal South		Grange-over-Sands		Milnthorpe		Windermere		Sedbergh, Grayrigg and Staveley		Arnside, Silverdale, Carnforth and Kirkby Lonsdale		Ulverston		Coniston and Broughton in Furness	
GEN Gender:																						
Male	30.2%	303	34.0%	34	33.7%	34	36.0%	36	32.0%	32	32.7%	33	24.0%	24	14.0%	14	29.0%	29	35.0%	35	31.7%	32
Female	69.8%	700	66.0%	66	66.3%	67	64.0%	64	68.0%	68	67.3%	68	76.0%	76	86.0%	86	71.0%	71	65.0%	65	68.3%	69
Base:		1003		100		101		100		100		101		100		100		100		100		101
AGE How old are you ?																						
18-24	0.8%	8	1.0%	1	1.0%	1	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	2.0%	2	1.0%	1	1.0%	1
25-34	1.5%	15	1.0%	1	2.0%	2	0.0%	0	2.0%	2	4.0%	4	2.0%	2	0.0%	0	2.0%	2	2.0%	2	0.0%	0
35-44	15.0%	150	11.0%	11	11.9%	12	22.0%	22	12.0%	12	16.8%	17	18.0%	18	13.0%	13	15.0%	15	12.0%	12	17.8%	18
45-54	24.9%	250	34.0%	34	20.8%	21	24.0%	24	16.0%	16	12.9%	13	26.0%	26	26.0%	26	28.0%	28	26.0%	26	35.6%	36
55-64	23.8%	239	26.0%	26	26.7%	27	19.0%	19	21.0%	21	30.7%	31	19.0%	19	27.0%	27	19.0%	19	23.0%	23	26.7%	27
65+	31.9%	320	27.0%	27	36.6%	37	30.0%	30	46.0%	46	34.7%	35	32.0%	32	32.0%	32	32.0%	32	32.0%	32	16.8%	17
(Refused)	2.1%	21	0.0%	0	1.0%	1	5.0%	5	3.0%	3	0.0%	0	2.0%	2	2.0%	2	2.0%	2	4.0%	4	2.0%	2
Base:		1003		100		101		100		100		101		100		100		100		100		101
SEG Socioeconomic Grading																						
A	2.7%	27	2.0%	2	2.0%	2	1.0%	1	4.0%	4	5.9%	6	1.0%	1	4.0%	4	4.0%	4	2.0%	2	1.0%	1
B	12.2%	122	9.0%	9	6.9%	7	17.0%	17	11.0%	11	10.9%	11	10.0%	10	12.0%	12	16.0%	16	19.0%	19	9.9%	10
C1	28.3%	284	33.0%	33	21.8%	22	35.0%	35	24.0%	24	32.7%	33	37.0%	37	23.0%	23	20.0%	20	31.0%	31	25.7%	26
C2	25.8%	259	22.0%	22	30.7%	31	21.0%	21	21.0%	21	26.7%	27	22.0%	22	20.0%	20	28.0%	28	32.0%	32	34.7%	35
D	8.3%	83	9.0%	9	17.8%	18	5.0%	5	6.0%	6	5.9%	6	8.0%	8	8.0%	8	9.0%	9	4.0%	4	9.9%	10
E	15.2%	152	18.0%	18	12.9%	13	14.0%	14	26.0%	26	13.9%	14	17.0%	17	21.0%	21	14.0%	14	7.0%	7	7.9%	8
(Refused)	7.6%	76	7.0%	7	7.9%	8	7.0%	7	8.0%	8	4.0%	4	5.0%	5	12.0%	12	9.0%	9	5.0%	5	10.9%	11
Base:		1003		100		101		100		100		101		100		100		100		100		101
LAN Where English is not your first language, please specify your main language:																						
No other language / English is my first language	99.2%	995	100.0%	100	100.0%	101	98.0%	98	99.0%	99	99.0%	100	100.0%	100	98.0%	98	99.0%	99	100.0%	100	99.0%	100
Other language	0.3%	3	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
(Don't know / varies)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Refused)	0.5%	5	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	2.0%	2	1.0%	1	0.0%	0	0.0%	0
Base:		1003		100		101		100		100		101		100		100		100		100		101

South Lakeland District Telephone Household Survey for Nathaniel Lichfield & Partners

	Total	Kendal Central and West	Kendal North and North East	Kendal South	Grange-over-Sands	Milnthorpe	Windermere	Sedbergh, Grayrigg and Staveley	Arnside, Silverdale, Carnforth and Kirkby Lonsdale	Ulverston	Coniston and Broughton in Furness
DIS Do you consider you have a disability? If so, what is the nature of your disability?											
No disabilities	88.7% 890	91.0% 91	87.1% 88	88.0% 88	81.0% 81	88.1% 89	90.0% 90	93.0% 93	91.0% 91	88.0% 88	90.1% 91
Disability	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0
Mental Disability	0.9% 9	2.0% 2	0.0% 0	1.0% 1	3.0% 3	0.0% 0	2.0% 2	0.0% 0	1.0% 1	0.0% 0	0.0% 0
Physical Disability	9.3% 93	7.0% 7	12.9% 13	9.0% 9	15.0% 15	10.9% 11	8.0% 8	5.0% 5	5.0% 5	12.0% 12	7.9% 8
(Don't know / varies)	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0
(Refused)	1.1% 11	0.0% 0	0.0% 0	2.0% 2	1.0% 1	1.0% 1	0.0% 0	2.0% 2	3.0% 3	0.0% 0	2.0% 2
Base:	1003	100	101	100	100	101	100	100	100	100	101
ZON Survey Zone											
Zone 1	10.0% 100	100.0% 100	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0
Zone 2	10.1% 101	0.0% 0	100.0% 101	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0
Zone 3	10.0% 100	0.0% 0	0.0% 0	100.0% 100	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0
Zone 4	10.0% 100	0.0% 0	0.0% 0	0.0% 0	100.0% 100	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0
Zone 5	10.1% 101	0.0% 0	0.0% 0	0.0% 0	0.0% 0	100.0% 101	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0
Zone 6	10.0% 100	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	100.0% 100	0.0% 0	0.0% 0	0.0% 0	0.0% 0
Zone 7	10.0% 100	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	100.0% 100	0.0% 0	0.0% 0	0.0% 0
Zone 8	10.0% 100	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	100.0% 100	0.0% 0	0.0% 0
Zone 9	10.0% 100	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	100.0% 100	0.0% 0
Zone 10	10.1% 101	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	100.0% 101
Base:	1003	100	101	100	100	101	100	100	100	100	101

PS Postal Sector

	Total		Kendal Central and West		Kendal North and North East		Kendal South		Grange-over-Sands		Milnthorpe		Windermere		Sedbergh, Grayrigg and Staveley		Arnside, Silverdale, Carnforth and Kirkby Lonsdale		Ulverston		Coniston and Broughton in Furness	
LA5 0	1.4%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.0%	14	0.0%	0	0.0%	0
LA5 9	3.5%	35	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	35.0%	35	0.0%	0	0.0%	0
LA6 1	2.7%	27	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	27.0%	27	0.0%	0	0.0%	0
LA6 2	1.6%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	16.0%	16	0.0%	0	0.0%	0
LA6 3	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.0%	8	0.0%	0	0.0%	0
LA7 7	7.6%	76	0.0%	0	0.0%	0	0.0%	0	0.0%	0	75.2%	76	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
LA8 0	3.1%	31	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	31.0%	31	0.0%	0	0.0%	0	0.0%	0
LA8 8	2.5%	25	0.0%	0	0.0%	0	0.0%	0	0.0%	0	24.8%	25	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
LA8 9	2.6%	26	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	26.0%	26	0.0%	0	0.0%	0	0.0%	0
LA9 4	2.3%	23	23.0%	23	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
LA9 5	7.7%	77	77.0%	77	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
LA9 6	10.1%	101	0.0%	0	100.0%	101	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
LA9 7	10.0%	100	0.0%	0	0.0%	0	100.0%	100	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
LA10 5	4.3%	43	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	43.0%	43	0.0%	0	0.0%	0	0.0%	0
LA11 6	3.5%	35	0.0%	0	0.0%	0	0.0%	0	35.0%	35	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
LA11 7	6.5%	65	0.0%	0	0.0%	0	0.0%	0	65.0%	65	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
LA12 0	3.8%	38	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	38.0%	38	0.0%	0
LA12 7	1.8%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.0%	18	0.0%	0
LA12 8	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.0%	8	0.0%	0
LA12 9	3.6%	36	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	36.0%	36	0.0%	0
LA14 4	3.5%	35	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	34.7%	35
LA15 8	3.6%	36	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	35.6%	36
LA16 7	1.3%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.9%	13
LA17 7	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.9%	8
LA20 6	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	5
LA21 8	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4
LA22 0	1.6%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	16.0%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0
LA22 9	2.3%	23	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	23.0%	23	0.0%	0	0.0%	0	0.0%	0	0.0%	0
LA23 1	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.0%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0
LA23 2	4.6%	46	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	46.0%	46	0.0%	0	0.0%	0	0.0%	0	0.0%	0
LA23 3	0.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.0%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Base:		1003		100		101		100		100		101		100		100		100		100		101

Appendix 3 Analysis of Shopping Patterns and Retail Capacity

Table 1: Study Area Population Growth

		Population					Change		
Sub Zone		**2001**	**2012**	**2017**	**2022**	**2025**	**12-'17**	**12-'22**	**12-'25**
1	Kendal Central and West	11,722	11,974	12,112	12,341	12,490	138	367	516
2	Kendal North and North East	7,709	7,875	7,965	8,116	8,214	90	241	339
3	Kendal South	10,249	10,469	10,590	10,790	10,920	120	321	451
4	Grange-over-Sands	9,455	9,658	9,769	9,954	10,074	111	296	416
5	Milnthorpe	7,348	7,506	7,592	7,736	7,829	86	230	323
6	Windermere	14,865	15,185	15,359	15,650	15,839	174	465	654
7	Sedbergh, Grayrigg and Staveley	9,669	9,877	9,990	10,179	10,302	113	302	425
8	Arnside, Silverdale, Carnforth and Kirkby Lonsdale	24,372	25,617	26,146	26,802	27,257	530	1,186	1,640
9	Ulverston	20,034	20,465	20,700	21,092	21,346	235	627	881
10	Coniston and Broughton-in-Furness	22,534	22,885	23,119	23,513	23,766	234	628	880
TOTAL		**137,957**	**141,511**	**143,343**	**146,172**	**148,036**	**1,832**	**4,661**	**6,525**

Notes:
(i) 2001 Census Population from Experian MMG3 (2011)
(ii) MMG3 (2011) is in 2010 prices
(iii) Population projected forward using ONS mid-year population estimates (2002 and 2008) and sub national (2008) population projections (published May 2010) for the South Lakeland, and the administrative areas of Barrow (Zone 10 part of), Craven (Zone 8 part of) and Lancaster (Zone 8 part of)

2010 Prices Inclusive of VAT where applicable, unless otherwise stated

Table 2a: Convenience Retail Expenditure Growth by Study Area Zone

Sub	Zone	Convenience Spending per Person (£)					Growth (£)		
		2010	2012	2017	2022	2025	12-'17	12-'22	12-'25
1	Kendal Central and West	2,041	2,007	2,032	2,082	2,110	25	75	103
2	Kendal North and North East	2,079	2,045	2,070	2,121	2,149	25	76	104
3	Kendal South	2,095	2,061	2,087	2,138	2,166	26	77	105
4	Grange-over-Sands	2,139	2,104	2,130	2,182	2,211	26	78	107
5	Milnthorpe	2,329	2,291	2,319	2,376	2,407	28	85	116
6	Windermere	2,028	1,995	2,019	2,069	2,097	24	74	102
7	Sedbergh, Grayrigg and Staveley	2,091	2,057	2,082	2,133	2,161	25	76	104
8	Arnside, Silverdale, Carnforth and Kirkby Lonsdale	2,158	2,123	2,149	2,202	2,231	26	79	108
9	Ulverston	2,150	2,115	2,141	2,194	2,223	26	79	108
10	Coniston and Broughton-in-Furness	1,991	1,959	1,983	2,032	2,059	24	73	100

Notes:
(i) Experian local estimates for 2010 convenience goods expenditure per person (including retail business e-tailing but excluding other special forms of trading: 3.7% in 2010; 4.6% in 2012; 6.0% in 2017; 6.3% in 2022; and 6.6% in 2025.
(ii) Forecast annual growth rates of: -0.3% ('10-'11); -0.4% ('11-'12); 0.5% ('12-'13) and 0.55% ('13-'14 and annually thereafter)

2010 Prices Inclusive of VAT where applicable, unless otherwise stated

Table 2b: Comparison Retail Expenditure Growth by Study Area Zone

Sub	Zone	Comparison Spending per Person (£)							
		2010	2012	2017	2022	2025	12-'17	12-'22	12-'25
1	Kendal Central and West	2,778	2,771	3,296	4,097	4,669	525	1,326	1,898
2	Kendal North and North East	2,842	2,835	3,372	4,192	4,776	537	1,357	1,941
3	Kendal South	2,948	2,941	3,498	4,349	4,956	557	1,408	2,015
4	Grange-over-Sands	2,675	2,668	3,174	3,945	4,496	506	1,277	1,828
5	Milnthorpe	3,282	3,274	3,894	4,841	5,517	620	1,567	2,243
6	Windermere	2,655	2,648	3,150	3,916	4,462	502	1,268	1,814
7	Sedbergh, Grayrigg and Staveley	2,917	2,909	3,460	4,302	4,902	551	1,393	1,993
8	Arnside, Silverdale, Carnforth and Kirkby Lonsdale	2,981	2,974	3,537	4,397	5,011	563	1,423	2,037
9	Ulverston	2,979	2,971	3,534	4,393	5,006	563	1,422	2,035
10	Coniston and Broughton-in-Furness	2,644	2,637	3,137	3,900	4,444	500	1,263	1,807

Notes:
(i) Experian local estimates for 2010 comparison goods expenditure per person (including retail business e-tailing but excluding other special forms of trading: 8.8% in 2010; 10.9% in 2012; 12.8% in 2017; 12.8% in 2022; and 12.8% in 2025 (constant 12.8% assumed over the period from 2017).
(ii) Forecast annual growth rates of: 0.5% ('10-'11); 1.6% ('11-'12); 2.1% ('12-'13); and 4.45% annually thereafter

2010 Prices Inclusive of VAT where applicable, unless otherwise stated

Table 3a: Total Convenience Retail Expenditure and Growth Amongst Study Area Residents

		Spending Power (£million)							
Sub Zone		**2010**	**2012**	**2017**	**2022**	**2025**	**12-'17**	**12-'22**	**12-'25**
1	Kendal Central and West	23.9	24.0	24.6	25.7	26.4	0.6	1.7	2.3
2	Kendal North and North East	16.0	16.1	16.5	17.2	17.7	0.4	1.1	1.5
3	Kendal South	21.5	21.6	22.1	23.1	23.7	0.5	1.5	2.1
4	Grange-over-Sands	20.2	20.3	20.8	21.7	22.3	0.5	1.4	2.0
5	Milnthorpe	17.1	17.2	17.6	18.4	18.8	0.4	1.2	1.6
6	Windermere	30.1	30.3	31.0	32.4	33.2	0.7	2.1	2.9
7	Sedbergh, Grayrigg and Staveley	20.2	20.3	20.8	21.7	22.3	0.5	1.4	1.9
8	Arnside, Silverdale, Carnforth and Kirkby Lonsdale	52.6	54.4	56.2	59.0	60.8	1.8	4.6	6.4
9	Ulverston	43.1	43.3	44.3	46.3	47.5	1.0	3.0	4.2
10	Coniston and Broughton-in-Furness	44.9	44.8	45.8	47.8	48.9	1.0	2.9	4.1
TOTAL		**289.7**	**292.3**	**299.8**	**313.2**	**321.4**	**7.4**	**20.9**	**29.1**

Notes:

(i) Experian local estimates for 2010 convenience goods expenditure per person (including retail business e-tailing but excluding other special forms of trading: 3.7% in 2010; 4.6% in 2012; 6.0% in 2017; 6.3% in 2022; and 5.6% in 2025.

(ii) Forecast annual growth rates of: 0.0% ('10-'11); -0.3% ('11-'12); -0.4% ('12-'13); 0.5% ('13-'14) and 0.55% ('12-'13 and annually thereafter)

2010 Prices Inclusive of VAT where applicable, unless otherwise stated

Table 3b: Total Comparison Retail Expenditure and Growth Amongst Study Area Residents

		Spending Power (£million)							
Sub Zone		**2010**	**2012**	**2017**	**2022**	**2025**	**12-'17**	**12-'22**	**12-'25**
1	Kendal Central and West	32.6	33.2	39.9	50.6	58.3	6.7	17.4	25.1
2	Kendal North and North East	21.9	22.3	26.9	34.0	39.2	4.5	11.7	16.9
3	Kendal South	30.2	30.8	37.0	46.9	54.1	6.3	16.1	23.3
4	Grange-over-Sands	25.3	25.8	31.0	39.3	45.3	5.2	13.5	19.5
5	Milnthorpe	24.1	24.6	29.6	37.4	43.2	5.0	12.9	18.6
6	Windermere	39.5	40.2	48.4	61.3	70.7	8.2	21.1	30.5
7	Sedbergh, Grayrigg and Staveley	28.2	28.7	34.6	43.8	50.5	5.8	15.1	21.8
8	Arnside, Silverdale, Carnforth and Kirkby Lonsdale	72.7	76.2	92.5	117.9	136.6	16.3	41.7	60.4
9	Ulverston	59.7	60.8	73.2	92.7	106.9	12.4	31.9	46.1
10	Coniston and Broughton-in-Furness	59.6	60.3	72.5	91.7	105.6	12.2	31.4	45.3
TOTAL		**393.7**	**402.9**	**485.5**	**615.5**	**710.4**	**82.6**	**212.6**	**307.5**

Notes:
(i) Experian local estimates for 2010 comparison goods expenditure per person (including retail business e-tailing but excluding other special forms of trading: 8.8% in 2010; 10.9% in 2012; 12.8% in 2017; 12.8% in 2022; and 12.8% in 2025 (constant 12.8% assumed over the period from 2017).
(ii) Forecast annual growth rates of: 0.0% ('10-'11); 0.5% ('11-'12); 1.6% ('12-'13); 2.1% ('13-'14); and 4.7% ('14-'15 and 4.45% annually thereafter)

2010 Prices Inclusive of VAT where applicable, unless otherwise stated

Table 4: Main Food Shopping Patterns

Centre/Facilities	Market Share (%) Zone 1 Kendal Central and West	Zone 2 Kendal North and North East	Zone 3 Kendal South	Zone 4 Grange-over-Sands	Zone 5 Milnthorpe	Zone 6 Windermere	Zone 7 Sedbergh, Grayrigg and Staveley	Zone 8 Arnside, Siverdale, Carnforth and Kirkby Lonsdale	Zone 9 Ulverston	Zone 10 Consiton and Broughton-in-Furness	Total
Kendal Town Centre (PSA/SSA)											
Booths, Wainwright's Yard, Stricklandgate	16.67	6.76	10.27	2.65	8.60	0.73	4.91	1.08	0.72	0.00	5.22
Marks and Spencer, Library Road	4.91	4.64	3.20	2.82	5.77	2.18	1.15	3.24	0.00	0.36	2.82
Iceland, Highgate	3.50	2.34	1.13	0.72	0.00	0.00	0.00	0.00	0.00	0.00	0.79
Other destinations	0.71	0.00	2.37	0.00	0.00	0.37	0.00	0.00	0.00	0.00	0.34
Kendal Town Centre Sub-Total	**25.79**	**13.74**	**16.97**	**6.19**	**14.37**	**3.28**	**6.06**	**4.32**	**0.72**	**0.36**	**9.17**
Kirkby Lonsdale Town Centre											
Booths, Dodge Croft Road	0.00	0.46	0.00	0.72	2.54	0.00	4.18	7.15	0.00	0.00	1.49
Other destinations	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.08	0.00	0.00	0.11
Kirkby Lonsdale Town Centre Sub-Total	**0.00**	**0.46**	**0.00**	**0.72**	**2.54**	**0.00**	**4.18**	**8.23**	**0.00**	**0.00**	**1.60**
Ulverston Town Centre (PSA)	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**3.82**	**0.00**	**0.37**
Grange over Sands Town Centre											
Co-operative, Kents Bank Road	0.00	0.00	0.00	8.99	0.00	0.00	0.00	0.00	0.00	0.00	0.89
Other destinations	0.00	0.00	0.00	3.46	0.00	0.00	0.00	0.00	0.00	0.00	0.34
Grange over Sands Town Centre Sub-Total	**0.00**	**0.00**	**0.00**	**12.45**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**1.23**
Milnthorpe Town Centre	**0.00**	**0.00**	**0.00**	**0.00**	**3.38**	**0.00**	**0.43**	**0.00**	**0.00**	**0.00**	**0.37**
Kendal Area											
Aldi, Appleby Road	7.79	6.98	7.00	6.02	3.23	7.27	8.08	1.44	0.83	0.36	4.85
Asda, Burton Road	25.91	23.36	44.97	34.09	41.80	18.68	33.48	19.33	1.14	0.36	24.16
Morrisons, Katherine Avenue	32.72	53.59	27.68	13.97	15.36	31.23	41.70	8.96	0.83	0.00	22.49
Spar, Sandylands Avenue	0.00	0.46	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.04
Other destinations	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Kendal Area Sub-Total	**66.42**	**84.39**	**79.65**	**54.08**	**60.39**	**57.18**	**83.26**	**29.73**	**2.80**	**0.72**	**51.54**
Ulverston Area											
Booths, Oubas Hill	0.00	0.00	0.00	7.46	0.00	0.71	0.00	0.00	33.95	4.97	4.66
Co-operative, Priory Road	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.71	0.00	0.66
Other destinations	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Ulverston Area Sub-Total	**0.00**	**0.00**	**0.00**	**7.46**	**0.00**	**0.71**	**0.00**	**0.00**	**40.66**	**4.97**	**5.32**
Other destinations South Lakeland											
Other destinations	0.35	0.00	0.00	0.72	0.00	0.00	0.43	0.71	0.00	0.00	0.22
Other destinations South Lakeland Sub-Total	**0.35**	**0.00**	**0.00**	**0.72**	**0.00**	**0.00**	**0.43**	**0.71**	**0.00**	**0.00**	**0.22**
South Lakeland Sub-Total	**92.56**	**98.59**	**96.62**	**81.62**	**80.68**	**61.17**	**94.36**	**42.99**	**48.00**	**6.05**	**69.82**
Within South Lakeland but under National Park Control											
Lake District National Park Area											
Booths, The Olde Station, Windermere	4.60	0.00	1.13	0.40	1.83	24.80	1.44	0.36	0.72	0.00	3.60
Ambleside Rural Service Centre	0.00	0.00	0.00	0.72	0.00	10.09	0.00	0.00	0.00	0.00	1.11
Other destinations	0.00	0.00	0.00	0.00	0.00	1.08	0.43	0.00	0.72	0.00	0.22
Yorkshire Dales National Park Area											
Spar, Sedbergh	0.00	0.00	0.00	0.00	0.00	0.00	1.44	0.00	0.00	0.00	0.14
Within South Lakeland but under National Park Control Sub-Total	**4.60**	**0.00**	**1.13**	**1.12**	**1.83**	**35.97**	**3.31**	**0.36**	**1.44**	**0.00**	**5.07**
Outside of the District											
Asda, Barrow-in-Furness	0.00	0.00	0.00	2.25	0.00	0.00	0.00	0.00	22.90	45.36	7.15
Booths, Carnforth	0.00	0.00	0.00	0.00	2.96	0.00	0.00	8.98	0.00	0.00	1.23
Co-operative, Dalton in Furness	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.96	2.48	0.44
Morrisons, Barrow-in-Furness	0.00	0.00	0.00	2.97	0.42	0.00	0.00	0.00	9.91	14.90	2.85
Morrisons, Morecambe	0.00	0.00	0.41	0.00	1.41	0.00	0.00	8.95	0.00	0.00	1.09
Tesco, Hindpool Road, Barrow-in-Furness	0.71	0.00	0.00	5.13	0.71	0.00	0.00	0.00	14.24	24.11	4.54
Tesco, Lodge Road, Carnforth	0.71	0.71	1.84	6.90	10.57	2.14	0.43	23.65	0.00	0.00	4.72
Other destinations	1.41	0.71	0.00	0.00	1.41	0.71	1.88	15.06	1.55	7.11	3.07
Outside of the District Sub-Total	**2.83**	**1.42**	**2.25**	**17.25**	**17.48**	**2.85**	**2.31**	**56.64**	**50.56**	**93.96**	**25.09**
Total	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**

Notes:
(i) Source: NEMS Household Telephone Survey (December 2011) - Excludes Don't Know/Don't Do and Other responses
(ii) Weightings afforded to Primary Main Food Destination and Secondary Main Food Destinations are 5/7 Primary Destination and 2/7 Secondary Destination

2010 Prices Inclusive of VAT where applicable, unless otherwise stated

Table 5: Top-Up Shopping Patterns

Centre/Facilities	Market Share (%)										
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Total
	Kendal Central and West	Kendal North and North East	Kendal South	Grange-over-Sands	Milnthorpe	Windermere	Sedbergh, Grayrigg and Staveley	Arnside, Siverdale, Carnforth and Kirkby Lonsdale	Ulverston	Consiton and Broughton-in-Furness	
Kendal Town Centre (PSA/SSA)											
Booths, Wainwright's Yard, Stricklandgate	28.77	8.11	20.73	0.00	8.33	0.00	7.69	0.00	0.00	0.00	7.28
Marks and Spencer, Library Road	5.48	6.76	6.10	0.00	3.33	0.00	3.85	0.00	1.25	1.23	2.78
Iceland, Highgate	9.59	5.41	4.88	0.00	0.00	0.00	0.00	0.00	0.00	1.23	2.12
Other destinations	4.11	9.46	7.32	0.00	0.00	0.00	1.28	5.41	0.00	0.00	2.78
Kendal Town Centre Sub-Total	**47.95**	**29.74**	**39.03**	**0.00**	**11.66**	**0.00**	**12.82**	**5.41**	**1.25**	**2.46**	**14.96**
Kirkby Lonsdale Town Centre											
Booths, Dodge Croft Road	0.00	1.35	0.00	0.00	3.33	0.00	1.28	9.46	0.00	0.00	1.46
Other destinations	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.41	0.00	0.00	0.53
Kirkby Lonsdale Town Centre Sub-Total	**0.00**	**1.35**	**0.00**	**0.00**	**3.33**	**0.00**	**1.28**	**14.87**	**0.00**	**0.00**	**1.99**
Ulverston Town Centre (PSA)	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**1.20**	**0.00**	**0.00**	**21.25**	**2.47**	**2.65**
Grange over Sands Town Centre											
Co-operative, Kents Bank Road	0.00	0.00	0.00	48.57	0.00	0.00	0.00	1.35	0.00	0.00	4.64
Other destinations	0.00	0.00	0.00	24.29	1.67	0.00	0.00	0.00	0.00	0.00	2.38
Grange over Sands Town Centre Sub-Total	**0.00**	**0.00**	**0.00**	**72.86**	**1.67**	**0.00**	**0.00**	**1.35**	**0.00**	**0.00**	**7.02**
Milnthorpe Town Centre	**0.00**	**0.00**	**0.00**	**0.00**	**61.67**	**0.00**	**1.28**	**1.35**	**0.00**	**0.00**	**5.17**
Kendal Area											
Aldi, Appleby Road	1.37	6.76	1.22	1.43	1.67	2.41	2.56	0.00	0.00	0.00	1.72
Asda, Burton Road	23.29	10.81	37.80	0.00	8.33	2.41	10.26	6.76	0.00	1.23	10.20
Morrisons, Katherine Avenue	10.96	27.03	8.54	0.00	1.67	0.00	8.97	0.00	0.00	0.00	5.70
Spar, Sandylands Avenue	0.00	22.97	0.00	0.00	0.00	0.00	3.85	0.00	0.00	0.00	2.65
Other destinations	0.00	0.00	7.32	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.79
Kendal Area Sub-Total	**35.62**	**67.57**	**54.88**	**1.43**	**11.67**	**4.82**	**25.64**	**6.76**	**0.00**	**1.23**	**21.06**
Ulverston Area											
Booths, Oubas Hill	0.00	0.00	0.00	1.43	0.00	0.00	0.00	0.00	27.50	4.94	3.58
Co-operative, Priory Road	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	32.50	1.23	3.58
Other destinations	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7.50	0.00	0.79
Ulverston Area Sub-Total	**0.00**	**0.00**	**0.00**	**1.43**	**0.00**	**0.00**	**0.00**	**0.00**	**67.50**	**6.17**	**7.95**
Other destinations South Lakeland											
Other destinations	0.00	0.00	3.66	20.00	5.00	1.20	26.92	8.11	1.25	0.00	6.49
Other destinations South Lakeland Sub-Total	**0.00**	**0.00**	**3.66**	**20.00**	**5.00**	**1.20**	**26.92**	**8.11**	**1.25**	**0.00**	**6.49**
South Lakeland Sub-Total	**83.57**	**98.66**	**97.57**	**95.72**	**95.00**	**7.22**	**67.94**	**37.85**	**91.25**	**12.33**	**67.29**
Within South Lakeland but under National Park Control											
Lake District National Park Area											
Booths, The Olde Station, Windermere	13.70	0.00	0.00	0.00	3.33	38.55	0.00	0.00	1.25	1.23	6.09
Ambleside Rural Service Centre	0.00	0.00	0.00	0.00	1.67	30.12	0.00	0.00	1.25	0.00	3.58
Other destinations	0.00	0.00	0.00	4.29	0.00	20.48	6.41	0.00	0.00	6.17	3.97
Yorkshire Dales National Park Area											
Spar, Sedbergh	0.00	0.00	0.00	0.00	0.00	0.00	24.36	0.00	0.00	0.00	2.52
Within South Lakeland but under National Park Control Sub-Total	**13.70**	**0.00**	**0.00**	**4.29**	**5.00**	**89.15**	**30.77**	**0.00**	**2.50**	**7.40**	**16.16**
Outside of the District											
Asda, Barrow-in-Furness	0.00	1.35	0.00	0.00	0.00	0.00	0.00	0.00	0.00	13.58	1.59
Booths, Carnforth	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.81	0.00	0.00	1.06
Co-operative, Dalton in Furness	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.50	30.86	3.58
Morrisons, Barrow-in-Furness	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.23	0.13
Morrisons, Morecambe	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.35	0.00	0.00	0.13
Tesco, Hindpool Road, Barrow-in-Furness	1.37	0.00	0.00	0.00	0.00	1.20	0.00	0.00	1.25	13.58	1.85
Tesco, Lodge Road, Carnforth	0.00	0.00	0.00	0.00	0.00	0.00	0.00	22.97	0.00	0.00	2.25
Other destinations	1.37	0.00	2.44	0.00	0.00	2.41	1.28	27.03	2.50	20.99	5.96
Outside of the District Sub-Total	**2.74**	**1.35**	**2.44**	**0.00**	**0.00**	**3.61**	**1.28**	**62.16**	**6.25**	**80.24**	**16.55**
Total	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**

Notes:
(i) Source: NEMS Household Telephone Survey (December 2011) - Excludes Don't Know/Don't Do and Other responses

2010 Prices Inclusive of VAT where applicable, unless otherwise stated

Table 6: Convenience Shopping Patterns (Main Food and Top-Up Combined)

Centre/Facilities	Market Share (%) Zone 1 Kendal Central and West	Zone 2 Kendal North and North East	Zone 3 Kendal South	Zone 4 Grange-over-Sands	Zone 5 Milnthorpe	Zone 6 Windermere	Zone 7 Sedbergh, Grayrigg and Staveley	Zone 8 Arnside, Siverdale, Carnforth and Kirkby Lonsdale	Zone 9 Ulverston	Zone 10 Consiton and Broughton-in-Furness	Total
Kendal Town Centre (PSA/SSA)											
Booths, Wainwright's Yard, Stricklandgate	20.30	7.17	13.41	1.86	8.52	0.51	5.74	0.76	0.51	0.00	5.84
Marks and Spencer, Library Road	5.08	5.28	4.07	1.97	5.04	1.53	1.96	2.27	0.38	0.62	2.81
Iceland, Highgate	5.33	3.26	2.25	0.51	0.00	0.00	0.00	0.00	0.00	0.37	1.19
Other destinations	1.73	2.84	3.85	0.00	0.00	0.26	0.38	1.62	0.00	0.00	1.07
Kendal Town Centre Sub-Total	**32.44**	**18.55**	**23.58**	**4.34**	**13.56**	**2.30**	**8.08**	**4.65**	**0.89**	**0.99**	**10.91**
Kirkby Lonsdale Town Centre											
Booths, Dodge Croft Road	0.00	0.73	0.00	0.51	2.78	0.00	3.31	7.84	0.00	0.00	1.48
Other destinations	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.37	0.00	0.00	0.24
Kirkby Lonsdale Town Centre Sub-Total	**0.00**	**0.73**	**0.00**	**0.51**	**2.78**	**0.00**	**3.31**	**10.21**	**0.00**	**0.00**	**1.72**
Ulverston Town Centre (PSA)	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.36**	**0.00**	**0.00**	**9.05**	**0.74**	**1.06**
Grange over Sands Town Centre											
Co-operative, Kents Bank Road	0.00	0.00	0.00	20.87	0.00	0.00	0.00	0.41	0.00	0.00	2.01
Other destinations	0.00	0.00	0.00	9.70	0.50	0.00	0.00	0.00	0.00	0.00	0.95
Grange over Sands Town Centre Sub-Total	**0.00**	**0.00**	**0.00**	**30.57**	**0.50**	**0.00**	**0.00**	**0.41**	**0.00**	**0.00**	**2.96**
Milnthorpe Town Centre	**0.00**	**0.00**	**0.00**	**0.00**	**20.87**	**0.00**	**0.69**	**0.41**	**0.00**	**0.00**	**1.81**
Kendal Area											
Aldi, Appleby Road	5.86	6.91	5.26	4.64	2.76	5.81	6.43	1.01	0.58	0.25	3.91
Asda, Burton Road	25.12	19.60	42.82	23.86	31.76	13.80	26.51	15.56	0.79	0.62	19.97
Morrisons, Katherine Avenue	26.19	45.62	21.94	9.78	11.25	21.86	31.88	6.27	0.58	0.00	17.45
Spar, Sandylands Avenue	0.00	7.21	0.00	0.00	0.00	0.00	1.15	0.00	0.00	0.00	0.82
Other destinations	0.00	0.00	2.20	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.24
Kendal Area Sub-Total	**57.17**	**79.34**	**72.22**	**38.28**	**45.77**	**41.47**	**65.97**	**22.84**	**1.95**	**0.87**	**42.39**
Ulverston Area											
Booths, Oubas Hill	0.00	0.00	0.00	5.65	0.00	0.50	0.00	0.00	32.01	4.96	4.33
Co-operative, Priory Road	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	14.44	0.37	1.53
Other destinations	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.25	0.00	0.24
Ulverston Area Sub-Total	**0.00**	**0.00**	**0.00**	**5.65**	**0.00**	**0.50**	**0.00**	**0.00**	**48.70**	**5.33**	**6.10**
Other destinations South Lakeland											
Other destinations	0.24	0.00	1.10	6.51	1.50	0.36	8.38	2.93	0.38	0.00	2.10
Other destinations South Lakeland Sub-Total	**0.24**	**0.00**	**1.10**	**6.51**	**1.50**	**0.36**	**8.38**	**2.93**	**0.38**	**0.00**	**2.10**
South Lakeland Sub-Total	**89.85**	**98.62**	**96.90**	**85.86**	**84.98**	**44.99**	**86.43**	**41.45**	**60.97**	**7.93**	**69.05**
Within South Lakeland but under National Park Control											
Lake District National Park Area											
Booths, The Olde Station, Windermere	7.33	0.00	0.79	0.28	2.28	28.93	1.01	0.25	0.88	0.37	4.35
Ambleside Rural Service Centre	0.00	0.00	0.00	0.51	0.50	16.10	0.00	0.00	0.38	0.00	1.85
Other destinations	0.00	0.00	0.00	1.29	0.00	6.90	2.23	0.00	0.51	1.85	1.35
Yorkshire Dales National Park Area											
Spar, Sedbergh	0.00	0.00	0.00	0.00	0.00	0.00	8.32	0.00	0.00	0.00	0.85
Within South Lakeland but under National Park Control Sub-Total	**7.33**	**0.00**	**0.79**	**2.08**	**2.78**	**51.93**	**11.56**	**0.25**	**1.77**	**2.22**	**8.40**
Outside of the District											
Asda, Barrow-in-Furness	0.00	0.41	0.00	1.57	0.00	0.00	0.00	0.00	16.03	35.83	5.48
Booths, Carnforth	0.00	0.00	0.00	0.00	2.07	0.00	0.00	9.53	0.00	0.00	1.18
Co-operative, Dalton in Furness	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.12	10.99	1.38
Morrisons, Barrow-in-Furness	0.00	0.00	0.00	2.08	0.29	0.00	0.00	0.00	6.94	10.80	2.04
Morrisons, Morecambe	0.00	0.00	0.29	0.00	0.99	0.00	0.00	6.67	0.00	0.00	0.81
Tesco, Hindpool Road, Barrow-in-Furness	0.91	0.00	0.00	3.59	0.50	0.36	0.00	0.00	10.34	20.95	3.74
Tesco, Lodge Road, Carnforth	0.50	0.50	1.29	4.83	7.40	1.50	0.30	23.45	0.00	0.00	3.98
Other destinations	1.40	0.50	0.73	0.00	0.99	1.22	1.70	18.65	1.83	11.27	3.94
Outside of the District Sub-Total	**2.81**	**1.41**	**2.31**	**12.07**	**12.24**	**3.08**	**2.00**	**58.30**	**37.26**	**89.84**	**22.55**
Total	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**

Notes:
(i) Source: NEMS Household Telephone Survey (December 2011) - Excludes Don't Know/Don't Do and Other responses
(ii) Weightings afforded to Main Food (Primary and Secondary combined)/Top up Shopping Destinations are 70%/30%

2010 Prices Inclusive of VAT where applicable, unless otherwise stated

Table 7: Convenience Goods Spending Potential of Tourists/Visitors

Total Tourist Spending on Shopping in South Lakeland (2010) (£m)	Proportion Directed to Convenience Retail Destinations (%)	Proportion of South Lakeland Tourist Visits to South Lakeland LDF Area (%)	Tourist Spending on Shopping in Convenience Retail Destinations (2010) (£m)	Tourist Spending on Shopping in Convenience Retail Destinations (2012) (£m)
74.3	42.0	39.4	12.3	12.1

Notes:
(i) Total Tourist Spending on Shopping in South Lakeland (2010) from STEAM Model Trend for the period 2008 to 2010 (STEAM Model outputs for South Lakeland District) - Global Tourism Solitions UK Ltd - excludes VAT given that relates to the sale of food goods
STEAM Model Trend for the Period 2008 to 2010 attached at Appendix 5
(ii) Total Tourist Spending (2012) is adjusted from the 2010 figure pro-rata to the reduction in per capita convenience goods spending identified in Table 2(a)
(iii) Proportion of Tourist Spending directed to convenience goods purchases assumed to be the same as the proportion of Study Area retail expenditure directed to convenience goods (from Tables 3a and 3b)
(iv) Proprtion of South Lakeland Tourist Visitis to South Lakeland LDF Area based upon 2006 TIC Survey of visits to TIC Offices -assumes that the proportion of visits to TICs in Ambleside, Broughton and Widermere (outside the LDF Area) and the proportion of visits to TICs in Grange-over-Sands, Kirby Lonsdale, Kendal and Ulverston (within the LDF area) are directly proprtion to the proprtion of visitor days in each.

2010 Prices Inclusive of VAT where applicable, unless otherwise stated

Table 8: Convenience Retail Turnover 2012

Centre/Facilities	Zone 1 Kendal Central and West	Zone 2 Kendal North and North East	Zone 3 Kendal South	Zone 4 Grange-over-Sands	Zone 5 Milnthorpe	Zone 6 Windermere	Zone 7 Sedbergh, Grayrigg and Staveley	Zone 8 Arnside, Siverdale, Carnforth and Kirkby Lonsdale	Zone 9 Ulverston	Zone 10 Consiton and Broughton-in-Furness	Sub-Total	Tourist Spend	In-Flow	Total
	Expenditure (£m)													
Expenditure 2012	**24.0**	**16.1**	**21.6**	**20.3**	**17.2**	**30.3**	**20.3**	**54.4**	**43.3**	**44.8**	**292.3**	**12.1**	**2.8**	**307.2**
South Lakeland District														
Kendal Town Centre (PSA/SSA)														
Booths, Wainwright's Yard, Stricklandgate	4.9	1.2	2.9	0.4	1.5	0.2	1.2	0.4	0.2	0.0	12.7	0.9		13.6
Marks and Spencer, Library Road	1.2	0.9	0.9	0.4	0.9	0.5	0.4	1.2	0.2	0.3	6.8	0.5		7.2
Iceland, Highgate	1.3	0.5	0.5	0.1	0.0	0.0	0.0	0.0	0.0	0.2	2.6	0.2		2.7
Other destinations	0.4	0.5	0.8	0.0	0.0	0.1	0.1	0.9	0.0	0.0	2.7	0.2		2.9
Kendal Town Centre Sub-Total	**7.8**	**3.0**	**5.1**	**0.9**	**2.3**	**0.7**	**1.6**	**2.5**	**0.4**	**0.4**	**24.8**	**1.7**		***26.5***
Kirkby Lonsdale Town Centre														
Booths, Dodge Croft Road	0.0	0.1	0.0	0.1	0.5	0.0	0.7	4.3	0.0	0.0	5.6	0.4	0.3	6.3
Other destinations	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.3	0.0	0.0	1.3	0.1	1.3	2.7
Kirkby Lonsdale Town Centre Sub-Total	**0.0**	**0.1**	**0.0**	**0.1**	**0.5**	**0.0**	**0.7**	**5.6**	**0.0**	**0.0**	**6.9**	**0.5**	**1.6**	***9.0***
Ulverston Town Centre (PSA)	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.1**	**0.0**	**0.0**	**3.9**	**0.3**	**4.4**	**0.3**		**4.7**
Grange over Sands Town Centre														
Co-operative, Kents Bank Road	0.0	0.0	0.0	4.2	0.0	0.0	0.0	0.2	0.0	0.0	4.5	0.3		4.8
Other destinations	0.0	0.0	0.0	2.0	0.1	0.0	0.0	0.0	0.0	0.0	2.1	0.1		2.2
Grange over Sands Town Centre Sub-Total	**0.0**	**0.0**	**0.0**	**6.2**	**0.1**	**0.0**	**0.0**	**0.2**	**0.0**	**0.0**	**6.5**	**0.5**		***7.0***
Milnthorpe Town Centre	**0.0**	**0.0**	**0.0**	**0.0**	**3.6**	**0.0**	**0.1**	**0.2**	**0.0**	**0.0**	**4.0**	**0.3**		**4.2**
Kendal Area														
Aldi, Appleby Road	1.4	1.1	1.1	0.9	0.5	1.8	1.3	0.5	0.3	0.1	9.1	0.6		9.7
Asda, Burton Road	6.0	3.2	9.2	4.8	5.5	4.2	5.4	8.5	0.3	0.3	47.4	3.3		50.7
Morrisons, Katherine Avenue	6.3	7.3	4.7	2.0	1.9	6.6	6.5	3.4	0.3	0.0	39.1	2.7		41.8
Spar, Sandylands Avenue	0.0	1.2	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	1.4	0.1		1.5
Other destinations	0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.0		0.5
Kendal Area Sub-Total	**13.7**	**12.8**	**15.6**	**7.8**	**7.9**	**12.6**	**13.4**	**12.4**	**0.8**	**0.4**	**97.4**	**6.8**		***104.1***
Ulverston Area														
Booths, Oubas Hill	0.0	0.0	0.0	1.1	0.0	0.2	0.0	0.0	13.9	2.2	17.4	1.2	0.9	19.5
Co-operative, Priory Road	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.3	0.2	6.4	0.4	0.3	7.2
Other destinations	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0	0.0	1.0	0.1	0.0	1.1
Ulverston Area Sub-Total	**0.0**	**0.0**	**0.0**	**1.1**	**0.0**	**0.2**	**0.0**	**0.0**	**21.1**	**2.4**	**24.8**	**1.7**	**1.2**	***27.7***
Other destinations South Lakeland														
Other destinations	0.1	0.0	0.2	1.3	0.3	0.1	1.7	1.6	0.2	0.0	5.4	0.4		5.8
Other destinations South Lakeland Sub-Total	**0.1**	**0.0**	**0.2**	**1.3**	**0.3**	**0.1**	**1.7**	**1.6**	**0.2**	**0.0**	**5.4**	**0.4**		***5.8***
South Lakeland Sub-Total	**21.6**	**15.9**	**20.9**	**17.4**	**14.6**	**13.6**	**17.6**	**22.5**	**26.4**	**3.6**	**174.1**	**12.1**		**189.0**
Within South Lakeland but under National Park Control														
Lake District National Park Area														
Booths, The Olde Station, Windermere	1.8	0.0	0.2	0.1	0.4	8.8	0.2	0.1	0.4	0.2	12.0			12.0
Ambleside Rural Service Centre	0.0	0.0	0.0	0.1	0.1	4.9	0.0	0.0	0.2	0.0	5.2			5.2
Other destinations	0.0	0.0	0.0	0.3	0.0	2.1	0.5	0.0	0.2	0.8	3.9			3.9
Yorkshire Dales National Park Area														
Spar, Sedbergh	0.0	0.0	0.0	0.0	0.0	0.0	1.7	0.0	0.0	0.0	1.7			1.7
Within South Lakeland but under National Park Control Sub-Total	**1.8**	**0.0**	**0.2**	**0.4**	**0.5**	**15.7**	**2.3**	**0.1**	**0.8**	**1.0**	**22.8**			**22.8**
Outside of the District														
Asda, Barrow-in-Furness	0.0	0.1	0.0	0.3	0.0	0.0	0.0	0.0	6.9	16.1	23.4			23.4
Booths, Carnforth	0.0	0.0	0.0	0.0	0.4	0.0	0.0	5.2	0.0	0.0	5.5			5.5
Co-operative, Dalton in Furness	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	4.9	5.8			5.8
Morrisons, Barrow-in-Furness	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	3.0	4.8	8.3			8.3
Morrisons, Morecambe	0.0	0.0	0.1	0.0	0.2	0.0	0.0	3.6	0.0	0.0	3.9			3.9
Tesco, Hindpool Road, Barrow-in-Furness	0.2	0.0	0.0	0.7	0.1	0.1	0.0	0.0	4.5	9.4	15.0			15.0
Tesco, Lodge Road, Carnforth	0.1	0.1	0.3	1.0	1.3	0.5	0.1	12.8	0.0	0.0	16.0			16.0
Other destinations	0.3	0.1	0.2	0.0	0.2	0.4	0.3	10.1	0.8	5.1	17.4			17.4
Outside of the District Sub-Total	**0.7**	**0.2**	**0.5**	**2.5**	**2.1**	**0.9**	**0.4**	**31.7**	**16.1**	**40.3**	**95.4**			***95.4***
Total	**24.0**	**16.1**	**21.6**	**20.3**	**17.2**	**30.3**	**20.3**	**54.4**	**43.3**	**44.8**	**292.3**		**2.8**	**307.2**

Notes:
(i) Source: Tables 3a, 6
(ii) Rounding errors may occur
(iii) Inflow to destinations in Kirkby Lonsdale and Ulverston is set at 5% of turnover, based on the findings of the Barrow Retail Study 2006 and the Lancaster City Council Retail Study Update 2009
(iv) Revised Total assumes that Booths (Dodge CroftRoad), Kirkby Lonsdale trades at the mid-point between survey derived and bencmark turnover. Turnover of other stores/destinations reduces pro-rata
(v)Tourist Spending from Table 7

2010 Prices Inclusive of VAT where applicable, unless otherwise stated

Table 9: Convenience Retail Turnover 2017

Centre/Facilities	Expenditure (£m)														
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Sub-Total	Tourist Spend	In-Flow	Total	Revised Total
	Kendal Central and West	Kendal North and North East	Kendal South	Grange-over-Sands	Milnthorpe	Windermere	Sedbergh, Grayrigg and Staveley	Arnside, Siverdale, Carnforth and Kirkby Lonsdale	Ulverston	Consiton and Broughton-in-Furness					
Expenditure 2017	**24.6**	**16.5**	**22.1**	**20.8**	**17.6**	**31.0**	**20.8**	**56.2**	**44.3**	**45.8**	**299.8**	**12.4**	**2.9**	**315.1**	**315.1**
South Lakeland District															
Kendal Town Centre (PSA/SSA)															
Booths, Wainwright's Yard, Stricklandgate	5.0	1.2	3.0	0.4	1.5	0.2	1.2	0.4	0.2	0.0	13.0	0.9		13.9	13.8
Marks and Spencer, Library Road	1.3	0.9	0.9	0.4	0.9	0.5	0.4	1.3	0.2	0.3	6.9	0.5		7.4	7.3
Iceland, Highgate	1.3	0.5	0.5	0.1	0.0	0.0	0.0	0.0	0.0	0.2	2.6	0.2		2.8	2.8
Other destinations	0.4	0.5	0.9	0.0	0.0	0.1	0.1	0.9	0.0	0.0	2.8	0.2		3.0	3.0
Kendal Town Centre Sub-Total	**8.0**	**3.1**	**5.2**	**0.9**	**2.4**	**0.7**	**1.7**	**2.6**	**0.4**	**0.5**	**25.4**	**1.8**		**27.2**	**26.8**
Kirkby Lonsdale Town Centre															
Booths, Dodge Croft Road	0.0	0.1	0.0	0.1	0.5	0.0	0.7	4.4	0.0	0.0	5.8	0.4	0.3	6.5	10.6
Other destinations	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.3	0.0	0.0	1.3	0.1	1.3	2.8	2.7
Kirkby Lonsdale Town Centre Sub-Total	**0.0**	**0.1**	**0.0**	**0.1**	**0.5**	**0.0**	**0.7**	**5.7**	**0.0**	**0.0**	**7.1**	**0.5**	**1.6**	***9.3***	***13.4***
Ulverston Town Centre (PSA)	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.1**	**0.0**	**0.0**	**4.0**	**0.3**	**4.5**	**0.3**		**4.8**	**4.7**
Grange over Sands Town Centre															
Co-operative, Kents Bank Road	0.0	0.0	0.0	4.3	0.0	0.0	0.0	0.2	0.0	0.0	4.6	0.3		4.9	4.8
Other destinations	0.0	0.0	0.0	2.0	0.1	0.0	0.0	0.0	0.0	0.0	2.1	0.1		2.3	2.2
Grange over Sands Town Centre Sub-Total	**0.0**	**0.0**	**0.0**	**6.4**	**0.1**	**0.0**	**0.0**	**0.2**	**0.0**	**0.0**	**6.7**	**0.5**		***7.1***	***7.0***
Milnthorpe Town Centre	**0.0**	**0.0**	**0.0**	**0.0**	**3.7**	**0.0**	**0.1**	**0.2**	**0.0**	**0.0**	**4.0**	**0.3**		**4.3**	**4.3**
Kendal Area															
Aldi, Appleby Road	1.4	1.1	1.2	1.0	0.5	1.8	1.3	0.6	0.3	0.1	9.3	0.6		9.9	9.8
Asda, Burton Road	6.2	3.2	9.5	5.0	5.6	4.3	5.5	8.7	0.4	0.3	48.6	3.4		52.0	51.3
Morrisons, Katherine Avenue	6.4	7.5	4.8	2.0	2.0	6.8	6.6	3.5	0.3	0.0	40.0	2.8		42.8	42.2
Spar, Sandylands Avenue	0.0	1.2	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	1.4	0.1		1.5	1.5
Other destinations	0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.0		0.5	0.5
Kendal Area Sub-Total	**14.1**	**13.1**	**16.0**	**8.0**	**8.1**	**12.9**	**13.7**	**12.8**	**0.9**	**0.4**	**99.8**	**6.9**		***106.7***	***105.3***
Ulverston Area															
Booths, Oubas Hill	0.0	0.0	0.0	1.2	0.0	0.2	0.0	0.0	14.2	2.3	17.8	1.2	0.9	19.9	19.6
Co-operative, Priory Road	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.4	0.2	6.6	0.5	0.3	7.4	7.3
Other destinations	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0	0.0	1.0	0.1	0.0	1.1	1.1
Ulverston Area Sub-Total	**0.0**	**0.0**	**0.0**	**1.2**	**0.0**	**0.2**	**0.0**	**0.0**	**21.6**	**2.4**	**25.4**	**1.8**	**1.3**	***28.4***	***28.0***
Other destinations South Lakeland															
Other destinations	0.1	0.0	0.2	1.4	0.3	0.1	1.7	1.6	0.2	0.0	5.6	0.4		6.0	5.9
Other destinations South Lakeland Sub-Total	**0.1**	**0.0**	**0.2**	**1.4**	**0.3**	**0.1**	**1.7**	**1.6**	**0.2**	**0.0**	**5.6**	**0.4**		***6.0***	***5.9***
South Lakeland Sub-Total	**22.1**	**16.3**	**21.4**	**17.9**	**15.0**	**14.0**	**18.0**	**23.3**	**27.0**	**3.6**	**178.5**	**12.4**		**193.8**	**195.4**
Within South Lakeland but under National Park Control															
Lake District National Park Area															
Booths, The Olde Station, Windermere	1.8	0.0	0.2	0.1	0.4	9.0	0.2	0.1	0.4	0.2	12.3			12.3	12.2
Ambleside Rural Service Centre	0.0	0.0	0.0	0.1	0.1	5.0	0.0	0.0	0.2	0.0	5.4			5.4	5.3
Other destinations	0.0	0.0	0.0	0.3	0.0	2.1	0.5	0.0	0.2	0.8	3.9			3.9	3.9
Yorkshire Dales National Park Area															
Spar, Sedbergh	0.0	0.0	0.0	0.0	0.0	0.0	1.7	0.0	0.0	0.0	1.7			1.7	1.7
Within South Lakeland but under National Park Control Sub-Total	**1.8**	**0.0**	**0.2**	**0.4**	**0.5**	**16.1**	**2.4**	**0.1**	**0.8**	**1.0**	**23.4**			**23.4**	**23.0**
Outside of the District															
Asda, Barrow-in-Furness	0.0	0.1	0.0	0.3	0.0	0.0	0.0	0.0	7.1	16.4	23.9			23.9	23.6
Booths, Carnforth	0.0	0.0	0.0	0.0	0.4	0.0	0.0	5.4	0.0	0.0	5.7			5.7	5.6
Co-operative, Dalton in Furness	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	5.0	6.0			6.0	5.9
Morrisons, Barrow-in-Furness	0.0	0.0	0.0	0.4	0.1	0.0	0.0	0.0	3.1	5.0	8.5			8.5	8.4
Morrisons, Morecambe	0.0	0.0	0.1	0.0	0.2	0.0	0.0	3.7	0.0	0.0	4.0			4.0	3.9
Tesco, Hindpool Road, Barrow-in-Furness	0.2	0.0	0.0	0.7	0.1	0.1	0.0	0.0	4.6	9.6	15.4			15.4	15.2
Tesco, Lodge Road, Carnforth	0.1	0.1	0.3	1.0	1.3	0.5	0.1	13.2	0.0	0.0	16.5			16.5	16.3
Other destinations	0.3	0.1	0.2	0.0	0.2	0.4	0.4	10.5	0.8	5.2	18.0			18.0	17.7
Outside of the District Sub-Total	**0.7**	**0.2**	**0.5**	**2.5**	**2.2**	**1.0**	**0.4**	**32.8**	**16.5**	**41.2**	**97.9**			***97.9***	***96.6***
Total	**24.6**	**16.5**	**22.1**	**20.8**	**17.6**	**31.0**	**20.8**	**56.2**	**44.3**	**45.8**	**299.8**		**2.9**	**315.1**	**315.1**

Notes:
(i) Source: Tables 3a, 6
(ii) Rounding errors may occur
(iii) Inflow to destinations in Kirkby Lonsdale and Ulverston is set at 5% of turnover, based on the findings of the Barrow Retail Study 2006 and the Lancaster City Council Retail Study Update 2009
(iv) Revised Total assumes that Booths (Dodge CroftRoad), Kirkby Lonsdale trades at the mid-point between survey derived and bencmark turnover. Turnover of other stores/destinations reduces pro-rata
(v) Tourist Spending from Table 7 and projected forward from 2012 pro-rata to the growth in spending power of Study Area residents

2010 Prices Inclusive of VAT where applicable, unless otherwise stated

Table 10: Convenience Retail Turnover 2022

Centre/Facilities	Expenditure (£m)														
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Sub-Total	Tourist Spend	In-Flow	Total	Revised Total
	Kendal Central and West	Kendal North and North East	Kendal South	Grange-over-Sands	Milnthorpe	Windermere	Sedbergh, Grayrigg and Staveley	Arnside, Siverdale, Carnforth and Kirkby Lonsdale	Ulverston	Consiton and Broughton-in-Furness					
Expenditure 2022	**25.7**	**17.2**	**23.1**	**21.7**	**18.4**	**32.4**	**21.7**	**59.0**	**46.3**	**47.8**	**313.2**	**13.0**	**3.0**	**329.2**	**329.2**
South Lakeland District															
Kendal Town Centre (PSA/SSA)															
Booths, Wainwright's Yard, Stricklandgate	5.2	1.2	3.1	0.4	1.6	0.2	1.2	0.4	0.2	0.0	13.6	0.9		14.6	14.4
Marks and Spencer, Library Road	1.3	0.9	0.9	0.4	0.9	0.5	0.4	1.3	0.2	0.3	7.2	0.5		7.7	7.6
Iceland, Highgate	1.4	0.6	0.5	0.1	0.0	0.0	0.0	0.0	0.0	0.2	2.7	0.2		2.9	2.9
Other destinations	0.4	0.5	0.9	0.0	0.0	0.1	0.1	1.0	0.0	0.0	2.9	0.2		3.1	3.1
Kendal Town Centre Sub-Total	**8.3**	**3.2**	**5.4**	**0.9**	**2.5**	**0.7**	**1.8**	**2.7**	**0.4**	**0.5**	**26.5**	**1.8**		**28.4**	**28.0**
Kirkby Lonsdale Town Centre															
Booths, Dodge Croft Road	0.0	0.1	0.0	0.1	0.5	0.0	0.7	4.6	0.0	0.0	6.1	0.4	0.3	6.8	10.8
Other destinations	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.4	0.0	0.0	1.4	0.1	1.4	2.9	2.9
Kirkby Lonsdale Town Centre Sub-Total	**0.0**	**0.1**	**0.0**	**0.1**	**0.5**	**0.0**	**0.7**	**6.0**	**0.0**	**0.0**	**7.5**	**0.5**	**1.7**	***9.7***	***13.7***
Ulverston Town Centre (PSA)	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.1**	**0.0**	**0.0**	**4.2**	**0.4**	**4.7**	**0.3**		**5.0**	**4.9**
Grange over Sands Town Centre															
Co-operative, Kents Bank Road	0.0	0.0	0.0	4.5	0.0	0.0	0.0	0.2	0.0	0.0	4.8	0.3		5.1	5.0
Other destinations	0.0	0.0	0.0	2.1	0.1	0.0	0.0	0.0	0.0	0.0	2.2	0.2		2.4	2.3
Grange over Sands Town Centre Sub-Total	**0.0**	**0.0**	**0.0**	**6.6**	**0.1**	**0.0**	**0.0**	**0.2**	**0.0**	**0.0**	**7.0**	**0.5**		***7.5***	***7.4***
Milnthorpe Town Centre	**0.0**	**0.0**	**0.0**	**0.0**	**3.8**	**0.0**	**0.1**	**0.2**	**0.0**	**0.0**	**4.2**	**0.3**		**4.5**	**4.5**
Kendal Area															
Aldi, Appleby Road	1.5	1.2	1.2	1.0	0.5	1.9	1.4	0.6	0.3	0.1	9.7	0.7		10.4	10.2
Asda, Burton Road	6.5	3.4	9.9	5.2	5.8	4.5	5.8	9.2	0.4	0.3	50.8	3.5		54.3	53.7
Morrisons, Katherine Avenue	6.7	7.9	5.1	2.1	2.1	7.1	6.9	3.7	0.3	0.0	41.8	2.9		44.7	44.2
Spar, Sandylands Avenue	0.0	1.2	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	1.5	0.1		1.6	1.6
Other destinations	0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.0		0.5	0.5
Kendal Area Sub-Total	**14.7**	**13.7**	**16.7**	**8.3**	**8.4**	**13.4**	**14.3**	**13.5**	**0.9**	**0.4**	**104.3**	**7.2**		***111.5***	***110.2***
Ulverston Area															
Booths, Oubas Hill	0.0	0.0	0.0	1.2	0.0	0.2	0.0	0.0	14.8	2.4	18.6	1.3	0.9	20.8	20.5
Co-operative, Priory Road	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.7	0.2	6.9	0.5	0.3	7.7	7.6
Other destinations	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0	0.0	1.0	0.1	0.1	1.2	1.2
Ulverston Area Sub-Total	**0.0**	**0.0**	**0.0**	**1.2**	**0.0**	**0.2**	**0.0**	**0.0**	**22.5**	**2.5**	**26.5**	**1.8**	**1.3**	***29.6***	***29.3***
Other destinations South Lakeland															
Other destinations	0.1	0.0	0.3	1.4	0.3	0.1	1.8	1.7	0.2	0.0	5.8	0.4		6.3	6.2
Other destinations South Lakeland Sub-Total	**0.1**	**0.0**	**0.3**	**1.4**	**0.3**	**0.1**	**1.8**	**1.7**	**0.2**	**0.0**	**5.8**	**0.4**		***6.3***	***6.2***
South Lakeland Sub-Total	**23.1**	**17.0**	**22.4**	**18.6**	**15.6**	**14.6**	**18.8**	**24.5**	**28.2**	**3.8**	**186.5**	**13.0**		**199.4**	**204.0**
Within South Lakeland but under National Park Control															
Lake District National Park Area															
Booths, The Olde Station, Windermere	1.9	0.0	0.2	0.1	0.4	9.4	0.2	0.1	0.4	0.2	12.9			12.9	12.7
Ambleside Rural Service Centre	0.0	0.0	0.0	0.1	0.1	5.2	0.0	0.0	0.2	0.0	5.6			5.6	5.5
Other destinations	0.0	0.0	0.0	0.3	0.0	2.2	0.5	0.0	0.2	0.9	4.1			4.1	4.1
Yorkshire Dales National Park Area															
Spar, Sedbergh	0.0	0.0	0.0	0.0	0.0	0.0	1.8	0.0	0.0	0.0	1.8			1.8	1.8
Within South Lakeland but under National Park Control Sub-Total	**1.9**	**0.0**	**0.2**	**0.5**	**0.5**	**16.8**	**2.5**	**0.1**	**0.8**	**1.1**	**24.4**			**24.4**	**24.1**
Outside of the District															
Asda, Barrow-in-Furness	0.0	0.1	0.0	0.3	0.0	0.0	0.0	0.0	7.4	17.1	24.9			24.9	24.6
Booths, Carnforth	0.0	0.0	0.0	0.0	0.4	0.0	0.0	5.6	0.0	0.0	6.0			6.0	5.9
Co-operative, Dalton in Furness	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0	5.3	6.2			6.2	6.2
Morrisons, Barrow-in-Furness	0.0	0.0	0.0	0.5	0.1	0.0	0.0	0.0	3.2	5.2	8.9			8.9	8.8
Morrisons, Morecambe	0.0	0.0	0.1	0.0	0.2	0.0	0.0	3.9	0.0	0.0	4.2			4.2	4.1
Tesco, Hindpool Road, Barrow-in-Furness	0.2	0.0	0.0	0.8	0.1	0.1	0.0	0.0	4.8	10.0	16.0			16.0	15.8
Tesco, Lodge Road, Carnforth	0.1	0.1	0.3	1.0	1.4	0.5	0.1	13.8	0.0	0.0	17.3			17.3	17.1
Other destinations	0.4	0.1	0.2	0.0	0.2	0.4	0.4	11.0	0.8	5.4	18.8			18.8	18.6
Outside of the District Sub-Total	**0.7**	**0.2**	**0.5**	**2.6**	**2.2**	**1.0**	**0.4**	**34.4**	**17.2**	**42.9**	**102.4**			***102.4***	***101.1***
Total	**25.7**	**17.2**	**23.1**	**21.7**	**18.4**	**32.4**	**21.7**	**59.0**	**46.3**	**47.8**	**313.2**		**3.0**	**329.2**	**329.2**

Notes:
(i) Source: Tables 3a, 6
(ii) Rounding errors may occur
(iii) Inflow to destinations in Kirkby Lonsdale and Ulverston is set at 5% of turnover, based on the findings of the Barrow Retail Study 2006 and the Lancaster City Council Retail Study Update 2009
(iv) Revised Total assumes that Booths (Dodge CroftRoad), Kirkby Lonsdale trades at the mid-point between survey derived and bencmark turnover. Turnover of other stores/destinations reduces pro-rata
(v) Tourist Spending from Table 7 and projected forward from 2012 pro-rata to the growth in spending power of Study Area residents

2010 Prices Inclusive of VAT where applicable, unless otherwise stated

Table 11: Convenience Retail Turnover 2025

Centre/Facilities	Expenditure (£m) Zone 1 Kendal Central and West	Zone 2 Kendal North and North East	Zone 3 Kendal South	Zone 4 Grange-over-Sands	Zone 5 Milnthorpe	Zone 6 Windermere	Zone 7 Sedbergh, Grayrigg and Staveley	Zone 8 Arnside, Siverdale, Carnforth and Kirkby Lonsdale	Zone 9 Ulverston	Zone 10 Consiton and Broughton-in-Furness	Sub-Total	Tourism Spend	In-Flow	Total	Revised Total
Expenditure 2025	**26.4**	**17.7**	**23.7**	**22.3**	**18.8**	**33.2**	**22.3**	**60.8**	**47.5**	**48.9**	**321.4**	**13.3**	**3.1**	**337.9**	**337.9**
South Lakeland District															
Kendal Town Centre (PSA/SSA)															
Booths, Wainwright's Yard, Stricklandgate	5.3	1.3	3.2	0.4	1.6	0.2	1.3	0.5	0.2	0.0	14.0	1.0		14.9	14.8
Marks and Spencer, Library Road	1.3	0.9	1.0	0.4	0.9	0.5	0.4	1.4	0.2	0.3	7.4	0.5		7.9	7.9
Iceland, Highgate	1.4	0.6	0.5	0.1	0.0	0.0	0.0	0.0	0.0	0.2	2.8	0.2		3.0	3.0
Other destinations	0.5	0.5	0.9	0.0	0.0	0.1	0.1	1.0	0.0	0.0	3.0	0.2		3.2	3.2
Kendal Town Centre Sub-Total	**8.5**	**3.3**	**5.6**	**1.0**	**2.6**	**0.8**	**1.8**	**2.8**	**0.4**	**0.5**	**27.2**	**1.9**		**29.1**	**28.8**
Kirkby Lonsdale Town Centre															
Booths, Dodge Croft Road	0.0	0.1	0.0	0.1	0.5	0.0	0.7	4.8	0.0	0.0	6.3	0.4	0.3	7.0	10.9
Other destinations	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.4	0.0	0.0	1.4	0.1	1.4	3.0	2.9
Kirkby Lonsdale Town Centre Sub-Total	**0.0**	**0.1**	**0.0**	**0.1**	**0.5**	**0.0**	**0.7**	**6.2**	**0.0**	**0.0**	**7.7**	**0.5**	**1.8**	**10.0**	***13.8***
Ulverston Town Centre (PSA)	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.1**	**0.0**	**0.0**	**4.3**	**0.4**	**4.8**	**0.3**		**5.1**	**5.0**
Grange over Sands Town Centre															
Co-operative, Kents Bank Road	0.0	0.0	0.0	4.6	0.0	0.0	0.0	0.2	0.0	0.0	4.9	0.3		5.2	5.2
Other destinations	0.0	0.0	0.0	2.2	0.1	0.0	0.0	0.0	0.0	0.0	2.3	0.2		2.4	2.4
Grange over Sands Town Centre Sub-Total	**0.0**	**0.0**	**0.0**	**6.8**	**0.1**	**0.0**	**0.0**	**0.2**	**0.0**	**0.0**	**7.2**	**0.5**		**7.6**	***7.6***
Milnthorpe Town Centre	**0.0**	**0.0**	**0.0**	**0.0**	**3.9**	**0.0**	**0.2**	**0.2**	**0.0**	**0.0**	**4.3**	**0.3**		**4.6**	**4.6**
Kendal Area															
Aldi, Appleby Road	1.5	1.2	1.2	1.0	0.5	1.9	1.4	0.6	0.3	0.1	9.9	0.7		10.6	10.5
Asda, Burton Road	6.6	3.5	10.1	5.3	6.0	4.6	5.9	9.5	0.4	0.3	52.1	3.6		55.8	55.1
Morrisons, Katherine Avenue	6.9	8.1	5.2	2.2	2.1	7.3	7.1	3.8	0.3	0.0	42.9	3.0		45.9	45.3
Spar, Sandylands Avenue	0.0	1.3	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	1.5	0.1		1.6	1.6
Other destinations	0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.0		0.6	0.6
Kendal Area Sub-Total	**15.1**	**14.0**	**17.1**	**8.5**	**8.6**	**13.8**	**14.7**	**13.9**	**0.9**	**0.4**	**107.0**	**7.4**		**114.4**	***113.1***
Ulverston Area															
Booths, Oubas Hill	0.0	0.0	0.0	1.3	0.0	0.2	0.0	0.0	15.2	2.4	19.0	1.3	1.0	21.3	21.1
Co-operative, Priory Road	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.9	0.2	7.0	0.5	0.4	7.9	7.8
Other destinations	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.1	0.0	1.1	0.1	0.1	1.2	1.2
Ulverston Area Sub-Total	**0.0**	**0.0**	**0.0**	**1.3**	**0.0**	**0.2**	**0.0**	**0.0**	**23.1**	**2.6**	**27.1**	**1.9**	1.4	**30.4**	***30.0***
Other destinations South Lakeland															
Other destinations	0.1	0.0	0.3	1.5	0.3	0.1	1.9	1.8	0.2	0.0	6.0	0.4		6.4	6.3
Other destinations South Lakeland Sub-Total	**0.1**	**0.0**	**0.3**	**1.5**	**0.3**	**0.1**	**1.9**	**1.8**	**0.2**	**0.0**	**6.0**	**0.4**		**6.4**	***6.3***
South Lakeland Sub-Total	**23.7**	**17.4**	**22.9**	**19.1**	**16.0**	**14.9**	**19.2**	**25.2**	**28.9**	**3.9**	**191.3**	**13.3**		**204.6**	**209.3**
Within South Lakeland but under National Park Control															
Lake District National Park Area															
Booths, The Olde Station, Windermere	1.9	0.0	0.2	0.1	0.4	9.6	0.2	0.2	0.4	0.2	13.2			13.2	13.0
Ambleside Rural Service Centre	0.0	0.0	0.0	0.1	0.1	5.3	0.0	0.0	0.2	0.0	5.7			5.7	5.7
Other destinations	0.0	0.0	0.0	0.3	0.0	2.3	0.5	0.0	0.2	0.9	4.2			4.2	4.2
Yorkshire Dales National Park Area															
Spar, Sedbergh	0.0	0.0	0.0	0.0	0.0	0.0	1.9	0.0	0.0	0.0	1.9			1.9	1.8
Within South Lakeland but under National Park Control Sub-Total	**1.9**	**0.0**	**0.2**	**0.5**	**0.5**	**17.2**	**2.6**	**0.2**	**0.8**	**1.1**	**25.0**			**25.0**	**24.7**
Outside of the District															
Asda, Barrow-in-Furness	0.0	0.1	0.0	0.3	0.0	0.0	0.0	0.0	7.6	17.5	25.6			25.6	25.3
Booths, Carnforth	0.0	0.0	0.0	0.0	0.4	0.0	0.0	5.8	0.0	0.0	6.2			6.2	6.1
Co-operative, Dalton in Furness	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0	5.4	6.4			6.4	6.3
Morrisons, Barrow-in-Furness	0.0	0.0	0.0	0.5	0.1	0.0	0.0	0.0	3.3	5.3	9.1			9.1	9.0
Morrisons, Morecambe	0.0	0.0	0.1	0.0	0.2	0.0	0.0	4.1	0.0	0.0	4.3			4.3	4.3
Tesco, Hindpool Road, Barrow-in-Furness	0.2	0.0	0.0	0.8	0.1	0.1	0.0	0.0	4.9	10.3	16.4			16.4	16.2
Tesco, Lodge Road, Carnforth	0.1	0.1	0.3	1.1	1.4	0.5	0.1	14.3	0.0	0.0	17.8			17.8	17.6
Other destinations	0.4	0.1	0.2	0.0	0.2	0.4	0.4	11.3	0.9	5.5	19.3			19.3	19.1
Outside of the District Sub-Total	**0.7**	**0.2**	**0.5**	**2.7**	**2.3**	**1.0**	**0.4**	**35.5**	**17.7**	**44.0**	**105.1**			**105.1**	***103.9***
Total	**26.4**	**17.7**	**23.7**	**22.3**	**18.8**	**33.2**	**22.3**	**60.8**	**47.5**	**48.9**	**321.4**		**3.1**	**337.9**	**337.9**

Notes:
(i) Source: Tables 3a, 6
(ii) Rounding errors may occur
(iii) Inflow to destinations in Kirkby Lonsdale and Ulverston is set at 5% of turnover, based on the findings of the Barrow Retail Study 2006 and the Lancaster City Council Retail Study Update 2009
(iv) Revised Total assumes that Booths (Dodge CroftRoad), Kirkby Lonsdale trades at the mid-point between survey derived and bencmark turnover. Turnover of other stores/destinations reduces pro-rata
(v) Tourist Spending from Table 7 and projected forward from 2012 pro-rata to the growth in spending power of Study Area residents

2010 Prices Inclusive of VAT where applicable, unless otherwise stated

Table 12: Summary of Convenience Retail Performance 2012 to 2025

Centre	2012	2017	2022	2025
Available Expenditure				
Kendal	128.80	132.12	138.18	141.87
Kirkby Lonsdale	13.17	13.35	13.65	13.84
Ulverston	31.93	32.71	34.19	35.08
Grange over Sands	6.88	7.05	7.37	7.56
Milnthorpe	4.17	4.27	4.47	4.58
Other destinations South Lakeland	5.74	5.90	6.18	6.35
South Lakeland Sub-Total	190.68	195.41	204.03	209.28
Benchmark Turnover				
Kendal	97.50	97.50	97.50	97.50
Kirkby Lonsdale	15.26	15.26	15.26	15.26
Ulverston	21.30	21.30	21.30	21.30
Grange over Sands	4.42	4.42	4.42	4.42
Milnthorpe	2.00	2.00	2.00	2.00
Other destinations South Lakeland	5.74	5.90	6.18	6.35
South Lakeland Sub-Total	146.22	146.38	146.66	146.83
Expenditure Deficit/Surplus				
Kendal	31.30	34.62	40.68	44.37
Kirkby Lonsdale	-2.09	-1.91	-1.61	-1.42
Ulverston	10.63	11.41	12.89	13.78
Grange over Sands	2.46	2.63	2.95	3.14
Milnthorpe	2.17	2.27	2.47	2.58
Other destinations South Lakeland	0.00	0.00	0.00	0.00
South Lakeland Sub-Total	44.46	49.03	57.37	62.45

Notes:
(i) Source: Tables 8, 9, 10, 11
(ii) Benchmark Turnover based upon national-multiple retailers' company average sales densities and independent floorspace trading at typical average sales densities

2010 Prices Inclusive of VAT where applicable, unless otherwise stated

Table 13: Convenience Retail Capacity (sq.m) at 2012, 2017, 2022 and 2025

Centre	AT 2012			BY 2017			BY 2022			BY 2025		
	Expenditure Surplus/ Deficit	Turnover Density /sq.m max	Net Sales Floorspace sq.m min	Expenditure Surplus/ Deficit	Turnover Density /sq.m max	Net Sales Floorspace sq.m min	Expenditure Surplus/ Deficit	Turnover Density /sq.m max	Net Sales Floorspace sq.m min	Expenditure Surplus/ Deficit	Turnover Density /sq.m max	Net Sales Floorspace sq.m min
Kendal	31.3	13,000	2,408	34.6	13,000	2,663	40.7	13,000	3,129	44.4	13,000	3,413
Kirkby Lonsdale	-2.1	8,000	-	-1.9	8,000	-	-1.6	8,000	-	-1.4	8,000	-
Ulverston	10.6	10,000	1,063	11.4	10,000	1,141	12.9	10,000	1,289	13.8	10,000	1,378
Grange over Sands	2.5	8,000	307	2.6	8,000	328	2.9	8,000	368	3.1	8,000	393
Milnthorpe	2.2	8,000	271	2.3	8,000	284	2.5	8,000	308	2.6	8,000	323
Other destinations South Lakeland	0.0	8,000	0	0.0	8,000	0	0.0	8,000	0	0.0	8,000	0

Notes:
(i) Source: Table 12
(ii) Capacity is assessed using a food superstore convenience retail sales density of £13,000/sq. m (Asda, Morrisons, Sainsbury's and Tesco average) for Kendal and lower sales densities for other destinations given the likelihood of secondary centres attracting smaller stores/retailers with lower average sales densities
(iii) Assumes other destinations in South Lakeland are trading at expected levels

2010 Prices Inclusive of VAT where applicable, unless otherwise stated

Table 14: Comparison Shopping Patterns

Centre/Facilities	Market Share (%)										
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Total
	Kendal Central and West	Kendal North and North East	Kendal South	Grange-over-Sands	Milnthorpe	Windermere	Sedbergh, Grayrigg and Staveley	Arnside, Siverdale, Carnforth and Kirkby Lonsdale	Ulverston	Consiton and Broughton-in-Furness	
Kendal Town Centre (PSA/SSA)	62.86	62.84	63.90	31.52	53.53	48.83	54.42	23.66	5.35	2.17	41.34
Kirkby Lonsdale Town Centre	0.00	0.00	0.00	0.00	0.57	0.15	0.11	2.09	0.00	0.00	0.29
Ulverston Town Centre (PSA)	0.45	0.00	0.00	1.48	0.00	0.55	0.00	0.00	25.68	2.66	3.08
Grange over Sands Town Centre	0.00	0.28	0.00	19.17	0.75	0.00	0.13	0.00	0.78	0.00	1.89
Milnthorpe Town Centre	0.00	0.14	0.06	0.21	9.57	0.00	0.70	0.93	0.00	0.00	1.14
Kendal Area											
South Lakeland Retail Park	15.31	18.88	11.45	6.05	7.94	11.35	13.63	4.99	0.00	0.13	8.95
Other destinations	9.44	8.29	9.56	8.72	8.62	3.61	8.03	2.90	0.29	0.00	6.02
Ulverston Area	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.12**	**0.00**	**0.01**
Other destinations South Lakeland											
Other destinations	0.12	0.19	0.12	2.47	0.33	0.00	0.13	1.26	0.00	0.15	0.46
South Lakeland Sub-total	**88.18**	**90.62**	**85.09**	**69.62**	**81.31**	**64.49**	**77.15**	**35.83**	**32.22**	**5.11**	**63.18**
Within South Lakeland but under National Park Control											
Lake District National Park Area											
Windermere	0.19	0.00	0.41	0.90	0.79	9.07	0.00	0.28	0.30	0.00	1.20
Ambleside Rural Service Centre	0.00	0.28	0.50	0.00	0.28	6.72	0.25	0.00	0.54	0.00	0.87
Other destinations	0.22	0.14	0.15	0.79	0.13	2.53	0.92	0.17	0.05	0.00	0.52
Yorkshire Dales National Park Area											
Sedbergh Local Centre	0.17	0.00	0.00	0.00	0.00	0.00	8.16	0.00	0.00	0.00	0.87
Within South Lakeland but under National Park Control Sub-total	**0.58**	**0.42**	**1.06**	**1.69**	**1.20**	**18.32**	**9.33**	**0.45**	**0.89**	**0.00**	**3.46**
Defined Centres Outside of the District											
Lancaster City Centre	2.17	1.22	1.95	2.54	5.38	1.68	3.77	35.81	1.42	0.00	5.41
Manchester City Centre	2.39	1.00	2.17	5.15	1.07	1.29	1.41	3.98	2.38	2.41	2.26
Preston City Centre	1.33	1.11	1.47	1.93	2.19	2.54	2.17	4.25	0.43	1.25	1.85
Carlisle City Centre	1.89	0.60	1.16	1.80	1.20	2.00	2.13	0.28	0.29	0.69	1.20
Bolton le Sands Village Centre	0.17	0.30	0.18	0.19	0.00	0.29	0.51	0.81	0.27	0.00	0.26
Morecambe Town Centre	0.17	0.65	1.03	0.06	0.32	0.33	0.13	3.80	0.00	0.00	0.62
Carnforth Town Centre	0.00	0.00	0.00	0.00	0.95	0.00	0.00	7.43	0.00	0.00	0.82
Barrow in Furness Town Centre	0.89	0.70	1.06	14.23	2.27	5.46	0.51	0.21	52.70	69.55	14.83
Other destinations	2.06	2.83	4.82	2.29	3.50	3.60	2.74	6.90	8.23	18.44	5.50
Retail Parks Outside of the District											
Hollywood Retail Park, Barrow in Furness	0.00	0.00	0.00	0.51	0.47	0.00	0.00	0.00	1.18	2.55	0.49
Lancaster Retail Park, Morecambe	0.17	0.56	0.00	0.00	0.13	0.00	0.17	0.26	0.00	0.00	0.13
Outside of the District Sub-Total	**11.24**	**8.97**	**13.84**	**28.70**	**17.48**	**17.19**	**13.54**	**63.73**	**66.90**	**94.89**	**33.37**
Total	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**

Notes:
(i) Source: NEMS Household Telephone Survey (December 2011) - Excludes Don't Know/Don't Do and Other responses
(ii) Weightings afforded to Non-Food Shopping are: clothing and footwear (25%); electrical items (16%); furniture/soft furnishings/carpets (12%); DIY/garden/hardware items (11%); health, beauty and chemist items (11%); and books, CDs, toys and gifts (25%).

2010 Prices Inclusive of VAT where applicable, unless otherwise stated

Table 15: Comparison Goods Spending Potential of Tourists/Visitors

Total Tourist Spending on Shopping in South Lakeland (2010) (£m excl. VAT)	Proportion Directed to Comparison Retail Destinations (%)	Comparison Retail Spending directed to South Lakeland LDF Area (2010) (£m incl. VAT)	Proportion of South Lakeland Tourist Visits to South Lakeland LDF Area (%)	Comparison Retail Spending directed to South Lakeland (2010) (£m incl. VAT)	Total Tourist Spending on Shopping in South Lakeland (2012) (£m excl. VAT)
74.3	58.0	51.6	39.4	20.3	20.3

(i) Total Tourist Spending on Shopping in South Lakeland (2010) from STEAM Model Trend for the period 2008 to 2010 (STEAM Model outputs for South Lakeland District) - Global Tourism Solitions UK Ltd -excludes VAT, which is added in Column 4 given that the table relates to the sale of non-food goods STEAM Model Trend for the Period 2008 to 2010 attached at Appendix 5

(ii) Total Tourist Spending (2012) is adjusted from the 2010 figure pro-rata to the reduction in per capita comparison goods spending identified in Table 2(b)

(iii) Proportion of Tourist Spending directed to comparison goods purchases assumed to be the same as the proportion of Study Area retail expenditure directed to comparison goods (from Table 3a and 3b)

(iv) Proprtion of South Lakeland Tourist Visitis to South Lakeland LDF Area based upon 2006 TIC Survey of visits to TIC Offices -assumes that the proportion of visits to TICs in Ambleside, Broughton and Widermere (outside the LDF Area) and the proportion of visits to TICs in Grange-over-Sands, Kirby Lonsdale, Kendal and Ulverston (within the LDF area) is directly proprtion to the proprtion of visitor days in each.

2010 Prices Inclusive of VAT where applicable, unless otherwise stated

Table 16: Comparison Retail Turnover 2012

Centre/Facilities	Expenditure (£m) Zone 1 Kendal Central and West	Zone 2 Kendal North and North East	Zone 3 Kendal South	Zone 4 Grange-over-Sands	Zone 5 Milnthorpe	Zone 6 Windermere	Zone 7 Sedbergh, Grayrigg and Staveley	Zone 8 Arnside, Silverdale, Carnforth and Kirkby Lonsdale	Zone 9 Ulverston	Zone 10 Consiton and Broughton-in-Furness	Sub-Total	Tourist Spend	Total	Revised Total
Expenditure 2012	**33.2**	**22.3**	**30.8**	**25.8**	**24.6**	**40.2**	**28.7**	**76.2**	**60.8**	**60.3**	**402.9**	**20.3**	**423.2**	**423.2**
South Lakeland District														
Kendal Town Centre (PSA/SSA)	20.9	14.0	19.7	8.1	13.2	19.6	15.6	18.0	3.3	1.3	133.7	12.8	146.5	145.6
Kirkby Lonsdale Town Centre	0.0	0.0	0.0	0.0	0.1	0.1	0.0	1.6	0.0	0.0	1.8	0.2	2.0	4.6
Ulverston Town Centre (PSA)	0.1	0.0	0.0	0.4	0.0	0.2	0.0	0.0	15.6	1.6	18.0	1.7	19.7	19.6
Grange over Sands Town Centre	0.0	0.1	0.0	4.9	0.2	0.0	0.0	0.0	0.5	0.0	5.7	0.5	6.2	6.2
Milnthorpe Town Centre	0.0	0.0	0.0	0.1	2.4	0.0	0.2	0.7	0.0	0.0	3.4	0.3	3.7	3.7
Kendal Area														
South Lakeland Retail Park	5.1	4.2	3.5	1.6	2.0	4.6	3.9	3.8	0.0	0.1	28.7	2.7	31.4	31.2
Other destinations	3.1	1.9	2.9	2.2	2.1	1.5	2.3	2.2	0.2	0.0	18.4	1.8	20.2	20.1
Kendal Area Sub-total	**8.2**	**6.1**	**6.5**	**3.8**	**4.1**	**6.0**	**6.2**	**6.0**	**0.2**	**0.1**	**47.1**	***4.5***	**51.6**	**51.3**
Ulverston Area	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.1**	**0.0**	**0.1**	**0.0**	**0.1**	**0.1**
Other destinations South Lakeland														
Other destinations	0.0	0.0	0.0	0.6	0.1	0.0	0.0	1.0	0.0	0.1	1.9	0.2	2.1	2.1
Other destinations South Lakeland Sub-total	**0.0**	**0.0**	**0.0**	**0.6**	**0.1**	**0.0**	**0.0**	**1.0**	**0.0**	**0.1**	**1.9**	***0.2***	**2.1**	**2.1**
South Lakeland Sub-total	**29.3**	**20.2**	**26.2**	**17.9**	**20.0**	**25.9**	**22.2**	**27.3**	**19.6**	**3.1**	**211.7**	**20.3**	**232.0**	**233.2**
Within South Lakeland but under National Park Control														
Lake District National Park Area														
Windermere	0.1	0.0	0.1	0.2	0.2	3.6	0.0	0.2	0.2	0.0	4.7		4.7	4.6
Ambleside Rural Service Centre	0.0	0.1	0.2	0.0	0.1	2.7	0.1	0.0	0.3	0.0	3.4		3.4	3.4
Other destinations	0.1	0.0	0.0	0.2	0.0	1.0	0.3	0.1	0.0	0.0	1.8		1.8	1.8
Yorkshire Dales National Park Area														
Sedbergh Local Centre	0.1	0.0	0.0	0.0	0.0	0.0	2.3	0.0	0.0	0.0	2.4		2.4	2.4
Within South Lakeland but under National Park Control Sub-total	**0.2**	**0.1**	**0.3**	**0.4**	**0.3**	**7.4**	**2.7**	**0.3**	**0.5**	**0.0**	**12.3**		**12.3**	**12.2**
Defined Centres Outside of the District														
Lancaster City Centre	0.7	0.3	0.6	0.7	1.3	0.7	1.1	27.3	0.9	0.0	33.5		33.5	33.3
Manchester City Centre	0.8	0.2	0.7	1.3	0.3	0.5	0.4	3.0	1.4	1.5	10.1		10.1	10.1
Preston City Centre	0.4	0.2	0.5	0.5	0.5	1.0	0.6	3.2	0.3	0.8	8.1		8.1	8.0
Carlisle City Centre	0.6	0.1	0.4	0.5	0.3	0.8	0.6	0.2	0.2	0.4	4.1		4.1	4.1
Bolton le Sands Village Centre	0.1	0.1	0.1	0.0	0.0	0.1	0.1	0.6	0.2	0.0	1.3		1.3	1.3
Morecambe Town Centre	0.1	0.1	0.3	0.0	0.1	0.1	0.0	2.9	0.0	0.0	3.7		3.7	3.7
Carnforth Town Centre	0.0	0.0	0.0	0.0	0.2	0.0	0.0	5.7	0.0	0.0	5.9		5.9	5.9
Barrow in Furness Town Centre	0.3	0.2	0.3	3.7	0.6	2.2	0.1	0.2	32.0	42.0	81.5		81.5	81.0
Other destinations	0.7	0.6	1.5	0.6	0.9	1.4	0.8	5.3	5.0	11.1	27.9		27.9	27.7
Defined centres Outside of the District Sub-total	**3.7**	**1.9**	**4.3**	**7.3**	**4.1**	**6.9**	**3.8**	**48.4**	**40.0**	**55.7**	**176.0**		**176.0**	**174.9**
Retail Parks Outside of the District														
Hollywood Retail Park, Barrow in Furness	0.0	0.0	0.0	0.1	0.1	0.0	0.0	0.0	0.7	1.5	2.5		2.5	2.5
Lancaster Retail Park, Morecambe	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.5		0.5	0.5
Retail Parks Outside of the District Sub-total	**0.1**	**0.1**	**0.0**	**0.1**	**0.1**	**0.0**	**0.0**	**0.2**	**0.7**	**1.5**	**3.0**		**3.0**	**2.9**
Outside of the District Sub-Total	**3.7**	**2.0**	**4.3**	**7.4**	**4.3**	**6.9**	**3.9**	**48.6**	**40.7**	**57.3**	**179.0**		**179.0**	**177.9**
Total	**33.2**	**22.3**	**30.8**	**25.8**	**24.6**	**40.2**	**28.7**	**76.2**	**60.8**	**60.3**	**402.9**		**423.2**	**423.2**

Notes:

(i) Source: Tables 3b, 15

(ii) Rounding errors may occur

(iii) Revised Total assumes that Kirkby Lonsdale town centre trades at the mid-point between survey derived and bencmark turnover. Turnover of other stores/destinations reduces pro-rata

(iv) Tourist Spending from Table 15

2010 Prices Inclusive of VAT where applicable, unless otherwise stated

Table 17: Comparison Retail Turnover 2017

Centre/Facilities	Expenditure (£m) Zone 1 Kendal Central and West	Zone 2 Kendal North and North East	Zone 3 Kendal South	Zone 4 Grange-over-Sands	Zone 5 Milnthorpe	Zone 6 Windermere	Zone 7 Sedbergh, Grayrigg and Staveley	Zone 8 Arnside, Silverdale, Carnforth and Kirkby Lonsdale	Zone 9 Ulverston	Zone 10 Consiton and Broughton-in-Furness	Sub-Total	Tourist Spend	Total	Revised Total
Expenditure 2017	**39.9**	**26.9**	**37.0**	**31.0**	**29.6**	**48.4**	**34.6**	**92.5**	**73.2**	**72.5**	**485.5**	**20.8**	**506.3**	**506.3**
South Lakeland District														
Kendal Town Centre (PSA/SSA)	25.1	16.9	23.7	9.8	15.8	23.6	18.8	21.9	3.9	1.6	161.0	13.1	174.2	173.3
Kirkby Lonsdale Town Centre	0.0	0.0	0.0	0.0	0.2	0.1	0.0	1.9	0.0	0.0	2.2	0.2	2.4	5.1
Ulverston Town Centre (PSA)	0.2	0.0	0.0	0.5	0.0	0.3	0.0	0.0	18.8	1.9	21.6	1.8	23.4	23.3
Grange over Sands Town Centre	0.0	0.1	0.0	5.9	0.2	0.0	0.0	0.0	0.6	0.0	6.9	0.6	7.4	7.4
Milnthorpe Town Centre	0.0	0.0	0.0	0.1	2.8	0.0	0.2	0.9	0.0	0.0	4.1	0.3	4.4	4.4
Kendal Area														
South Lakeland Retail Park	6.1	5.1	4.2	1.9	2.3	5.5	4.7	4.6	0.0	0.1	34.6	2.8	37.4	37.2
Other destinations	3.8	2.2	3.5	2.7	2.5	1.7	2.8	2.7	0.2	0.0	22.2	1.8	24.0	23.9
Kendal Area Sub-total	**9.9**	**7.3**	**7.8**	**4.6**	**4.9**	**7.2**	**7.5**	**7.3**	**0.2**	**0.1**	**56.8**	**4.6**	**61.4**	**61.1**
Ulverston Area	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.1**	**0.0**	**0.1**	**0.0**	**0.1**	**0.1**
Other destinations South Lakeland														
Other destinations	0.0	0.1	0.0	0.8	0.1	0.0	0.0	1.2	0.0	0.1	2.3	0.2	2.5	2.5
Other destinations South Lakeland Sub-total	**0.0**	**0.1**	**0.0**	**0.8**	**0.1**	**0.0**	**0.0**	**1.2**	**0.0**	**0.1**	**2.3**	**0.2**	**2.5**	**2.5**
South Lakeland Sub-total	**35.2**	**24.3**	**31.5**	**21.6**	**24.0**	**31.2**	**26.7**	**33.1**	**23.6**	**3.7**	**255.0**	**20.8**	**275.8**	**277.0**
Within South Lakeland but under National Park Control														
Lake District National Park Area														
Windermere	0.1	0.0	0.2	0.3	0.2	4.4	0.0	0.3	0.2	0.0	5.6		5.6	5.6
Ambleside Rural Service Centre	0.0	0.1	0.2	0.0	0.1	3.3	0.1	0.0	0.4	0.0	4.1		4.1	4.1
Other destinations	0.1	0.0	0.1	0.2	0.0	1.2	0.3	0.2	0.0	0.0	2.2		2.2	2.2
Yorkshire Dales National Park Area														
Sedbergh Local Centre	0.1	0.0	0.0	0.0	0.0	0.0	2.8	0.0	0.0	0.0	2.9		2.9	2.9
Within South Lakeland but under National Park Control Sub-total	**0.2**	**0.1**	**0.4**	**0.5**	**0.4**	**8.9**	**3.2**	**0.4**	**0.7**	**0.0**	**14.8**		**14.8**	**14.7**
Defined Centres Outside of the District														
Lancaster City Centre	0.9	0.3	0.7	0.8	1.6	0.8	1.3	33.1	1.0	0.0	40.6		40.6	40.4
Manchester City Centre	1.0	0.3	0.8	1.6	0.3	0.6	0.5	3.7	1.7	1.7	12.2		12.2	12.2
Preston City Centre	0.5	0.3	0.5	0.6	0.6	1.2	0.8	3.9	0.3	0.9	9.7		9.7	9.7
Carlisle City Centre	0.8	0.2	0.4	0.6	0.4	1.0	0.7	0.3	0.2	0.5	4.9		4.9	4.9
Bolton le Sands Village Centre	0.1	0.1	0.1	0.1	0.0	0.1	0.2	0.7	0.2	0.0	1.5		1.5	1.5
Morecambe Town Centre	0.1	0.2	0.4	0.0	0.1	0.2	0.0	3.5	0.0	0.0	4.5		4.5	4.4
Carnforth Town Centre	0.0	0.0	0.0	0.0	0.3	0.0	0.0	6.9	0.0	0.0	7.2		7.2	7.1
Barrow in Furness Town Centre	0.4	0.2	0.4	4.4	0.7	2.6	0.2	0.2	38.6	50.4	98.0		98.0	97.5
Other destinations	0.8	0.8	1.8	0.7	1.0	1.7	0.9	6.4	6.0	13.4	33.6		33.6	33.4
Defined Centres Outside of the District Sub-total	**4.4**	**2.3**	**5.1**	**8.7**	**5.0**	**8.3**	**4.6**	**58.7**	**48.1**	**67.0**	**212.2**		**212.2**	**211.1**
Retail Parks Outside of the District														
Hollywood Retail Park, Barrow in Furness	0.0	0.0	0.0	0.2	0.1	0.0	0.0	0.0	0.9	1.8	3.0		3.0	3.0
Lancaster Retail Park, Morecambe	0.1	0.2	0.0	0.0	0.0	0.0	0.1	0.2	0.0	0.0	0.6		0.6	0.6
Retail Parks Outside of the District Sub-total	**0.1**	**0.2**	**0.0**	**0.2**	**0.2**	**0.0**	**0.1**	**0.2**	**0.9**	**1.8**	**3.6**		**3.6**	**3.5**
Outside of the District Sub-Total	**4.5**	**2.4**	**5.1**	**8.9**	**5.2**	**8.3**	**4.7**	**58.9**	**48.9**	**68.8**	**215.8**		**215.8**	**214.6**
Total	**39.9**	**26.9**	**37.0**	**31.0**	**29.6**	**48.4**	**34.6**	**92.5**	**73.2**	**72.5**	**485.5**		**506.3**	**506.3**

Notes:
(i) Source: Tables 3b, 15
(ii) Rounding errors may occur
(iii) Revised Total assumes that Kirkby Lonsdale town centre trades at the mid-point between survey derived and bencmark turnover. Turnover of other stores/destinations reduces pro-rata
(iv) Tourist Spending from Table 15 and extended projected forward from 2012 pro-rata to the growth in spending power of Study Area residents

2010 Prices Inclusive of VAT where applicable, unless otherwise stated

Table 18: Comparison Retail Turnover 2022

Centre/Facilities	Expenditure (£m) Zone 1 Kendal Central and West	Zone 2 Kendal North and North East	Zone 3 Kendal South	Zone 4 Grange-over-Sands	Zone 5 Milnthorpe	Zone 6 Windermere	Zone 7 Sedbergh, Grayrigg and Staveley	Zone 8 Arnside, Siverdale, Carnforth and Kirkby Lonsdale	Zone 9 Ulverston	Zone 10 Consiton and Broughton-in-Furness	Sub-Total	Tourist Spend	Total	Revised Total
Expenditure 2022	**50.6**	**34.0**	**46.9**	**39.3**	**37.4**	**61.3**	**43.8**	**117.9**	**92.7**	**91.7**	**615.5**	**21.7**	**637.2**	**637.2**
South Lakeland District														
Kendal Town Centre (PSA/SSA)	31.8	21.4	30.0	12.4	20.0	29.9	23.8	27.9	5.0	2.0	204.2	13.7	217.9	217.1
Kirkby Lonsdale Town Centre	0.0	0.0	0.0	0.0	0.2	0.1	0.0	2.5	0.0	0.0	2.8	0.2	3.0	5.4
Ulverston Town Centre (PSA)	0.2	0.0	0.0	0.6	0.0	0.3	0.0	0.0	23.8	2.4	27.4	1.8	29.2	29.1
Grange over Sands Town Centre	0.0	0.1	0.0	7.5	0.3	0.0	0.1	0.0	0.7	0.0	8.7	0.6	9.3	9.2
Milnthorpe Town Centre	0.0	0.0	0.0	0.1	3.6	0.0	0.3	1.1	0.0	0.0	5.1	0.3	5.5	5.5
Kendal Area														
South Lakeland Retail Park	7.7	6.4	5.4	2.4	3.0	7.0	6.0	5.9	0.0	0.1	43.8	2.9	46.8	46.6
Other destinations	4.8	2.8	4.5	3.4	3.2	2.2	3.5	3.4	0.3	0.0	28.1	1.9	30.0	29.9
Kendal Area Sub-total	**12.5**	**9.2**	**9.9**	**5.8**	**6.2**	**9.2**	**9.5**	**9.3**	**0.3**	**0.1**	**72.0**	**4.8**	**76.8**	**76.5**
Ulverston Area	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.1**	**0.0**	**0.1**	**0.0**	**0.1**	**0.1**
Other destinations South Lakeland														
Other destinations	0.1	0.1	0.1	1.0	0.1	0.0	0.1	1.5	0.0	0.1	3.0	0.2	3.2	3.1
Other destinations South Lakeland Sub-total	**0.1**	**0.1**	**0.1**	**1.0**	**0.1**	**0.0**	**0.1**	**1.5**	**0.0**	**0.1**	**3.0**	**0.2**	**3.2**	**3.1**
South Lakeland Sub-total	**44.6**	**30.8**	**39.9**	**27.3**	**30.5**	**39.5**	**33.8**	**42.2**	**29.9**	**4.7**	**323.2**	**21.7**	**344.9**	**346.0**
Within South Lakeland but under National Park Control														
Lake District National Park Area														
Windermere	0.1	0.0	0.2	0.4	0.3	5.6	0.0	0.3	0.3	0.0	7.1		7.1	7.1
Ambleside Rural Service Centre	0.0	0.1	0.2	0.0	0.1	4.1	0.1	0.0	0.5	0.0	5.2		5.2	5.1
Other destinations	0.1	0.0	0.1	0.3	0.0	1.6	0.4	0.2	0.0	0.0	2.8		2.8	2.8
Yorkshire Dales National Park Area														
Sedbergh Local Centre	0.1	0.0	0.0	0.0	0.0	0.0	3.6	0.0	0.0	0.0	3.7		3.7	3.6
Within South Lakeland but under National Park Control Sub-total	**0.3**	**0.1**	**0.5**	**0.7**	**0.4**	**11.2**	**4.1**	**0.5**	**0.8**	**0.0**	**18.7**		**18.7**	**18.6**
Defined Centres Outside of the District														
Lancaster City Centre	1.1	0.4	0.9	1.0	2.0	1.0	1.7	42.2	1.3	0.0	51.6		51.6	51.4
Manchester City Centre	1.2	0.3	1.0	2.0	0.4	0.8	0.6	4.7	2.2	2.2	15.5		15.5	15.4
Preston City Centre	0.7	0.4	0.7	0.8	0.8	1.6	1.0	5.0	0.4	1.1	12.4		12.4	12.3
Carlisle City Centre	1.0	0.2	0.5	0.7	0.4	1.2	0.9	0.3	0.3	0.6	6.3		6.3	6.2
Bolton le Sands Village Centre	0.1	0.1	0.1	0.1	0.0	0.2	0.2	1.0	0.3	0.0	2.0		2.0	1.9
Morecambe Town Centre	0.1	0.2	0.5	0.0	0.1	0.2	0.1	4.5	0.0	0.0	5.7		5.7	5.7
Carnforth Town Centre	0.0	0.0	0.0	0.0	0.4	0.0	0.0	8.8	0.0	0.0	9.1		9.1	9.1
Barrow in Furness Town Centre	0.4	0.2	0.5	5.6	0.9	3.3	0.2	0.2	48.8	63.8	124.0		124.0	123.6
Other destinations	1.0	1.0	2.3	0.9	1.3	2.2	1.2	8.1	7.6	16.9	42.5		42.5	42.4
Defined Centres Outside of the District Sub-total	**5.6**	**2.9**	**6.5**	**11.1**	**6.3**	**10.5**	**5.9**	**74.8**	**60.9**	**84.7**	**269.1**		**269.1**	**268.1**
Retail Parks Outside of the District														
Hollywood Retail Park, Barrow in Furness	0.0	0.0	0.0	0.2	0.2	0.0	0.0	0.0	1.1	2.3	3.8		3.8	3.8
Lancaster Retail Park, Morecambe	0.1	0.2	0.0	0.0	0.0	0.0	0.1	0.3	0.0	0.0	0.7		0.7	0.7
Retail Parks Outside of the District	**0.1**	**0.2**	**0.0**	**0.2**	**0.2**	**0.0**	**0.1**	**0.3**	**1.1**	**2.3**	**4.5**		**4.5**	**4.5**
Outside of the District Sub-Total	**5.7**	**3.1**	**6.5**	**11.3**	**6.5**	**10.5**	**5.9**	**75.1**	**62.0**	**87.0**	**273.6**		**273.6**	**272.6**
Total	**50.6**	**34.0**	**46.9**	**39.3**	**37.4**	**61.3**	**43.8**	**117.9**	**92.7**	**91.7**	**615.5**		**637.3**	**637.3**

Notes:
(i) Source: Tables 3b, 15
(ii) Rounding errors may occur
(iii) Revised Total assumes that Kirkby Lonsdale town centre trades at the mid-point between survey derived and bencmark turnover. Turnover of other stores/destinations reduces pro-rata
(iv) Tourist Spending from Table 15 and extended projected forward from 2012 pro-rata to the growth in spending power of Study Area residents

2010 Prices Inclusive of VAT where applicable, unless otherwise stated

Table 19: Comparison Retail Turnover 2025

Centre/Facilities	Expenditure (£m) Zone 1 Kendal Central and West	Zone 2 Kendal North and North East	Zone 3 Kendal South	Zone 4 Grange-over-Sands	Zone 5 Milnthorpe	Zone 6 Windermere	Zone 7 Sedbergh, Grayrigg and Staveley	Zone 8 Arnside, Siverdale, Carnforth and Kirkby Lonsdale	Zone 9 Ulverston	Zone 10 Consiton and Broughton-in-Furness	Sub-Total	Tourist Spend	Total	Revised Total
Expenditure 2025	**58.3**	**39.2**	**54.1**	**45.3**	**43.2**	**70.7**	**50.5**	**136.6**	**106.9**	**105.6**	**710.4**	**22.3**	**732.7**	**732.7**
South Lakeland District														
Kendal Town Centre (PSA/SSA)	36.7	24.7	34.6	14.3	23.1	34.5	27.5	32.3	5.7	2.3	235.6	14.1	249.7	248.8
Kirkby Lonsdale Town Centre	0.0	0.0	0.0	0.0	0.2	0.1	0.1	2.9	0.0	0.0	3.3	0.2	3.5	6.1
Ulverston Town Centre (PSA)	0.3	0.0	0.0	0.7	0.0	0.4	0.0	0.0	27.4	2.8	31.6	1.9	33.5	33.3
Grange over Sands Town Centre	0.0	0.1	0.0	8.7	0.3	0.0	0.1	0.0	0.8	0.0	10.0	0.6	10.6	10.6
Milnthorpe Town Centre	0.0	0.1	0.0	0.1	4.1	0.0	0.4	1.3	0.0	0.0	5.9	0.4	6.3	6.3
Kendal Area														
South Lakeland Retail Park	8.9	7.4	6.2	2.7	3.4	8.0	6.9	6.8	0.0	0.1	50.6	3.0	53.6	53.4
Other destinations	5.5	3.3	5.2	3.9	3.7	2.6	4.1	4.0	0.3	0.0	32.5	1.9	34.4	34.3
Kendal Area Sub-total	**14.4**	**10.7**	**11.4**	**6.7**	**7.2**	**10.6**	**10.9**	**10.8**	**0.3**	**0.1**	**83.0**	**5.0**	**88.0**	**87.7**
Ulverston Area	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.1**	**0.0**	**0.1**	**0.0**	**0.1**	**0.1**
Other destinations South Lakeland														
Other destinations	0.1	0.1	0.1	1.1	0.1	0.0	0.1	1.7	0.0	0.2	3.4	0.2	3.6	3.6
Other destinations South Lakeland Sub-total	**0.1**	**0.1**	**0.1**	**1.1**	**0.1**	**0.0**	**0.1**	**1.7**	**0.0**	**0.2**	**3.4**	**0.2**	**3.6**	**3.6**
South Lakeland Sub-total	**51.4**	**35.5**	**46.1**	**31.5**	**35.1**	**45.6**	**39.0**	**48.9**	**34.3**	**5.4**	**372.9**	**22.3**	**395.2**	**396.4**
Within South Lakeland but under National Park Control														
Lake District National Park Area														
Windermere	0.1	0.0	0.2	0.4	0.3	6.4	0.0	0.4	0.3	0.0	8.2		8.2	8.2
Ambleside Rural Service Centre	0.0	0.1	0.3	0.0	0.1	4.7	0.1	0.0	0.6	0.0	6.0		6.0	5.9
Other destinations	0.1	0.1	0.1	0.4	0.1	1.8	0.5	0.2	0.1	0.0	3.2		3.2	3.2
Yorkshire Dales National Park Area														
Sedbergh Local Centre	0.1	0.0	0.0	0.0	0.0	0.0	4.1	0.0	0.0	0.0	4.2		4.2	4.2
Within South Lakeland but under National Park Control Sub-total	**0.3**	**0.2**	**0.6**	**0.8**	**0.5**	**12.9**	**4.7**	**0.6**	**1.0**	**0.0**	**21.6**		**21.6**	**21.5**
Defined Centres Outside of the District														
Lancaster City Centre	1.3	0.5	1.1	1.2	2.3	1.2	1.9	48.9	1.5	0.0	59.8		59.8	59.6
Manchester City Centre	1.4	0.4	1.2	2.3	0.5	0.9	0.7	5.4	2.5	2.5	17.9		17.9	17.8
Preston City Centre	0.8	0.4	0.8	0.9	0.9	1.8	1.1	5.8	0.5	1.3	14.3		14.3	14.2
Carlisle City Centre	1.1	0.2	0.6	0.8	0.5	1.4	1.1	0.4	0.3	0.7	7.2		7.2	7.2
Bolton le Sands Village Centre	0.1	0.1	0.1	0.1	0.0	0.2	0.3	1.1	0.3	0.0	2.3		2.3	2.2
Morecambe Town Centre	0.1	0.3	0.6	0.0	0.1	0.2	0.1	5.2	0.0	0.0	6.6		6.6	6.5
Carnforth Town Centre	0.0	0.0	0.0	0.0	0.4	0.0	0.0	10.1	0.0	0.0	10.6		10.6	10.5
Barrow in Furness Town Centre	0.5	0.3	0.6	6.4	1.0	3.9	0.3	0.3	56.3	73.5	143.0		143.0	142.4
Other destinations	1.2	1.1	2.6	1.0	1.5	2.5	1.4	9.4	8.8	19.5	49.1		49.1	48.9
Defined Centres Outside of the District Sub-total	**6.5**	**3.3**	**7.5**	**12.8**	**7.3**	**12.1**	**6.8**	**86.7**	**70.2**	**97.5**	**310.6**		**310.6**	**309.5**
Retail Parks Outside of the District														
Hollywood Retail Park, Barrow in Furness	0.0	0.0	0.0	0.2	0.2	0.0	0.0	0.0	1.3	2.7	4.4		4.4	4.4
Lancaster Retail Park, Morecambe	0.1	0.2	0.0	0.0	0.1	0.0	0.1	0.4	0.0	0.0	0.8		0.8	0.8
Retail Parks Outside of the District Sub-total	**0.1**	**0.2**	**0.0**	**0.2**	**0.3**	**0.0**	**0.1**	**0.4**	**1.3**	**2.7**	**5.2**		**5.2**	**5.2**
Outside of the District Sub-Total	**6.6**	**3.5**	**7.5**	**13.0**	**7.6**	**12.1**	**6.8**	**87.0**	**71.5**	**100.2**	**315.8**		**315.8**	**314.7**
Total	**58.3**	**39.2**	**54.1**	**45.3**	**43.2**	**70.7**	**50.5**	**136.6**	**106.7**	**105.6**	**710.3**		**732.6**	**732.6**

Notes:
(i) Source: Tables 3b, 15
(ii) Rounding errors may occur
(iii) Revised Total assumes that Kirkby Lonsdale town centre trades at the mid-point between survey derived and bencmark turnover. Turnover of other stores/destinations reduces pro-rata
(iv) Tourist Spending from Table 15 and extended projected forward from 2012 pro-rata to the growth in spending power of Study Area residents

2010 Prices Inclusive of VAT where applicable, unless otherwise stated

Table 20: Summary of Comparison Retail Performance 2012 to 2025

Centre	2012	2017	2022	2025
Available Expenditure				
Kendal	196.92	234.33	293.59	336.46
Kirkby Lonsdale	4.61	5.06	5.36	6.15
Ulverston	19.65	23.35	29.23	33.47
Grange over Sands	6.21	7.38	9.23	10.58
Milnthorpe	3.66	4.36	5.47	6.27
Other destinations South Lakeland	2.10	2.50	3.14	3.61
South Lakeland Sub-Total	233.15	276.99	346.03	396.54
Benchmark Turnover				
Kendal	177.70	190.10	206.81	217.54
Kirkby Lonsdale	7.22	7.72	8.40	8.84
Ulverston	12.16	13.01	14.15	14.89
Grange over Sands	10.31	11.03	12.00	12.62
Milnthorpe	5.03	5.38	5.85	6.16
Other destinations South Lakeland	2.10	2.50	3.14	3.61
South Lakeland Sub-Total	214.52	229.74	250.36	263.65
Expenditure Deficit/Surplus				
Kendal	19.22	44.24	86.78	118.92
Kirkby Lonsdale	-2.61	-2.67	-3.04	-2.69
Ulverston	7.49	10.35	15.08	18.59
Grange over Sands	-4.10	-3.65	-2.77	-2.05
Milnthorpe	-1.37	-1.02	-0.38	0.11
Other destinations South Lakeland	0.00	0.00	0.00	0.00
South Lakeland Sub-Total	18.63	47.25	95.67	132.89

Notes:
(i) Source: Tables 16,17,18,19
(ii) Benchmark Turnover based upon national-multiple retailers' company average sales densities and independent floorspace trading at typical average sales densities

2010 Prices Inclusive of VAT where applicable, unless otherwise stated

Table 21: Comparison Retail Capacity (sq.m) at 2012, 2017, 2022 and 2025 (taking account of floorspace efficiencies)

Centre	AT 2012			BY 2017			BY 2022			BY 2025		
	Expenditure Surplus/ Deficit	Turnover Density sq.m	Net Sales Floorspace sq.m	Expenditure Surplus/ Deficit	Turnover Density sq.m	Net Sales Floorspace sq.m	Expenditure Surplus/ Deficit	Turnover Density sq.m	Net Sales Floorspace sq.m	Expenditure Surplus/ Deficit	Turnover Density sq.m	Net Sales Floorspace sq.m
Kendal	19.2	6,000	3,204	44.2	6,419	6,892	86.8	6,983	12,427	118.9	7,345	16,191
Kirkby Lonsdale	-2.6	3,500	-	-2.7	3,864	-	-3.0	4,266	-	-2.7	4,528	-
Ulverston	7.5	3,500	2,140	10.3	3,864	2,677	15.1	4,266	3,534	18.6	4,528	4,105
Grange over Sands	-4.1	3,500	-	-3.7	3,864	-	-2.8	4,266	-	-2.0	4,528	-
Milnthorpe	-1.4	3,500	-	-1.0	3,864	-	-0.4	4,266	-	0.1	4,528	25
Other destinations South Lakeland	0.0	3,500	0	0.0	3,864	0	0.0	4,266	0	0.0	4,528	0
South Lakeland Sub-Total	18.6		3,036	47.2		7,672	95.7		14,511	132.9		19,275

Notes:
(i) Source: Table 18
(ii) Capacity Assessed assuming sales density of £6,000/sq. m for Kendal and £3,500/sq. m for other destinations (typical to primary and secondary town centres/district centres)
(iii) Assumes other destinations in South Lakeland are trading at expected levels

2010 Prices Inclusive of VAT where applicable, unless otherwise stated

Appendix 4 Notes on NLP Retail Assessment Methodology

EXPLANATORY TEXT

Reason for NLP's use of Experian data rather than Pitney Bowes (MapInfo)

Local expenditure estimates and projections are available from two providers, Experian and Pitney Bowes (MapInfo). Both providers base their expenditure estimates on Central Government expenditure data for the country as a whole. Therefore the base data is the same. Experian and Pitney Bowes produce local expenditure estimates based on the socio-economic and demographic characteristics of specific local areas, i.e. to predict if expenditure per capita is higher or lower than the national average. Both providers use lifestyle classifications for households to estimate local expenditure. Experian use the Mosaic classification and Pitney Bowes use the Acorn classification. Mosaic and Acorn use similar, but different, socio-economic household classifications derived by socio-economic and demographic data. These two classifications are produced by two different data providing companies, both sources are widely used. In relation to forecast expenditure growth both Experian and Pitney Bowes provide their own econometric forecasts and projections based on past trends. However, the growth rates provided are broadly similar.

Nathaniel Lichfield & Partners preference is to adopt Experian rather than Pitney Bowes data for the following reasons:

- Both Experian's and Pitney Bowes' local expenditure estimates are based on Central Government data. However, Experian has historically been quicker to update their information as and when new government data becomes available;
- Experian data makes a deduction for tobacco sales within non-retail businesses (e.g. restaurants, public houses, hotels etc.), Pitney Bowes does not;
- Experian data makes a deduction for expenditure abroad, Pitney Bowes does not; and
- Experian classifies 10% of non-durable household goods as comparison rather than convenience expenditure, which relates to goods such as household hardware, pins, needles, tape measures and nuts and bolts (i.e. DIY type goods). The other 90% is classified as convenience goods i.e. cleaning materials, kitchen disposables, cloths etc. Although these goods are defined as comparison by Pitney Bowes, they are not separated out of this spending category and therefore expenditure on them effectively forms part of Pitney Bowes's convenience goods retail spending.

Description of Experian data and projections adopted

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 local consumer expenditure estimates for comparison and convenience goods for each of the study area zones for the year 2010 have been obtained.

Experian's EBS national expenditure information has been used to forecast expenditure within the study area in the short term (2010 to 2013). Experian's forecasts are based on an econometric model of disaggregated consumer spending. This model takes a number of macro-economic forecasts (chiefly consumer spending, incomes and inflation) and uses them to produce forecasts of consumer spending volumes, prices and value, broken down into separate categories of goods. The model incorporates assumptions about income and price elasticities.

For longer term projections Experian provide forecast growth rates and trend line projections. Experian's average annual growth forecast for the period 2014 to 2018 is 0.5% for convenience goods and 3% for comparison goods. The ultra long term trend line annual growth rates are 0.6% for convenience goods and 5.9% for comparison goods.

We believe the Experian's lower EBS growth forecast rates for 2011 to 2013 reflect the current economic circumstances and provide an appropriate growth rate for the short term. In the longer term it is more difficult to forecast year on year changes in expenditure. Experian's longer term growth forecasts (0.5% and 3%) are relatively cautious based on past growth rates. The ultra long trend line projection for comparison goods (5.9%) is relatively optimistic. We believe long term growth (after 2013) is likely to fall within this range and therefore we adopt the mid-point growth rate between Experian's lower growth forecast and the higher trend line projections. The mid-point annual growth rates adopted after 2013 are 0.55% for convenience goods and 4.45% for comparison goods. In our view these mid-point growth rates provide the most appropriate average growth rate following and the economic recovery.

Growth in Convenience Goods Turnover Efficiency

The potential for existing convenience floorspace to increase its turnover efficiency in real terms in the future has been considered. Retail studies should assess the potential for existing floorspace to increase its productivity in the future. Historically limited or no growth in turnover density has been assumed by most retail planners for convenience floorspace. 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.

Growth in Comparison Goods Turnover Efficiency

Allowance is made for the turnover of existing comparison floorspace to increase in real terms in the future. Historically a growth rate of between 1% to 1.5% per annum has been widely adopted by retail planners. 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. Allowing for this growth to be absorbed by existing retailers represents a cautious approach to forecasting future needs, and this allowance may help existing centres maintain their vitality and viability in the future. It effectively allows for existing retail outlets to increase their turnover to help them to compete with new provision.

Recent information provided by Experian (September 2011) recommends turnover efficiency growth of 1.7% per annum for the period after 2013, in line with the post economic recovery expenditure growth rates. We have assumed no growth in turnover efficiency in the short term up to 2013, reflecting Experian's lower expenditure growth forecasts (an average of 1.4% per annum).

NLP's Assumptions on Growth in SFT and E-tailing

Special Forms of Trading (SFT) or non-store activity is included within Experian's Goods Based Expenditure (GBE) estimates. 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 with 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. Experian provides projections for special forms of trading and E-tailing.

This Experian information suggests that non-store retail sales in 2010 is:

- 7.4% of convenience goods expenditure; and
- 11.7% of comparison goods expenditure.

Experian predicts that these figures will increase in the future.

Experian recognises that not all of this SFT expenditure should be excluded from a retail capacity analysis, because some of it relates to internet sales through traditional retail businesses, rather than internet companies. The turnover attributable to e-tail through retail businesses is included in the company average turnovers, and therefore expenditure figures should not exclude this expenditure. Experian has provided adjusted deductions for SFT and projections. These projections have been used to exclude only e-tail expenditure attributed to non-retail businesses, which will not directly impact on the demand for retail floorspace.

The adjusted figures suggests that SFT sales in 2010 is:

- 3.7% of convenience goods expenditure; and
- 8.8% of comparison goods expenditure.

The projections provided by Experian suggest that these percentages could increase to 5.9% and 12.7% by 2016.

General Commentary on E-tailing Trends

Home/electronic shopping has also emerged with the increasing growth in the use of personal computers and the Internet. Trends within this sector may well have implications for retailing. It will be necessary to carefully monitor the growth within this sector particularly in the long term and the effect that it may have on diverting expenditure that might otherwise be spent in shops.

In broad terms, home/electronic shopping from non-retail businesses is classified by Experian as "special forms of trading", as mentioned previously, this includes other forms of retail expenditure not spent in shops e.g. mail order. Special forms of trading have been excluded from the quantitative capacity analysis within this study because this expenditure does not affect the need for retail floorspace. This study makes an allowance for future growth in e-tailing based on Experian projections.

On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains an insignificant percentage of total retail expenditure. Recent trends suggest continued strong growth in this sector, but Experian's projections suggest this growth will level off by 2016/17.

Appendix 5 STEAM/TIC Data

STEAM Model Trend for the Period 2008 to 2010

Sub-Area Analysis for South Lakeland District Council

Summary of Key STEAM Model Outputs for South Lakeland District Council by Year

Total Economic Impact by Sector of Expenditure			
£'s Millions	**2008**	**2009**	**2010**
Direct Expenditure			
Accommodation	174.22	172.89	168.16
Food & Drink	186.04	190.04	184.88
Recreation	53.27	54.65	53.45
Shopping	75.3	77.06	74.26
Transport	105.22	108.18	105.43
Total Direct Expenditure	594.06	602.82	586.18
VAT	103.96	105.49	102.58
Indirect Expenditure	232.68	236.44	231.17
Total	930.69	944.76	919.93

Total Economic Impact by Category of Visitor			
£'s Millions	**2008**	**2009**	**2010**
Serviced	258.6	254.79	244.16
Non-Serviced	213.05	215.18	211.7
Staying with Friends and Relati	9.36	9.32	9.27
Day Visitors	449.68	465.47	454.8
Total	930.69	944.76	919.93

Tourist Days by Category of Visitor			
Millions	**2008**	**2009**	**2010**
Serviced	2.57	2.51	2.39
Non-Serviced	4.63	4.71	4.59
Staying with Friends and Relati	0.39	0.38	0.38
Day Visitors	13.46	13.94	13.62
Total	21.05	21.54	20.98

Tourist Numbers by Category of Visitor			
Millions	**2008**	**2009**	**2010**
Serviced	1.20	1.22	1.08
Non-Serviced	0.72	0.73	0.73
Staying with Friends and Relati	0.16	0.16	0.16
Day Visitors	13.46	13.94	13.62
Total	15.55	16.04	15.59

Sectors in which Employment is Supported (FTE's)			
Monthly Average by Year	**2008**	**2009**	**2010**
Direct Employment			
Accommodation	3,974	4,039	4,039
Food & Drink	3,616	3,596	3,533
Recreation	1,257	1,255	1,240
Shopping	1,334	1,329	1,294
Transport	914	915	900
Total Direct Employment	11,095	11,134	11,004
Indirect Employment	2,984	2,952	2,915
Total	14,079	14,086	13,919

This trend report takes advantage of the updated tourist day visitor volume data from the North West Day and Staying Visitor Survey 2009/10. The trend in tourist day visitor volume and value has been adjusted back to 2000, using the 2009 tourist day visitor and reported year on year percentage changes from 2000 through to 2008.

APPENDIX B

Committee: Cabinet

Date of Meeting: 11th October 2006

Report Title: Implementation of the Tourist Information Centres service review

Centre Options

Community managed provision

Broughton

Annual statistics : Visitor Numbers : 17,500 Telephone enquiries 2750 Accom bookings made 120

Options considered

1. **Reduce service level to single staffed operation with reduced seasonal opening**.

   Whilst reducing cost, this option would also reduce service and not result in added value for the Councils investment.
2. **Create partnership with new community owned business (NewCo) which will manage and run the centre**.
3. **Close operations**.

   This option would not reflect the intention of the Cabinet resolution, it would be met with significant local opposition

Recommended Option

Option 2

This will transfer the responsibility of providing the centre to the new company. Local management will enable the centre to meet local needs and undertake local initiatives. It will result in improved local investment and support for the centre.

It is proposed that existing centre staff are seconded to the new operation, as a means of supporting the partnership and new company in its formative years.

It is the intention that as natural wastage occurs, the new company would take on the employment of its own staff.

The Council would provide part of the costs of employing the seconded staff, which would reduce year on year the first three years of the arrangement. Management inputs would be reduced to almost zero

Information would focus on visitor information.

The new company would be able to secure a 'Visitor Information Point' kiosk from CTB

Grange – over - Sands

Annual statistics: Visitor Numbers : 65000. Telephone enquiries 11000. Accom bookings made 620

Options considered

1. **Reduce service level to single staffed operation with reduced seasonal opening**.

   Whilst reducing cost, this option would also reduce service and not result in added value for the Councils investment.

2. **Create joint delivery arrangement with Grange Town Council.**

3. **Close operations**.
   This option would not reflect the intention of the Cabinet resolution, it would be met with significant local opposition

Recommended Option

Option 2
This option would enable visitor information to be provided whilst also providing a 'front desk' for GTC and residents access to information about local services.

SLDC would reduce TIC services to the equivalent of a single staffed operation. The visitor information service could be supplemented by the installation of a 'Visitor Information Point' (CTB) which will provide kiosk access to DMS and a telephone access to the accommodation booking line.

The retail operation would be reduced to focus on a core supply of guides and maps and a small scale of souvenirs. Free leaflets would be carried as part of the 'VIP' package.

Subject to negotiation, GTC would provide a member of their staff to work in the centre, focussing on providing information on GTC, local services and bookings for Victoria Hall.

The centre would require management input from SLDC. Subject to negotiation, GTC would make a contribution to running costs.

Kirkby Lonsdale

Annual statistics   Visitor Numbers : 26600 Telephone enquiries 4300   Accom bookings made 233

Options considered

1. **Reduce service level to single staffed operation with reduced seasonal opening**.

   Whilst reducing the overall cost, this option would reduce the range of services the centre offers and not result in added value for the Councils investment

2. **Deliver Tourist Information via a 'Kiosk' delivery, based within another business or premises in Kirkby Lonsdale OR in existing premises**
   A host organisation or business would have to be found who would site the kiosk without charge. (Business should benefit from attracting increased footfall into the premises). Significant local resistance to reliance on Kiosk delivery
3. **Develop partnership delivery arrangement with KL Town Council, Chamber of Trade and 'The Voice' community radio.**

4. **Close operations**.

   This option would not reflect the intention of the Cabinet resolution, it would be met with significant local opposition

Recommended Option

Option 1 as a holding operation to enable Option 3

This option would see the continued delivery of the service. SLDC would reduce TIC services to the equivalent of a single staffed operation and consideration of reduced seasonal opening hours. The visitor information service would be supplemented by the installation of a 'Visitor Information Point' (CTB) which will provide kiosk access to DMS and a telephone access to the accommodation booking line.

The involvement of other organisations and their operations combined through the centre would add value in terms of providing, for example, a focus for local business development and business support services, retail offer and the use of volunteers to support the enterprise. Local parties describe this as the 'Enterprise Approach'

There are options to look at relocating such provision into the business premises of another party.

Further work is required to identify a deliverable proposal. Local parties propose that in the immediate term, SLDC reduces service delivery as per option 1. This would give opportunity for the 'Enterprise approach' to be established. Full implementation would be expected by March 2008.

The intent would be for the local partnership to take on the running of the centre with a form of SLA with SLDC for particular aspects of service provision.

Provision by combining Council service delivery

Kendal

Annual statistics Visitor Numbers : 151000   Telephone enquiries 15600   Accom bookings made 1800

1. **Combine the service delivery of Tourist Information Centre and the Kendal Town Hall and the creation of an access point for Council information and services.**

2. **Maintain tourist information focus for the centre**

   This option would retain a priority focus on providing tourism information. The service could include a VIP to assist with the numbers of enquiries.

   The possibility of Kendal Town Council's assistance in running the centre should be investigated.

   A reorganisation of staff roles would be required

   SLDC management input would be required.

   Opportunity would exist for the whole service to be provided by another party through a service delivery contract / agreement

Recommended Option

Option 1

This option would seek to apportion costs of delivering the service between Tourism information and acting as a council access point. To enable a greater handling of enquiries, the tourist information function could be supplemented by the installation of a VIP (CTB), enabling a self help option for users.

The centre would continue with a broad range of visitor services. A proportion of accommodation bookings would be directed towards the Accommodation booking line, via the VIP.

The management and supervision of the information centre would be incorporated with the management and supervision of the public use of Kendal Town Hall.

A reorganisation of staff roles would be required

Management responsibilities would be devolved to the manager of the facility.

Ulverston

Annual statistics Visitor Numbers : 90355 Telephone enquiries 12600 Accom bookings made 295

Options Considered

1. **Combine the service delivery of Tourist Information Centre, box office and the Coronation hall, create an access point for Council information and services.**

2. **Continue with existing arrangements**
   This option would not take account of the service review findings (Public Halls) and would not deliver efficiencies in staffing arrangements

Recommended Option

Option 1

This option seeks to combine a number of 'services' into a singularly managed **'Coronation Hall Service'** This service would : provide access and information to users of Council Services, Deliver management of a theatre and community venue service and provide visitor information.

The visitor information service would be primarily delivered through the installation of a VIP, (CTB), enabling a self help option for users. Staff would assist users.

Accommodation bookings would be directed towards the Accommodation booking line, via the VIP.

Retail activities would be reduced.

The management and supervision of the services would combined into a revised manager role.

A reorganisation of staff roles would be required

Management would be devolved to the manager of the facility.

Provision of Key Centres

Windermere

Annual statistics   Visitor Numbers : 239000   Telephone enquiries 27000   Accom bookings made 5400

Options Considered

1. **To deliver a primary tourist information centre**.

   This option would maintain the centres focus on providing tourist information.
   Services would be revised so that the centre focussed on services which are delivered across the counter.

   Telephone accommodation booking enquiries would be directed to the Accommodation booking line.

   Staff roles would be reviewed to ensure efficiencies with the operation of Ambleside TIC.

   Management arrangements would be shared with Ambleside TIC, dependent upon options for Ambleside

   Future options would be to accommodate an access to Council Services via use of the downstairs area.

2. **To provide a primary tourist information centre through delivery by another organisation**

Recommended Option

Option 2
Undertake detailed investigation of Option 2, whilst preparing for Option 1 should option 2 prove un attainable.
This option would see the delivery of the function (as Option 1) by another party through a service agreement / contract with SLDC

This option would enable external investment in the centre and the services it offers

This option would reduce significantly the level of management input and back office support provided by the Council to the service.

This option will require the transfer of existing staff to the new provider.

The Council has been approached by 2 parties interested in delivering the service. Details are contained within the Part II report.

Further detailed assessment is required.

Ambleside

Annual statistics Visitor Numbers : 256000   Telephone enquiries 31000   Accom bookings made 1800

Options considered

1. **To deliver a primary tourist information centre**.

   This option would maintain the centres focus on providing tourist information.
   Services would be revised so that the centre focussed on services which are delivered across the counter.

   Telephone accommodation booking enquiries would be directed to the Accommodation booking line.

   Staff roles would be reviewed to ensure efficiencies with the operation of Windermere TIC.

   Management arrangements would be shared with Windermere TIC

2. **To provide a primary tourist information centre through delivery by another organisation**

Recommended Option

Option 2
This option would see the delivery of the function by another party through a service agreement / contract with SLDC

This option would enable external investment in the centre and the services it offers

This option would reduce significantly the level of management input and back office support provided by the Council to the service.

This option will require the transfer of existing staff to the new provider.

The Council has been approached by 2 parties interested in delivering the service. Details are contained within the Part II report.

Further detailed assessment is required to evaluate the benefits offered by the 2 parties.

Appendix 6 GOAD Summary Reports

goad Centre Report

Kendal

Experian A world of insight

GETTING THE MOST FROM YOUR GOAD CENTRE REPORT

Each shopping centre has its own unique mix of multiple outlets, independent shops, convenience and comparison stores, food outlets and vacant premises.

Understanding the retail composition of a centre and its effect on local consumers is crucial to the success of any business. By studying the information in the report, you will be able to examine site quality, evaluate threats and opportunities, and assess the vitality and viability of the centre. However, you will only achieve this if you are aware of the various implications of the data that you see. This guide is designed to help you interpret the information you see on the Goad Centre Report.

1. The Local Area
The map in the top left-hand corner of your report locates other local Goad centres. When evaluating the quality of a site, it is often beneficial to compare it with other local shopping centres. Goad Centre Reports are available for any of the highlighted centres.

2. The Indexing System
A simple indexing system appears thr oughout the report. This illustrates the difference between a percentage figure for the centre and the UK average. An index of 100 represents an exact match, anything less than 100 indicates a below average count for the centre, and a figure over 100 represents an above average count.
For example, if restaurants accounted for 10% of a centre's outlets and the UK average was also 10%, the index would be 100. If however, the UK average was 8%, the index would be 125.
The index is an effective gap analysis tool and can be used to identify areas that are under and over represented within a centre. A retail category that is heavily under represented could indicate poor local demand. On the other hand, it could show that there is an untapped market waiting to be serviced. Either way, it provides a st rong indication that the site will need to be examined further.

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Comparing the number of vacant outle ts with the UK average provides a useful insight into the current economic status of a centre. For example, a high index generally represents under-development or decay, while a low index shows a strong retail presence.

5. Multiple Outlets/Key Attractors
A multiple retailer is defined as being part of a network of nine or more outlets. The presence of multiple outlets can greatly enhance the appeal of a centre to local consumers: The strong branding and comprehensive product mix of retailers such as Marks & Spencer, Boots and HMV is often sufficient in itself to attract consumers to a centre. Approximately 27 national multiples have been identified as key attractors, (i.e. those retailers most likely to improve t he consumer appeal of a centre).
The presence of multiple outlets and key attractors can have a significant impact on neighbouring outlets: While other retailers will undoubtedly benefit from increased pedestrian traffi c, (and therefore increased sales opportunities), multiples provide fierce co mpetition for rivals in their retail categories.

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E-mail: goad.sales@uk.experian.com

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Kendal

Survey Date: 17-May-11

Closest Centres	Distance (km)
Kendal - K Village Outlet Shop|	0.9
Milnthorpe	11.3
Windermere	11.8
Bowness-on-Windermere	11.9
Kirkby Lonsdale	16.9

Key Retail Indicators

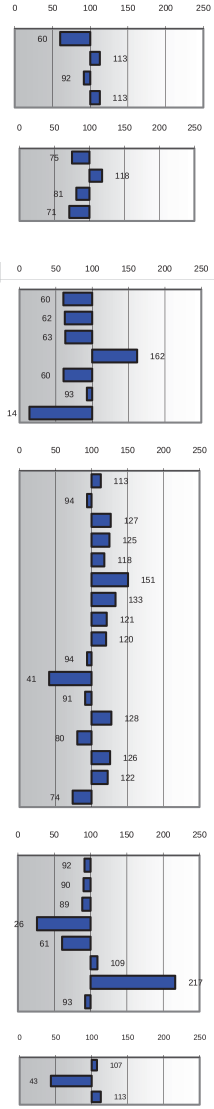
	Count	%	% UK	Index
Total Outlets	398			
Total Floorspace (sq ft)	643,600			
Vacant Outlets	61	15.33	13.60	113
Vacant Floorspace (sq ft)	84,900	13.19	11.85	111
Multiple Outlets	123	30.90	29.63	104
Comparison Outlets	186	46.73	41.42	113

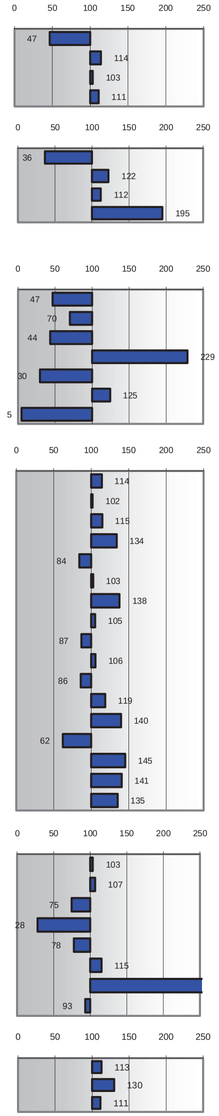
Major Retailers

Argos	1	Next	1
BhS	0	O2	1
Boots The Chemist	1	Phones 4 U	1
Burton	1	Primark	0
Carphone Warehouse	1	River Island	0
Clarks	1	Sainsburys	0
Clintons	1	Superdrug	1
Debenhams	0	T K Maxx	0
Dorothy Perkins	1	Tesco	0
H & M	0	Topman	0
H M V	0	Topshop	1
House of Fraser	0	Vodafone	1
John Lewis	0	Waitrose	0
Marks & Spencer	1	Waterstones	1
New Look	1	WHSmith	1
		Wilkinsons	0

Retail Composition

	Outlets Number	%	% UK	Index	Floorspace sq.ft	sq.m	%	% UK	Index
Retail Trade Group									
Convenience	21	5.28	8.75	60	51,400	4,775	7.99	17.13	47
Comparison	186	46.73	41.42	113	344,300	31,987	53.50	46.80	114
Service	128	32.16	35.08	92	154,400	14,344	23.99	23.18	103
Vacant	61	15.33	13.60	113	84,900	7,887	13.19	11.85	111
Multiple Retailers by Trade Group									
Convenience	11	8.94	11.92	75	30,000	2,787	9.00	24.74	36
Comparison	78	63.41	53.76	118	227,100	21,098	68.16	55.82	122
Service	32	26.02	32.04	81	67,500	6,271	20.26	18.11	112
Miscellaneous	2	1.63	2.29	71	8,600	799	2.58	1.32	195
Retail Category									
Convenience	21	5.28	8.75	60	51,400	4,775	7.99	17.13	47
Bakers	5	1.26	2.02	62	4,600	427	0.71	1.02	70
Butchers	2	0.50	0.80	63	1,200	111	0.19	0.43	44
Greengrocers & fishmongers	4	1.01	0.62	162	18,800	1,747	2.92	1.28	229
Groceries & frozen foods	7	1.76	2.91	60	23,600	2,193	3.67	12.41	30
Off licences & home brew	2	0.50	0.54	93	2,700	251	0.42	0.34	125
CTN & convenience	1	0.25	1.86	14	500	46	0.08	1.65	5
Comparison	186	46.73	41.42	113	344,300	31,987	53.50	46.80	114
Footwear & repairs	7	1.76	1.87	94	8,700	808	1.35	1.33	102
Mens, boys wear	5	1.26	0.99	127	6,300	585	0.98	0.85	115
Womens, girls & childrens clothing	22	5.53	4.43	125	34,300	3,187	5.33	3.97	134
Mixed & general clothing	17	4.27	3.63	118	33,700	3,131	5.24	6.22	84
Furniture, carpets, textiles	21	5.28	3.50	151	26,500	2,462	4.12	4.01	103
Books, arts/crafts, stationers/copy	23	5.78	4.34	133	28,500	2,648	4.43	3.22	138
Elec, home ent, 'phones & video	19	4.77	3.94	121	21,100	1,960	3.28	3.11	105
DIY, hardware & household goods	12	3.02	2.51	120	26,300	2,443	4.09	4.70	87
Gifts, china, glass & leather goods	6	1.51	1.61	94	5,900	548	0.92	0.87	106
Cars, motor cycles & accessories	2	0.50	1.23	41	10,400	966	1.62	1.88	86
Chemists, toiletries & opticians	14	3.52	3.86	91	29,800	2,769	4.63	3.90	119
Variety, department & catalogue	3	0.75	0.59	128	57,300	5,323	8.90	6.37	140
Florists & gardens	3	0.75	0.94	80	1,700	158	0.26	0.43	62
Sports, toys, cycles & hobbies	11	2.76	2.20	126	22,700	2,109	3.53	2.43	145
Jewellers, clocks & repairs	10	2.51	2.05	122	8,500	790	1.32	0.94	141
Charity, pets & other comparison	11	2.76	3.74	74	22,600	2,100	3.51	2.59	135
Service	128	32.16	35.08	92	154,400	14,344	23.99	23.18	103
Restaurants, cafes, fast food	57	14.32	15.85	90	75,400	7,005	11.72	10.97	107
Hairdressing, beauty & health	30	7.54	8.51	89	19,400	1,802	3.01	4.04	75
Launderettes & dry cleaners	1	0.25	0.96	26	800	74	0.12	0.44	28
Travel agents	3	0.75	1.24	61	3,700	344	0.57	0.74	78
Banks & financial services	18	4.52	4.13	109	32,800	3,047	5.10	4.42	115
Building societies	5	1.26	0.58	217	9,700	901	1.51	0.48	315
Estate agents & auctioneers	14	3.52	3.80	93	12,600	1,171	1.96	2.10	93
Miscellaneous	63	15.83	14.76	107	93,500	8,686	14.53	12.88	113
Employment, careers, POs & info	2	0.50	1.16	43	8,600	799	1.34	1.03	130
Vacant	61	15.33	13.60	113	84,900	7,887	13.19	11.85	111





For a Goad Paper Plan, a Goad Catchment Report or if you have any queries please contact Experian on tel: 0845 601 6011 or fax: 0115 968 5003 or E-mail: goad.sales@uk.experian.com

goad Centre Report

Experian™ A world of insight

TERMS AND CONDITIONS

1. DEFINITIONS
"this agreement" means the terms and conditions hereunder and the correspondence between the parties attached hereto.
"Experian" means Experian Group Limited.
"the Client" means the person, firm or limited company to whom the Services are to be provided.
"the Information" means any information (in whatsoever form) provided to the Client by Experian in connection with the Services.
"the Media" means the records, tapes or other materials and documents by which the information is communicated to the Client.
"the Services" means the services to be provided by Experian to the Client more particularly described in the correspondence between the parties attached hereto.

2. CONTRACT TERMS
Subject to Clause 14 hereunder this Agreement shall be on the terms and conditions set out below to the exclusion of any other terms and conditions whether or not the same are endorsed upon, delivered with or referred to in any document delivered or sent by the client to Experian.

3. PAYMENT OF CHARGES
3.1 The charges for the Services ("the Charges") shall be specified by Experian to the Client.
3.2 The Client shall pay the Charges within 28 days of the date of Experian's invoice thereof.
3.3 Interest at an annual rate of 5% above Barclays Bank plc's base rate from time to time shall accrue daily and be calculated on a daily basis on any sum overdue from the date of invoice until payment in full of the Charges.
3.4 Unless expressly stated otherwise the Charges shall be exclusive of VAT (or any other duty chargeable in respect thereof) (which for the avoidance of doubt shall be payable by the Client in accordance with the terms and conditions hereof).

4. PROVISION OF THE SERVICES
4.1 Experian shall use all reasonable endeavours to ensure that the information is accurate in all material respects.
4.2 Save as provided in sub-clause 4.1 above or otherwise expressly provided in this Agreement or to the extent that it is unlawful for any said representations and warranties to be excluded Experian makes no representations or warranties whether express or implied (by statute or otherwise) in connection with the Services or use thereof by the Client or otherwise in connection with this Agreement.
4.3 The parties hereto agree that the time for the performance of Experian's obligations in connection with the Services shall not be of the essence in this Agreement.

5. LIMITATION OF LIABILITY
Notwithstanding anything to the contrary contained in this Agreement:
5.1 Experian shall not be liable (whether in contract or in negligence (other than the liability in respect of death or personal injury arising out of the negligence of Experian its servants or agents) or other tort or otherwise) for any indirect or consequential loss of any kind whatsoever (including without limitation loss of profit or loss of business) suffered by the Client in connection with the Services.
5.2 Without prejudice to the provisions of sub-clause 4.1 above Experian's maximum aggregate liability hereunder (other than liability in respect of death or personal injury arising out of the negligence of Experian its servants or agents) whether for breach of this Agreement or otherwise and whether or not arising from the negligence of Experian or any other person involved directly or indirectly in the provision of the Services shall not exceed an amount equal to the Charges (exclusive of VAT) payable to Experian hereunder.

6. COPYRIGHT
Property and the copyright (and all other intellectual property rights) in the Media and the Information (other than any information which has passed to Experian by the Client in connection with the Services or which has been obtained from any third party by Experian which copyright and all other intellectual property rights as appropriate shall remain vested in such third party) shall at all times remain vested in Experian.

7. CONFIDENTIALITY
7.1 The Client undertakes that it shall use the Information solely for the purpose of its own business and shall not (without the prior written consent of Experian) copy reproduce publish or transmit any part of the Information in any manner whatsoever and the media shall be returned to Experian upon demand.
7.2 The Client undertakes with Experian that the Client shall permit access to the Information only to those of its authorised officers or employees who need to know or use the Information and that the Client shall procure that its offices and employees shall maintain in strictest confidence and not divulge communicate or permit access to any third party any confidential information relating to Experian.
7.3 For the purpose of sub-clause 7.2 hereof the expression "confidential information" shall mean (as the context may require)
7.3.1 the Information; and/or
7.3.2 any information concerning Experian's trade secrets or business dealings transactions or affairs which may come to the notice of the client; and/or
7.3.3 any information and/or know how relating to the methods or techniques used by Experian in devising and developing the Services and any tapes documents or other materials comprising any part of such information and/or know how made available by Experian hereunder.
7.4 The provisions of sub-clause 7.2 hereof shall not apply to any confidential information to the extent that:
7.4.1 the Client is required to divulge the same by a Court tribunal or government authority with competent jurisdiction
7.4.2 it has already come within the public domain
7.4.3 it was already known to the Client prior to the date of disclosure by Experian (as evidence by written records)

8. INDEMNITY
The Client shall indemnify and keep indemnified Experian from and against any and all liability loss claims demands costs or expenses of any kind whatsoever which shall at any time suffer or incur and which arise out of or in connection with the services provided that this indemnity shall not apply to the extent that any such liability arises of the default of Experian.

9. DATA PROTECTION ACT 1984
The Client undertakes that at all times they shall comply fully with the provisions of the Data Protection Act 1984 and any subsequent amendments thereto or re-enactments thereof.

10. TERMINATION
10.1 Experian shall be entitled to terminate this Agreement immediately by written notice to the Client if:
10.1.1 The Client is guilty of any material breach of the provisions of this Agreement and such breach if capable of remedy is not remedied within twenty one working days of written notice having been given to remedy such breach.

10.1.2 The Client has had a bankruptcy order made against it or has made an arrangement or composition with its creditors or (being a body corporate) has had convened a meeting of creditors (whether formal or informal) or has entered into liquidation (whether voluntary or compulsory) except a solvent voluntary liquidation for the purpose only of reconstruction or amalgamation or has a receiver manager administrator or administrative receiver appointed of its undertaking or any part thereof or a resolution has been passed or a petition presented to any Court for the winding-up of the Client or for the granting of an administration order in respect of the Client or any proceedings have been commenced relating to the insolvency of the Client.

10.2 The termination of this Agreement shall be without prejudice to the rights of Experian accrued prior to such termination.

11. FORCE MAJEURE
Notwithstanding anything herein contained neither party shall be under any liability to the other in respect of any failure to perform or delay in performing any of the obligations hereunder which is due to any cause of whatsoever nature beyond its reasonable control and no such failure or delay shall be deemed for any purposes to be a breach of this Agreement.

12. ASSIGNMENT
The rights granted to the Client hereunder are personal to it and the Client shall not assign or grant any rights in respect of or otherwise deal in the same.

13. WAIVER
Failure by either party to enforce any of the provisions of this Agreement shall not operate as a waiver of any of its rights hereunder or operate so as to bar the exercise or enforcement thereof at any time or times.

14. VARIATIONS
This Agreement constitutes the whole of the terms agreed between the parties hereto in respect of the subject matter hereof and supersedes all previous negotiations, understandings or representations and shall be capable of being varied only by an instrument in writing signed by a duly authorised representative of each of the parties hereto.

15. NOTICE
Any notice to be given hereunder by either party to the other may be given by first class mail addressed to the party of the address herein specified or such other address as such party may from time to time nominate for the purpose hereof or by telex or telefax and shall be deemed to have been served.
15.1 if given by mail seventy-two hours after the same shall have been despatched and
15.2 if given by telex or telefax one hour after transmission (if transmitted during normal business hours) and twelve hours after transmission (if transmitted outside normal business hours).

16. SEVERANCE
This Agreement is severable in that if any provision hereof is determined to be illegal or unenforceable by any Court or competent jurisdiction such provision shall be deemed to have been deleted without affecting the remaining provisions of this Agreement.

17. LAW
This Agreement shall be governed by and construed in accordance with English Law and the parties hereto agree that the English Courts shall have exclusive jurisdiction.

Experian™
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goad Centre Report

Ulverston

Experian™ A world of insight

GETTING THE MOST FROM YOUR GOAD CENTRE REPORT

Each shopping centre has its own unique mix of multiple outlets, independent shops, convenience and comparison stores, food outlets and vacant premises.

Understanding the retail composition of a centre and its effect on local consumers is crucial to the success of any business. By studying the information in the report, you will be able to examine site quality, evaluate threats and opportunities, and assess the vitality and viability of the centre. However, you will only achieve this if you are aware of the various implications of the data that you see. This guide is designed to help you interpret the information you see on the Goad Centre Report.

1. The Local Area
The map in the top left-hand corner of your report locates other local Goad centres. When evaluating the quality of a site, it is often beneficial to compare it with other local shopping centres. Goad Centre Reports are available for any of the highlighted centres.

2. The Indexing System
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E-mail: goad.sales@uk.experian.com

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Ulverston

Survey Date: 22-Dec-10

Closest Centres	Distance (km)
Dalton-in-Furness	7.0
Millom	11.3
Grange-over-Sands	12.1
Barrow-in-Furness	12.6
Morecambe	20.2

Key Retail Indicators

Total Outlets 193
Total Floorspace (sq ft) 198,100

	Count	%	% UK	Index
Vacant Outlets	33	17.10	13.60	126
Vacant Floorspace (sq ft)	27,500	13.88	11.85	117
Multiple Outlets	30	15.54	29.63	52
Comparison Outlets	69	35.75	41.42	86

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Burton	0	Primark	0
Carphone Warehouse	0	River Island	0
Clarks	0	Sainsburys	0
Clintons	0	Superdrug	0
Debenhams	0	T K Maxx	0
Dorothy Perkins	0	Tesco	1
H & M	0	Topman	0
H M V	0	Topshop	0
House of Fraser	0	Vodafone	0
John Lewis	0	Waitrose	0
Marks & Spencer	0	Waterstones	0
New Look	0	WHSmith	0
		Wilkinsons	0

Retail Composition

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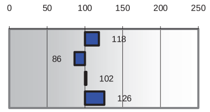
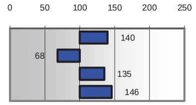
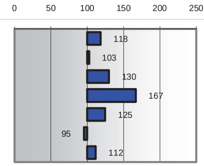
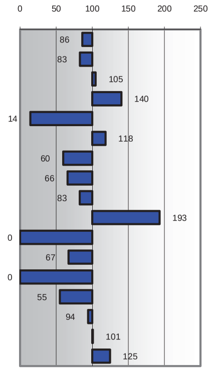
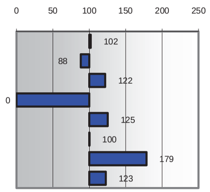
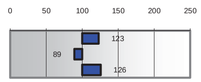
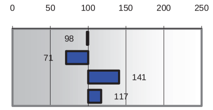
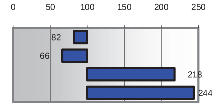
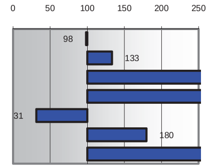
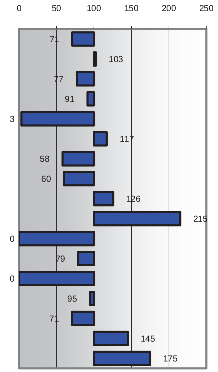
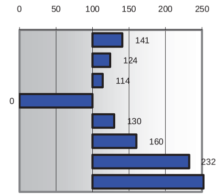
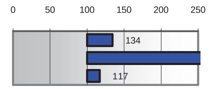
Comparison	69	35.75	41.42	86	65,700	6,104	33.17	46.80	71
Service	69	35.75	35.08	102	64,700	6,011	32.66	23.18	141
Vacant	33	17.10	13.60	126	27,500	2,555	13.88	11.85	117
Multiple Retailers by Trade Group									
Convenience	5	16.67	11.92	140	10,700	994	20.30	24.74	82
Comparison	11	36.67	53.76	68	19,500	1,812	37.00	55.82	66
Service	13	43.33	32.04	135	20,800	1,932	39.47	18.11	218
Miscellaneous	1	3.33	2.29	146	1,700	158	3.23	1.32	244
Retail Category									
Convenience	20	10.36	8.75	118	33,400	3,103	16.86	17.13	98
Bakers	4	2.07	2.02	103	2,700	251	1.36	1.02	133
Butchers	2	1.04	0.80	130	2,200	204	1.11	0.43	259
Greengrocers & fishmongers	2	1.04	0.62	167	10,900	1,013	5.50	1.28	431
Groceries & frozen foods	7	3.63	2.91	125	7,700	715	3.89	12.41	31
Off licences & home brew	1	0.52	0.54	95	1,200	111	0.61	0.34	180
CTN & convenience	4	2.07	1.86	112	8,700	808	4.39	1.65	265
Comparison	69	35.75	41.42	86	65,700	6,104	33.17	46.80	71
Footwear & repairs	3	1.55	1.87	83	2,700	251	1.36	1.33	103
Mens, boys wear	2	1.04	0.99	105	1,300	121	0.66	0.85	77
Womens, girls & childrens clothing	12	6.22	4.43	140	7,200	669	3.63	3.97	91
Mixed & general clothing	1	0.52	3.63	14	400	37	0.20	6.22	3
Furniture, carpets, textiles	8	4.15	3.50	118	9,300	864	4.69	4.01	117
Books, arts/crafts, stationers/copy	5	2.59	4.34	60	3,700	344	1.87	3.22	58
Elec, home ent, 'phones & video	5	2.59	3.94	66	3,700	344	1.87	3.11	60
DIY, hardware & household goods	4	2.07	2.51	83	11,700	1,087	5.91	4.70	126
Gifts, china, glass & leather goods	6	3.11	1.61	193	3,700	344	1.87	0.87	215
Cars, motor cycles & accessories	0	0.00	1.23	0	0	0	0.00	1.88	0
Chemists, toiletries & opticians	5	2.59	3.86	67	6,100	567	3.08	3.90	79
Variety, department & catalogue	0	0.00	0.59	0	0	0	0.00	6.37	0
Florists & gardens	1	0.52	0.94	55	800	74	0.40	0.43	95
Sports, toys, cycles & hobbies	4	2.07	2.20	94	3,400	316	1.72	2.43	71
Jewellers, clocks & repairs	4	2.07	2.05	101	2,700	251	1.36	0.94	145
Charity, pets & other comparison	9	4.66	3.74	125	9,000	836	4.54	2.59	175
Service	69	35.75	35.08	102	64,700	6,011	32.66	23.18	141
Restaurants, cafes, fast food	27	13.99	15.85	88	27,000	2,508	13.63	10.97	124
Hairdressing, beauty & health	20	10.36	8.51	122	9,100	845	4.59	4.04	114
Launderettes & dry cleaners	0	0.00	0.96	0	0	0	0.00	0.44	0
Travel agents	3	1.55	1.24	125	1,900	177	0.96	0.74	130
Banks & financial services	8	4.15	4.13	100	14,000	1,301	7.07	4.42	160
Building societies	2	1.04	0.58	179	2,200	204	1.11	0.48	232
Estate agents & auctioneers	9	4.66	3.80	123	10,500	975	5.30	2.10	252
Miscellaneous	35	18.13	14.76	123	34,300	3,187	17.31	12.88	134
Employment, careers, POs & info	2	1.04	1.16	89	6,800	632	3.43	1.03	334
Vacant	33	17.10	13.60	126	27,500	2,555	13.88	11.85	117

For a Goad Paper Plan, a Goad Catchment Report or if you have any queries please contact Experian on tel: 0845 601 6011 or fax: 0115 968 5003 or E-mail: goad.sales@uk.experian.com

goad Centre Report

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TERMS AND CONDITIONS

1. DEFINITIONS
"this agreement" means the terms and conditions hereunder and the correspondence between the parties attached hereto.
"Experian" means Experian Group Limited.
"the Client" means the person, firm or limited company to whom the Services are to be provided.
"the Information" means any information (in whatsoever form) provided to the Client by Experian in connection with the Services.
"the Media" means the records, tapes or other materials and documents by which the information is communicated to the Client.
"the Services" means the services to be provided by Experian to the Client more particularly described in the correspondence between the parties attached hereto.

2. CONTRACT TERMS
Subject to Clause 14 hereunder this Agreement shall be on the terms and conditions set out below to the exclusion of any other terms and conditions whether or not the same are endorsed upon, delivered with or referred to in any document delivered or sent by the client to Experian.

3. PAYMENT OF CHARGES
3.1 The charges for the Services ("the Charges") shall be specified by Experian to the Client.
3.2 The Client shall pay the Charges within 28 days of the date of Experian's invoice thereof.
3.3 Interest at an annual rate of 5% above Barclays Bank plc's base rate from time to time shall accrue daily and be calculated on a daily basis on any sum overdue from the date of invoice until payment in full of the Charges.
3.4 Unless expressly stated otherwise the Charges shall be exclusive of VAT (or any other duty chargeable in respect thereof) (which for the avoidance of doubt shall be payable by the Client in accordance with the terms and conditions hereof).

4. PROVISION OF THE SERVICES
4.1 Experian shall use all reasonable endeavours to ensure that the information is accurate in all material respects.
4.2 Save as provided in sub-clause 4.1 above or otherwise expressly provided in this Agreement or to the extent that it is unlawful for any said representations and warranties to be excluded Experian makes no representations or warranties whether express or implied (by statute or otherwise) in connection with the Services or use thereof by the Client or otherwise in connection with this Agreement.
4.3 The parties hereto agree that the time for the performance of Experian's obligations in connection with the Services shall not be of the essence in this Agreement.

5. LIMITATION OF LIABILITY
Notwithstanding anything to the contrary contained in this Agreement:
5.1 Experian shall not be liable (whether in contract or in negligence (other than the liability in respect of death or personal injury arising out of the negligence of Experian its servants or agents) or other tort or otherwise) for any indirect or consequential loss of any kind whatsoever (including without limitation loss of profit or loss of business) suffered by the Client in connection with the Services.
5.2 Without prejudice to the provisions of sub-clause 4.1 above Experian's maximum aggregate liability hereunder (other than liability in respect of death or personal injury arising out of the negligence of Experian its servants or agents) whether for breach of this Agreement or otherwise and whether or not arising from the negligence of Experian or any other person involved directly or indirectly in the provision of the Services shall not exceed an amount equal to the Charges (exclusive of VAT) payable to Experian hereunder.

6. COPYRIGHT
Property and the copyright (and all other intellectual property rights) in the Media and the Information (other than any information which has passed to Experian by the Client in connection with the Services or which has been obtained from any third party by Experian which copyright and all other intellectual property rights as appropriate shall remain vested in such third party) shall at all times remain vested in Experian.

7. CONFIDENTIALITY
7.1 The Client undertakes that it shall use the Information solely for the purpose of its own business and shall not (without the prior written consent of Experian) copy reproduce publish or transmit any part of the Information in any manner whatsoever and the media shall be returned to Experian upon demand.
7.2 The Client undertakes with Experian that the Client shall permit access to the Information only to those of its authorised officers or employees who need to know or use the Information and that the Client shall procure that its offices and employees shall maintain in strictest confidence and not divulge communicate or permit access to any third party any confidential information relating to Experian.
7.3 For the purpose of sub-clause 7.2 hereof the expression "confidential information" shall mean (as the context may require)
7.3.1 the Information; and/or
7.3.2 any information concerning Experian's trade secrets or business dealings transactions or affairs which may come to the notice of the client; and/or
7.3.3 any information and/or know how relating to the methods or techniques used by Experian in devising and developing the Services and any tapes documents or other materials comprising any part of such information and/or know how made available by Experian hereunder.
7.4 The provisions of sub-clause 7.2 hereof shall not apply to any confidential information to the extent that:
7.4.1 the Client is required to divulge the same by a Court tribunal or government authority with competent jurisdiction
7.4.2 it has already come within the public domain
7.4.3 it was already known to the Client prior to the date of disclosure by Experian (as evidence by written records)

8. INDEMNITY
The Client shall indemnify and keep indemnified Experian from and against any and all liability loss claims demands costs or expenses of any kind whatsoever which shall at any time suffer or incur and which arise out of or in connection with the services provided that this indemnity shall not apply to the extent that any such liability arises of the default of Experian.

9. DATA PROTECTION ACT 1984
The Client undertakes that at all times they shall comply fully with the provisions of the Data Protection Act 1984 and any subsequent amendments thereto or re-enactments thereof.

10. TERMINATION
10.1 Experian shall be entitled to terminate this Agreement immediately by written notice to the Client if:
10.1.1 The Client is guilty of any material breach of the provisions of this Agreement and such breach if capable of remedy is not remedied within twenty one working days of written notice having been given to remedy such breach.

10.1.2 The Client has had a bankruptcy order made against it or has made an arrangement or composition with its creditors or (being a body corporate) has had convened a meeting of creditors (whether formal or informal) or has entered into liquidation (whether voluntary or compulsory) except a solvent voluntary liquidation for the purpose only of reconstruction or amalgamation or has a receiver manager administrator or administrative receiver appointed of its undertaking or any part thereof or a resolution has been passed or a petition presented to any Court for the winding-up of the Client or for the granting of an administration order in respect of the Client or any proceedings have been commenced relating to the insolvency of the Client.

10.2 The termination of this Agreement shall be without prejudice to the rights of Experian accrued prior to such termination.

11. FORCE MAJEURE
Notwithstanding anything herein contained neither party shall be under any liability to the other in respect of any failure to perform or delay in performing any of the obligations hereunder which is due to any cause of whatsoever nature beyond its reasonable control and no such failure or delay shall be deemed for any purposes to be a breach of this Agreement.

12. ASSIGNMENT
The rights granted to the Client hereunder are personal to it and the Client shall not assign or grant any rights in respect of or otherwise deal in the same.

13. WAIVER
Failure by either party to enforce any of the provisions of this Agreement shall not operate as a waiver of any of its rights hereunder or operate so as to bar the exercise or enforcement thereof at any time or times.

14. VARIATIONS
This Agreement constitutes the whole of the terms agreed between the parties hereto in respect of the subject matter hereof and supersedes all previous negotiations, understandings or representations and shall be capable of being varied only by an instrument in writing signed by a duly authorised representative of each of the parties hereto.

15. NOTICE
Any notice to be given hereunder by either party to the other may be given by first class mail addressed to the party of the address herein specified or such other address as such party may from time to time nominate for the purpose hereof or by telex or telefax and shall be deemed to have been served.
15.1 if given by mail seventy-two hours after the same shall have been despatched and
15.2 if given by telex or telefax one hour after transmission (if transmitted during normal business hours) and twelve hours after transmission (if transmitted outside normal business hours).

16. SEVERANCE
This Agreement is severable in that if any provision hereof is determined to be illegal or unenforceable by any Court or competent jurisdiction such provision shall be deemed to have been deleted without affecting the remaining provisions of this Agreement.

17. LAW
This Agreement shall be governed by and construed in accordance with English Law and the parties hereto agree that the English Courts shall have exclusive jurisdiction.

Experian™
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goad Centre Report

Grange-over-Sands

Experian™ A world of insight

GETTING THE MOST FROM YOUR GOAD CENTRE REPORT

Each shopping centre has its own unique mix of multiple outlets, independent shops, convenience and comparison stores, food outlets and vacant premises.

Understanding the retail composition of a centre and its effect on local consumers is crucial to the success of any business. By studying the information in the report, you will be able to examine site quality, evaluate threats and opportunities, and assess the vitality and viability of the centre. However, you will only achieve this if you are aware of the various implications of the data that you see. This guide is designed to help you interpret the information you see on the Goad Centre Report.

1. The Local Area
The map in the top left-hand corner of your report locates other local Goad centres. When evaluating the quality of a site, it is often beneficial to compare it with other local shopping centres. Goad Centre Reports are available for any of the highlighted centres.

2. The Indexing System
A simple indexing system appears throughout the report. This illustrates the difference between a percentage figure for the centre and the UK average. An index of 100 represents an exact match, anything less than 100 indicates a below average count for the centre, and a figure over 100 represents an above average count.
For example, if restaurants accounted for 10% of a centre's outlets and the UK average was also 10%, the index would be 100. If however, the UK average was 8%, the index would be 125.
The index is an effective gap analysis tool and can be used to identify areas that are under and over represented within a centre. A retail category that is heavily under represented could indicate poor local demand. On the other hand, it could show that there is an untapped market waiting to be serviced. Either way, it provides a strong indication that the site will need to be examined further.

3. Floor Space
The floor space figures shown on the report are derived from the relevant Goad Plan, but only show the footprint floorspace, and the site area without the building lines. They should not therefore be read as a definitive report of floor space, but do provide a useful means of comparison between centres, as all outlets are measured in a consistent manner.

4. Vacant Outlets
Comparing the number of vacant outlets with the UK average provides a useful insight into the current economic status of a centre. For example, a high index generally represents under-development or decay, while a low index shows a strong retail presence.

5. Multiple Outlets/Key Attractors
A multiple retailer is defined as being part of a network of nine or more outlets. The presence of multiple outlets can greatly enhance the appeal of a centre to local consumers: The strong branding and comprehensive product mix of retailers such as Marks & Spencer, Boots and HMV is often sufficient in itself to attract consumers to a centre. Approximately 27 national multiples have been identified as key attractors, (i.e. those retailers most likely to improve the consumer appeal of a centre).
The presence of multiple outlets and key attractors can have a significant impact on neighbouring outlets: While other retailers will undoubtedly benefit from increased pedestrian traffic, (and therefore increased sales opportunities), multiples provide fierce competition for rivals in their retail categories.

Also available from Experian:

The Goad Category Reports
Category reports allow you to compare retail centres and breakdown the retail types to allow you to undertake detailed study.
The report allows you to examine site quality, evaluate threats and opportunities and assess the vitality and viability for all the retail centres within your town centres. Provides a comprehensive breakdown of floor space and outlet count for all individual trade types in the Convenience, Comparison, Retail Service, Leisure, Financial / Business Services and Vacancy sectors.
Using a number of simple indicators, Goad Category reports look at the retail composition and its impact on local consumers. A simple indexing system acts as an effective gap analysis tool, identifying retail categories that are under or over represented within a shopping area. This in turn can indicate an untapped market or poor consumer demand for particular products or services in a retail area .

The Goad Catchment Profile
This measures the extent of the local consumer base, in relation to a shopping centre. It also helps you to recognise the individual groups that make-up a local population, using Mosaic, the world's leading geo-demographic classification system.
Mosaic classifies individuals using census, financial, housing and retail data. Combining this with the profile's information on local household composition and age structure enables you to understand the varied lifestyles and behaviours of individual customers. You can then tailor your products, services and communications to suit local markets, build one-to-one customer relations and generate greater brand loyalty.

Retail Planner
Retail Planner delivers clear, comprehensive, up-to-date expenditure and demographic information to improve your planning-related decisions:
- Estimate future spending on retail goods and leisure services
- Identify changes in the efficiency of retail floor space
- Explain past trends and forecast business turnover potential
- Demonstrate retail planning knowledge to your clients

Goad Network
A Goad plan provides a bird's-eye view of a retail centre, illustrating the fascia name, retail category, floor space and exact location of all retail outlets and vacant premises. Key location factors such as pedestrian zones, road crossings, bus stops and car parks are also featured, allowing you to instantly assess the site quality of existing or prospective store locations in an easy to use Goad Network internet service.

Access to services at
http://www.experian.co.uk/goad/goad-network.html

Historic Plans
Historic Goad plans dating back to 1968 are available for you to compare retail mix over a period of time and are ideal for supporting planning and consultancy services. Plans surveyed after 1999 are also available in a digital format and can be uploaded to your Goad Network service, allowing you to make online comparisons.

Bespoke Goads
Our Cartography team can produce paper or PDF copies of Goad plans that identify Use Class, floor space variations and can display client data in a variety of mediums. Gap Analysis of multiple Goad plans can be presented in a clear visual manner, which allows clients to run comparisons of neighbouring locations

Demographics Online
DOL is the one stop shop for organisations requiring a quick, clear and actionable source of on-line demographic data that helps clients analyse existing and potential retail locations. Our DOL service provides clients with access to UK census data, and award winning market segmentation data in simple, easy to read, local area information reports specified by you. The report packs include sections on population statistics, age analysis, employment data and many others. The interactive mapping section allows you to map drive-times around your locations and view your customers. Our off the shelf reports include maps , charts and tables to help your understanding; or tailor the data to meet your own requirements. Subscription is for a year and usage is unlimited!

Shop Point
Shop Point is a comprehensive database covering all retail locations in the UK and the main towns and cities in the Republic of Ireland. It combines data from Experian's Goad Retail Database, Experian's National Business Database. Catalist and other researched sources, for example, the Internet, direct contact with retailers, and industry publications. The data set includes over 30 pieces of retail in formation including: Fascia, address, floor space and co-ordinates.

For further details on these products or if you have any queries regarding your Goad Centre Report, please contact Experian on:

Tel: 0845 601 6011
Fax: 0115 968 5003
E-mail: goad.sales@uk.experian.com

Experian™ A world of insight

Grange-over-Sands

Survey Date: 28-Feb-09

Closest Centres	Distance (km)
Milnthorpe	9.6
Carnforth	11.6
Ulverston	12.1
Morecambe	13.9
Lancaster	17.6

Key Retail Indicators

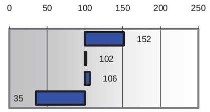
Total Outlets	83			
Total Floorspace (sq ft)	98,300			
	Count	**%**	**% UK**	**Index**
Vacant Outlets	4	4.82	13.60	35
Vacant Floorspace (sq ft)	3,900	3.97	11.85	33
Multiple Outlets	16	19.28	29.63	65
Comparison Outlets	35	42.17	41.42	102

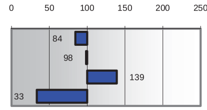
Major Retailers

Argos	0	Next	0
BhS	0	O2	0
Boots The Chemist	0	Phones 4 U	0
Burton	0	Primark	0
Carphone Warehouse	0	River Island	0
Clarks	0	Sainsburys	0
Clintons	0	Superdrug	0
Debenhams	0	T K Maxx	0
Dorothy Perkins	0	Tesco	0
H & M	0	Topman	0
H M V	0	Topshop	0
House of Fraser	0	Vodafone	0
John Lewis	0	Waitrose	0
Marks & Spencer	0	Waterstones	0
New Look	0	WHSmith	0
		Wilkinsons	0

Retail Composition

	Outlets Number	%	% UK	Index	Floorspace sq.ft	sq.m	%	% UK	Index
Retail Trade Group									
Convenience	11	13.25	8.75	152	14,200	1,319	14.45	17.13	84
Comparison	35	42.17	41.42	102	45,300	4,209	46.08	46.80	98
Service	31	37.35	35.08	106	31,700	2,945	32.25	23.18	139
Vacant	4	4.82	13.60	35	3,900	362	3.97	11.85	33





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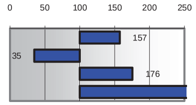
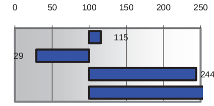
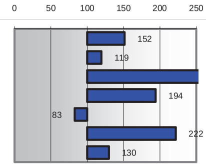
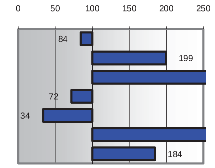
Multiple Retailers by Trade Group									
Convenience	3	18.75	11.92	157	6,400	595	28.57	24.74	115
Comparison	3	18.75	53.76	35	3,600	334	16.07	55.82	29
Service	9	56.25	32.04	176	9,900	920	44.20	18.11	244
Miscellaneous	1	6.25	2.29	273	2,500	232	11.16	1.32	843



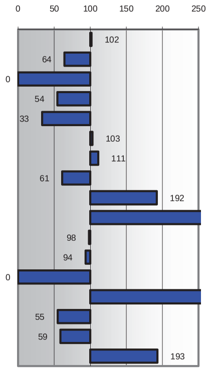


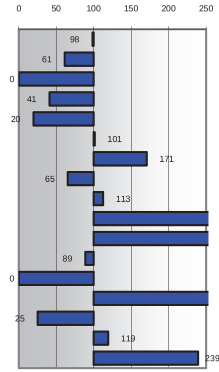
	Outlets Number	%	% UK	Index	Floorspace sq.ft	sq.m	%	% UK	Index
Retail Category									
Convenience	11	13.25	8.75	152	14,200	1,319	14.45	17.13	84
Bakers	2	2.41	2.02	119	2,000	186	2.03	1.02	199
Butchers	3	3.61	0.80	453	3,000	279	3.05	0.43	712
Greengrocers & fishmongers	1	1.20	0.62	194	900	84	0.92	1.28	72
Groceries & frozen foods	2	2.41	2.91	83	4,100	381	4.17	12.41	34
Off licences & home brew	1	1.20	0.54	222	1,200	111	1.22	0.34	362
CTN & convenience	2	2.41	1.86	130	3,000	279	3.05	1.65	184



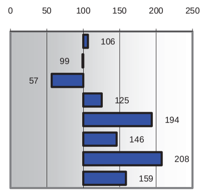


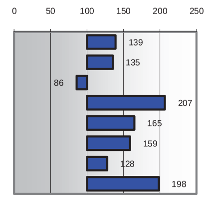
	Outlets Number	%	% UK	Index	Floorspace sq.ft	sq.m	%	% UK	Index
Comparison	35	42.17	41.42	102	45,300	4,209	46.08	46.80	98
Footwear & repairs	1	1.20	1.87	64	800	74	0.81	1.33	61
Mens, boys wear	0	0.00	0.99	0	0	0	0.00	0.85	0
Womens, girls & childrens clothing	2	2.41	4.43	54	1,600	149	1.63	3.97	41
Mixed & general clothing	1	1.20	3.63	33	1,200	111	1.22	6.22	20
Furniture, carpets, textiles	3	3.61	3.50	103	4,000	372	4.07	4.01	101
Books, arts/crafts, stationers/copy	4	4.82	4.34	111	5,400	502	5.49	3.22	171
Elec, home ent, 'phones & video	2	2.41	3.94	61	2,000	186	2.03	3.11	65
DIY, hardware & household goods	4	4.82	2.51	192	5,200	483	5.29	4.70	113
Gifts, china, glass & leather goods	4	4.82	1.61	300	3,100	288	3.15	0.87	363
Cars, motor cycles & accessories	1	1.20	1.23	98	7,900	734	8.04	1.88	428
Chemists, toiletries & opticians	3	3.61	3.86	94	3,400	316	3.46	3.90	89
Variety, department & catalogue	0	0.00	0.59	0	0	0	0.00	6.37	0
Florists & gardens	2	2.41	0.94	257	2,900	269	2.95	0.43	694
Sports, toys, cycles & hobbies	1	1.20	2.20	55	600	56	0.61	2.43	25
Jewellers, clocks & repairs	1	1.20	2.05	59	1,100	102	1.12	0.94	119
Charity, pets & other comparison	6	7.23	3.74	193	6,100	567	6.21	2.59	239



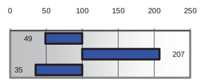


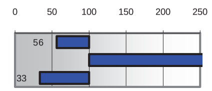
	Outlets Number	%	% UK	Index	Floorspace sq.ft	sq.m	%	% UK	Index
Service	31	37.35	35.08	106	31,700	2,945	32.25	23.18	139
Restaurants, cafes, fast food	13	15.66	15.85	99	14,600	1,356	14.85	10.97	135
Hairdressing, beauty & health	4	4.82	8.51	57	3,400	316	3.46	4.04	86
Launderettes & dry cleaners	1	1.20	0.96	125	900	84	0.92	0.44	207
Travel agents	2	2.41	1.24	194	1,200	111	1.22	0.74	165
Banks & financial services	5	6.02	4.13	146	6,900	641	7.02	4.42	159
Building societies	1	1.20	0.58	208	600	56	0.61	0.48	128
Estate agents & auctioneers	5	6.02	3.80	159	4,100	381	4.17	2.10	198





	Outlets Number	%	% UK	Index	Floorspace sq.ft	sq.m	%	% UK	Index
Miscellaneous	6	7.23	14.76	49	7,100	660	7.22	12.88	56
Employment, careers, POs & info	2	2.41	1.16	207	3,200	297	3.26	1.03	316
Vacant	4	4.82	13.60	35	3,900	362	3.97	11.85	33





For a Goad Paper Plan, a Goad Catchment Report or if you have any queries please contact Experian on tel: 0845 601 6011 or fax: 0115 968 5003 or E-mail: goad.sales@uk.experian.com

TERMS AND CONDITIONS

1. DEFINITIONS
"this agreement" means the terms and conditions hereunder and the correspondence between the parties attached hereto.
"Experian" means Experian Group Limited.
"the Client" means the person, firm or limited company to whom the Services are to be provided.
"the Information" means any information (in whatsoever form) provided to the Client by Experian in connection with the Services.
"the Media" means the records, tapes or other materials and documents by which the information is communicated to the Client.
"the Services" means the services to be provided by Experian to the Client more particularly described in the correspondence between the parties attached hereto.

2. CONTRACT TERMS
Subject to Clause 14 hereunder this Agreement shall be on the terms and conditions set out below to the exclusion of any other terms and conditions whether or not the same are endorsed upon, delivered with or referred to in any document delivered or sent by the client to Experian.

3. PAYMENT OF CHARGES
3.1 The charges for the Services ("the Charges") shall be specified by Experian to the Client.
3.2 The Client shall pay the Charges within 28 days of the date of Experian's invoice thereof.
3.3 Interest at an annual rate of 5% above Barclays Bank plc's base rate from time to time shall accrue daily and be calculated on a daily basis on any sum overdue from the date of invoice until payment in full of the Charges.
3.4 Unless expressly stated otherwise the Charges shall be exclusive of VAT (or any other duty chargeable in respect thereof) (which for the avoidance of doubt shall be payable by the Client in accordance with the terms and conditions hereof).

4. PROVISION OF THE SERVICES
4.1 Experian shall use all reasonable endeavours to ensure that the information is accurate in all material respects.
4.2 Save as provided in sub-clause 4.1 above or otherwise expressly provided in this Agreement or to the extent that it is unlawful for any said representations and warranties to be excluded Experian makes no representations or warranties whether express or implied (by statute or otherwise) in connection with the Services or use thereof by the Client or otherwise in connection with this Agreement.
4.3 The parties hereto agree that the time for the performance of Experian's obligations in connection with the Services shall not be of the essence in this Agreement.

5. LIMITATION OF LIABILITY
Notwithstanding anything to the contrary contained in this Agreement:
5.1 Experian shall not be liable (whether in contract or in negligence (other than the liability in respect of death or personal injury arising out of the negligence of Experian its servants or agents) or other tort or otherwise) for any indirect or consequential loss of any kind whatsoever (including without limitation loss of profit or loss of business) suffered by the Client in connection with the Services.
5.2 Without prejudice to the provisions of sub-clause 4.1 above Experian's maximum aggregate liability hereunder (other than liability in respect of death or personal injury arising out of the negligence of Experian its servants or agents) whether for breach of this Agreement or otherwise and whether or not arising from the negligence of Experian or any other person involved directly or indirectly in the provision of the Services shall not exceed an amount equal to the Charges (exclusive of VAT) payable to Experian hereunder.

6. COPYRIGHT
Property and the copyright (and all other intellectual property rights) in the Media and the Information (other than any information which has passed to Experian by the Client in connection with the Services or which has been obtained from any third party by Experian which copyright and all other intellectual property rights as appropriate shall remain vested in such third party) shall at all times remain vested in Experian.

7. CONFIDENTIALITY
7.1 The Client undertakes that it shall use the Information solely for the purpose of its own business and shall not (without the prior written consent of Experian) copy reproduce publish or transmit any part of the Information in any manner whatsoever and the media shall be returned to Experian upon demand.
7.2 The Client undertakes with Experian that the Client shall permit access to the Information only to those of its authorised officers or employees who need to know or use the Information and that the Client shall procure that its offices and employees shall maintain in strictest confidence and not divulge communicate or permit access to any third party any confidential information relating to Experian.
7.3 For the purpose of sub-clause 7.2 hereof the expression "confidential information" shall mean (as the context may require)
7.3.1 the Information; and/or
7.3.2 any information concerning Experian's trade secrets or business dealings transactions or affairs which may come to the notice of the client; and/or
7.3.3 any information and/or know how relating to the methods or techniques used by Experian in devising and developing the Services and any tapes documents or other materials comprising any part of such information and/or know how made available by Experian hereunder.
7.4 The provisions of sub-clause 7.2 hereof shall not apply to any confidential information to the extent that:
7.4.1 the Client is required to divulge the same by a Court tribunal or government authority with competent jurisdiction
7.4.2 it has already come within the public domain
7.4.3 it was already known to the Client prior to the date of disclosure by Experian (as evidence by written records)

8. INDEMNITY
The Client shall indemnify and keep indemnified Experian from and against any and all liability loss claims demands costs or expenses of any kind whatsoever which shall at any time suffer or incur and which arise out of or in connection with the services provided that this indemnity shall not apply to the extent that any such liability arises of the default of Experian.

9. DATA PROTECTION ACT 1984
The Client undertakes that at all times they shall comply fully with the provisions of the Data Protection Act 1984 and any subsequent amendments thereto or re-enactments thereof.

10. TERMINATION
10.1 Experian shall be entitled to terminate this Agreement immediately by written notice to the Client if:
10.1.1 The Client is guilty of any material breach of the provisions of this Agreement and such breach if capable of remedy is not remedied within twenty one working days of written notice having been given to remedy such breach.

10.1.2 The Client has had a bankruptcy order made against it or has made an arrangement or composition with its creditors or (being a body corporate) has had convened a meeting of creditors (whether formal or informal) or has entered into liquidation (whether voluntary or compulsory) except a solvent voluntary liquidation for the purpose only of reconstruction or amalgamation or has a receiver manager administrator or administrative receiver appointed of its undertaking or any part thereof or a resolution has been passed or a petition presented to any Court for the winding-up of the Client or for the granting of an administration order in respect of the Client or any proceedings have been commenced relating to the insolvency of the Client.

10.2 The termination of this Agreement shall be without prejudice to the rights of Experian accrued prior to such termination.

11. FORCE MAJEURE
Notwithstanding anything herein contained neither party shall be under any liability to the other in respect of any failure to perform or delay in performing any of the obligations hereunder which is due to any cause of whatsoever nature beyond its reasonable control and no such failure or delay shall be deemed for any purposes to be a breach of this Agreement.

12. ASSIGNMENT
The rights granted to the Client hereunder are personal to it and the Client shall not assign or grant any rights in respect of or otherwise deal in the same.

13. WAIVER
Failure by either party to enforce any of the provisions of this Agreement shall not operate as a waiver of any of its rights hereunder or operate so as to bar the exercise or enforcement thereof at any time or times.

14. VARIATIONS
This Agreement constitutes the whole of the terms agreed between the parties hereto in respect of the subject matter hereof and supersedes all previous negotiations, understandings or representations and shall be capable of being varied only by an instrument in writing signed by a duly authorised representative of each of the parties hereto.

15. NOTICE
Any notice to be given hereunder by either party to the other may be given by first class mail addressed to the party of the address herein specified or such other address as such party may from time to time nominate for the purpose hereof or by telex or telefax and shall be deemed to have been served.
15.1 if given by mail seventy-two hours after the same shall have been despatched and
15.2 if given by telex or telefax one hour after transmission (if transmitted during normal business hours) and twelve hours after transmission (if transmitted outside normal business hours).

16. SEVERANCE
This Agreement is severable in that if any provision hereof is determined to be illegal or unenforceable by any Court or competent jurisdiction such provision shall be deemed to have been deleted without affecting the remaining provisions of this Agreement.

17. LAW
This Agreement shall be governed by and construed in accordance with English Law and the parties hereto agree that the English Courts shall have exclusive jurisdiction.

Experian™
A world of insight

goad Centre Report

Milnthorpe

Experian™ A world of insight

GETTING THE MOST FROM YOUR GOAD CENTRE REPORT

Each shopping centre has its own unique mix of multiple outlets, independent shops, convenience and comparison stores, food outlets and vacant premises.

Understanding the retail composition of a centre and its effect on local consumers is crucial to the success of any business. By studying the information in the report, you will be able to examine site quality, evaluate threats and opportunities, and assess the vitality and viability of the centre. However, you will only achieve this if you are aware of the various implications of the data that you see. This guide is designed to help you interpret the information you see on the Goad Centre Report.

1. The Local Area

The map in the top left-hand corner of your report locates other local Goad centres. When evaluating the quality of a site, it is often beneficial to compare it with other local shopping centres. Goad Centre Reports are available for any of the highlighted centres.

2. The Indexing System

A simple indexing system appears thr oughout the report. This illustrates the difference between a percentage figure for the centre and the UK average. An index of 100 represents an exact match, anything less than 100 indicates a below average count for the centre, and a figure over 100 represents an above average count.
For example, if restaurants accounted for 10% of a centre's outlets and the UK average was also 10%, the index would be 100. If however, the UK average was 8%, the index would be 125.
The index is an effective gap analysis tool and can be used to identify areas that are under and over represented within a centre. A retail category that is heavily under represented could indicate poor local demand. On the other hand, it could show that there is an untapped market waiting to be serviced. Either way, it provides a st rong indication that the site will need to be examined further.

3. Floor Space

The floor space figures shown on the report are derived from the relevant Goad Plan, but only show the footprint floorspace, and the site area without the building lines. They should not t herefore be read as a definitive report of floor space, but do provide a useful means of comparison between centres, as all outlets are measured in a consistent manner.

4. Vacant Outlets

Comparing the number of vacant outle ts with the UK average provides a useful insight into the current economic status of a centre. For example, a high index generally represents under-development or decay, while a low index shows a strong retail presence.

5. Multiple Outlets/Key Attractors

A multiple retailer is defined as being part of a network of nine or more outlets. The presence of multiple outlets can greatly enhance the appeal of a centre to local consumers: The strong branding and comprehensive product mix of retailers such as Marks & Spencer, Boots and HMV is often sufficient in itself to attract consumers to a centre. Approximately 27 national multiples have been identified as key attractors, (i.e. those retailers most likely to improve t he consumer appeal of a centre).
The presence of multiple outlets and key attractors can have a significant impact on neighbouring outlets: While other retailers will undoubtedly benefit from increased pedestrian traffi c, (and therefore increased sales opportunities), multiples provide fierce co mpetition for rivals in their retail categories.

Also available from Experian:

The Goad Category Reports

Category reports allow you to com pare retail centres and breakdown the retail types to allow you to undertake detailed study.
The report allows you to examine site quality, evaluate threats and opportunities and assess the vitality and viability for all the retail centres within your town centres. Provi des a comprehensive breakdown of floor space and outlet count for all individual trade types in the Convenience, Comparison, Retail Service, Leisure , Financial / Business Services and Vacancy sectors.
Using a number of simple indicators, Goad Category reports look at the retail composition and its impact on local consumers. A simple indexing system acts as an effective gap analysis tool, identifying retail categories that are under or over represented within a shopping area. This in turn can indicate an untapped market or poor consumer demand for particular products or services in a retail area .

The Goad Catchment Profile

This measures the extent of the local consumer base, in relation to a shopping centre. It also helps you to recognise the individual groups that make-up a local population, using Mosaic, the world's leading geo-demographic classification system.
Mosaic classifies individuals usi ng census, financial, housing and retail data. Combining this with the prof ile's information on local household composition and age structure enabl es you to understand the varied lifestyles and behaviours of individual customers. Y ou can then tailor your products, services and communications to suit local markets, build one-to-one customer relations and gener ate greater brand loyalty.

Retail Planner

Retail Planner delivers clear, compr ehensive, up-to-date expenditure and demographic information to improve your planning-related decisions:
• Estimate future spending on retail goods and leisure services
• Identify changes in the efficiency of retail floor space
• Explain past trends and forecast business turnover potential
• Demonstrate retail planning knowledge to your clients

Goad Network

A Goad plan provides a bird s-eye view of a retail centre, illustrating the fascia name, retail category, floor space and exact location of all retail outlets and vacant premises. Key location factors such as pedestrian zones, road crossings, bus stops and ca r parks are also featured, allowing you to instantly assess the site quality of existing or prospective store locations in an easy to use Goad Network internet service.

Access to services at
http://www.experian.co.uk/goad/goad-network.html

Historic Plans

Historic Goad plans dating back to 1968are available for you to compare retail mix over a period of time and are ideal for supporting planning and consultancy services. Plans surveyed after 1999 are also available in a digital format and can be uploaded to your Goad Network service, allowing you to make online comparisons.

Bespoke Goads

Our Cartography team can produce paper or PDF copies of Goad plans that identify Use Class, floor space variations and can display client data in a variety of mediums. Gap Analysis of multiple Goad plans can be presented in a clear visual manner, which allows clients to run comparisons of neighbouring locations

Demoographics Online

DOL is the one stop shop for organisations requiring a quick, clear and actionable source of on-line demographic data that helps clients analyse existing and potential retail locations. Our DOL service provides clients with access to UK census data, and award winning market segmentation data in simple, easy to read, local area information reports specified by you. The report packs include sections on population statistics, age analysis, employment data and many others. The interactive mapping section allows you to map drive-times around your lo cations and view your customers. Our off the shelf reports include maps , charts and tables to help your understanding; or tailor the data to meet your requirements. Subscription is for a year and usage is unlimited!

Shop Point

Shop Point is a comprehensive database covering all retail locations in the UK and the main towns and cities in the Republic of Ireland. It combines data from Experian's Goad Retail Database, Experian's National Business Database. Catalist and other researched sources, for example, the Internet, direct contact with retailers, and industry publications. The data set includes over 30 pieces of retail in formation including: Fascia, address, floor space and co-ordinates.
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For further details on these products or if you have any queries regarding your Goad Centre Report, please contact Experian on:
Tel: 0845 601 6011
Fax: 0115 968 5003

E-mail: goad.sales@uk.experian.com

Experian™
A world of insight

Milnthorpe

goad Centre Report

Survey Date: 28-Feb-11

Closest Centres	Distance (km)
Grange-over-Sands	9.6
Kendal - K Village Outlet Shop|	10.5
Carnforth	10.9
Kendal	11.3
Kirkby Lonsdale	11.7

Key Retail Indicators

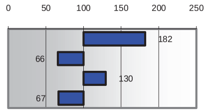
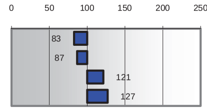
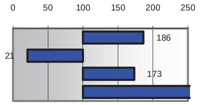
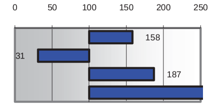
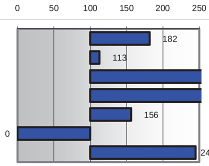
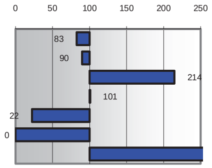
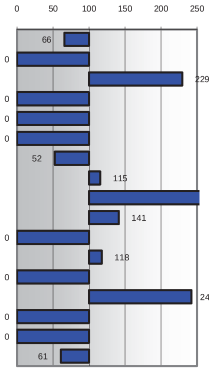
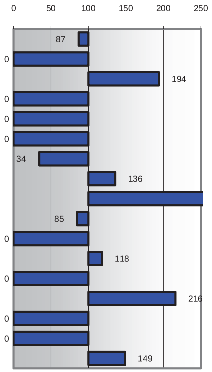
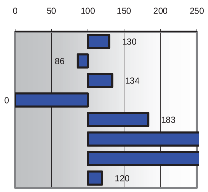
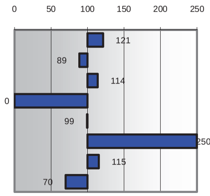
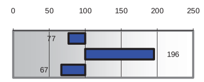
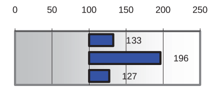
	Count	%	% UK	Index
Total Outlets	**44**			
Total Floorspace (sq ft)	**54,400**			
Vacant Outlets	4	9.09	13.60	67
Vacant Floorspace (sq ft)	8,200	15.07	11.85	127
Multiple Outlets	9	20.45	29.63	69
Comparison Outlets	12	27.27	41.42	66

Major Retailers

Argos	0	Next	0
BhS	0	O2	0
Boots The Chemist	0	Phones 4 U	0
Burton	0	Primark	0
Carphone Warehouse	0	River Island	0
Clarks	0	Sainsburys	0
Clintons	0	Superdrug	0
Debenhams	0	T K Maxx	0
Dorothy Perkins	0	Tesco	0
H & M	0	Topman	0
H M V	0	Topshop	0
House of Fraser	0	Vodafone	0
John Lewis	0	Waitrose	0
Marks & Spencer	0	Waterstones	0
New Look	0	WHSmith	0
		Wilkinsons	0

Retail Composition

	Outlets Number	%	% UK	Index	Floorspace sq.ft	sq.m	%	% UK	Index
Retail Trade Group									
Convenience	7	15.91	8.75	182	7,700	715	14.15	17.13	83
Comparison	12	27.27	41.42	66	22,100	2,053	40.63	46.80	87
Service	20	45.45	35.08	130	15,300	1,421	28.13	23.18	121
Vacant	4	9.09	13.60	67	8,200	762	15.07	11.85	127
Multiple Retailers by Trade Group									
Convenience	2	22.22	11.92	186	4,500	418	39.13	24.74	158
Comparison	1	11.11	53.76	21	2,000	186	17.39	55.82	31
Service	5	55.56	32.04	173	3,900	362	33.91	18.11	187
Miscellaneous	1	11.11	2.29	486	1,100	102	9.57	1.32	723
Retail Category									
Convenience	7	15.91	8.75	182	7,700	715	14.15	17.13	83
Bakers	1	2.27	2.02	113	500	46	0.92	1.02	90
Butchers	1	2.27	0.80	285	500	46	0.92	0.43	214
Greengrocers & fishmongers	1	2.27	0.62	366	700	65	1.29	1.28	101
Groceries & frozen foods	2	4.55	2.91	156	1,500	139	2.76	12.41	22
Off licences & home brew	0	0.00	0.54	0	0	0	0.00	0.34	0
CTN & convenience	2	4.55	1.86	245	4,500	418	8.27	1.65	500
Comparison	12	27.27	41.42	66	22,100	2,053	40.63	46.80	87
Footwear & repairs	0	0.00	1.87	0	0	0	0.00	1.33	0
Mens, boys wear	1	2.27	0.99	229	900	84	1.65	0.85	194
Womens, girls & childrens clothing	0	0.00	4.43	0	0	0	0.00	3.97	0
Mixed & general clothing	0	0.00	3.63	0	0	0	0.00	6.22	0
Furniture, carpets, textiles	0	0.00	3.50	0	0	0	0.00	4.01	0
Books, arts/crafts, stationers/copy	1	2.27	4.34	52	600	56	1.10	3.22	34
Elec, home ent, 'phones & video	2	4.55	3.94	115	2,300	214	4.23	3.11	136
DIY, hardware & household goods	3	6.82	2.51	272	12,800	1,189	23.53	4.70	501
Gifts, china, glass & leather goods	1	2.27	1.61	141	400	37	0.74	0.87	85
Cars, motor cycles & accessories	0	0.00	1.23	0	0	0	0.00	1.88	0
Chemists, toiletries & opticians	2	4.55	3.86	118	2,500	232	4.60	3.90	118
Variety, department & catalogue	0	0.00	0.59	0	0	0	0.00	6.37	0
Florists & gardens	1	2.27	0.94	242	500	46	0.92	0.43	216
Sports, toys, cycles & hobbies	0	0.00	2.20	0	0	0	0.00	2.43	0
Jewellers, clocks & repairs	0	0.00	2.05	0	0	0	0.00	0.94	0
Charity, pets & other comparison	1	2.27	3.74	61	2,100	195	3.86	2.59	149
Service	20	45.45	35.08	130	15,300	1,421	28.13	23.18	121
Restaurants, cafes, fast food	6	13.64	15.85	86	5,300	492	9.74	10.97	89
Hairdressing, beauty & health	5	11.36	8.51	134	2,500	232	4.60	4.04	114
Launderettes & dry cleaners	0	0.00	0.96	0	0	0	0.00	0.44	0
Travel agents	1	2.27	1.24	183	400	37	0.74	0.74	99
Banks & financial services	5	11.36	4.13	275	6,000	557	11.03	4.42	250
Building societies	1	2.27	0.58	392	300	28	0.55	0.48	115
Estate agents & auctioneers	2	4.55	3.80	120	800	74	1.47	2.10	70
Miscellaneous	5	11.36	14.76	77	9,300	864	17.10	12.88	133
Employment, careers, POs & info	1	2.27	1.16	196	1,100	102	2.02	1.03	196
Vacant	4	9.09	13.60	67	8,200	762	15.07	11.85	127

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TERMS AND CONDITIONS

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"this agreement" means the terms and conditions hereunder and the correspondence between the parties attached hereto.
"Experian" means Experian Group Limited.
"the Client" means the person, firm or limited company to whom the Services are to be provided.
"the Information" means any information (in whatsoever form) provided to the Client by Experian in connection with the Services.
"the Media" means the records, tapes or other materials and documents by which the information is communicated to the Client.
"the Services" means the services to be provided by Experian to the Client more particularly described in the correspondence between the parties attached hereto.

2. CONTRACT TERMS
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3.1 The charges for the Services ("the Charges") shall be specified by Experian to the Client.
3.2 The Client shall pay the Charges within 28 days of the date of Experian's invoice thereof.
3.3 Interest at an annual rate of 5% above Barclays Bank plc's base rate from time to time shall accrue daily and be calculated on a daily basis on any sum overdue from the date of invoice until payment in full of the Charges.
3.4 Unless expressly stated otherwise the Charges shall be exclusive of VAT (or any other duty chargeable in respect thereof) (which for the avoidance of doubt shall be payable by the Client in accordance with the terms and conditions hereof).

4. PROVISION OF THE SERVICES
4.1 Experian shall use all reasonable endeavours to ensure that the information is accurate in all material respects.
4.2 Save as provided in sub-clause 4.1 above or otherwise expressly provided in this Agreement or to the extent that it is unlawful for any said representations and warranties to be excluded Experian makes no representations or warranties whether express or implied (by statute or otherwise) in connection with the Services or use thereof by the Client or otherwise in connection with this Agreement.
4.3 The parties hereto agree that the time for the performance of Experian's obligations in connection with the Services shall not be of the essence in this Agreement.

5. LIMITATION OF LIABILITY
Notwithstanding anything to the contrary contained in this Agreement:
5.1 Experian shall not be liable (whether in contract or in negligence (other than the liability in respect of death or personal injury arising out of the negligence of Experian its servants or agents) or other tort or otherwise) for any indirect or consequential loss of any kind whatsoever (including without limitation loss of profit or loss of business) suffered by the Client in connection with the Services.
5.2 Without prejudice to the provisions of sub-clause 4.1 above Experian's maximum aggregate liability hereunder (other than liability in respect of death or personal injury arising out of the negligence of Experian its servants or agents) whether for breach of this Agreement or otherwise and whether or not arising from the negligence of Experian or any other person involved directly or indirectly in the provision of the Services shall not exceed an amount equal to the Charges (exclusive of VAT) payable to Experian hereunder.

6. COPYRIGHT
Property and the copyright (and all other intellectual property rights) in the Media and the Information (other than any information which has passed to Experian by the Client in connection with the Services or which has been obtained from any third party by Experian which copyright and all other intellectual property rights as appropriate shall remain vested in such third party) shall at all times remain vested in Experian.

7. CONFIDENTIALITY
7.1 The Client undertakes that it shall use the Information solely for the purpose of its own business and shall not (without the prior written consent of Experian) copy reproduce publish or transmit any part of the Information in any manner whatsoever and the media shall be returned to Experian upon demand.
7.2 The Client undertakes with Experian that the Client shall permit access to the Information only to those of its authorised officers or employees who need to know or use the Information and that the Client shall procure that its offices and employees shall maintain in strictest confidence and not divulge communicate or permit access to any third party any confidential information relating to Experian.
7.3 For the purpose of sub-clause 7.2 hereof the expression "confidential information" shall mean (as the context may require)
7.3.1 the Information; and/or
7.3.2 any information concerning Experian's trade secrets or business dealings transactions or affairs which may come to the notice of the client; and/or
7.3.3 any information and/or know how relating to the methods or techniques used by Experian in devising and developing the Services and any tapes documents or other materials comprising any part of such information and/or know how made available by Experian hereunder.
7.4 The provisions of sub-clause 7.2 hereof shall not apply to any confidential information to the extent that:
7.4.1 the Client is required to divulge the same by a Court tribunal or government authority with competent jurisdiction
7.4.2 it has already come within the public domain
7.4.3 it was already known to the Client prior to the date of disclosure by Experian (as evidence by written records)

8. INDEMNITY
The Client shall indemnify and keep indemnified Experian from and against any and all liability loss claims demands costs or expenses of any kind whatsoever which shall at any time suffer or incur and which arise out of or in connection with the services provided that this indemnity shall not apply to the extent that any such liability arises of the default of Experian.

9. DATA PROTECTION ACT 1984
The Client undertakes that at all times they shall comply fully with the provisions of the Data Protection Act 1984 and any subsequent amendments thereto or re-enactments thereof.

10. TERMINATION
10.1 Experian shall be entitled to terminate this Agreement immediately by written notice to the Client if:
10.1.1 The Client is guilty of any material breach of the provisions of this Agreement and such breach if capable of remedy is not remedied within twenty one working days of written notice having been given to remedy such breach.

10.1.2 The Client has had a bankruptcy order made against it or has made an arrangement or composition with its creditors or (being a body corporate) has had convened a meeting of creditors (whether formal or informal) or has entered into liquidation (whether voluntary or compulsory) except a solvent voluntary liquidation for the purpose only of reconstruction or amalgamation or has a receiver manager administrator or administrative receiver appointed of its undertaking or any part thereof or a resolution has been passed or a petition presented to any Court for the winding-up of the Client or for the granting of an administration order in respect of the Client or any proceedings have been commenced relating to the insolvency of the Client.

10.2 The termination of this Agreement shall be without prejudice to the rights of Experian accrued prior to such termination.

11. FORCE MAJEURE
Notwithstanding anything herein contained neither party shall be under any liability to the other in respect of any failure to perform or delay in performing any of the obligations hereunder which is due to any cause of whatsoever nature beyond its reasonable control and no such failure or delay shall be deemed for any purposes to be a breach of this Agreement.

12. ASSIGNMENT
The rights granted to the Client hereunder are personal to it and the Client shall not assign or grant any rights in respect of or otherwise deal in the same.

13. WAIVER
Failure by either party to enforce any of the provisions of this Agreement shall not operate as a waiver of any of its rights hereunder or operate so as to bar the exercise or enforcement thereof at any time or times.

14. VARIATIONS
This Agreement constitutes the whole of the terms agreed between the parties hereto in respect of the subject matter hereof and supersedes all previous negotiations, understandings or representations and shall be capable of being varied only by an instrument in writing signed by a duly authorised representative of each of the parties hereto.

15. NOTICE
Any notice to be given hereunder by either party to the other may be given by first class mail addressed to the party of the address herein specified or such other address as such party may from time to time nominate for the purpose hereof or by telex or telefax and shall be deemed to have been served.
15.1 if given by mail seventy-two hours after the same shall have been despatched and
15.2 if given by telex or telefax one hour after transmission (if transmitted during normal business hours) and twelve hours after transmission (if transmitted outside normal business hours).

16. SEVERANCE
This Agreement is severable in that if any provision hereof is determined to be illegal or unenforceable by any Court or competent jurisdiction such provision shall be deemed to have been deleted without affecting the remaining provisions of this Agreement.

17. LAW
This Agreement shall be governed by and construed in accordance with English Law and the parties hereto agree that the English Courts shall have exclusive jurisdiction.

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Centre Report

Kirkby Lonsdale

A world of insight

GETTING THE MOST FROM YOUR GOAD CENTRE REPORT

Each shopping centre has its own unique mix of multiple outlets, independent shops, convenience and comparison stores, food outlets and vacant premises.

Understanding the retail composition of a centre and its effect on local consumers is crucial to the success of any business. By studying the information in the report, you will be able to examine site quality, evaluate threats and opportunities, and assess the vitality and viability of the centre. However, you will only achieve this if you are aware of the various implications of the data that you see. This guide is designed to help you interpret the information you see on the Goad Centre Report.

1. The Local Area

The map in the top left-hand corner of your report locates other local Goad centres. When evaluating the quality of a site, it is often beneficial to compare it with other local shopping centres. Goad Centre Reports are available for any of the highlighted centres.

2. The Indexing System

A simple indexing system appears thr oughout the report. This illustrates the difference between a percentage figure for the centre and the UK average. An index of 100 represents an exact match, anything less than 100 indicates a below average count for the centre, and a figure over 100 represents an above average count.
For example, if restaurants accounted for 10% of a centre's outlets and the UK average was also 10%, the index would be 100. If however, the UK average was 8%, the index would be 125.
The index is an effective gap analysis tool and can be used to identify areas that are under and over represented within a centre. A retail category that is heavily under represented could indicate poor local demand. On the other hand, it could show that there is an untapped market waiting to be serviced. Either way, it provides a st rong indication that the site will need to be examined further.

3. Floor Space

The floor space figures shown on the report are derived from the relevant Goad Plan, but only show the footprint floorspace, and the site area without the building lines. They should not t herefore be read as a definitive report of floor space, but do provide a useful means of comparison between centres, as all outlets are measured in a consistent manner.

4. Vacant Outlets

Comparing the number of vacant outle ts with the UK average provides a useful insight into the current economic status of a centre. For example, a high index generally represents under-development or decay, while a low index shows a strong retail presence.

5. Multiple Outlets/Key Attractors

A multiple retailer is defined as being part of a network of nine or more outlets. The presence of multiple outlets can greatly enhance the appeal of a centre to local consumers: The strong branding and comprehensive product mix of retailers such as Marks & Spencer, Boots and HMV is often sufficient in itself to attract consumers to a centre. Approximately 27 national multiples have been identified as key attractors, (i.e. those retailers most likely to improve t he consumer appeal of a centre).
The presence of multiple outlets and key attractors can have a significant impact on neighbouring outlets: While other retailers will undoubtedly benefit from increased pedestrian traffi c, (and therefore increased sales opportunities), multiples provide fierce co mpetition for rivals in their retail categories.

Also available from Experian:

The Goad Category Reports

Category reports allow you to com pare retail centres and breakdown the retail types to allow you to undertake detailed study.
The report allows you to examine site quality, evaluate threats and opportunities and assess the vitality and viability for all the retail centres within your town centres. Provi des a comprehensive breakdown of floor space and outlet count for all individual trade types in the Convenience, Comparison, Retail Service, Leisure , Financial / Business Services and Vacancy sectors.
Using a number of simple indicators, Goad Category reports look at the retail composition and its impact on local consumers. A simple indexing system acts as an effective gap analysis tool, identifying retail categories that are under or over represented within a shopping area. This in turn can indicate an untapped market or poor consumer demand for particular products or services in a retail area .

The Goad Catchment Profile

This measures the extent of the local consumer base, in relation to a shopping centre. It also helps you to recognise the individual groups that make-up a local population, using Mosaic, the world's leading geo-demographic classification system.
Mosaic classifies individuals usi ng census, financial, housing and retail data. Combining this with the prof ile's information on local household composition and age structure enabl es you to understand the varied lifestyles and behaviours of individual customers. Y ou can then tailor your products, services and communications to suit local markets, build one-to-one customer relations and gener ate greater brand loyalty.

Retail Planner

Retail Planner delivers clear, compr ehensive, up-to-date expenditure and demographic information to improve your planning-related decisions:
- Estimate future spending on retail goods and leisure services
- Identify changes in the efficiency of retail floor space
- Explain past trends and forecast business turnover potential
- Demonstrate retail planning knowledge to your clients

Goad Network

A Goad plan provides a bird s-eye view of a retail centre, illustrating the fascia name, retail category, floor space and exact location of all retail outlets and vacant premises. Key location factors such as pedestrian zones, road crossings, bus stops and ca r parks are also featured, allowing you to instantly assess the site quality of existing or prospective store locations in an easy to use Goad Network internet service.

Access to services at
http://www.experian.co.uk/goad/goad-network.html

Historic Plans

Historic Goad plans dating back to 1968 are available for you to compare retail mix over a period of time and are ideal for supporting planning and consultancy services. Plans surveyed after 1999 are also available in a digital format and can be uploaded to your Goad Network service, allowing you to make online comparisons.

Bespoke Goads

Our Cartography team can produce paper or PDF copies of Goad plans that identify Use Class, floor space variations and can display client data in a variety of mediums. Gap Analysis of multiple Goad plans can be presented in a clear visual manner, which allows clients to run comparisons of neighbouring locations

DemographicOnlineD

OListheonestops shopfororganisationsrequiringaquick,clearand actionablesourceofon-linedemographicdatathathelpsclients analyse existingandpotentialretaillocations.OurDOLservice providesclients withaccesstoUKcensusdata,andawardwinning marketsegmentation datainsimple,easytoread,localarea informationreportsspecifiedby you.Thereportpacksincludesections onpopulationstatistics,age analysis,employmentdataandmany others.Theinteractivemapping sectionallowsyoutomapdrive-times aroundyourlocationsandview yourcustomers.Ourofftheshelf reportsincludemaps,chartsand tables tohelpyourunderstanding;or tailorthedatatomeetyourown requirements.Subscriptionisforayear andusageisunlimited!

Shop Point

Shop Point is a comprehensive database covering all retail locations in the UK and the main towns and cities in the Republic of Ireland. It combines data from Experian's Goad Retail Database, Experian's National Business Database. Catalist and other researched sources, for example, the Internet, direct contact with retailers, and industry publications. The datasetincludesover30piecesofretailinformation including: Fascia, address,floorspaceandco-ordinates.

For further details on these products or if you have any queries regarding your Goad Centre Report, please contact Experian on:

Tel: 08456016011
Fax: 01159685003

E-mail: goad.sales@uk.experian.com

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Kirkby Lonsdale

goad Centre Report

Survey Date: 28-Feb-09

Closest Centres	Distance (km)
Milnthorpe	11.7
Carnforth	13.9
Kendal - K Village Outlet Shopı	16.1
Kendal	16.9
Grange-over-Sands	20.3

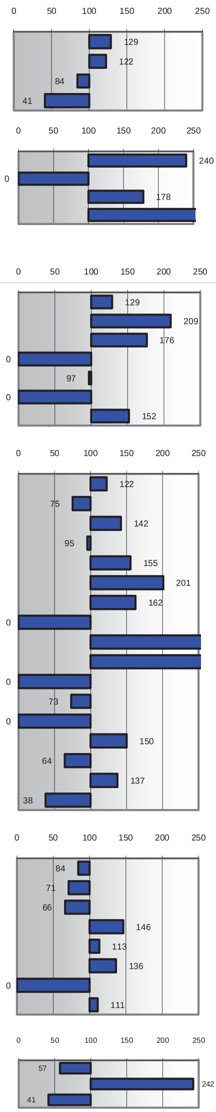
Key Retail Indicators

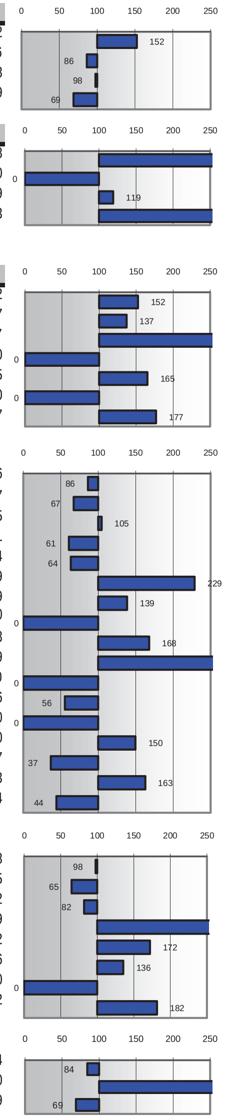
Total Outlets	71			
Total Floorspace (sq ft)	78,500			
	Count	**%**	**% UK**	**Index**
Vacant Outlets	4	5.63	13.60	41
Vacant Floorspace (sq ft)	6,400	8.15	11.85	69
Multiple Outlets	7	9.86	29.63	33
Comparison Outlets	36	50.70	41.42	122

Major Retailers			
Argos	0	Next	0
BhS	0	O2	0
Boots The Chemist	0	Phones 4 U	0
Burton	0	Primark	0
Carphone Warehouse	0	River Island	0
Clarks	0	Sainsburys	0
Clintons	0	Superdrug	0
Debenhams	0	T K Maxx	0
Dorothy Perkins	0	Tesco	0
H & M	0	Topman	0
H M V	0	Topshop	0
House of Fraser	0	Vodafone	0
John Lewis	0	Waitrose	0
Marks & Spencer	0	Waterstones	0
New Look	0	WHSmith	0
		Wilkinsons	0

Retail Composition

	Outlets Number	%	% UK	Index	Floorspace sq.ft	sq.m	%	% UK	Index
Retail Trade Group									
Convenience	8	11.27	8.75	129	20,500	1,905	26.11	17.13	152
Comparison	36	50.70	41.42	122	31,700	2,945	40.38	46.80	86
Service	21	29.58	35.08	84	17,800	1,654	22.68	23.18	98
Vacant	4	5.63	13.60	41	6,400	595	8.15	11.85	69
Multiple Retailers by Trade Group									
Convenience	2	28.57	11.92	240	17,200	1,598	71.37	24.74	288
Comparison	0	0.00	53.76	0	0	0	0.00	55.82	0
Service	4	57.14	32.04	178	5,200	483	21.58	18.11	119
Miscellaneous	1	14.29	2.29	625	1,700	158	7.05	1.32	533
Retail Category									
Convenience	8	11.27	8.75	129	20,500	1,905	26.11	17.13	152
Bakers	3	4.23	2.02	209	1,100	102	1.40	1.02	137
Butchers	1	1.41	0.80	176	1,000	93	1.27	0.43	297
Greengrocers & fishmongers	0	0.00	0.62	0	0	0	0.00	1.28	0
Groceries & frozen foods	2	2.82	2.91	97	16,100	1,496	20.51	12.41	165
Off licences & home brew	0	0.00	0.54	0	0	0	0.00	0.34	0
CTN & convenience	2	2.82	1.86	152	2,300	214	2.93	1.65	177
Comparison	36	50.70	41.42	122	31,700	2,945	40.38	46.80	86
Footwear & repairs	1	1.41	1.87	75	700	65	0.89	1.33	67
Mens, boys wear	1	1.41	0.99	142	700	65	0.89	0.85	105
Womens, girls & childrens clothing	3	4.23	4.43	95	1,900	177	2.42	3.97	61
Mixed & general clothing	4	5.63	3.63	155	3,100	288	3.95	6.22	64
Furniture, carpets, textiles	5	7.04	3.50	201	7,200	669	9.17	4.01	229
Books, arts/crafts, stationers/copy	5	7.04	4.34	162	3,500	325	4.46	3.22	139
Elec, home ent, 'phones & video	0	0.00	3.94	0	0	0	0.00	3.11	0
DIY, hardware & household goods	7	9.86	2.51	393	6,200	576	7.90	4.70	168
Gifts, china, glass & leather goods	3	4.23	1.61	263	3,400	316	4.33	0.87	499
Cars, motor cycles & accessories	0	0.00	1.23	0	0	0	0.00	1.88	0
Chemists, toiletries & opticians	2	2.82	3.86	73	1,700	158	2.17	3.90	56
Variety, department & catalogue	0	0.00	0.59	0	0	0	0.00	6.37	0
Florists & gardens	1	1.41	0.94	150	500	46	0.64	0.43	150
Sports, toys, cycles & hobbies	1	1.41	2.20	64	700	65	0.89	2.43	37
Jewellers, clocks & repairs	2	2.82	2.05	137	1,200	111	1.53	0.94	163
Charity, pets & other comparison	1	1.41	3.74	38	900	84	1.15	2.59	44
Service	21	29.58	35.08	84	17,800	1,654	22.68	23.18	98
Restaurants, cafes, fast food	8	11.27	15.85	71	5,600	520	7.13	10.97	65
Hairdressing, beauty & health	4	5.63	8.51	66	2,600	242	3.31	4.04	82
Launderettes & dry cleaners	1	1.41	0.96	146	900	84	1.15	0.44	259
Travel agents	1	1.41	1.24	113	1,000	93	1.27	0.74	172
Banks & financial services	4	5.63	4.13	136	4,700	437	5.99	4.42	136
Building societies	0	0.00	0.58	0	0	0	0.00	0.48	0
Estate agents & auctioneers	3	4.23	3.80	111	3,000	279	3.82	2.10	182
Miscellaneous	6	8.45	14.76	57	8,500	790	10.83	12.88	84
Employment, careers, POs & info	2	2.82	1.16	242	2,100	195	2.68	1.03	260
Vacant	4	5.63	13.60	41	6,400	595	8.15	11.85	69





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5.2 Without prejudice to the provisions of sub-clause 4.1 above Experian's maximum aggregate liability hereunder (other than liability in respect of death or personal injury arising out of the negligence of Experian its servants or agents) whether for breach of this Agreement or otherwise and whether or not arising from the negligence of Experian or any other person involved directly or indirectly in the provision of the Services shall not exceed an amount equal to the Charges (exclusive of VAT) payable to Experian hereunder.

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7.1 The Client undertakes that it shall use the Information solely for the purpose of its own business and shall not (without the prior written consent of Experian) copy reproduce publish or transmit any part of the Information in any manner whatsoever and the media shall be returned to Experian upon demand.
7.2 The Client undertakes with Experian that the Client shall permit access to the Information only to those of its authorised officers or employees who need to know or use the Information and that the Client shall procure that its offices and employees shall maintain in strictest confidence and not divulge communicate or permit access to any third party any confidential information relating to Experian.
7.3 For the purpose of sub-clause 7.2 hereof the expression "confidential information" shall mean (as the context may require)
7.3.1 the Information; and/or
7.3.2 any information concerning Experian's trade secrets or business dealings transactions or affairs which may come to the notice of the client; and/or
7.3.3 any information and/or know how relating to the methods or techniques used by Experian in devising and developing the Services and any tapes documents or other materials comprising any part of such information and/or know how made available by Experian hereunder.
7.4 The provisions of sub-clause 7.2 hereof shall not apply to any confidential information to the extent that:
7.4.1 the Client is required to divulge the same by a Court tribunal or government authority with competent jurisdiction
7.4.2 it has already come within the public domain
7.4.3 it was already known to the Client prior to the date of disclosure by Experian (as evidence by written records)

8. INDEMNITY
The Client shall indemnify and keep indemnified Experian from and against any and all liability loss claims demands costs or expenses of any kind whatsoever which shall at any time suffer or incur and which arise out of or in connection with the services provided that this indemnity shall not apply to the extent that any such liability arises of the default of Experian.

9. DATA PROTECTION ACT 1984
The Client undertakes that at all times they shall comply fully with the provisions of the Data Protection Act 1984 and any subsequent amendments thereto or re-enactments thereof.

10. TERMINATION
10.1 Experian shall be entitled to terminate this Agreement immediately by written notice to the Client if:
10.1.1 The Client is guilty of any material breach of the provisions of this Agreement and such breach if capable of remedy is not remedied within twenty one working days of written notice having been given to remedy such breach.

10.1.2 The Client has had a bankruptcy order made against it or has made an arrangement or composition with its creditors or (being a body corporate) has had convened a meeting of creditors (whether formal or informal) or has entered into liquidation (whether voluntary or compulsory) except a solvent voluntary liquidation for the purpose only of reconstruction or amalgamation or has a receiver manager administrator or administrative receiver appointed of its undertaking or any part thereof or a resolution has been passed or a petition presented to any Court for the winding-up of the Client or for the granting of an administration order in respect of the Client or any proceedings have been commenced relating to the insolvency of the Client.

10.2 The termination of this Agreement shall be without prejudice to the rights of Experian accrued prior to such termination.

11. FORCE MAJEURE
Notwithstanding anything herein contained neither party shall be under any liability to the other in respect of any failure to perform or delay in performing any of the obligations hereunder which is due to any cause of whatsoever nature beyond its reasonable control and no such failure or delay shall be deemed for any purposes to be a breach of this Agreement.

12. ASSIGNMENT
The rights granted to the Client hereunder are personal to it and the Client shall not assign or grant any rights in respect of or otherwise deal in the same.

13. WAIVER
Failure by either party to enforce any of the provisions of this Agreement shall not operate as a waiver of any of its rights hereunder or operate so as to bar the exercise or enforcement thereof at any time or times.

14. VARIATIONS
This Agreement constitutes the whole of the terms agreed between the parties hereto in respect of the subject matter hereof and supersedes all previous negotiations, understandings or representations and shall be capable of being varied only by an instrument in writing signed by a duly authorised representative of each of the parties hereto.

15. NOTICE
Any notice to be given hereunder by either party to the other may be given by first class mail addressed to the party of the address herein specified or such other address as such party may from time to time nominate for the purpose hereof or by telex or telefax and shall be deemed to have been served.
15.1 if given by mail seventy-two hours after the same shall have been despatched and
15.2 if given by telex or telefax one hour after transmission (if transmitted during normal business hours) and twelve hours after transmission (if transmitted outside normal business hours).

16. SEVERANCE
This Agreement is severable in that if any provision hereof is determined to be illegal or unenforceable by any Court or competent jurisdiction such provision shall be deemed to have been deleted without affecting the remaining provisions of this Agreement.

17. LAW
This Agreement shall be governed by and construed in accordance with English Law and the parties hereto agree that the English Courts shall have exclusive jurisdiction.

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Appendix 7 Development Site Appraisals

SITE 1: Rugby Club Union Football Club, Shap Road, Kendal

The KRUFC site is located 1.3km to the north of Kendal town centre and comprises the KRUFC ground with principal pitch and stand, second pitch, club house, training area and car park. The Site is located to the west side of the A6 Shap Road.

Fronting Shap Road, to the east of the KRUFC ground, is a motor dealership occupied by Pye Motors. To the north of the site are industrial units and residential properties, accessed from Mint Bridge Road. Residential properties are located to the south of the site, accessed from Finlay Close. Queen Katherine School is located to the north-east of the Site, accessed from Appleby Road.

Nearby, and also to the east side of Shap Road, are: the South Lakeland Retail Park with units occupied by Comet, Halfords, Pets at Home, Poundstretcher, Next and JJB Sports; Aldi and Morrisons foodstores; laundrette/drycleaners; a vacant Children's adventure Playground; and a number of car showrooms.

A 2008 planning application proposed the redevelopment of the site for a foodstore and retail park, connected with the relocation of KRUFC to a site at Oxenholme Road. Whilst the District Council granted planning permission for the relocated ground, it refused planning permission for the redevelopment of the Shap Road site on retail (need, sequential approach and impact) grounds. An Appeal lodged in 2009 was subject to an Inquiry and dismissed in 2010 on highways grounds. A resubmitted planning application was before Planning Committee of the District Council in November 2011 and refused on grounds of the sequential approach. A second Inquiry is scheduled for March 2012.

Evaluation Criteria	Comment
Availability	Available. KRUFC is looking to relocate to a new ground and a development partners is pursuing redevelopment of the existing ground.
Planning History	Planning Application Ref: SL/2008/1219 for foodstore and retail park (refused on retail and highways grounds). Appeal Ref: APP/M0933/A/09/2101381 (dismissed on highways grounds). Planning Application Reference: SL/10/0180 for foodstore and retail park (refused on grounds of the sequential approach test

SITE 1: Rugby Club Union Football Club, Shap Road, Kendal	
	not being satisfied). Appeal Reference APP/M0933/A/11/2166628 (Inquiry scheduled for March 2012).
Scale of Development (retail/leisure/community/cultural)	Available, suitable and viable for large format retail development, subject accordance with development plan and PPS4 sequential approach and impact tests. Also has potential for residential development.
Commercial Potential	Development partner to KRUFC promoting retail development. Known operator interest in developing a foodstore at the site.
Likely Type of Development	Retail. Dependent upon outcome of Appeal lodged.
Development Constraints	Out-of-centre location. Requirement to relocate KRUFC prior to development commencing. Air Quality Management Area. Highways improvements required.
Possible Alternative Uses	Refurbishment of existing ground for continued use by KRUFC. Housing potential as an alternative to retail.
Access	Access can be achieved from Shap Road or Mint Bridge Road. Appeal scheme proposes service access from Mint Bridge Road and customer access from Shap Road. Highway improvements required.
Overall Development Prospects	Good. The outcome of the 2012 Appeal is likely to determine whether or not the site is redeveloped as a foodstore-led retail park. If the Appeal is dismissed on grounds of an alternative site (Canal Head) being considered available, suitable and viable for retail (foodstore) development, and this comes forward, then scope still exists for a bulky goods retail park at the KRUFC site.

SITE 2: Canal Head, Kendal

The Canal Head area is an edge of centre location, accessed from the Kendal one way system at Aynam Road. It is occupied by a number of businesses and operations, including Gilbert Gilkes & Gordon (Gilkes), a District Council depot and a County Council Household Waster recycling centre. The proximity of the town centre means that the site is well served by pedestrian links and other public transport.

The regeneration of Canal Head is a Key aim of the District Council and set out on the Core Strategy, adopted in 2010 (Policy CS2).

The Kendal Canal Head regeneration area is to be the subject of an Area Action Plan (AAP). Public consultation on the AAP Issues and Options Report took place during summer 2007 and consultation on the Preferred Options Report took place during spring 2008. The District Council Cabinet considered the Revised Preferred Options Report at its October 2010 meeting. The AAP Programme is for further consultation on the revised Preferred Options Report in 2012, which introduces into the list of acceptable uses an element of appropriate retail floorspace, and publication in 2013. The AAP is at an advanced stage of preparation having been subject to two periods of public consultation ahead of completion of the Revised Preferred Options version.

The Core Strategy justification text states that a comprehensive planning application would be considered and that applicants would not be refused solely on the basis of prematurity of the AAP. Canal Head development partners are working to submit a planning application in advance of the AAP. Key components of Canal Head regeneration are considered to be: canal based developments; possible restoration of the Canal; a new commercial sector including a cluster of knowledge based industries; housing and appropriate scale retail developments.

Evaluation Criteria	Comment
Availability	Available. Agreement for development signed in 2011 between principal landowners and commitments from the County Council and District Council to seek alternative premises.
Planning History	Pre-application discussions regarding redevelopment but no planning application submitted.

SITE 2: Canal Head, Kendal	
Scale of Development (retail/leisure/community/cultural)	Major mixed use development.
Commercial Potential	Gilkes requires commercial investment to secure its future in Kendal. Regional Growth Fund (RGF) money awarded in 2011 offers the potential of a financially viable mixed-use development subject to an appropriate scale of high-value use being delivered.
Likely Type of Development	Redevelopment of Canal Head is likely to comprise commercial premises (including the retention and extension of Gilkes' premises), town centre uses and housing. The Canal Head and alignment of the Lancaster Canal should be safeguarded at least for future restoration.
Development Constraints	Conservation area status, listed buildings nearby and the Miller Bridge scheduled ancient monument require any scheme to be designed sympathetically. Major redevelopment of the site may require a new road crossing of the River Kent to accommodate traffic generated. The River Kent is a Site of Special Scientific Interest and a Special Area (SSSI) of Conservation (SAC) and any new bridge will have to be engineering so as to not impact adversely on the river environment. Alternative facilities for the District Council depot and County Council Household Waste Recycling Centre have will have to be completed prior to redevelopment of the site.
Possible Alternative Uses	Comprehensive mixed-use development is the only viable option for Canal Head.
Access	Current access from Aynam Road requires improvement to deliver redevelopment.
Overall Development Prospects	Good, subject to financial viability.

SITE 3: Kendal Cricket Club, Kendal

The Kendal Cricket Club site is located 1.0km to the north of the town centre, off Shap Road. Redevelopment of this site would require the relocation of the cricket club to an alternative site. The site is close to Kendal railway station and has good public transport links.

Kendal Cricket Club has a lease on the site until 2026 and there is no legal means by which the club can be forced to leave the site before 2026. An Extraordinary General Meeting of the Cricket Club in October 2011 considered potential relocation to a site known as Jubilee Fields, with the Shap Road site being redeveloped as a foodstore. The membership voted 64 to 1 against the relocation proposal and the site is considered to be unavailable for redevelopment over the LDF period to 2025.

Evaluation Criteria	Comment
Availability	Not available.
Planning History	Pre-application discussions regarding redevelopment but no planning application submitted.
Scale of Development (retail/leisure/community/cultural)	Suitable for large format foodstore/retail warehousing or residential development.
Commercial Potential	Commercially viable site, but low potential for delivery due to resolution of the cricket club to remain in situ.
Likely Type of Development	None. Almost certain to continue in use as a cricket club.
Development Constraints	Availability.
Possible Alternative Uses	n/a.
Access	Access is from Shap Road.
Overall Development Prospects	Very low.

SITE 4: K Village, Kendal

K Village is an out-of-centre factory outlet centre, approximately 500m south of Kendal town centre. It was refurbished and redeveloped in latter half of the last decade and re-opened in June 2010. Since redevelopment it has suffered from under-occupancy, despite identified capacity for additional retail floorspace in Kendal, suggesting a qualitative deficiency in the retail environment. The evaluation of this site relates to improving occupancy and not redevelopment.

There is potential for enhancement of the vitality and viability of the river frontage through development of additional service and cultural uses in the units fronting the river. The development would be further enhanced by improved pedestrian and vehicular links to the town centre. The success of the Canal Head development is pivotal to achieving these linkage between K Village and the town centre.

Evaluation Criteria	Comment
Availability	Vacant units are available in the short term, other units in the medium term (lease arrangements not known).
Planning History	Planning permission for redevelopment obtained 29 September 2006 (ref: SL/2005/0619) and implemented.
Scale of Development (retail/leisure/community/cultural)	Proposals to increase occupancy are likely to be small scale.
Commercial Potential	A prominent location, adjacent to the River Kent, but poorly connected to the town centre, both visually and due to the road network layout.
Likely Type of Development	Potential for promotion of additional service and cultural uses fronting the River Kent to enhance 'liveliness' of the river frontage. In terms of retail development, operators could seek to create a niche shopping environment, tailoring the operators to the visitors and the local population.
Development Constraints	Restricted by existing development and retailers' lease arrangements.

SITE 4: K Village, Kendal	
Possible Alternative Uses	Release of units fronting the River Kent for service and cultural uses.
Access	Accessed via Lound Road. K Village has a basement car park, which operates on a pay-and-display basis.
Overall Development Prospects	Reasonable prospects of improvement.

SITE 5: Woolpack Yard, Kendal

The Woolpack Yard site comprises land between Booths and Mark and Spencer which is occupied by premises including B Class uses, retail uses, service uses and residential units. Units of limited floorspace generate a high density of development.

This site is suitable for redevelopment for town centre uses, particularly comparison retail to compliment Wainright's Yard, and potentially through a development similar to Booths-led development. The site is constrained by land assembly difficulties.

Evaluation Criteria	Comment
Availability	Medium/long term due to multiple land ownership and lease arrangements.
Planning History	Planning permission for redevelopment of the site for retail/hotel expired in 2011.
Scale of Development (retail/leisure/community/cultural)	Small/medium scale retail development.
Commercial Potential	Edge of centre site (2007 composite Local Plan), adjacent to Marks and Spencer and Booths. The site is not visible from Stricklandgate but within the Primary Shopping Area proposed by the draft Land Allocations DPD.
Likely Type of Development	Comparison retail uses, given its location adjacent to the (and potentially part of the future wider) PSA.
Development Constraints	Surrounding topography is restrictive and land assembly may delay any development proposal. Any development will be required to respond to the Conservation Area designation.
Possible Alternative Uses	Redevelopment for a cultural/tourist attraction.
Access	Site has excellent pedestrian access. Potential for improved vehicular access from Library Walk/ Booths.
Overall Development Prospects	Good subject to land assembly.

SITE 6: Canal Head, Ulverston

The Canal Head site comprises 4.0 hectares of land to adjacent to the Ulverston canal, and approximately 550m to the east of Ulverston town centre. The site is currently occupied by a cattle auction market and an commercial estate comprising Class A1, Class A2 and Class B Class uses. Land to the north of the canal in this location is undeveloped grazing land.

Potential exists for redevelopment as a mixed use scheme incorporating retail, employment and housing uses and improved linkages to the town centre. Any retail development in this location would be subject to the sequential approach and impact tests as set out in PPS4 and would be required to demonstrate that there would not be an adverse impact on town centre vitality and viability.

Evaluation Criteria	Comment
Availability	Medium term because the majority of the site is occupied.
Planning History	No planning history of relevance.
Scale of Development (retail/leisure/community/cultural)	Large scale, low density development.
Commercial Potential	Located on A590, a prominent route into and through Ulverston town centre.
Likely Type of Development	Mixed use scheme incorporating retail development.
Development Constraints	The site is an unusual shape, positioned around three sides of a canal, which restricts potential for large floorplate development. Residential development in proximity, which restricts the appropriate height of development.
Possible Alternative Uses	Mixed use leisure-led scheme.
Access	Good roundabout access to Booths car park. North Lonsdale Terrace access may require improvements if traffic movements increased.
Overall Development Prospects	Reasonable.

SITE 7: Lightburn Road, Ulverston

The 3.0 hectare Lightburn Road site is in an out of centre location in retail planning terms, approximately 500m from Ulverston town centre. It is located on the edge of the urban area and includes a residential unit.

Lightburn Road is a greenfield site with poor visual links to the town centre. The size of the site could potentially accommodate a food superstore but there previously developed sites that should be favoured sequentially over this greenfield option.

Evaluation Criteria	Comment
Availability	Short term.
Planning History	No planning history of relevance.
Scale of Development (retail/leisure/community/cultural)	Large scale, low rise development.
Commercial Potential	Fronts the A590, 500m to the southwest of Ulverston town centre. No visual link to the town centre and limited commercial development nearby.
Likely Type of Development	Unlikely to prove acceptable for retail development given potential availability of alternative sites that are likely to be deemed sequentially preferable.
Development Constraints	The site is bound by A590 and a railway line. The topography of the site is undulating and it is greenfield.
Possible Alternative Uses	Low density commercial/industrial development or residential development.
Access	Access from A590 may require improvements in light of increased traffic flows as a result of any development.
Overall Development Prospects	Poor

SITE 8: 4 & 6 Brewery Street, Ulverston

A former Brewery in an edge of centre location, for retail planning purposes, and prominent location. Future development of the site could be restricted by the steeply sloping topography and will be required to preserve or enhance the character and appearance of the Ulverston conservation area.

The site is considered to have good potential for redevelopment for retail uses, subject to site constraints being overcome. As an edge of centre site any proposal on this site must demonstrate that redevelopment for retail use is in accordance with the PPS4 tests of the sequential approach and impact.

Evaluation Criteria	Comment
Availability	Short/medium term, subject to vacation by existing occupier.
Planning History	Planning application ref: SL/2011/0564 for a Booths foodstore submitted July 2011 is yet to be determined.
Scale of Development (retail/leisure/community/cultural)	Medium scale.
Commercial Potential	An edge of centre site. A high profile location adjacent to a roundabout on the edge of the town centre and A590.
Likely Type of Development	Retail development. Likely to come forward as either a single convenience retail unit or a number of comparison retail units.
Development Constraints	Transport movements due to Brewery Street being one-way and the adjacent roundabout being a busy through-route. The site is steeply sloping and residential properties are located immediately adjacent to the site. The site is tightly bound by development and may not be able to provide sufficient car parking. The site is within a Conservation Area.

SITE 8: 4 & 6 Brewery Street, Ulverston	
Possible Alternative Uses	Conversion of existing buildings to offices, residential or a community/cultural use.
Access	Access via Brewery Street, a one-way street. Good access from/to A590.
Overall Development Prospects	Good subject to development constraints being overcome.

SITE 9: Cumbria English Crystal, Ulverston

The site comprises the Cumbria English Crystal factory shop and Lighthouse Restaurant, located some 800 metres from Ulverston town centre. There is scope to redevelop this site either individually or in combination with the adjacent Canal Head site. A comprehensive scheme could incorporate mixed uses, including retail, employment and housing, along with improved linkages to the town centre. Alternatively, the site could be redeveloped individually for foodstore/retail warehouse development. As this site is an out of centre location for retail planning purposes, it would be subject to the PPS4 tests of sequential approach and impact and any proposal would have to demonstrate that there would not be an adverse impact on the vitality and viability of Ulverston town centre.

Evaluation Criteria	Comment
Availability	Short/medium term. Ownership arrangements are unknown but likely to be in single ownership.
Planning History	Application submitted in February 2012 for change of use to Class A1, A2, A3, A5 and a garden compound. This application remains undetermined.
Scale of Development (retail/leisure/community/cultural)	Medium scale, low rise development.
Commercial Potential	An out of centre site, over 800 metres from Ulverston town centre. Located adjacent to Booths and accessed from A590 but it has no main road frontage.
Likely Type of Development	Foodstore and/or comparison retail warehouse development. Could be brought forward for a mixed use development along with the Canal Head site but any retail development proposed will be subject to the PPS4 retail tests of the sequential approach and impact.
Development Constraints	None identified other than ownership .
Possible Alternative Uses	Conversion of existing building to multiple

SITE 9: Cumbria English Crystal, Ulverston	
	retail units. Retention of existing use.
Access	Accessed via Booths roundabout from A590 roundabout.
Overall Development Prospects	Reasonable.

SITE 10: Croftlands Residential Extension, Ulverston

The Pre-Submission Land Allocations DPD (February 2012) identifies land to the south of Croftlands, Ulverston for a residential extension. The assessment considers the potential for an appropriate scale of retail development to come forward as part of this proposal, but not if the residential scheme does not come forward.

A small scale convenience store to serve the day to day needs of local residents would be appropriate as part of the new residential development.

Evaluation Criteria	Comment
Availability	Medium/long term. Subject to phasing of a housing scheme that comes forward on the site.
Planning History	No planning history of relevance.
Scale of Development (retail/leisure/community/cultural)	Small scale development to provide for day to day needs of new residents.
Commercial Potential	Small scale development meeting convenience needs. Retail development would have nearby customers, subject to housing development coming forward.
Likely Type of Development	Small scale convenience store to provide for day to day needs.
Development Constraints	Development of retail store is subject to residential development being granted planning permission and any phasing of the scheme permitted.
Possible Alternative Uses	A wholly residential development not including a convenience retail store.
Access	Access to residential site from Mountbarrow Road. Details of accesses to the site will be determined through the planning application process.
Overall Development Prospects	Reasonable subject to residential development coming forward.

SITE 11: Toyota Garage, Grange over Sands

Batemans Toyota car showroom is located at the junction of Windermere Road and Main Street. It is a prominent location within Grange over Sands and visually links to some existing commercial uses. The site has reasonable potential for convenience retail development although any proposal will need to demonstrate linkages to the existing shopping environment and the town centre defined through the emerging Land Allocations DPD.

Evaluation Criteria	Comment
Availability	Medium term. Site is currently occupied by Batemans Toyota and is likely to be under single ownership.
Planning History	Extant planning permission for a Booths foodstore (ref: SL/2011/1034).
Scale of Development (retail/leisure/community/cultural)	Suitable for small or medium scale retail town centre uses development.
Commercial Potential	A prominent location at the junction of Main Street and Windermere Road. There is no defined town centre but the site is visually connected to existing commercial uses. A town centre boundary is to be defined through the emerging Land Allocations DPD.
Likely Type of Development	Medium scale convenience store or a number of small scale comparison stores.
Development Constraints	Relocation of car showroom.
Possible Alternative Uses	Redevelopment for leisure or service use. Retention in existing use.
Access	Existing site access from Main Street (B5277). Potential for access difficulties due to proximity to roundabout.
Overall Development Prospects	Reasonable.

SITE 12: Park Street, Milnthorpe

Booths is developing a new foodstore at Park Street Milnthorpe, which forms part of a wider site being developed as the Lakeland Industrial Estate. Residential units and a Home Improvement centre which occupy a site sandwiched between the Booths/Parkhouse Lakeland Industrial Estate and Park Street offer potential for the further development of the Milnthorpe shopping area (Church Street/Park Street). The undeveloped land offers some potential for additional commercial (retail) development, subject to existing premises being vacated and frontage.

Evaluation Criteria	Comment
Availability	Medium term subject to acquisition of existing premises.
Planning History	Planning permission for Booths foodstore approved November 2010/August 2011 (refs: SL/2011/0180 and SL/2010/0643).
Scale of Development (retail/leisure/community/cultural)	Small scale.
Commercial Potential	On the edge of the existing shopping area of Milnthorpe (not defined). Further retail development is likely to require Park Street or Church Street frontage.
Likely Type of Development	Small scale retail units, to complement existing commercial uses in the central area and the Booths foodstore.
Development Constraints	Acquisition of units fronting Park Street or Church Street will be required to provide frontage development.
Possible Alternative Uses	Other town centre uses. Retain as existing.
Access	Existing access from Park Street. Improvements to Park Street/Church Street junction may be required.
Overall Development Prospects	Reasonable.

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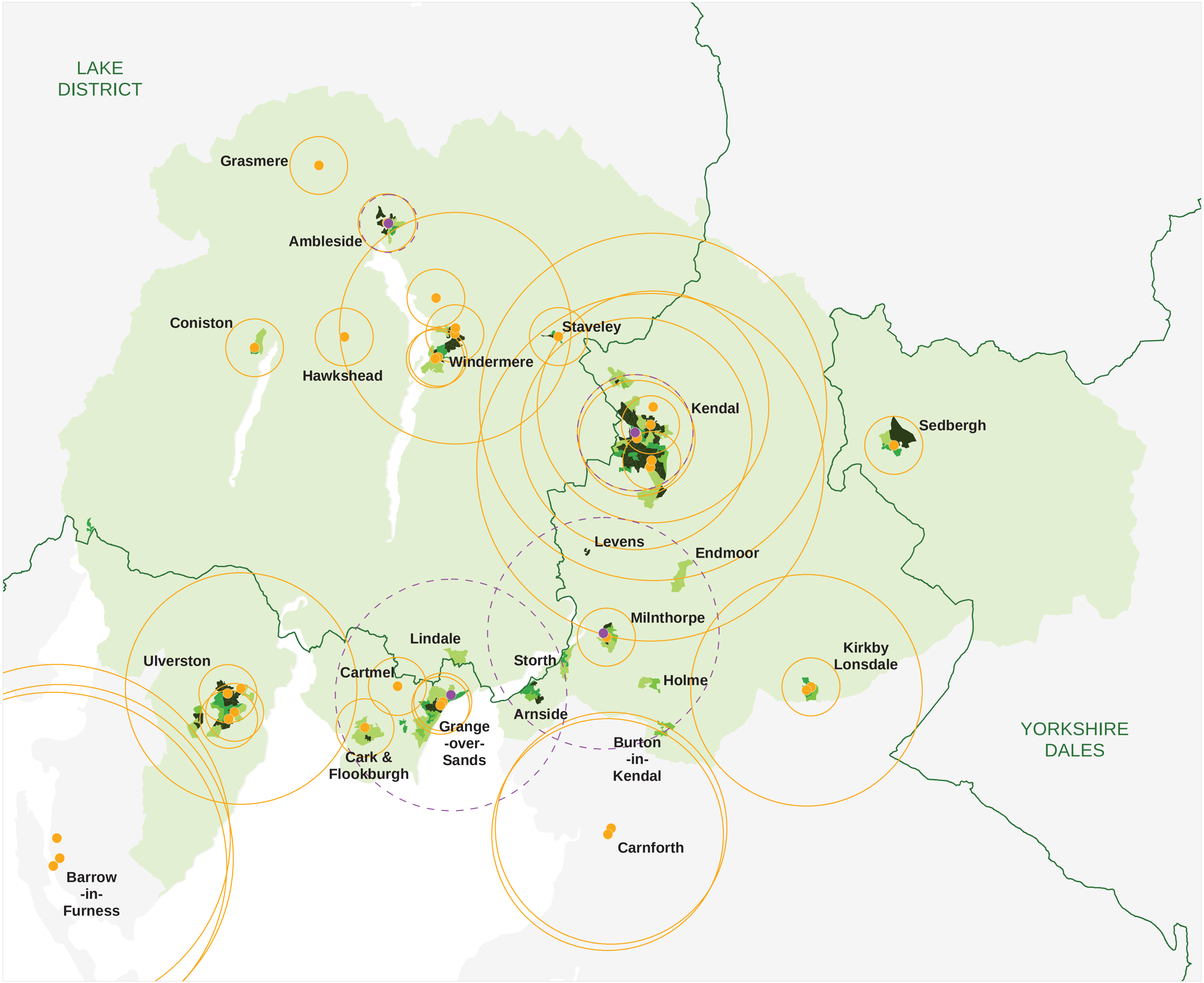
SITE 13: Booths, Kirkby Lonsdale

The site comprises land adjacent to Booths in Kirkby Lonsdale. Planning permission is granted for development for an extension to the existing store, including provision being made for replacement/additional car parking. Potential exists to improve linkages between the Booths store and the main shopping area.

Evaluation Criteria	Comment
Availability	Booths has secured planning permission for an extension.
Planning History	Planning permission for an extension to the existing Booths store obtained November 2010 (ref: SL/2010/0781).
Scale of Development (retail/leisure/community/cultural)	Small/medium scale development.
Commercial Potential	Located on the edge of Kirkby Lonsdale urban area, near to the A65 but separate from the main shopping area of the town.
Likely Type of Development	Extension to the existing foodstore.
Development Constraints	Size of the site and the potential to accommodate additional floorspace and car parking.
Possible Alternative Uses	Develop for a cultural/community use.
Access	Access is good via Dodgecroft Road from A65.
Overall Development Prospects	Reasonable.

Appendix 8 Plan Illustrating Convenience Retail Provision and Food Deserts



Key

National Park Boundary

Population Density by Census Output Area (ONS Census, 2001) - Number of Persons per Hectare

- >20.0
- 15.1 - 20.0
- 10.1 - 15.0
- 5.1 - 10.0
- <5.0

Existing Foodstore

Existing Foodstore Catchment (miles)

Commitment/Under Construction

Commitment/Under Construction Catchment (miles)

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Project	South Lakeland Retail Study Update 2012
Title	South Lakeland Food Deserts
Client	South Lakeland District Council
Date	28.02.2012
Scale	
Drawn by	MAr
Drg. No	GIS41056-005

GIS Reference: S:\MA41056 - South Lakeland Retail Study\MA41056 - South Lakeland Retail Study - South Lakeland Food Deserts - Population Density - 15.02.2012.mxd