

Following matters that have arisen through the examination process of the Land allocation Development Plan Document in November 2012 around retail capacity figures for Ulverston, the council's retail consultants NLP have published updated capacity tables dated 15/11/12. These tables provide an updated position in respect to appendix 3 of the 2012 South Lakeland Retail Study.

Nathaniel Lichfield & Partners Limited
South Lakeland Retail Study Update, 2012
Revised Capacity Assessment 15/11/2012

Table 1: Study Area Population Growth

Sub Zone	Population					Change		
	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 Arnsdale, 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	2,028	2,081	2,112	21	74	105
2 Kendal North and North East	2,079	2,045	2,066	2,120	2,151	21	75	106
3 Kendal South	2,095	2,061	2,082	2,137	2,168	21	76	107
4 Grange-over-Sands	2,139	2,104	2,126	2,181	2,213	22	77	109
5 Milnthorpe	2,329	2,291	2,314	2,374	2,410	23	83	119
6 Windermere	2,028	1,995	2,015	2,068	2,099	20	73	104
7 Sedbergh, Grayrigg and Staveley	2,091	2,057	2,078	2,132	2,163	21	75	106
8 Arnsdale, Silverdale, Carnforth and Kirkby Lonsdale	2,158	2,123	2,145	2,201	2,233	22	78	110
9 Ulverston	2,150	2,115	2,137	2,193	2,225	22	78	110
10 Coniston and Broughton-in-Furness	1,991	1,959	1,979	2,031	2,061	20	72	102

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 to '17-'18) and 0.6% ('18-'19 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 (£)					12-'17	12-'22	12-'25
	2010	2012	2017	2022	2025			
1 Kendal Central and West	2,778	2,771	3,117	3,613	3,948	346	842	1,177
2 Kendal North and North East	2,842	2,835	3,188	3,696	4,039	353	861	1,204
3 Kendal South	2,948	2,941	3,308	3,835	4,190	367	894	1,249
4 Grange-over-Sands	2,675	2,668	3,001	3,479	3,802	333	811	1,134
5 Milnthorpe	3,282	3,274	3,682	4,269	4,665	408	995	1,391
6 Windermere	2,655	2,648	2,978	3,453	3,773	330	805	1,125
7 Sedbergh, Grayrigg and Staveley	2,917	2,909	3,272	3,793	4,145	363	884	1,236
8 Arnsdale, Silverdale, Carnforth and Kirkby Lonsdale	2,981	2,974	3,345	3,878	4,237	371	904	1,263
9 Ulverston	2,979	2,971	3,342	3,874	4,233	371	903	1,262
10 Coniston and Broughton-in-Furness	2,644	2,637	2,966	3,439	3,757	329	802	1,120

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 3.0% annually thereafter

2010 Prices Inclusive of VAT where applicable, unless otherwise stated

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

Sub Zone	Spending Power (£million)					12-'17	12-'22	12-'25
	2010	2012	2017	2022	2025			
1 Kendal Central and West	23.9	24.0	24.6	25.7	26.4	0.5	1.6	2.3
2 Kendal North and North East	16.0	16.1	16.5	17.2	17.7	0.4	1.1	1.6
3 Kendal South	21.5	21.6	22.0	23.1	23.7	0.5	1.5	2.1
4 Grange-over-Sands	20.2	20.3	20.8	21.7	22.3	0.4	1.4	2.0
5 Milnthorpe	17.1	17.2	17.6	18.4	18.9	0.4	1.2	1.7
6 Windermere	30.1	30.3	30.9	32.4	33.2	0.7	2.1	3.0
7 Sedbergh, Grayrigg and Staveley	20.2	20.3	20.8	21.7	22.3	0.4	1.4	2.0
8 Arnsdale, Silverdale, Carnforth and Kirkby Lonsdale	52.6	54.4	56.1	59.0	60.9	1.7	4.6	6.5
9 Ulverston	43.1	43.3	44.2	46.3	47.5	1.0	3.0	4.2
10 Coniston and Broughton-in-Furness	44.9	44.8	45.8	47.8	49.0	0.9	2.9	4.1
TOTAL	289.7	292.3	299.2	313.1	321.8	6.8	20.7	29.4

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: -0.3% ('10-'11); -0.4% ('11-'12); 0.5% ('12-'13 to '17-'18) and 0.6% ('18-'19 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

Sub Zone	Spending Power (£million)					12-'17	12-'22	12-'25
	2010	2012	2017	2022	2025			
1 Kendal Central and West	32.6	33.2	37.8	44.6	49.3	4.6	11.4	16.1
2 Kendal North and North East	21.9	22.3	25.4	30.0	33.2	3.1	7.7	10.9
3 Kendal South	30.2	30.8	35.0	41.4	45.8	4.2	10.6	15.0
4 Grange-over-Sands	25.3	25.8	29.3	34.6	38.3	3.5	8.9	12.5
5 Milnthorpe	24.1	24.6	28.0	33.0	36.5	3.4	8.4	11.9
6 Windermere	39.5	40.2	45.7	54.0	59.8	5.5	13.8	19.5
7 Sedbergh, Grayrigg and Staveley	28.2	28.7	32.7	38.6	42.7	4.0	9.9	14.0
8 Arnsdale, Silverdale, Carnforth and Kirkby Lonsdale	72.7	76.2	87.5	103.9	115.5	11.3	27.8	39.3
9 Ulverston	59.7	60.8	69.2	81.7	90.4	8.4	20.9	29.6
10 Coniston and Broughton-in-Furness	59.6	60.3	68.6	80.9	89.3	8.2	20.5	28.9
TOTAL	393.7	402.9	459.1	542.8	600.7	56.2	139.9	197.7

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 3.0% annually thereafter

2010 Prices Inclusive of VAT where applicable, unless otherwise stated

Table 4: Main Food Shopping Patterns

Centre/Facilities	Market Share (%)										Total
	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 Arnsdale, Siverdale, Carnforth and Kirkby Lonsdale	Zone 9 Ulverston	Zone 10 Consiton and Broughton-in-Furness	
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 (%)										Total
	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	
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 (%)										Total
	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 Arnsdale, Siverdale, Carnforth and Kirkby Lonsdale	Zone 9 Ulverston	Zone 10 Consiton and Broughton-in-Furness	
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%

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 Solutions 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) Proportion of South Lakeland Tourist Visits 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 proportion to the proportion of visitor days in each.

2010 Prices Inclusive of VAT where applicable, unless otherwise stated

Table 8: Convenience Retail Turnover 2012

Centre/Facilities	Expenditure (£m)										Sub-Total	Tourist Spend	In-Flow	Total
	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 Arnsdale, Siverdale, Carnforth and Kirkby Lonsdale	Zone 9 Ulverston	Zone 10 Conishton and Broughton-In-Furness				
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, Camforth	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, Camforth	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 Croft Road), Kirkby Lonsdale trades at the mid-point between survey derived and benchmark 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)										Sub-Total	Tourist Spend	In-Flow	Total	Revised Total
	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 Arnsdale, Siverdale, Carnforth and Kirkby Lonsdale	Zone 9 Ulverston	Zone 10 Consiton and Broughton-in-Furness					
Expenditure 2017	24.6	16.5	22.0	20.8	17.6	30.9	20.8	56.1	44.2	45.8	299.2	12.4	2.9	314.4	314.4
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	13.7
Marks and Spencer, Library Road	1.2	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	0.8	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	25.3	1.8		27.1	26.7
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	9.2	13.3
Ulverston Town Centre (PSA)															
Co-operative, Kents Bank Road	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
Other destinations	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.0
Ulverston Town Centre Sub-Total	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		2.2	2.2
Grange over Sands Town Centre Sub-Total	0.0	0.0	0.0	6.3	0.1	0.0	0.0	0.2	0.0	0.0	6.7	0.5		7.1	7.0
Milnthorpe Town Centre															
Co-operative, Kents Bank Road	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
Other destinations	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.0
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	9.4	5.0	5.6	4.3	5.5	8.7	0.3	0.3	48.5	3.4		51.9	51.2
Morrisons, Katherine Avenue	6.4	7.5	4.8	2.0	2.0	6.8	6.6	3.5	0.3	0.0	39.9	2.8		42.7	42.1
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	14.0	13.1	15.9	8.0	8.0	12.8	13.7	12.8	0.9	0.4	99.6	6.9		106.5	105.1
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	7.3	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	1.1
Ulverston Area Sub-Total	0.0	0.0	0.0	1.2	0.0	0.2	0.0	0.0	21.5	2.4	25.3	1.8	1.3	28.3	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	16.2	21.4	17.8	14.9	13.9	17.9	23.2	27.0	3.6	178.1	12.4		193.4	195.0
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	9.0	0.2	0.1	0.4	0.2	12.3			12.3	12.1
Ambleside Rural Service Centre	0.0	0.0	0.0	0.1	0.1	5.0	0.0	0.0	0.2	0.0	5.3			5.3	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	23.3			23.3	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	5.3	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	4.9	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	15.3			15.3	15.1
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	16.2
Other destinations	0.3	0.1	0.2	0.0	0.2	0.4	0.4	10.5	0.8	5.2	17.9			17.9	17.7
Outside of the District Sub-Total	0.7	0.2	0.5	2.5	2.2	1.0	0.4	32.7	16.5	41.1	97.7			97.7	96.4
Total	24.6	16.5	22.0	20.8	17.6	30.9	20.8	56.1	44.2	45.7	299.2		2.9	314.4	314.4

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 Croft Road), Kirkby Lonsdale trades at the mid-point between survey derived and benchmark 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)										Sub-Total	Tourist Spend	In-Flow	Total	Revised Total
	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 Arnsdale, Siverdale, Carnforth and Kirkby Lonsdale	Zone 9 Ulverston	Zone 10 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	313.1	13.0	3.0	329.1	329.1
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		14.5	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)															
Co-operative, Kents Bank Road	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
Other destinations	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.0
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															
Co-operative, Kents Bank Road	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
Other destinations	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.0
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	53.6
Morrisons, Katherine Avenue	6.7	7.8	5.1	2.1	2.1	7.1	6.9	3.7	0.3	0.0	41.8	2.9		44.7	44.1
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	104.2	7.2		111.5	110.1
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		6.2	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		6.2	6.2
South Lakeland Sub-Total	23.1	17.0	22.3	18.6	15.6	14.6	18.8	24.5	28.2	3.8	186.4	13.0		199.3	203.9
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	5.2	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	102.3			102.3	101.1
Total	25.7	17.2	23.1	21.7	18.4	32.4	21.7	59.0	46.3	47.7	313.1		3.0	329.1	329.1

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 Croft Road), Kirkby Lonsdale trades at the mid-point between survey derived and benchmark 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)										Sub-Total	Tourism Spend	In-Flow	Total	Revised Total
	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 Arnsdale, Siverdale, Carnforth and Kirkby Lonsdale	Zone 9 Ulverston	Zone 10 Cossiton and Broughton-in-Furness					
Expenditure 2025	26.4	17.7	23.7	22.3	18.9	33.2	22.3	60.9	47.5	49.0	321.8	13.3	3.1	338.2	338.2
South Lakeland District															
Kendal Town Centre (PSA/SSA)															
Booths, Wainwright's Yard, Stricklandgate	5.4	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	1.0	0.5	0.4	1.4	0.2	0.3	7.4	0.5		8.0	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	8.6	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	3.0
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)															
Booths, Oubas Hill	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	5.1
Other destinations	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.0
Ulverston Town Centre Sub-Total	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	5.1
Grange over Sands Town Centre															
Co-operative, Kents Bank Road	0.0	0.0	0.0	4.7	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		7.7	7.6
Milnthorpe Town Centre															
Booths, Oubas Hill	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
Other destinations	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.0
Milnthorpe Town Centre Sub-Total	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	52.2	3.6		55.8	55.2
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	45.4
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	107.1	7.4		114.6	113.2
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	19.1	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	27.2	1.9	1.4	30.4	30.1
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	6.4
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	6.4
South Lakeland Sub-Total	23.7	17.4	22.9	19.1	16.0	15.0	19.3	25.2	29.0	3.9	191.5	13.3		204.8	209.5
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	13.1
Ambleside Rural Service Centre	0.0	0.0	0.0	0.1	0.1	5.4	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	17.3	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	0.4	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	11.4	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	105.2			105.2	104.0
Total	26.4	17.7	23.7	22.3	18.9	33.2	22.3	60.9	47.5	49.0	321.8		3.1	338.2	338.2

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 Croft Road), Kirkby Lonsdale trades at the mid-point between survey derived and benchmark 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	131.85	138.11	142.01
Kirkby Lonsdale	13.17	13.34	13.65	13.85
Ulverston	31.93	32.65	34.17	35.11
Grange over Sands	6.88	7.03	7.36	7.57
Milnthorpe	4.17	4.26	4.46	4.59
Other destinations South Lakeland	5.74	5.89	6.17	6.35
South Lakeland Sub-Total	190.68	195.02	203.93	209.47
Benchmark Turnover				
Kendal	97.50	97.50	97.50	97.50
Kirkby Lonsdale	15.26	15.26	15.26	15.26
Ulverston	29.58	29.58	29.58	29.58
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	5.89	6.17	6.35
South Lakeland Sub-Total	154.50	154.65	154.93	155.11
Expenditure Deficit/Surplus				
Kendal	31.30	34.35	40.61	44.51
Kirkby Lonsdale	-2.09	-1.92	-1.61	-1.41
Ulverston	2.35	3.07	4.59	5.53
Grange over Sands	2.46	2.61	2.94	3.15
Milnthorpe	2.17	2.26	2.46	2.59
Other destinations South Lakeland	0.00	0.00	0.00	0.00
South Lakeland Sub-Total	36.18	40.38	49.00	54.36

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	34.3	13,000	2,642	40.6	13,000	3,124	44.5	13,000	3,424
Kirkby Lonsdale	-2.1	8,000	-	-1.9	8,000	-	-1.6	8,000	-	-1.4	8,000	-
Ulverston	2.4	10,000	235	3.1	10,000	307	4.6	10,000	459	5.5	10,000	553
Grange over Sands	2.5	8,000	307	2.6	8,000	327	2.9	8,000	368	3.1	8,000	393
Milnthorpe	2.2	8,000	271	2.3	8,000	283	2.5	8,000	308	2.6	8,000	324
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 (%)										Total
	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 Arnsdale, Siverdale, Carnforth and Kirkby Lonsdale	Zone 9 Ulverston	Zone 10 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) Proportion of South Lakeland Tourist Visits 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 proportion to the proportion 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)										Sub-Total	Tourist Spend	Total	Revised Total
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10				
	Kendal Central and West	Kendal North and North East	Kendal South	Grange-over-Sands	Milnthorpe	Windermere	Sedbergh, Grayrigg and Staveley	Arnsdale, Silverdale, Carnforth and Kirkby Lonsdale	Ulverston	Conishton and Broughton-in-Furness				
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	0.3	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 benchmark 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)										Sub-Total	Tourist Spend	Total	Revised Total
	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 Arnsdale, Silverdale, Carnforth and Kirkby Lonsdale	Zone 9 Ulverston	Zone 10 Consiton and Broughton-In-Furness				
Expenditure 2017	37.8	25.4	35.0	29.3	28.0	45.7	32.7	87.5	69.2	68.6	459.1	20.8	479.8	479.8
South Lakeland District														
Kendal Town Centre (PSA/SSA)	23.7	16.0	22.4	9.2	15.0	22.3	17.8	20.7	3.7	1.5	152.3	13.1	165.4	164.5
Kirkby Lonsdale Town Centre	0.0	0.0	0.0	0.0	0.2	0.1	0.0	1.8	0.0	0.0	2.1	0.2	2.3	5.0
Ulverston Town Centre (PSA)	0.2	0.0	0.0	0.4	0.0	0.3	0.0	0.0	17.8	1.8	20.4	1.8	22.2	22.1
Grange over Sands Town Centre	0.0	0.1	0.0	5.6	0.2	0.0	0.0	0.0	0.5	0.0	6.5	0.6	7.0	7.0
Milnthorpe Town Centre	0.0	0.0	0.0	0.1	2.7	0.0	0.2	0.8	0.0	0.0	3.8	0.3	4.2	4.1
Kendal Area														
South Lakeland Retail Park	5.8	4.8	4.0	1.8	2.2	5.2	4.5	4.4	0.0	0.1	32.7	2.8	35.5	35.3
Other destinations	3.6	2.1	3.3	2.6	2.4	1.7	2.6	2.5	0.2	0.0	21.0	1.8	22.8	22.7
Kendal Area Sub-total	9.3	6.9	7.4	4.3	4.6	6.8	7.1	6.9	0.2	0.1	53.7	4.6	58.3	58.0
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	0.7	0.1	0.0	0.0	1.1	0.0	0.1	2.2	0.2	2.4	2.4
Other destinations South Lakeland Sub-total	0.0	0.0	0.0	0.7	0.1	0.0	0.0	1.1	0.0	0.1	2.2	0.2	2.4	2.4
South Lakeland Sub-total	33.3	23.0	29.8	20.4	22.7	29.5	25.2	31.3	22.3	3.5	241.1	20.8	261.9	263.1
Within South Lakeland but under National Park Control														
Lake District National Park Area														
Windermere	0.1	0.0	0.1	0.3	0.2	4.1	0.0	0.2	0.2	0.0	5.3		5.3	5.3
Ambleside Rural Service Centre	0.0	0.1	0.2	0.0	0.1	3.1	0.1	0.0	0.4	0.0	3.9		3.9	3.8
Other destinations	0.1	0.0	0.1	0.2	0.0	1.2	0.3	0.1	0.0	0.0	2.1		2.1	2.1
Yorkshire Dales National Park Area														
Sedbergh Local Centre	0.1	0.0	0.0	0.0	0.0	0.0	2.7	0.0	0.0	0.0	2.7		2.7	2.7
Within South Lakeland but under National Park Control Sub-total	0.2	0.1	0.4	0.5	0.3	8.4	3.0	0.4	0.6	0.0	14.0		14.0	13.9
Defined Centres Outside of the District														
Lancaster City Centre	0.8	0.3	0.7	0.7	1.5	0.8	1.2	31.3	1.0	0.0	38.4		38.4	38.1
Manchester City Centre	0.9	0.3	0.8	1.5	0.3	0.6	0.5	3.5	1.6	1.7	11.6		11.6	11.5
Preston City Centre	0.5	0.3	0.5	0.6	0.6	1.2	0.7	3.7	0.3	0.9	9.2		9.2	9.2
Carlisle City Centre	0.7	0.2	0.4	0.5	0.3	0.9	0.7	0.2	0.2	0.5	4.7		4.7	4.6
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	1.4
Morecambe Town Centre	0.1	0.2	0.4	0.0	0.1	0.2	0.0	3.3	0.0	0.0	4.2		4.2	4.2
Carnforth Town Centre	0.0	0.0	0.0	0.0	0.3	0.0	0.0	6.5	0.0	0.0	6.8		6.8	6.7
Barrow in Furness Town Centre	0.3	0.2	0.4	4.2	0.6	2.5	0.2	0.2	36.5	47.7	92.7		92.7	92.2
Other destinations	0.8	0.7	1.7	0.7	1.0	1.6	0.9	6.0	5.7	12.6	31.7		31.7	31.6
Defined Centres Outside of the District Sub-total	4.2	2.1	4.8	8.3	4.7	7.9	4.4	55.5	45.5	63.3	200.7		200.7	199.5
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	0.8	1.7	2.8		2.8	2.8
Lancaster Retail Park, Morecambe	0.1	0.1	0.0	0.0	0.0	0.0	0.1	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	0.2	0.0	0.1	0.2	0.8	1.7	3.4		3.4	3.4
Outside of the District Sub-Total	4.2	2.3	4.8	8.4	4.9	7.9	4.4	55.7	46.3	65.1	204.0		204.0	202.9
Total	37.8	25.4	35.0	29.3	28.0	45.7	32.7	87.5	69.2	68.6	459.1		479.9	479.9

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 benchmark 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)										Sub-Total	Tourist Spend	Total	Revised Total
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10				
	Kendal Central and West	Kendal North and North East	Kendal South	Grange-over-Sands	Milnthorpe	Windermere	Sedbergh, Grayrigg and Staveley	Arnsdale, Siverdale, Carnforth and Kirkby Lonsdale	Ulverston	Consiton and Broughton-In-Furness				
Expenditure 2022	44.6	30.0	41.4	34.6	33.0	54.0	38.6	103.9	81.7	80.9	542.8	21.7	564.5	564.5
South Lakeland District														
Kendal Town Centre (PSA/SSA)	28.0	18.8	26.4	10.9	17.7	26.4	21.0	24.6	4.4	1.8	180.0	13.7	193.8	192.9
Kirkby Lonsdale Town Centre	0.0	0.0	0.0	0.0	0.2	0.1	0.0	2.2	0.0	0.0	2.5	0.2	2.7	5.2
Ulverston Town Centre (PSA)	0.2	0.0	0.0	0.5	0.0	0.3	0.0	0.0	21.0	2.2	24.1	1.8	26.0	25.9
Grange over Sands Town Centre	0.0	0.1	0.0	6.6	0.2	0.0	0.1	0.0	0.6	0.0	7.7	0.6	8.2	8.2
Milnthorpe Town Centre	0.0	0.0	0.0	0.1	3.2	0.0	0.3	1.0	0.0	0.0	4.5	0.3	4.9	4.9
Kendal Area														
South Lakeland Retail Park	6.8	5.7	4.7	2.1	2.6	6.1	5.3	5.2	0.0	0.1	38.6	2.9	41.6	41.4
Other destinations	4.2	2.5	4.0	3.0	2.8	2.0	3.1	3.0	0.2	0.0	24.8	1.9	26.7	26.6
Kendal Area Sub-total	11.0	8.2	8.7	5.1	5.5	8.1	8.4	8.2	0.2	0.1	63.5	4.8	68.3	68.0
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	0.0	0.9	0.1	0.0	0.1	1.3	0.0	0.1	2.6	0.2	2.8	2.8
Other destinations South Lakeland Sub-total	0.1	0.1	0.0	0.9	0.1	0.0	0.1	1.3	0.0	0.1	2.6	0.2	2.8	2.8
South Lakeland Sub-total	39.3	27.2	35.2	24.1	26.9	34.8	29.8	37.2	26.3	4.1	285.0	21.7	306.7	307.9
Within South Lakeland but under National Park Control														
Lake District National Park Area														
Windermere	0.1	0.0	0.2	0.3	0.3	4.9	0.0	0.3	0.2	0.0	6.3		6.3	6.2
Ambleside Rural Service Centre	0.0	0.1	0.2	0.0	0.1	3.6	0.1	0.0	0.4	0.0	4.6		4.6	4.5
Other destinations	0.1	0.0	0.1	0.3	0.0	1.4	0.4	0.2	0.0	0.0	2.5		2.5	2.4
Yorkshire Dales National Park Area														
Sedbergh Local Centre	0.1	0.0	0.0	0.0	0.0	0.0	3.2	0.0	0.0	0.0	3.2		3.2	3.2
Within South Lakeland but under National Park Control Sub-total	0.3	0.1	0.4	0.6	0.4	9.9	3.6	0.5	0.7	0.0	16.5		16.5	16.4
Defined Centres Outside of the District														
Lancaster City Centre	1.0	0.4	0.8	0.9	1.8	0.9	1.5	37.2	1.2	0.0	45.5		45.5	45.3
Manchester City Centre	1.1	0.3	0.9	1.8	0.4	0.7	0.5	4.1	1.9	1.9	13.7		13.7	13.6
Preston City Centre	0.6	0.3	0.6	0.7	0.7	1.4	0.8	4.4	0.4	1.0	10.9		10.9	10.9
Carlisle City Centre	0.8	0.2	0.5	0.6	0.4	1.1	0.8	0.3	0.2	0.6	5.5		5.5	5.5
Bolton le Sands Village Centre	0.1	0.1	0.1	0.1	0.0	0.2	0.2	0.8	0.2	0.0	1.7		1.7	1.7
Morecambe Town Centre	0.1	0.2	0.4	0.0	0.1	0.2	0.1	3.9	0.0	0.0	5.0		5.0	5.0
Carnforth Town Centre	0.0	0.0	0.0	0.0	0.3	0.0	0.0	7.7	0.0	0.0	8.0		8.0	8.0
Barrow in Furness Town Centre	0.4	0.2	0.4	4.9	0.7	3.0	0.2	0.2	43.1	56.2	109.4		109.4	108.9
Other destinations	0.9	0.8	2.0	0.8	1.2	1.9	1.1	7.2	6.7	14.9	37.5		37.5	37.4
Defined Centres Outside of the District Sub-total	4.9	2.5	5.7	9.8	5.6	9.3	5.2	66.0	53.7	74.7	237.3		237.3	236.2
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	1.0	2.1	3.4		3.4	3.3
Lancaster Retail Park, Morecambe	0.1	0.2	0.0	0.0	0.0	0.0	0.1	0.3	0.0	0.0	0.6		0.6	0.6
Retail Parks Outside of the District	0.1	0.2	0.0	0.2	0.2	0.0	0.1	0.3	1.0	2.1	4.0		4.0	4.0
Outside of the District Sub-Total	5.0	2.7	5.7	9.9	5.8	9.3	5.2	66.2	54.7	76.7	241.3		241.3	240.2
Total	44.6	30.0	41.4	34.6	33.0	54.0	38.6	104.0	81.7	80.9	542.8		564.5	564.5

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 benchmark 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)										Sub-Total	Tourist Spend	Total	Revised Total
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10				
	Kendal Central and West	Kendal North and North East	Kendal South	Grange-over-Sands	Milnthorpe	Windermere	Sedbergh, Grayrigg and Staveley	Arnsdale, Siverdale, Carnforth and Kirkby Lonsdale	Ulverston	Consiton and Broughton-In-Furness				
Expenditure 2025	49.3	33.2	45.8	38.3	36.5	59.8	42.7	115.5	90.4	89.3	600.7	22.3	623.0	623.0
South Lakeland District														
Kendal Town Centre (PSA/SSA)	31.0	20.8	29.2	12.1	19.6	29.2	23.2	27.3	4.8	1.9	199.2	14.1	213.3	212.3
Kirkby Lonsdale Town Centre	0.0	0.0	0.0	0.0	0.2	0.1	0.0	2.4	0.0	0.0	2.8	0.2	3.0	5.9
Ulverston Town Centre (PSA)	0.2	0.0	0.0	0.6	0.0	0.3	0.0	0.0	23.2	2.4	26.7	1.9	28.6	28.5
Grange over Sands Town Centre	0.0	0.1	0.0	7.3	0.3	0.0	0.1	0.0	0.7	0.0	8.5	0.6	9.1	9.0
Milnthorpe Town Centre	0.0	0.0	0.0	0.1	3.5	0.0	0.3	1.1	0.0	0.0	5.0	0.4	5.4	5.4
Kendal Area														
South Lakeland Retail Park	7.5	6.3	5.2	2.3	2.9	6.8	5.8	5.8	0.0	0.1	42.8	3.0	45.8	45.6
Other destinations	4.7	2.8	4.4	3.3	3.1	2.2	3.4	3.3	0.3	0.0	27.5	1.9	29.4	29.3
Kendal Area Sub-total	12.2	9.0	9.6	5.7	6.0	8.9	9.2	9.1	0.3	0.1	70.2	5.0	75.2	74.8
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	0.9	0.1	0.0	0.1	1.5	0.0	0.1	2.9	0.2	3.1	3.1
Other destinations South Lakeland Sub-total	0.1	0.1	0.1	0.9	0.1	0.0	0.1	1.5	0.0	0.1	2.9	0.2	3.1	3.1
South Lakeland Sub-total	43.5	30.1	38.9	26.7	29.7	38.5	32.9	41.4	29.0	4.6	315.3	22.3	337.6	339.0
Within South Lakeland but under National Park Control														
Lake District National Park Area														
Windermere	0.1	0.0	0.2	0.3	0.3	5.4	0.0	0.3	0.3	0.0	6.9		6.9	6.9
Ambleside Rural Service Centre	0.0	0.1	0.2	0.0	0.1	4.0	0.1	0.0	0.5	0.0	5.0		5.0	5.0
Other destinations	0.1	0.0	0.1	0.3	0.0	1.5	0.4	0.2	0.0	0.0	2.7		2.7	2.7
Yorkshire Dales National Park Area														
Sedbergh Local Centre	0.1	0.0	0.0	0.0	0.0	0.0	3.5	0.0	0.0	0.0	3.6		3.6	3.6
Within South Lakeland but under National Park Control Sub-total	0.3	0.1	0.5	0.6	0.4	10.9	4.0	0.5	0.8	0.0	18.3		18.3	18.2
Defined Centres Outside of the District														
Lancaster City Centre	1.1	0.4	0.9	1.0	2.0	1.0	1.6	41.4	1.3	0.0	50.6		50.6	50.3
Manchester City Centre	1.2	0.3	1.0	2.0	0.4	0.8	0.6	4.6	2.2	2.2	15.1		15.1	15.1
Preston City Centre	0.7	0.4	0.7	0.7	0.8	1.5	0.9	4.9	0.4	1.1	12.1		12.1	12.0
Carlisle City Centre	0.9	0.2	0.5	0.7	0.4	1.2	0.9	0.3	0.3	0.6	6.1		6.1	6.1
Bolton le Sands Village Centre	0.1	0.1	0.1	0.1	0.0	0.2	0.2	0.9	0.2	0.0	1.9		1.9	1.9
Morecambe Town Centre	0.1	0.2	0.5	0.0	0.1	0.2	0.1	4.4	0.0	0.0	5.6		5.6	5.5
Carnforth Town Centre	0.0	0.0	0.0	0.0	0.3	0.0	0.0	8.6	0.0	0.0	8.9		8.9	8.9
Barrow in Furness Town Centre	0.4	0.2	0.5	5.5	0.8	3.3	0.2	0.2	47.6	62.1	120.9		120.9	120.3
Other destinations	1.0	0.9	2.2	0.9	1.3	2.2	1.2	8.0	7.4	16.5	41.5		41.5	41.3
Defined Centres Outside of the District Sub-total	5.5	2.8	6.3	10.8	6.2	10.3	5.7	73.3	59.4	82.4	262.7		262.7	261.4
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	3.7		3.7	3.7
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 Sub-total	0.1	0.2	0.0	0.2	0.2	0.0	0.1	0.3	1.1	2.3	4.4		4.4	4.4
Outside of the District Sub-Total	5.5	3.0	6.3	11.0	6.4	10.3	5.8	73.6	60.4	84.7	267.1		267.1	265.8
Total	49.3	33.2	45.8	38.3	36.5	59.8	42.7	115.5	90.3	89.3	600.6		622.9	622.9

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 benchmark 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	222.42	260.87	287.15
Kirkby Lonsdale	4.61	5.00	5.20	5.90
Ulverston	19.65	22.17	25.97	28.57
Grange over Sands	6.21	7.00	8.20	9.03
Milnthorpe	3.66	4.14	4.86	5.35
Other destinations South Lakeland	2.10	2.38	2.79	3.08
South Lakeland Sub-Total	233.15	263.10	307.89	339.07
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	2.38	2.79	3.08
South Lakeland Sub-Total	214.52	229.61	250.01	263.12
Expenditure Deficit/Surplus				
Kendal	19.22	32.32	54.05	69.61
Kirkby Lonsdale	-2.61	-2.73	-3.20	-2.94
Ulverston	7.49	9.16	11.82	13.68
Grange over Sands	-4.10	-4.03	-3.79	-3.60
Milnthorpe	-1.37	-1.24	-0.99	-0.80
Other destinations South Lakeland	0.00	0.00	0.00	0.00
South Lakeland Sub-Total	18.63	33.49	57.88	75.95

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	32.3	6,419	5,036	54.1	6,983	7,741	69.6	7,345	9,477
Kirkby Lonsdale	-2.6	3,500	-	-2.7	3,864	-	-3.2	4,266	-	-2.9	4,528	-
Ulverston	7.5	3,500	2,140	9.2	3,864	2,370	11.8	4,266	2,771	13.7	4,528	3,022
Grange over Sands	-4.1	3,500	-	-4.0	3,864	-	-3.8	4,266	-	-3.6	4,528	-
Milnthorpe	-1.4	3,500	-	-1.2	3,864	-	-1.0	4,266	-	-0.8	4,528	-
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	33.5		5,338	57.9		8,638	75.9		10,877

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