

# West Cumbria Retail Study

## Final Report

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**WYG** PLANNING AND DESIGN  
Regatta House  
Clippers Quay  
Salford Quays  
Manchester  
M50 3XP

[www.wyg.com](http://www.wyg.com)



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<b>Prepared By:</b>	<b>Adrian Fox – Associate Kathryn Donnelly – Principal Planner</b>
<b>Approved By:</b>	<b>Keith Nutter - Director</b>

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## GLOSSARY OF TERMS



## 1.0 INTRODUCTION

### Scope and Purpose

- 1.01 WYG Planning & Design (WYG) was commissioned by Allerdale Borough Council; Copeland Borough Council and Cumbria County Council in April 2008, to undertake an assessment of the current and future retail role of the main centres within the West Cumbria Sub-Region. In response to the Tender Brief this report seeks to:
- Assess the current retail picture in the main retail centres in the Boroughs of Allerdale and Copeland;
  - Describe the current retail spending patterns in all retail sectors across the two Boroughs plus assess the likely impact on spending patterns of the implementation of outstanding retail planning permissions in all the main towns;
  - Provide a 'health check' for each of the main retail centres of Workington, Whitehaven, Maryport, Cockermouth, Cleator Moor, Millom, Wigton and Egremont;
  - Assess the retail roles of Keswick, Silloth, Aspatria, Seascale and Gosforth;
  - Consider the impact of out-of-centre outlets in each town and the role of smaller outlets in the rural villages.
  - Assess the impact of the recent Workington Town Centre redevelopment on the shopping patterns of the sub-region;
  - Assess capacity for further retail development in all retail sectors in each of the main centres for five, ten and fifteen year time periods;
  - Consider the relationship of the respective retail roles of Workington and Whitehaven and the implications for the capacity for future retail development in each of the two towns.
  - Assess the potential impact of various population growth scenarios for the Boroughs on spending capacity and patterns;
  - Appreciate the deliverability of all retail elements of current development initiatives in Whitehaven and Workington; and
  - Consider the impact of possible changes to retail policy at the national level.
- 1.02 This study includes an in-depth analysis of the retail provision within the main centres of the West Cumbria Sub-Region, including an assessment of the extent to which the centres are meeting the retail needs of the local population and the role of the local shopping network and the Sub-Regional shopping hierarchy.



- 1.03 In undertaking the study, consideration has been made with regard to the relevant advice contained in Planning Policy Statement 6 (PPS6) 'Planning for Town Centres', which was published in March 2005, together with relevant regional and local planning policy.



## 2.0 CURRENT AND EMERGING RETAIL TRENDS

### Introduction

- 2.01 The retail property landscape across the UK has changed significantly over the past 50 years, from post-war redevelopment in town centres, through to the emergence of the retail warehouse parks and out-of-town regional shopping malls.
- 2.02 During this time, the retail and leisure sectors have experienced considerable growth. Spending on retail goods has significantly increased over the past decade, particularly spending on comparison (or non-food) goods. This growth in spending is attributable to a number of factors, including greater disposable income, cheaper prices and new technology.
- 2.03 The retail market is continually changing as a result of shifts in demographics, increasingly restrictive planning policies and technological advancements, such as e-tailing. These changes are having an impact on the format of retail and leisure floorspace. Research undertaken by British Council of Shopping Centres ('Future of Retail Property, 2006/7') identified that for the period 1999 to 2005 the proportion of new retail space that was developed in UK town centres rose to 35%. This reflects the Government's 'town centres first' approach.

### Current Retail Picture

- 2.04 Research undertaken by Colliers CRE (Midsummer Retail Report, June 2007) provides information on recent trends together with forecasts for the future of retailing in the UK.
- 2.05 The research identifies that although the UK has seen impressive economic growth over the 2006 to mid-2007 period, particularly in the financial and business services sector. Recent evidence has suggested that the economic growth over the latter part of 2007 and during 2008 has declined. The on-going downturn in both the UK and global economy is likely to continue to hit growth in retail spend. Indeed, the British Retail Consortium identified that total UK retail sales have fallen for the first time in 13 years between October and November 2008 and like-for-like sales have declined for six consecutive months since June 2008.
- 2.06 Rapidly rising inflation through 2008, the limited availability of credit and the sharp downturn in the housing market means that consumers are coming under increasing pressure. Whilst it is anticipated that the current slow down in the economy is not expected to last beyond 2010, it is notable that

MapInfo<sup>1</sup>, who identify the latest trends in retail consumer expenditure per head on convenience (food) goods and comparison (non-food) goods in the UK on an annual basis, have recently revised their forecast growth rates for comparison goods expenditure for the period to 2018 from a high of +5.3% per annum in 2007, to a notably lower figure of +4.0% per annum in 2008, after assessing the potential implications of the current 'credit crunch'. This represents a significant reduction in the forecast growth of comparison goods expenditure from that experienced in recent years.

- 2.07 Indeed, a number of high street retailers reported poor trading figures during the latter part of 2008 resulting in many retailers selling heavily reduced goods. Despite this heavy discounting on products over the festive period together with the reduction in VAT from 17.5% to 15% set by the Government until January 2010, a number of retailers fell into administration during the end of 2008 and early 2009, including high street retailers such as Woolworths, Adams, Zavvi and Whittards of Chelsea. It is widely accepted that further losses to the high street will be seen during 2009.
- 2.08 Despite the loss of key high street retailers and the overall decline in the retail sector specific parts of the retail sector have performed well. Indeed, the market for recreational goods including DVDs, CDs, toys, computers and books performed well, with healthy growth aided by supermarket sales over the period 2007 to 2008, together with the growing popularity of online shopping for these types of goods from retailers such as Amazon, who continue to see an increase in sales year-on-year. In addition, growth in convenience goods expenditure is forecast to increase in the future, with MapInfo revising their forecasts from +1.2% per annum last year to 1.5% per annum for the period 2007 to 2018. In particular discount convenience retailers such as Aldi have seen a notable increase in sales during 2008 and are looking to expand their portfolio through to 2009. Similarly, Iceland has also seen an increased performance and has recently purchased a number of former Woolworths stores as they seek to expand. Against this, Marks & Spencer has not performed as well, resulting in the proposed closure of 27 of their M&S Simply Food stores throughout the UK, although Marks & Spencer are still committed to opening a number of new stores elsewhere.
- 2.09 Overall, indications during the latter part of 2008 point to a challenging 2009 for retailers, especially in light of falling income growth and a decline in savings. Colliers CRE predicted that retailer confidence will erode as a result of slowing house prices, which will reduce retail sales growth, and due to increased competition for custom. Furthermore, the increasing unemployment and falling investor confidence, particularly in the short-term, will have an impact on future retail spend.

<sup>1</sup> Derived from MapInfo Brief 07/02 and 08/02

## Trends in Comparison Goods Shopping

- 2.10 Whilst it is anticipated that over the next ten years there will be continued growth in retail spending, this is expected to slow down. Despite this, over the long-term comparison goods retail expenditure is expected to grow at a faster rate than convenience goods. Consequently, there is increasing impetus from retailers to achieve more efficient use of floorspace, particularly given the recent poor performance of many national multiples; many of which have been affected by the significant increase in e-tailing. As a consequence of the recent performance retailers are more reluctant to commit to many schemes in contrast with previous decades. Instead, retailers are being more selective in choosing schemes that are appropriate in terms of location and the types of premises provided. Indeed, retailers are seeking to occupy larger units in order to achieve more efficient use of floorspace and attract shoppers from a wider area. These larger floorplates enable retailers to provide a greater range of goods.
- 2.11 International market conditions and price deflation in some key sectors means that many high street names are becoming increasingly vulnerable to takeovers. Similarly, due to increased competition there have been a number of high profile losses from the high street, including Littlewoods and Music Zone. In addition, 2008 has seen the loss of major retailers such as Woolworths, MFI and The Pier from the high street and a number of further retailers are understood to be struggling.
- 2.12 There will continue to be demand for larger, more modern retail units in the future, although increased sensitivity over future viability will mean a cautious approach to new investment for many key national retailers. Marginal locations within centres will be increasingly rejected. Whilst many national retailers were previously looking at smaller/ lower order centres in order to increase their market share, the ongoing downturn in the economy has resulted in some retailers assessing the performance of existing stores and the potential closure of underperforming stores. Consequently, many investment decisions will be influenced by the scale of commitment from other retailers; developers will increasingly need to promote large town centre redevelopment schemes if they are to attract high quality retailers.

## Trends in Food Retailing

- 2.13 In the aftermath of the growth in the number of edge and out-of-centre large format supermarkets during the 1990s, development of such facilities is now more limited due to stricter planning laws, following the adoption of PPS6, and a lack of suitable sites. As a result, the national multiples in the food retailing sector are finding a range of other measures to improve their market share. These include:



- Offering a wider product range, such as financial and insurance products, petrol and non-food goods;
- Developing a wider range of outlets, for example small-format convenience stores in town centres (e.g. Sainsbury's Local, Tesco Express), smaller supermarkets mostly in town centres (e.g. Tesco Metro), superstores (e.g. Tesco) and hypermarkets (e.g. Tesco Extra, Asda Wal-Mart);
- Extended opening hours;
- Offering cheap products and no-frills service;
- Providing an attractive and powerful brand image; and
- Offering a home delivery service.

- 2.14 Nevertheless, Verdict (2008)<sup>2</sup> identifies that the food and grocery market is estimated at £118.2bn in 2007. Indeed, in recent years, food and grocery sales have forged ahead, driven primarily by the initiatives of grocers. The opening of substantial new space by the leading players (particularly Asda and Tesco) has enabled grocers to stock increasingly comprehensive non-food ranges, which have raised average transaction values and stolen market share from a wide range of non-food retailers to become significant players in the clothing, electricals, health and beauty, homewares and music and video sectors.
- 2.15 Verdict (2008) identifies that grocers' superstores – those with net selling space of at least 2,323 sq m – remain the primary driver of growth in the market. Large superstores, which now reach sizes of more than 9,290 sq m, are the preferred format for the leading players since they enable the merchandising of comprehensive non-food offers in addition to their full core food and grocery ranges and so command a higher average spend per customer.
- 2.16 As well as opening new stores leading grocers have aggressively sought to increase the selling space of their existing stores through extensions and the installation of mezzanines. Normally this additional space is dedicated to a broad non-food offer that spans clothing and footwear, homewares, electrical and music and video products. Tesco for instance is extending many of its superstores to create 'Extra' stores for this purpose while Sainsbury's is also prioritising the development of larger stores now that it has greater confidence in its potential in non-food.

<sup>2</sup> Verdict – UK Grocery Retailers 2008



- 2.17 Though large format stores remain supermarket operators' format of choice, a shortage of sites and a recognition that many shoppers, particularly the time poor and the elderly, prefer to shop at more local and quicker to shop stores mean that smaller stores have also been a focus for development.
- 2.18 Although supermarket sales have expanded, other types of convenience retailers have struggled. Verdict identifies that over the last five years food specialists' sales have been broadly flat, while off-licences and tobacconists have experienced a particularly sharp drop in sales.
- 2.19 Although total stores numbers have been in decline, Verdict (2008) identifies that total convenience goods space has increased, albeit slightly. This is a result of the vast scale of new superstores being opened which has lifted average store size and compensated for the decline in store numbers. Over recent years the size of the largest superstores has increased significantly. As supermarket operators expand their non-food ranges further, particularly into more space intensive categories such as furniture, average store size is set to increase further. This trend will be given greater momentum if Tesco pushes ahead with a rollout of its town centre 'department store' concept.
- 2.20 Tesco is the biggest UK supermarket operator (and retailer) by floorspace with 2.56m sq m in 2007 and Sainsbury's is behind, operating from just under 1.64m sq m (Verdict 2008). Tesco was also one of the more aggressive grocers in space expansion adding more space than its rivals. Indeed, only Waitrose had a higher space growth percentage. However, Asda and Morrisons have the largest average store size due largely to the two retailers not operating smaller-format convenience stores. In 2006/07, Verdict identified that Morrisons closed 14 of its smaller stores to be replaced with four new superstores, boosting its average size even further. Morrisons, Somerfield and the Co-operative Group all saw their total sales space fall. Both the Co-operative Group and Morrisons closed some of their underperforming stores in the 2006/07 financial year while Somerfield mainly closed bigger stores following the simplifications of its product offer.

### In Town Investment and Prime Rents

- 2.21 Colliers CRE highlights that August 2006 saw a cooling of demand for town centre representation in the retail market. Over the 2006-2007 period a lack of meaningful activity was recorded, with investors deterred by interest rate rise, retail failures and poor high street rental growth, despite retail yields over this period declining, suggesting improved investor confidence. Indeed, Property Data show that the volume of deals was down by 60% in 2006 compared to 2005.



- 2.22 Spring 2007 saw renewed interest in retail property investment, although this was still lower than in previous years. Although investors are still active in acquiring property, this has been on a more selective basis with the variety of bidders being reduced. Investors are concentrating on predominantly substantial, prime, well located assets in major city/town centres and in Central London. This may indicate a willingness to take a longer term view on the high street, rather than a demonstration of confidence in the current market.
- 2.23 Over the 12 months to May 2008, the prime Zone A rental level increase recorded in the UK was the smallest since the 2000/2001 period. However, once inflation is stripped out of this change, prime Zone A rents in real terms are seen to have actually fallen in recent years. Nationally, there is differentiation in the performance of Regions<sup>3</sup>, with five Regions (including London and the South West) recording static or increased prime rents, and seven regions recording a fall in their rental growth rate (including Yorkshire and the Humber, the West Midlands and the North West and Merseyside). Notably, both the North West and Merseyside and Yorkshire and The Humber both underperformed against the UK national average in terms of rental level gains. It is likely, particularly in the short-term, that rental values will continue to decline given the limited demand for retail floorspace in the future.

### Out of Centre

- 2.24 Colliers CRE note that demand for out-of-centre representation is relatively static, with some retailers including TK Maxx, Asda Living and Tesco Home Plus actively seeking to expand their out-of-centre floorspace and others, including Focus, B&Q and Currys either disposing of stores or downsizing their operations.
- 2.25 In terms of proposals in the development pipeline, the majority of consents for out-of-centre retail floorspace are for bulky goods stores. However, there has been a decline in out-of-centre proposals in the development pipeline during 2007. Despite this, Colliers CRE predict that the development of out-of-centre floorspace development will increase compared to 2007, albeit by a modest amount.

### Shopping Centre Development

- 2.26 Research undertaken by Colliers CRE recognises that within town centres, supply outstrips demand. This is particularly prevalent in terms of lettings within shopping centres. As a result, Colliers CRE expect future shopping centre schemes to be pre-let by only 70% to 80%. This compares to a number of similar schemes being 100% pre-let in previous years. This is symptomatic of a reluctance of retailers

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<sup>3</sup> Includes nine regions within England together with Scotland, Northern Ireland and Wales



to commit to schemes. This presents challenges for schemes due to open in the next few years, and it is anticipated that the timeframe for developing many shopping centre schemes will be pushed back.

- 2.27 The research also identifies that retailers are reluctant to commit to schemes before they are constructed due to difficult trading positions and a large amount of supply. Retailers are able to 'cherry-pick' the best schemes to which they commit, and the largest anchor stores in particular, including Debenhams, House of Fraser and Marks and Spencer, are able to negotiate very favourable letting terms.
- 2.28 Town centre shopping centre schemes that will be successful in the future are considered to be those which benefit from good design and good location. Car parking facilities are also a distinct advantage. It is this type of development that will be able to compete with out-of-centre shopping facilities, which whilst more convenient for many consumers are considered not to offer an attractive shopping experience.
- 2.29 Although a number of major town centre schemes are still in the pipeline, the lack of funding available to developers due to the global 'credit crunch' has resulted in a number of schemes falling away such as the comprehensive redevelopment in Stockport Town Centre or the delay in other schemes elsewhere.

### Growth in E-tailing ('E-commerce')

- 2.30 Many consumers who previously shopped in town centres and at retail parks are now using the internet for some of their purchases. This trend is set to continue, although the exact impact that e-commerce will have on the high street has yet to be fully established. However, the rise in the UK in recent years of e-commerce has impacted upon retailers, developers and investors alike. As access to the internet/online shopping continues to grow through digital televisions and mobile phones, proportionally less money is anticipated to be spent in the high street or at retail parks.
- 2.31 The growth in use of the internet as a sales medium has been enabled by increasing access to the internet by households. The proportion of households with access to the internet is expected to increase further over the coming years. This has supported the strong growth recorded, together with improved consumer confidence in the security of online payment, and heavy demand for expensive electrical products available online.



- 2.32 More than a third (36.3%) of UK consumers now purchases goods over the internet. Moreover, the average spend per customer is increasing. The online electrical goods sector represents the largest amount of expenditure, followed by online food shopping.
- 2.33 More recent research conducted by the Interactive Media in Retail Group and analysts Capgemini indicates that internet shopping accounted for 15p of every £1 of retail spending during 2007. This equates to some £46.6 billion of expenditure. This is likely to have increased during 2008 and is set to increase into 2009. However, this compares to the British Retail Consortium's data identifying that online sales accounted for 6% of retail spending during 2007. Despite these differing results, internet spend has increased in recent years.
- 2.34 The forecast for online sales suggests that this sector could more than double over the next five years. Furthermore, online sales are expected to account for an increasing share of all retail goods sales, with a market share predicted of a little under 10% in 2011. Against this, forecasts by Experian indicate that whilst growth in this sector will be rapid, it will tail-off and stabilise not far beyond 10%.
- 2.35 The success of internet shopping is having an impact upon traditional high streets, in light of increased competition and lower prices. Consequently, there is a possibility that online retailing will put some pressure on retail rental growth over the next five to ten years, but is unlikely to impact on capital values. Research by BCSC identifies that 'large' and 'very large' shopping centres (of over 40,000 sq m) are deemed almost immune from the impact of online shopping as they offer the complete 'day out'. Although as the size of the shopping centres decreases, it is more likely that there will be greater adverse effects. Within small shopping centres (sized between 5,000 – 20,000 sq m) it is likely that the growth of online shopping could reduce turnover notwithstanding any growth in disposable income.
- 2.36 Furthermore, there is some evidence to suggest that the increase in e-commerce is impacting not just on high street sales, but also on the inclination of retailers to expand their 'bricks and mortar' outlets (BCSC, 2006). Despite this, retailers are optimistic, as they envisage a continued demand for physical stores and, for most, store sizes are likely to remain the same. Significantly, more retailers ranked physical stores first, ahead of all other current channels of retail distribution, and this is a pattern that they envisaged continuing. Retailers see e-tailing as another channel of distribution (BCSC, 2006).
- 2.37 As a consequence of the likely increase in e-tailing, retailers will increasingly have to adapt their stores to create more experience led environments. However, the increase in 'virtual' floorspace could result in a



decrease in the level of innovation and number of new concepts and formats in the high street and in shopping centres.

- 2.38 Despite all these different assumptions with regard to the future effect of online shopping, it is considered that e-tailing will not replace the shopping experience as shopping is a social activity. Online shopping is very much seen as a complementary tool to support retail sales from physical destinations (BCSC, 2006). For successful retailers, online selling provides an additional route to the market. Online retailers benefit from demand generated through physical channels whilst high-street outlets can benefit from reaching a wider customer base through the internet.
- 2.39 In response to increased competition from the internet, high street retailers have improved their online services. The future for online retailing will mean that retailers without a website will lose out to competitors who have one. Crucially, retailers which combine a strong high-street offer with a well-represented and closely related e-tailing offer will have a positive outlook.

## 3.0 PLANNING POLICY CONTEXT

### Introduction

3.01 Given that the study seeks to provide important evidence that will assist in the future development of the Local Development Framework (LDF) process, it is important to identify key policy advice and how the national and regional guidance may impact upon the development of policies locally. The key texts that have been considered as part of this study include:

- Planning Policy Statement 6 'Planning for Town Centres' – PPS6 (March 2005); and
- Regional Spatial Strategy for the North West – North West of England Plan Regional Spatial Strategy to 2021.
- Proposed changes to PPS6 'Planning for Town Centres' (July 2008)

### Planning Policy Statement 6 – Planning for Town Centres (March 2005)

3.02 Planning Policy Statement 6: 'Planning for Town Centres' (PPS6) was published in March 2005 and sets out the Government's national policies and principles with regard to retailing and town centres.

3.03 Paragraph 1.3 of PPS6 notes that: **'The Government's key objective for town centres is to promote their vitality and viability by:**

- **Planning for the growth and development of existing centres; and**
- **Promoting and enhancing existing centres, by focusing development in such centres and encouraging a wide range of services in a good environment accessible to all.'**

3.04 There are other Government objectives which should be considered in the context of paragraph 1.3. These include:

- **'enhancing customer choice by making provision for a range of shopping, leisure and local services, which allow genuine choice to meet the needs of the entire community, particularly socially-excluded groups;**
- **supporting efficient, competitive and innovative retail, leisure, tourism and other sectors, with improving productivity; and**
- **improving accessibility, ensuring that existing or new development is, or will be, accessible and well-served by a choice of means of transport.'**



- 3.05 In order to deliver the Government's objectives, paragraph 2.1 notes that development should be focused in existing centres in order to strengthen and, where appropriate, regenerate them.
- 3.06 A positive and proactive approach to planning is encouraged by the guidance, noting that local planning authorities should work in conjunction with stakeholders and the community to, *inter alia*, assess the need for new floorspace for retail, leisure and other main town centre uses, taking into account both quantitative and qualitative considerations.
- 3.07 In assessing the need and capacity for additional retail and leisure development, paragraph 2.33 of PPS6 notes that:

**'...local planning authorities should place greater weight on quantitative need for additional floorspace for the specific types of retail and leisure developments. However, local planning authorities should also take account of qualitative considerations. In deprived areas which lack access to a range of services and facilities, and there will be clear and demonstrable benefits in identifying sites for appropriate development to serve communities in these areas, additional weight should be given to meeting these qualitative considerations.'**

- 3.08 In terms of quantitative need for additional retail development when preparing its development plan documents, paragraph 2.34 notes that a local planning authority should assess the likely future demand having a realistic assessment of:

- **'Existing and forecast population levels;**
- **Forecast expenditure for specific classes of goods to be sold, within the broad categories of comparison and convenience goods and for main leisure sectors; and**
- **Forecast improvements in productivity in the use of floorspace.'**

- 3.09 In terms of qualitative need, the guidance states at paragraph 2.35 that:

**'...a key consideration for a local planning department will be to provide for consumer choice by ensuring that:**

- **An appropriate distribution of locations is achieved, subject to the key objective of promoting the vitality and viability of town centres and the application of the sequential approach, to improve accessibility for the whole community; and**



- **Provision is made for a range of sites for shopping, leisure and local services, which allow genuine choice to meet the needs of the whole community, particularly the needs of those living in deprived areas.'**

- 3.10 The guidance further states at paragraph 2.36 that in addition to the above, other considerations that may be taken into account include the degree to which shops may be overtrading.
- 3.11 The guidance in paragraph 2.41 of PPS6 states that Local Planning Authorities should ensure when selecting sites for development that the scale of opportunities identified are related to the role and function of the centre and its catchment. Appropriate development should be located in the right type of centre to ensure that it fits and complements its role and function.
- 3.12 In terms of local centres, given their characteristics the guidance considers that it would be inappropriate as a location for large scale new development. Therefore, Local Planning Authorities are to consider an indicative upper limit for the scale of development likely to be permissible in different types of centres.
- 3.13 PPS6 adopts the sequential approach to site selection whereby Local Planning Authorities should select appropriate sites for allocation within identified centres where an identified need is to be met. All options in town centres should be thoroughly assessed before less central sites are considered for development of town centre uses. Paragraph 2.44 sets out the sequential approach that is required. A development should be considered in the following order:
- First locations in appropriate existing centres where suitable sites or buildings for conversion are, or are likely to become available within the development plan document period, taking account of an appropriate scale of the development in relation to the role and function of the centre; and then
  - Edge-of-centre locations with preference given to sites that are or will be well connected to the centre; and then
  - Out-of-centre sites with preference given to sites that are or will be well served by a choice of means of transport and which are close to the centre and have a high likelihood of performing links with the centre.
- 3.14 When considering sites Local Planning Authorities should, in consultation with stakeholders identify an appropriate range of sites to allow the accommodation of the identified need. It also recognises that Local Planning Authorities should be flexible and realistic when drawing up such sites and should discuss this with developers and operators. It is also recognised that Local Planning Authorities should have



appreciation for business models and should take into account business models in terms of scale, format, car parking provision and the scope for disaggregation.

3.15 When considering potential sites for allocation either in edge-of-centre or out-of-centre locations, the statement also suggests that Local Planning Authorities should assess the impact that potential development could have on identified centres within the catchment. In addition, Local Planning Authorities should ensure that locations are accessible when selecting appropriate sites for allocation. These should be:

- Whether the site is or will be accessible or well served by a choice of means of transport, especially public transport, walking and cycling, as well as by car; and
- The impact on car use, traffic and congestion.

3.16 PPS6 identifies that other matters which may be relevant when considering sites for allocation in future development plan documents include: the physical regeneration benefits of developing a site; additional employment opportunities; economic growth; and social inclusion.

3.17 Local planning authorities are also required to allocate sufficient sites for the future which can accommodate the identified need for at least the first five years from the adoption of their development plan documents. Notwithstanding this, for large town centres a site will be needed to be identified for a longer term period.

#### Consultation Draft PPS6

3.18 The proposed changes to PPS6 'Planning for Town Centres' has recently been published (July 2008) for consultation. One of the key aims of the changes, the Government say, is to protect local retailers which may struggle in the current economic climate, and in the face of competition from internet sales and the global market place.

3.19 The revised policy will remove the current 'need test' for new retail development outside town centres, which the Government considers has unintentionally stifled diversity and consumer choice, and led to some new retail schemes on the edge of a town centre being refused despite the fact that such schemes could improve the vitality and viability of the centre.

3.20 Instead a new 'impact test' is proposed which is aimed at providing councils with a better tool to prevent large scale developments putting small shops and town centres at risk. The new test includes assessing



social, economic and environmental criteria including retail diversity and consumer choice; loss of trade; impact on town centre investment; impact on sustainable development and climate change; scope for regeneration and job creation. New development will normally be refused where there are significant negative impacts on a town centre. However, if wider benefits outweigh negative impacts then the proposed development should be approved.

- 3.21 The current PPS6 tests, which ensure that the size of the development is not out of scale with a town centre and that development is accessible by a range of transport modes, are to be incorporated into the new impact test.
- 3.22 The 'sequential test' is retained requiring the most central town centre sites to be developed first, but the policy also encourages investment in disadvantaged areas where new employment opportunities can be created through development.
- 3.23 As a general rule, new development proposals should satisfy both the new 'impact test' and the 'sequential test'.
- 3.24 The new document carries forward the thrust of current policy by requiring local authorities to take a pro-active approach to planning for their town centres and to provide sustainable economic growth through policies which are responsive to economic change. Notably, Consultation Draft PPS6 states that [local planning policies should still be based on quantitative and qualitative assessments of need for new floorspace](#), but the current emphasis on quantitative need is proposed to be removed.
- 3.25 In summary, notable proposals to change particular aspects of policy include:
- Replacing the current five tests for development outside town centres with two: impact and the sequential test;
  - A greater focus on the wider social, economic and environmental benefits of proposals which could outweigh adverse town centre impacts;
  - Taking a longer term view of any impacts, typically beyond five years;
  - Assessing the effects of a proposal on consumer choice and retail diversity;
  - Introducing land values and the length of time key sites have remained undeveloped as indicators of a centre's vitality and viability; and
  - Further clarification of the requirements for impact assessments to accompany proposals of less than 2,500 sq m gross.



- 3.26 The consultation document contains no formal response to the Competition Commission's recommendation that the Government should introduce a 'competition test' into the planning system. However, a response is expected from the Government shortly.
- 3.27 A final revised planning policy statement is expected to be published in early 2009, together with supporting practice guidance.

### Regional Spatial Strategy for the North West – North West of England Plan Regional Spatial Strategy to 2021

- 3.28 The Planning and Compulsory Purchase Act 2004 strengthened the importance of regional planning by introducing Regional Spatial Strategies (RSS) which bring together economic, social and environmental issues linked to planning in a coherent framework. The RSS for the North West was published on 30 September 2008 and provides a framework for development and investment in the region over the next fifteen to twenty years.
- 3.29 Policy DP5 of the adopted RSS seeks to reduce the need to travel and increase accessibility. In this respect, the RSS identifies that development should be located so as to reduce the need to travel, especially by car, and to enable people as far as possible to meet their needs locally. This includes accessibility to range of services and facilities, such as retail.
- 3.30 In making provision for development, Policy RDF1 states that the first priority for growth and development should be the regional centres of Manchester and Liverpool followed by the inner areas surrounding these regional centres. The third priority should be the towns/cities in the three city regions, which includes Workington and Whitehaven town centres (which are grouped together). In this respect, development should be focused in and around the centres of the towns and cities, although development elsewhere may be acceptable if it satisfies other policies.
- 3.31 Policy RDF2 highlights that plans and strategies should identify a subset of towns and villages as Key Service Centres which:
- Act as service centres for surrounding areas, providing a range of services including retail, leisure, community, civic, health and education facilities and financial and professional services; and
  - Have good public transport links to surrounding towns and villages, or the potential for their development and enhancement.



3.32 Retail development is specifically dealt with under Policy W5. This policy states that:

**'Plans and strategies should promote retail investment where it assists in the regeneration and economic growth of the North West's town and city centres. In considering proposals and schemes any investment made should be consistent with the scale and function of the centre, should not undermine the vitality and viability of any other centre or result in the creation of unsustainable shopping patterns.'**

3.33 Although Policy W5 states that Manchester/Salford and Liverpool city centre should continue to function as the North West's primary retail centres, comparison retail facilities should be enhanced in a number of centres (including Workington/Whitehaven) to ensure a sustainable distribution of high quality retail facilities.

3.34 Outside the 25 centres identified under Policy W5, investment, of an appropriate scale, will be encouraged in order to maintain and enhance their vitality and viability, including investment to underpin wider regeneration initiatives to ensure that centres meet the needs of the local community, as identified by Local Authorities.

3.35 In addition, the RSS recognises that retail development that supports entrepreneurship, particularly increasing the number of independent retailers, should be supported.

3.36 Policy W5 states that there will be a presumption against new out-of-centre regional or sub-regional comparison retailing facilities requiring Local Authorities to be pro-active in identifying and creating opportunities for development within town centre. RSS also identifies that there should be a presumption against large-scale extensions to such facilities (which are defined in RSS as being over 2,500 sq m net of floorspace) unless they are fully justified in line with the sequential approach established in PPS6. There is no justification for such facilities to be designated as town centres with plans and strategies.

3.37 The supporting text to Policy W5 highlights the 25 centres identified are well developed as vibrant centres, particularly for comparison goods retailing which has traditionally been concentrated in town centres, and should continue this role. Paragraph 6.22 of RSS states:

**'Recent research points to a significant growth in retail spending in the North West, which will in turn require the provision of additional retail floorspace across the region. The network of centres**



**identified in Policy W5 will be the primary focus for this future growth and development, although they are not the only centres that should receive development through to 2021. The policy does not preclude the investment of resources in other centres, particularly where this will assist in the regeneration of the centre and the wider area. Future reviews of RSS may need to consider the impact of changes to retail formats on the pattern of both convenience and comparison retailing.'**

- 3.38 RSS acknowledges that the flow of expenditure between sub-regions generally reflects the proximity of population to centres in adjoining sub-regions. New investment should promote sustainable shopping patterns, which result in a reduced need to travel, especially by private car, to access retail facilities of an appropriate type and nature.
- 3.39 RSS highlights that local planning authorities will have to prepare retail need assessment for their local development frameworks, in line with the advice in PPS6. Specific retail development schemes will also require the preparation of detailed needs assessments.

## 4.0 ORIGINAL MARKET RESEARCH

### Introduction

- 4.01 Although WYG acknowledges that there are limitations to survey research, particularly in relation to the samples that can be achieved, the results provide important broad indicators as to consumer preference in relation to where people live and shop. Original market research enables analysis of a particular area, which helps to evaluate the actual draw of major centres and how they impact upon the market share of smaller centres. This is particularly important for some of the smaller centres within the West Cumbria Sub-Region given the strength and proximity of competing centres such as Carlisle. The use of specifically commissioned survey research is fundamental in informing a study that will effectively identify the likely capacity for future retail floorspace within the Sub-Region.
- 4.02 A key element of this Study was to obtain a detailed understanding of shopping patterns within and just beyond the West Cumbria Sub-Region and identify the potential catchment of existing centres within it. WYG commissioned specialist market researchers (NEMS Market Research Limited) to undertake empirical research, which comprised the following:
- Household Telephone Survey;
  - On-street Survey; and
  - Business Survey<sup>4</sup>

### Household Telephone Survey

- 4.03 Between May and June 2008 a survey of 1,002 households was undertaken within a defined Study Area, which comprised the local authority areas of Allerdale and Copeland, but also extended to include the neighbouring authorities of Barrow-in-Furness and South Lakeland together with the Lake District National Park. Figure 4.1 indicates the extent of the defined Study Area. A more detailed plan indicating the Study Area in relation to the local authority boundaries is contained at [Appendix 1](#).
- 4.04 The Study Area was broken down into eight zones based on post code sectors at a four digit level (e.g. CA14 1):

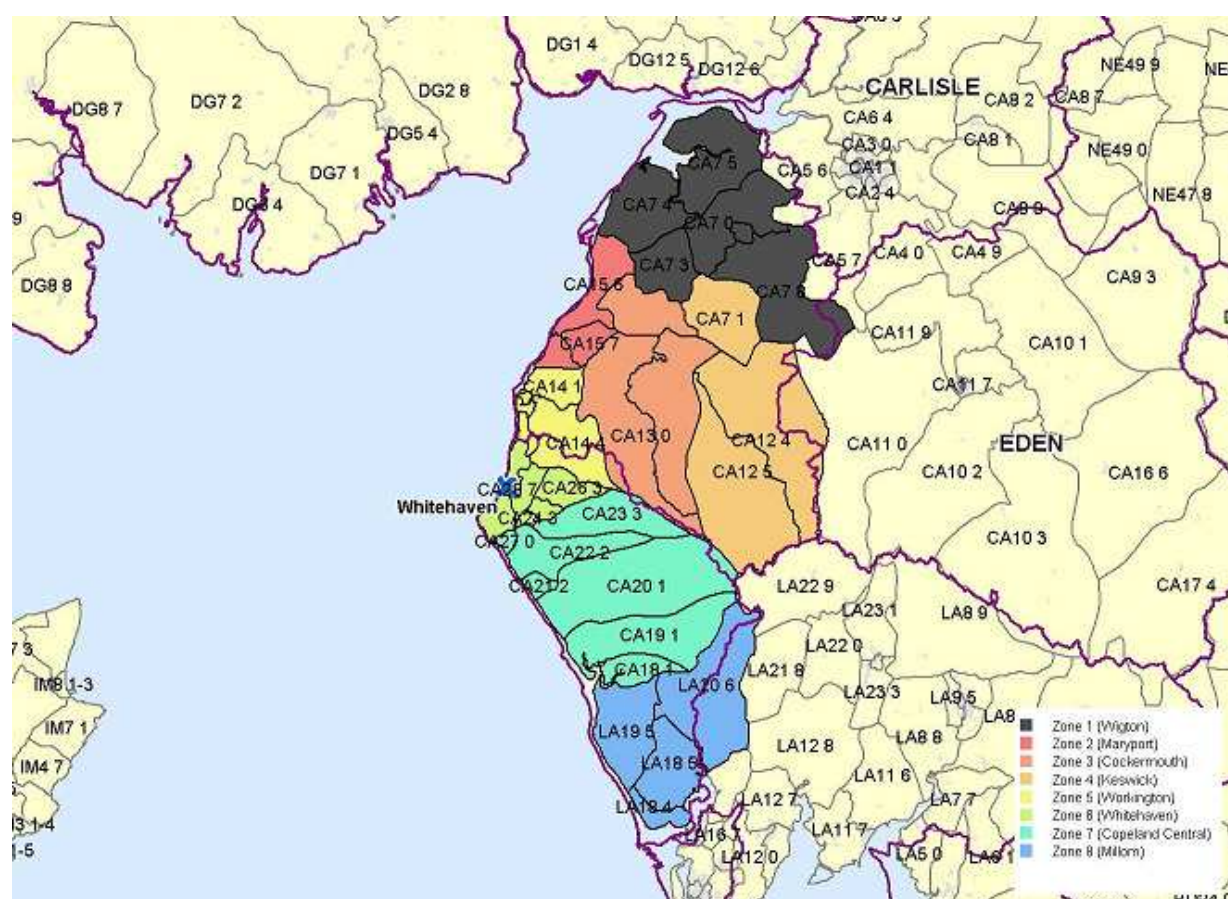
1. Wigton (CA7 0 / 3 / 4 / 5 / 8 / 9)

<sup>4</sup> Business surveys undertaken by WYG.



2. Maryport (CA15 6 / 7 / 8)
3. Cockermouth (CA13 0 / 9 and CA7 2)
4. Keswick (CA12 4 / 5 and CA7 1)
5. Workington (CA14 1 / 2 / 3 / 4 / 5)
6. Whitehaven (CA24 3, CA25 5, CA26 3, CA28 6 / 7 / 8 / 9)
7. Copeland Central (CA19 1, CA20 1, CA21 2, CA22 2, CA23 3 and CA27 0)
8. Millom (LA18 4, LA18 5, LA19 5 and LA20 6)

**Figure 4.1: Plan indicating the Extent of the West Cumbria Study Area**



4.05 A copy of the questionnaire and full tabulations of the West Cumbria Household Survey are contained at [Appendix 2](#).





### On-Street Survey

- 4.06 In addition, an on-street survey has been undertaken within the defined centres of Workington and Whitehaven in order to identify customer views, including their perception of each centre and how they could be improved. In this respect, a total of 315 surveys were undertaken in July 2008. The tabulated results of the on-street survey are contained at [Appendix 3](#).

### Business Survey

- 4.07 To complement the survey work undertaken by NEMS Market Research, WYG also undertook a postal survey in July/August 2008 of all businesses within the main centres of the West Cumbria Sub-Region: Workington, Whitehaven, Aspatria, Cockermouth, Cleator Moor, Millom, Maryport and Egremont. The survey explored the current strengths and weaknesses from a business operator's perspective as recommended by PPS6. For the centre of Wigton this study utilised the survey undertaken as part of the Wigton Impact Assessment, which was completed on behalf of the North Allerdale Partnership (completed in February/March 2008). In addition, local business forums were held in Workington (26 August 2008) and Whitehaven (27 August 2008) where local businesses were invited to share their views of the two main centres in the sub-region.
- 4.08 Business surveys were distributed to all of the commercial premises within the defined centres. A copy of the questionnaires and summary of the results are contained at [Appendix 4](#).

## 5.0 ASSESSMENT OF VITALITY AND VIABILITY OF EXISTING CENTRES

### Assessing the 'Vitality and Viability' of Existing Centres

5.01 Planning Policy Statement 6 'Planning for Town Centres' (2005) emphasises the importance of maintaining a 'healthy' town centre as it helps foster civic pride and local identity and can contribute towards the aim of sustainable development. It also states that by monitoring town centres on a regular basis, signs of decline can be identified early. [Appendix 5](#) provides detailed analysis of the vitality and viability of the following centres in accordance with guidance contained in PPS6:

- Whitehaven;
- Workington;
- Cockermouth;
- Maryport;
- Wigton;
- Millom;
- Cleator Moor; and
- Egremont.

5.02 Indicators of vitality and viability, set out in Paragraph 4.4 of PPS6, are used as a basis for the assessment of the 'health' of existing centres. These indicators are as follows:

- [Diversity of main town centre uses \(by number, type and amount of floorspace\)](#): An Experian land use plan (Goad plan) is used to assess the diversity of uses in the town centres;
- [The amount of retail, leisure and office floorspace in edge-of-centre and out-of-centre locations](#): WYG includes all retail floorspace within the two local authority areas (where available) in the assessment;
- [The potential capacity for growth or change of centres in the network](#): WYG has considered the opportunity for the main centres within West Cumbria to expand, including considering the scope for more intensive development on previously developed land;



- **Commercial Operator representation and intentions to change representation:** Derived from the land-use surveys, town centre business surveys (Appendix 4) and FOCUS reports from outstanding retailer demand (Appendix 6);
- **Shopping rents:** the average Zone A rents paid in centres, derived from published data (where available);
- **Proportion of vacant street level property:** derived from the land-use surveys;
- **Commercial yields on non-domestic property (i.e. the capital value in relation to the expected market rental):** derived from published data, where available;
- **Pedestrian flows:** from on-site observations;
- **Accessibility:** from WYG's assessment and shopper and business surveys;
- **Customers' and residents' views and behaviour:** derived from the various surveys;
- **Perception of safety and occurrence of crime:** from various surveys and 'on-the-ground' observations; and
- **State of the city / town centre environmental quality:** from 'on-the-ground' observations and survey results.

5.03 Based on our research, the following sets out a brief summary of the main issues within each of the West Cumbrian town centres. Full details and analysis of the surveys, observations and town centre forums and published data sources are included in Appendix 5.

## Workington

5.04 Workington is the principal shopping centre in Allerdale and the highest ranking town within the retail settlement hierarchy across West Cumbria. Since 2004 the town centre has seen significant change through the implementation of the £50million Washington Square redevelopment scheme which has sought to re-establish the town as a major shopping destination. The main focus of town centre



retailing in Workington is Washington Square area, extending into the older retail area along Pow Street, Murray Road and Finkle Street.

- 5.05 Workington offers a wide choice of shops, particularly in the comparison goods sector and has strong representation of the 'top twenty' retailers. The Washington Square development has improved the overall pedestrian environment and layout of the town centre. Whilst visitors to the town centre have a generally positive view of the redevelopment scheme all town centre businesses do not share this view.
- 5.06 The current main concern for the town centre is the number of vacant units. There is a high vacancy rate throughout the town centre and this includes clusters of units and some occupying prominent locations within the Washington Square development.
- 5.07 The town centre also has below average convenience provision. Although the proposed redevelopment of the Laundry Fields site as a Tesco store, adjacent to the town centre, may address this issue, this is not a development supported by all town centre traders who have concern over the impact on their businesses.
- 5.08 There is the potential to increase marketing and promotion of the town centre as a shopping 'destination' for visitors to the wider area. Further development of the town centre evening economy is also a key opportunity for Workington.

## Maryport

- 5.09 Maryport has a relatively compact town centre focused primarily along the length of Senhouse Street. There have been several recent initiatives and regeneration schemes both within and adjacent to the town centre which in particular have focused on improving the physical appearance of the town, (such as the Townscape Heritage Initiative and harbour public realm improvements) and the attractiveness of the town to visitors (such as 'The Wave' visitor centre).
- 5.10 In addition to the close proximity to the harbour, the town centre has several other key assets, on which it can build including a high proportion of independent retailers and good accessibility, including rail.
- 5.11 The lack of high street names and limited comparison shopping provision in Maryport however sees a significant leakage, particularly to Workington. The views expressed by business owners in the town centre indicate that the already high vacancy rates will increase further unless significant changes are



made. Potential opportunities to support the town centre include building further on increasing visitor numbers to Maryport and making further improvements to the physical and historic environment.

## Cockermouth

- 5.12 The retail focus of Cockermouth is along Main Street and Station Street, extending to Market Place, which has undergone significant improvements to the built environment in recent years as part of the Cockermouth Masterplan.
- 5.13 Overall, when compared to the other West Cumbria town centres, Cockermouth has many positives. The town has a significant number of independent retailers which it has turned to its advantage and a below average vacancy rate. Due to its location the town is well situated to draw on both the visitor and local economy. The quality of the built environment is generally high and overall accessibility is good and the recently constructed Sainsbury's store on Station Road appears to be trading well and has a positive impact on the vitality and viability of the centre.
- 5.14 A key concern, particularly of business operators is the availability of car parking serving the town centre.

## Wigton

- 5.15 Wigton is a small settlement, but the town centre also has an important role in serving the wider catchment in rural north Allerdale. The retail focus of the town centre is along High Street and King Street. There is a significant proportion of independent retailers in Wigton with few High Street names represented.
- 5.16 The general quality of the physical environment is poor and there are significant concerns over heavy traffic flows through the town centre and conflicts with pedestrian movements. Whilst these are long recognised issues they are yet to be fully addressed.
- 5.17 The future of the auction mart as a town centre use is also a key issue for Wigton. Indeed, Tesco has recently submitted an application for a new supermarket on this site and it is proposed that the auction mart will relocate to a new purpose-built auction mart at Skye Road in Wigton. There are also concerns over security issues within the town centre.



- 5.18 Future opportunities include increasing the number of visitors to Wigton through the promotion of wider tourism initiatives and providing support for further physical improvements to the town centre.

## Whitehaven

- 5.19 Whitehaven is the largest settlement within Copeland. The town centre is characterised by its Georgian architecture, 'grid iron' street pattern and close proximity to the harbour which has undergone significant investment in recent years.
- 5.20 Whitehaven has a fair representation of national retailers, mainly focused with the main shopping area along King Street and Lowther Street. The town centre also has a significant number of independent retailers which, along with the distinctive layout and architecture, bring a 'unique' feel to Whitehaven.
- 5.21 Vacancy rates in Whitehaven are of concern however, particularly those in key locations such as the entrances to the town centre and in the upper area of King Street. Some areas of the public realm, including those which have benefitted previously from public investment are now beginning to look tired. Poor public toilet provision and the lack of a bus station continue to be key issues for the town centre. Furthermore, parking and accessibility (particularly for pedestrians) were identified as poor aspects of the town centre by both visitors and local business and potential improvements will need to be carefully considered by the Council.
- 5.22 Despite these issues, Whitehaven has several assets upon which it can build and the opinion of town centre traders is generally optimistic about what can be achieved. There is recognition that Whitehaven is not seeking to compete with Workington, but rather needs to focus on developing a complementary role building upon its offer of independent and specialist retailers, the historic environment and heritage.
- 5.23 Further development of the evening economy and the provision of a transport interchange to improve accessibility are key opportunities for the town. Further marketing and promotion of the town centre as a distinctive shopping destination could also be beneficial.

## Egremont

- 5.24 Egremont has a compact, linear town centre, focused along Main Street and the Market Place. The town has a high proportion of service sector outlets, with below average representation of both comparison and convenience retailers. There is a high proportion of independent retailers, but also a high vacancy rate. The overall poor perception of the town centre is compounded by concerns over security.



- 5.25 There are opportunities to provide support for further physical improvements to the town centre and also wider initiatives to attract an increase in the number of visitors to the town.

### Cleator Moor

- 5.26 Cleator Moor has a very compact town centre focused around the Market Square. The Market Square itself is dominated by public building and community / leisure space. The town has a significant number of small independent retailers and good parking provision. The town has also benefitted from significant public investment in the built environment both in and around the Market Square.
- 5.27 The town continues to suffer from a high vacancy rate however, and several properties in prominent locations are in a poor state of repair. Security and crime issues have also been raised as a concern by town centre businesses adding to the overall poor perception of the town centre.
- 5.28 There is the opportunity in Cleator Moor to address some of the key concerns through improved town centre management and further improvements to the built environment.

### Millom

- 5.29 Millom is characterised by a high number of small independent retailers set within a compact town centre. The focus of the town centre is to the east of the railway line. The town centre has relatively good accessibility. There is a below average representation of service sector provision and limited entertainment/leisure provision. The vacancy rates are above the national average.
- 5.30 The town centre would benefit from further physical improvements to the built environment and may also have the potential to benefit from an increase in the number of leisure / tourist visitors to the area.

## 6.0 SHOPPING PATTERNS WITHIN THE WEST CUMBRIA STUDY AREA

### Introduction

- 6.01 As previously highlighted, a key element of the study was to obtain a detailed understanding of the potential catchment of existing centres within the West Cumbria Sub-Region. A breakdown of the market shares achieved by each centre/store is contained at [Appendix 7](#). This section of the report is concerned with the market share of existing centres/facilities based on shopping trips rather than the levels of expenditure generated. The assessment of existing market shares is based on the defined West Cumbria Study Area as a whole. An assessment of changes in shopping patterns within this core area between 2003 and 2008 is contained in Section 7 of this report.

### Food Shopping Patterns

#### *Main Food Shopping Patterns*

- 6.02 Within the wider Study Area, the Household Survey identified that all convenience facilities within the Allerdale and Copeland combined attract more than 82% of the main food shopping trips undertaken (does not include facilities in Keswick – 3.4%). The relative market shares of existing facilities within each zone are set out in Table 6.1.

**Table 6.1: Main Food Market Share - 2008**

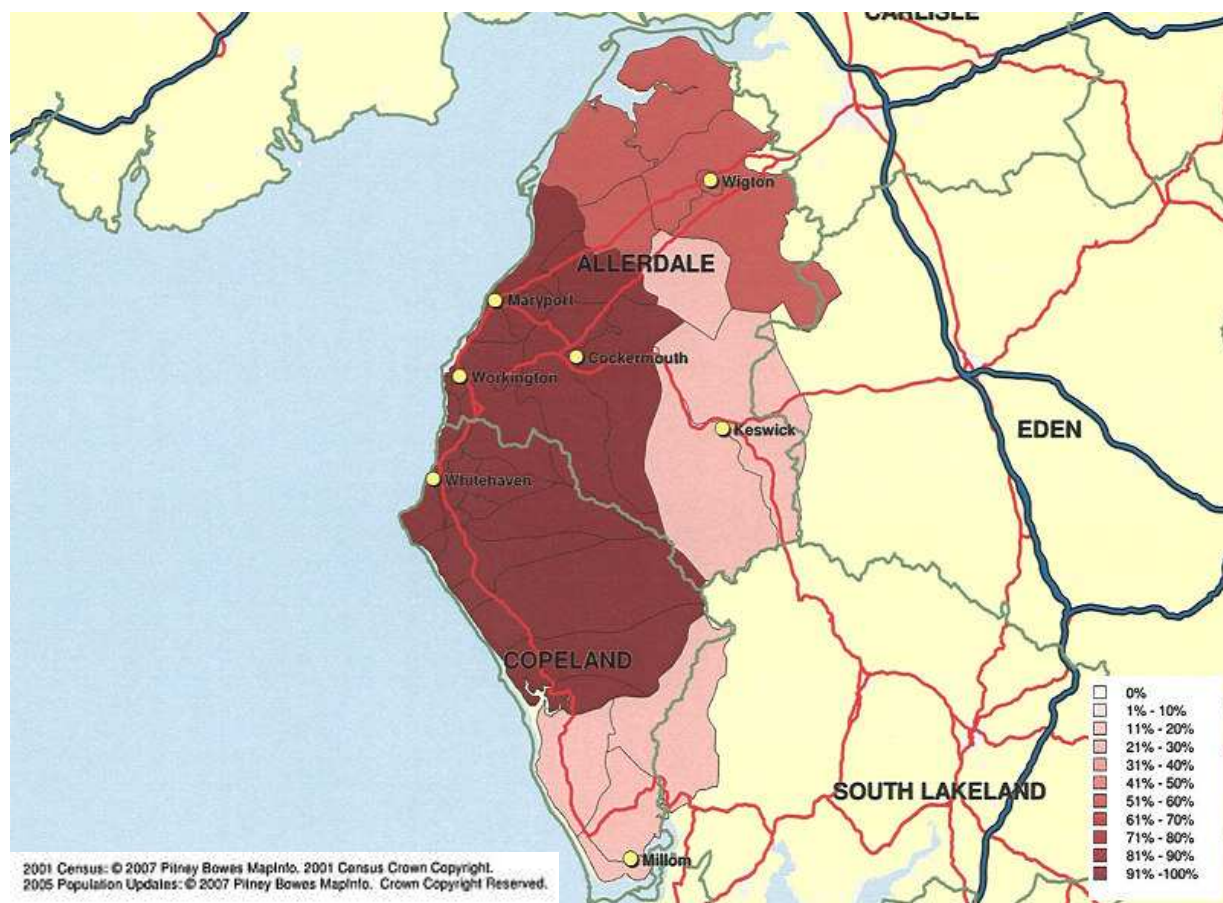
Zone	Wigton	Maryport	Cockermouth	Keswick	Workington	Whitehaven	Copeland Central	Millom	Total
<b>Study Area</b>	<b>55.5%</b>	<b>97.8%</b>	<b>97.8%</b>	<b>26.4%</b>	<b>99.3%</b>	<b>98.5%</b>	<b>95.0%</b>	<b>29.9%</b>	<b>82.7%</b>
<i>Allerdale</i>	<i>55.5%</i>	<i>97.8%</i>	<i>90.7%</i>	<i>26.4</i>	<i>98.1%</i>	<i>3.2%</i>	<i>2.4%</i>	<i>1.1%</i>	<i>48.2%</i>
<i>Copeland</i>	<i>0.0%</i>	<i>0.0%</i>	<i>0.0%</i>	<i>0.0%</i>	<i>1.2%</i>	<i>95.3%</i>	<i>92.6%</i>	<i>28.8%</i>	<i>34.5%</i>

Source: NEMS West Cumbria Household Survey (May 2008)  
Excludes 'varies/ no pattern'

- 6.03 As Table 6.1 illustrates that existing facilities in Allerdale attract some 48% of main food shopping trips undertaken within the Study Area, whereas facilities in Copeland achieve a lower market share of less than 35%. Understandably, the highest market shares are achieved in the Whitehaven and Workington zones where more than 99% of main food shopping trips undertaken in these zones is attracted to facilities in West Cumbria. A lower market share is achieved in the peripheral Millom Zone (30%). Figure 6.1 illustrates the levels of penetration achieved by all facilities within the two local authority areas.



**Figure 6.1: Penetration Level Achieved by Existing Facilities in the West Cumbria Sub-Region – Main Food Shopping**



- 6.04 With regard to specific foodstores in the West Cumbria Sub-Region, the Household Survey identifies the most popular store to be the out-of-centre Morrisons store at Derwent Drive in Workington, attracting almost 16% of main food shopping trips undertaken within the Study Area.
- 6.05 The next most popular store is the out-of-centre Morrisons store at Flatt Walks and Tesco store at North Shore, both of which are located in Whitehaven, together with the out-of-centre Tesco store in New Bridge Road in Workington, each attracting 14% of main food shopping trips undertaken in the Study Area.
- 6.06 Outside the West Cumbria Sub-Region, the most popular destinations for main food shopping are facilities in Carlisle (5%), most notably from the Wigton Zone. This is understandable given the proximity of residents within this zone to facilities in Carlisle.

- 6.07 When travelling to main food shopping destinations, the Household Survey identified that 69% of respondents within the Study Area travelled by car (either as driver or passenger) underlying the popularity of the private motor car for main food shopping. Some 9% of respondents indicated that they walked and only 5% indicated that they used public transport.

#### *Top-up Food Shopping*

- 6.08 When asked if people undertook 'top-up' food shopping between their main food shops, the Household Survey revealed that some 73% of respondents within the Study Area said that they did visit such facilities.
- 6.09 In terms of top-up shopping, facilities within the West Cumbria Sub-Region attract approximately 88% of top-up shopping trips undertaken within the Study Area. Accordingly, facilities within the Sub-Region achieve a greater market share for top-up shopping than that identified for main food shopping (83%). This is not surprising given the fact the majority of people tend to use the most convenient facilities for top-up shopping rather than travel further distances where there may be a greater choice.
- 6.10 The Household Survey results suggest that fewer people are travelling to facilities outside the two local authority areas to undertake top-up shopping when compared to main food shopping trips. Indeed, within the Wigton Zone, whereas some 44% of main food shopping undertaken in this zone are directed to facilities outside West Cumbria, this reduces to less than 21% for top-up shopping. Similarly, within the Millom Zone some 70% of main food shopping trips undertaken in this zone are directed to facilities outside the sub-region compared to less than 14% for top-up food shopping.
- 6.11 Table 6.2 provides a breakdown of the top-up shopping market share achieved by facilities within each local authority area.

**Table 6.2: Top up Food Market Share - 2008**

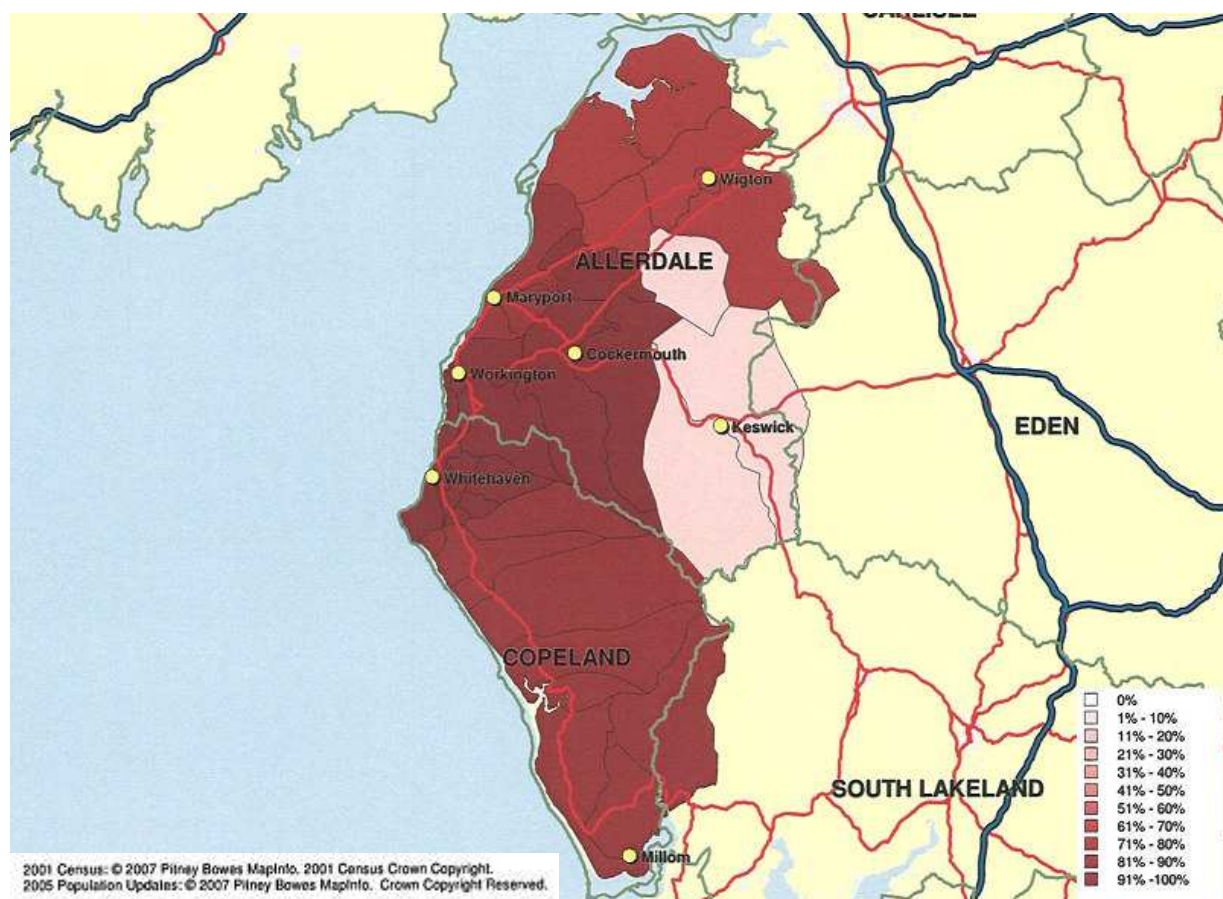
Zone	Wigton	Maryport	Cockermouth	Keswick	Workington	Whitehaven	Copeland Central	Millom	Total
<b>Study Area</b>	<b>79.2%</b>	<b>86.0%</b>	<b>93.3%</b>	<b>13.8%</b>	<b>95.6%</b>	<b>96.1%</b>	<b>88.9%</b>	<b>86.1%</b>	<b>87.5%</b>
<i>Allerdale</i>	<i>79.2%</i>	<i>86.0%</i>	<i>93.3%</i>	<i>13.8%</i>	<i>95.6%</i>	<i>0.7%</i>	<i>0.0%</i>	<i>0.0%</i>	<i>48.9%</i>
<i>Copeland</i>	<i>0.0%</i>	<i>0.0%</i>	<i>0.0%</i>	<i>0.0%</i>	<i>0.0%</i>	<i>95.4%</i>	<i>88.9%</i>	<i>86.1%</i>	<i>38.6%</i>

Source: NEMS West Cumbria Household Survey (May 2008)  
Excludes 'varies/ no pattern'

- 6.12 Table 6.2 indicates that the importance of facilities in Copeland appears to be greater for top-up food shopping (39%) than they are for main food shopping (35%). However, again facilities in Whitehaven are identified to achieve the higher market share of the two authorities within the Sub-Region. Figure

6.2 illustrates the penetration levels of existing facilities within the West Cumbria Sub-Region for top-up food shopping within the Study Area.

**Figure 6.2: Penetration Level Achieved by Existing Facilities in the West Cumbria Sub-Region – Top-up Food Shopping**



- 6.13 As with main food shopping, the highest levels of retention are identified in the zones located around the principal centres of Workington and Whitehaven, reflecting the main levels of population and existing provision. The market share achieved by facilities in the Sub-Region within the peripheral zones of the Study Area decline, owing to the proximity of competing provision, although not to the same extent to that identified for main food shopping.
- 6.14 With regard to destinations within the West Cumbria Sub-Region, the Household Survey identifies facilities in Workington to be the most popular (23%), which include modern supermarkets, small format retailers and independents, followed by facilities in Whitehaven (21%).



### *Other Food Shopping Patterns*

- 6.15 In addition to seeking to identify residents' shopping patterns for traditional food shopping, the Household Survey also sought to identify whether residents visit retail destinations for speciality food goods, such as farm shops, speciality bakers, cheese shops, etc. More than a third (37%) of respondents indicated that they did visit such facilities. Popular facilities include butchers and independent traders within each of the main centres in West Cumbria together with farm shops elsewhere, including in Harrington together with Farmers' markets in Whitehaven and Egremont.
- 6.16 Clearly, these facilities contribute to providing consumer choice for local residents and supplement the more traditional convenience goods provision within the larger supermarkets and superstores within the West Cumbria Sub-Region.

### *Non Food Shopping Patterns*

- 6.17 The Household Survey also assessed shopping patterns for a wide variety of non-food (or comparison) goods. Whilst the survey results provide useful indications of shopping habits within the Sub-Region and just beyond, the findings of the results should be treated with a note of caution given that some respondents may respond that they shop in a defined centre, but in fact visit nearby out-of-centre facilities, particularly for bulky goods, where retailers that sell these goods are generally located outside defined centres. This could have the effect of overstating the attraction of town centres and underplaying the role of out-of-centre facilities for certain types of goods. Whilst this is not a significant issue in considering the attraction of certain smaller centres in West Cumbria given the limited out-of-centre retail offer, it is of greater concern when assessing the current role of Workington Town Centre given the greater out-of-centre retail provision nearby. Accordingly, in assessing the current role and future retail need of Workington Town Centre an adjustment has been made to take into account the likely underrepresentation of out-of-centre retailing for certain goods.

### Non Bulky Goods Shopping

#### *Clothing and Footwear*

- 6.18 In terms of shopping for clothing and footwear, facilities in the West Cumbria Sub-Region attract 59% of shopping trips undertaken within the Study Area.

**Table 6.3: West Cumbria Clothing & Footwear Market Share Analysis - 2008**

Zone	Wigton	Maryport	Cockermouth	Keswick	Workington	Whitehaven	Copeland Central	Millom	Total
<b>Study Area</b>	<b>15.7%</b>	<b>68.1%</b>	<b>57.7%</b>	<b>22.4%</b>	<b>76.1%</b>	<b>81.5%</b>	<b>75.6%</b>	<b>4.1%</b>	<b>58.9%</b>
Allerdale	15.7%	67.1%	56.6%	22.4%	75.0%	32.7%	39.4%	1.0%	42.8%
Copeland	0.0%	1.0%	1.1%	0.0%	1.1%	48.8%	36.2%	3.1%	16.1%

Source: NEMS West Cumbria Household Survey (May 2008)  
Excludes 'varies/ no pattern'

- 6.19 The highest level of retention is achieved by facilities within Allerdale (most notably Workington Town Centre). Indeed, some 43% (including 37% directed to Workington Town Centre) of shopping trips for clothing and footwear undertaken by residents within the Study Area are attracted by facilities in Allerdale. This compares to retention level of only 16% in Copeland (including 15% of shopping trips directed to Whitehaven Town Centre), reflecting the more limited clothing and footwear offer in these areas and the significant investment in the retail offer of Workington Town Centre that has taken place in recent years. Table 6.4 provides a breakdown of the market share achieved by Workington Town Centre for Clothing & Footwear from the defined Study Area compared to the other main centre in West Cumbria - Whitehaven.

**Table 6.4: Market Shares achieved by Workington Town Centre and Whitehaven Centre for Clothing & Footwear Market Share Analysis - 2008**

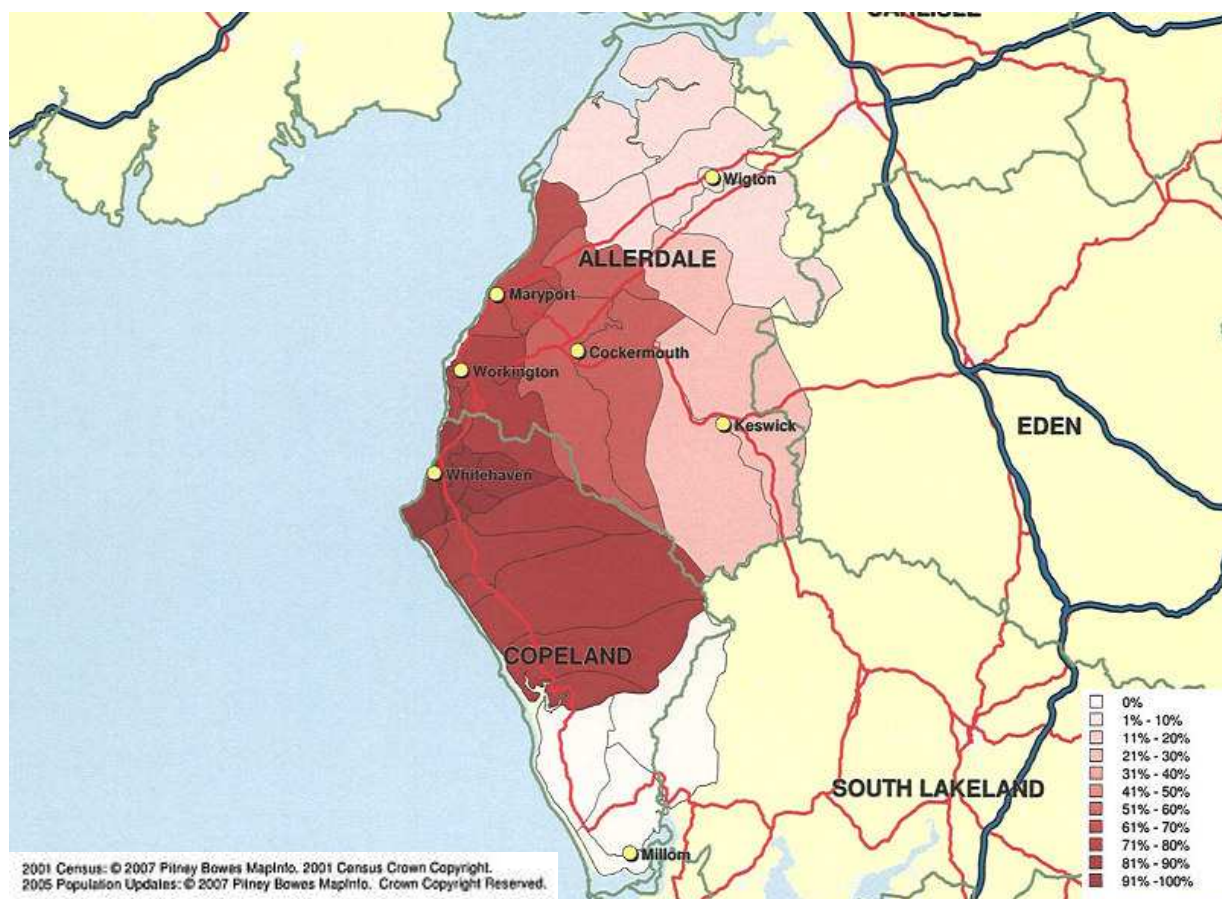
Zone	Market Share (%)	
	Workington Town Centre	Whitehaven Town Centre
Wigton	10.8	0.0
Maryport	61.9	1.0
Cockermouth	44.6	1.1
Keswick	19.1	0.0
Workington	71.6	1.1
Whitehaven	24.9	48.8
Copeland Central	30.9	30.9
Millom	1.0	0.0
<b>TOTAL</b>	<b>37.0</b>	<b>15.4</b>

Source: NEMS Household Survey (July 2008)  
Excludes 'Don't know/ can't remember' and 'Don't buy these goods'

- 6.20 Table 6.4 illustrates that it is notable that a number of shopping trips are being made to Workington Town Centre from each zone that comprises the defined Study Area. This includes almost a quarter of Clothing & Footwear shopping trips undertaken in the Whitehaven Zone being directed to Workington. In comparison, Whitehaven Town Centre appears to achieve a much lesser shopping role within the defined Study Area. Clothing & Footwear shopping trips directed to Whitehaven Town Centre appear to be almost exclusively derived from the Whitehaven Zone and Copeland Central Zone.
- 6.21 Figure 6.3 illustrates the penetration levels of existing facilities within the West Cumbria Sub-Region for clothing and footwear shopping trips.



**Figure 6.3: Penetration Level Achieved by Existing Facilities in the West Cumbria Sub-Region – Clothing & Footwear**



6.22 Table 6.5 provides a breakdown of the market shares achieved by the main centres within the West Cumbria Sub-Region.

**Table 6.5: Market Shares achieved by Main Centres – Clothing & Footwear**

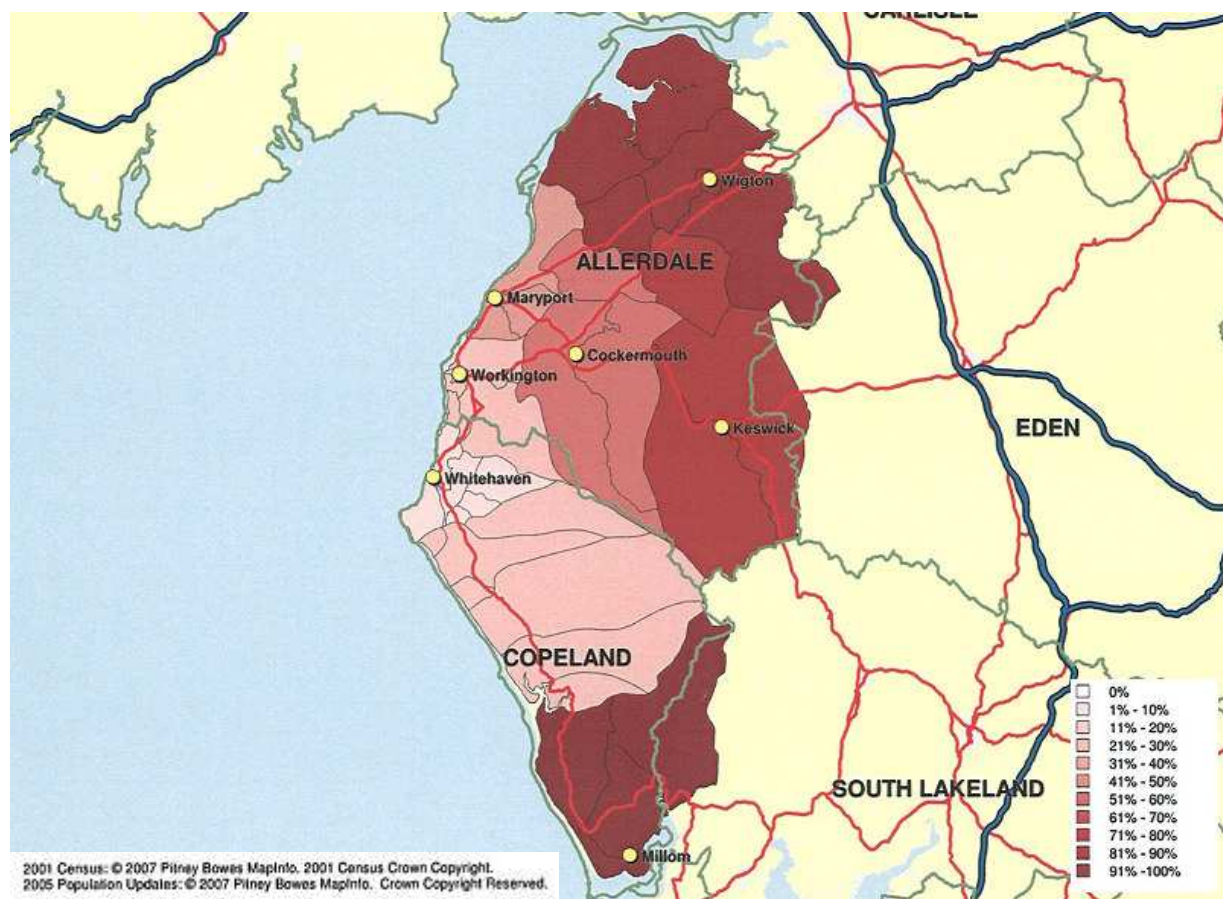
Centre	Market Share
Workington	38.4%*
Whitehaven	15.4%
Cockermouth	1.3%
Warton	0.8%
Egremont	0.5%
Maryport	0.3%
Millom	0.2%

\* Includes Matalan store, Solway Road



- 6.23 Table 6.5 illustrates the popularity of Workington Town Centre as a clothing and footwear destination within the Study Area. Indeed, Workington Town Centre is identified to achieve a market share (38%) within the Study Area that is double the collective market share achieved by all the other centres within the West Cumbria Sub-Region (19%) which are identified to attract shopping trips for Clothing & Footwear. This reflects the relative strength of the offer in Workington Town Centre when compared to other centres elsewhere in the Sub-Region
- 6.24 In terms of facilities outside the West Cumbria Sub-Region, some 36% of shopping trips for Clothing & Footwear are attracted to facilities outside West Cumbria, predominantly to facilities in Carlisle (20%). The greatest levels of trade draw to facilities in Carlisle are from the Wigton Zone (76%) and Keswick Zone (35%). Figure 6.4 illustrates the penetration levels achieved by existing facilities outside the West Cumbria Sub-Region and highlights that facilities outside the Sub-Region (most notably Carlisle and Barrow) have a significant influence on shopping patterns for these types of goods, particularly from the peripheral zones.

**Figure 6.4: Penetration Level Achieved by Existing Facilities outside the West Cumbria Sub-Region – Clothing & Footwear**



#### *Books, CDs, DVDs and Other Similar Goods*

- 6.25 In terms of shopping for books, CDs, DVDs and other similar goods, within the Study Area, some 52% of shopping trips are attracted to facilities within West Cumbria.

**Table 6.6: West Cumbria Books, CDs, DVDs, etc. Market Share Analysis - 2008**

Zone	Wigton	Maryport	Cockermouth	Keswick	Workington	Whitehaven	Copeland Central	Millom	Total
<b>Study Area</b>	<b>11.7%</b>	<b>64.2%</b>	<b>51.9%</b>	<b>7.1%</b>	<b>72.5%</b>	<b>69.2%</b>	<b>57.3%</b>	<b>4.2%</b>	<b>52.1%</b>
<i>Allerdale</i>	<i>11.7%</i>	<i>62.9%</i>	<i>51.9%</i>	<i>7.1%</i>	<i>70.4%</i>	<i>10.9%</i>	<i>13.3%</i>	<i>0.0%</i>	<i>33.0%</i>
<i>Copeland</i>	<i>0.0%</i>	<i>1.3%</i>	<i>0.0%</i>	<i>0.0%</i>	<i>2.1%</i>	<i>58.3%</i>	<i>44.0%</i>	<i>4.2%</i>	<i>19.1%</i>

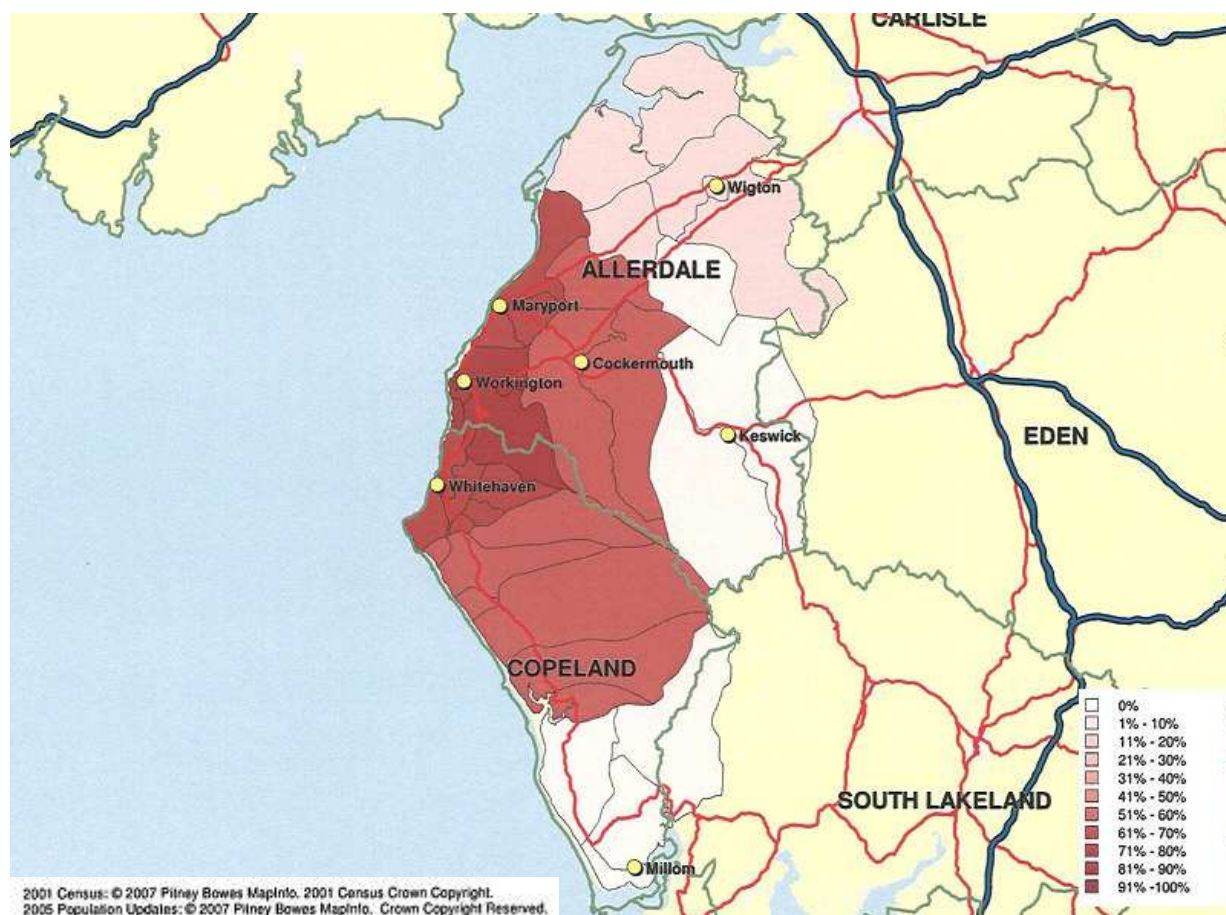
Source: NEMS West Cumbria Household Survey (May 2008)  
Excludes 'varies/ no pattern'

- 6.26 Again, Table 6.6 indicates that facilities in Allerdale are the most popular destination, attracting some 33% of shopping trips, including some 27% of shopping trips being directed to Workington Town Centre.



This compares to some 19% of shopping trips being directed to facilities in Copeland. Figure 6.5 indicates the level of penetration levels achieved by all facilities within the West Cumbria Sub-Region.

**Figure 6.5: Penetration Level Achieved by Existing Facilities in the West Cumbria Sub-Region – Books, CDs, DVDs, etc.**



6.27 Table 6.7 provides a breakdown of the market shares achieved by the main centres within the West Cumbria Sub-Region.

**Table 6.7: Market Shares achieved by Main Centres – Books, CDs, DVDs, etc.**

Centre	Market Share
Workington	27.4%
Whitehaven	18.5%
Cockermouth	3.0%
Maryport	1.7%
Wigton	0.5%
Cleator Moor	0.3%
Silloth	0.2%
Millom	0.2%
Egremont	0.1%

- 6.28 As with clothing and footwear shopping trips, Workington Town Centre is identified to be the dominant centre within the West Cumbria Sub-Region, attracting more than a quarter (27%) of shopping trips undertaken. This compares to 19% of shopping trips being directed to Whitehaven Town Centre – the second most popular destination.
- 6.29 With regard to facilities outside the West Cumbria Sub-Region, some 27% of shopping trips undertaken are identified to be directed to facilities elsewhere, primarily to facilities in Carlisle, attracting some 14% of shopping trips. Understandably, the highest level of trade draw is from the peripheral zones of the West Cumbria Study Area, predominantly from the Wigton Zone (68%).

#### *Small Household Goods*

- 6.30 In terms of shopping patterns for Household Goods within the Study Area (e.g. soft furnishings, china, jewellery and other miscellaneous goods), almost two-thirds of shopping trips (65%) are retained by facilities in the West Cumbria Sub-Region.

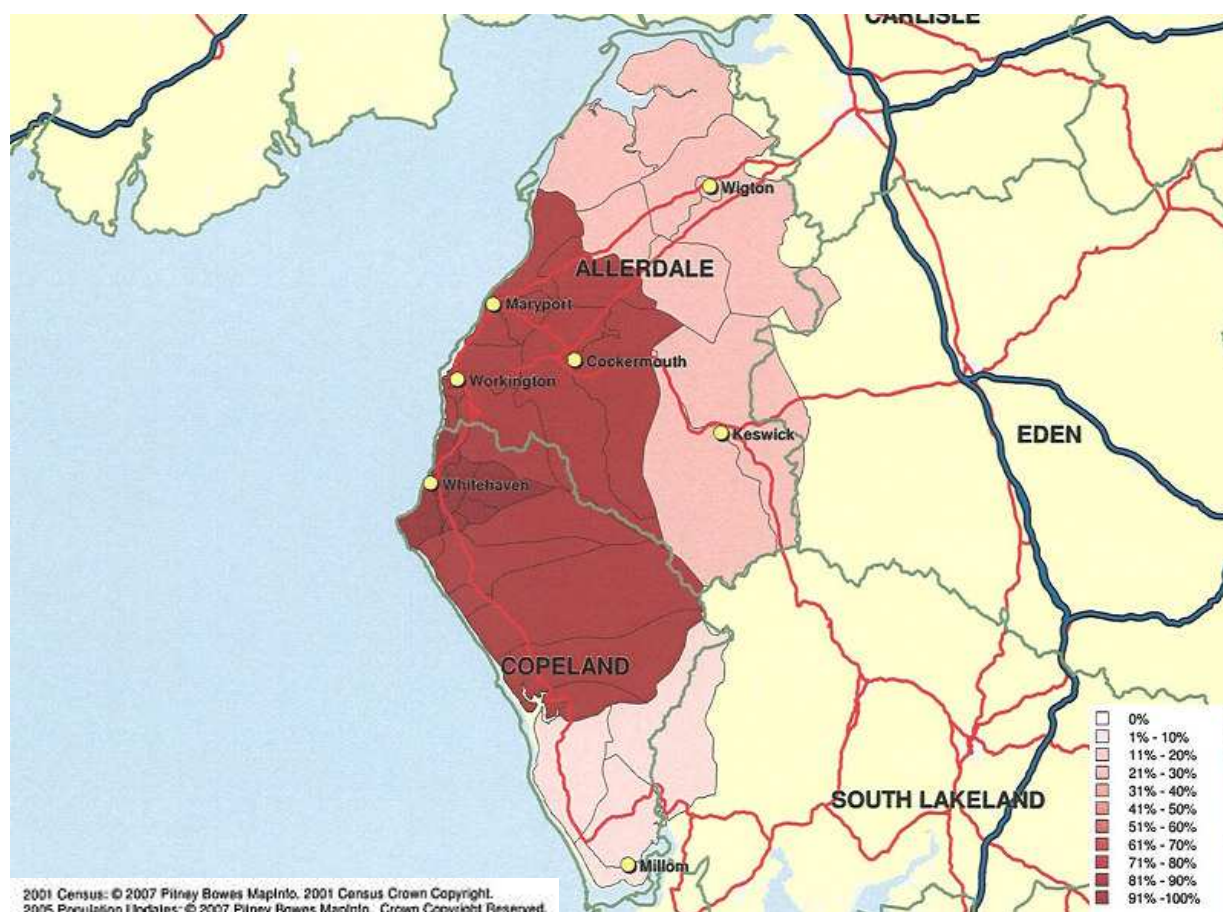
**Table 6.8: West Cumbria Small Household Goods Market Share Analysis - 2008**

Zone	Wigton	Maryport	Cockermouth	Keswick	Workington	Whitehaven	Copeland Central	Millom	Total
<b>Study Area</b>	<b>24.8%</b>	<b>78.9%</b>	<b>74.2%</b>	<b>28.2%</b>	<b>77.5%</b>	<b>84.6%</b>	<b>74.6%</b>	<b>15.4%</b>	<b>64.7%</b>
<i>Allerdale</i>	<i>23.6%</i>	<i>78.9%</i>	<i>72.8%</i>	<i>28.2%</i>	<i>75.4%</i>	<i>28.2%</i>	<i>26.7%</i>	<i>1.3%</i>	<i>44.9%</i>
<i>Copeland</i>	<i>1.2%</i>	<i>0.0%</i>	<i>1.4%</i>	<i>0.0%</i>	<i>2.1%</i>	<i>56.4%</i>	<i>47.9%</i>	<i>14.1%</i>	<i>19.8%</i>

Source: NEMS West Cumbria Household Survey (May 2008)  
Excludes 'varies/ no pattern'

- 6.31 Table 6.8 illustrates that facilities in Allerdale are clearly the most popular destination for these types of goods, attracting some 45% of shopping trips. This compares to facilities in Copeland achieving a market share of less than 20%. Figure 6.6 illustrates the penetration levels achieved by existing facilities in the West Cumbria Sub-Region within the Study Area.

**Figure 6.6: Penetration Level Achieved by Existing Facilities in the West Cumbria Sub-Region – Small Household Goods**



6.32 In terms of the main centres within the West Cumbria Sub-Region, Table 6.9 provides a breakdown of the market shares achieved.

**Table 6.9: Market Shares achieved by Main Centres – Small Household Goods**

Centre	Market Share
Workington	30.7%*
Whitehaven	18.3%
Cockermouth	6.2%
Maryport	1.9%
Wigton	1.4%
Egremont	0.8%
Millom	0.6%
Silloth	0.3%
Cleator Moor	0.1%

\* Includes Matalan store, Solway Road

- 6.33 Table 6.9 again indicates that Workington Town Centre is the dominant destination, achieving a market share of 31% of shopping trips undertaken in the Study Area. This compares to the second most popular destination (Whitehaven) achieving a market share of 18%.
- 6.34 In terms of competing centres located outside the West Cumbria Sub-Region, facilities in Carlisle are identified to be the most popular (14%) for residents within the Study Area who chose not to shop within centres/facilities within Allerdale or Copeland.

*Toys, Games, Bicycles and Recreation Goods*

- 6.35 In terms of shopping patterns for Toys, Games, Bicycles and Recreation Goods within the Study Area, more than half (61%) of shopping trips for these type of goods are retained by facilities in the West Cumbria Sub-Region from the defined Study Area.

**Table 6.10: West Cumbria Toys, Games, Bicycles and Recreation Goods Market Share Analysis - 2008**

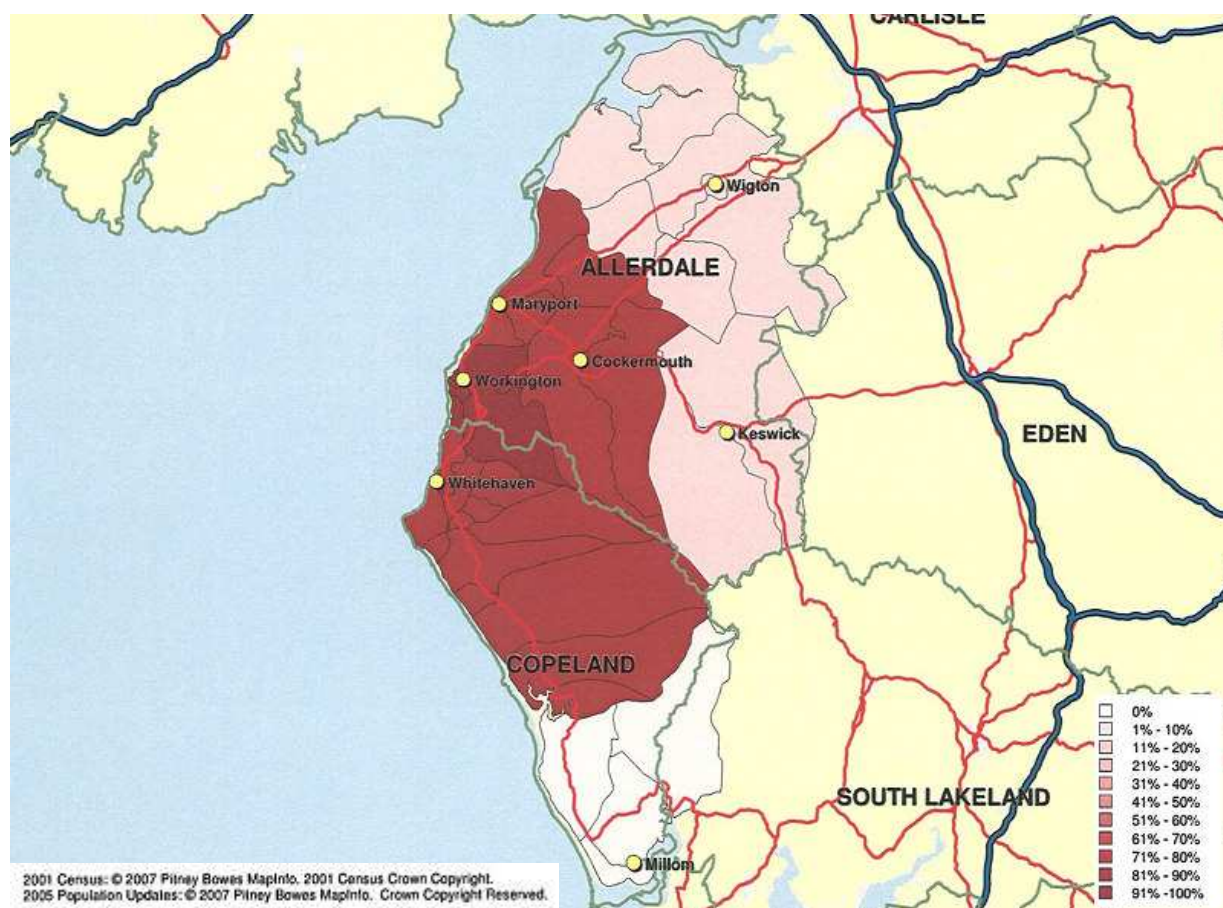
Zone	Wigton	Maryport	Cockermouth	Keswick	Workington	Whitehaven	Copeland Central	Millom	Total
<b>Study Area</b>	<b>14.6%</b>	<b>71.5%</b>	<b>73.0%</b>	<b>16.3%</b>	<b>82.5%</b>	<b>75.2%</b>	<b>77.3%</b>	<b>8.4%</b>	<b>61.4%</b>
<i>Allerdale</i>	<i>14.6%</i>	<i>71.5%</i>	<i>71.1%</i>	<i>16.3%</i>	<i>80.5%</i>	<i>17.4%</i>	<i>28.2%</i>	<i>0.0%</i>	<i>40.3%</i>
<i>Copeland</i>	<i>0.0%</i>	<i>0.0%</i>	<i>1.9%</i>	<i>0.0%</i>	<i>2.0%</i>	<i>57.8%</i>	<i>49.1%</i>	<i>8.4%</i>	<i>21.1%</i>

Source: NEMS West Cumbria Household Survey (May 2008)  
Excludes 'varies/ no pattern'

- 6.36 Table 6.10 illustrates that facilities within Allerdale are the most popular destination retaining more than 40% of shopping trips undertaken in the Study Area. As with shopping patterns for other goods, the influence of facilities within Copeland (21%) is notably less than that identified for Workington. Figure 6.7 illustrates the penetration levels achieved by existing facilities in the West Cumbria Sub-Region.



**Figure 6.7: Penetration Level Achieved by Existing Facilities in the West Cumbria Sub-Region – Toys, Games, Bicycles & Recreational Goods**



6.37 In terms of the main centres within the West Cumbria Sub-Region, Table 6.11 provides a breakdown of the market shares achieved.

**Table 6.11: Market Shares achieved by Main Centres – Toys, Games, Bicycles & Recreational Goods**

Centre	Market Share
Workington	29.9%
Whitehaven	20.0%
Cockermouth	4.2%
Maryport	1.1%
Wigton	0.6%
Millom	0.5%
Cleator Moor	0.4%
Silloth	0.2%

- 6.38 Table 6.11 indicates that Workington Town Centre is the most popular destination within the West Cumbria Sub-Region achieving a market share of 30%. This level of retention is higher than that the collective market share of all other centres within the Sub-Region.
- 6.39 In terms of centres outside the West Cumbria Sub-Region, facilities in Carlisle (11%) are identified to be the most popular. This is higher than that achieved by all other centres within the Sub-Region with the exception of the two principal centres in West Cumbria of Workington and Whitehaven.

#### *Chemist Goods*

- 6.40 In terms of shopping patterns for Chemist Goods within the Study Area, some 81% of shopping trips are retained by facilities in the West Cumbria Sub-Region.

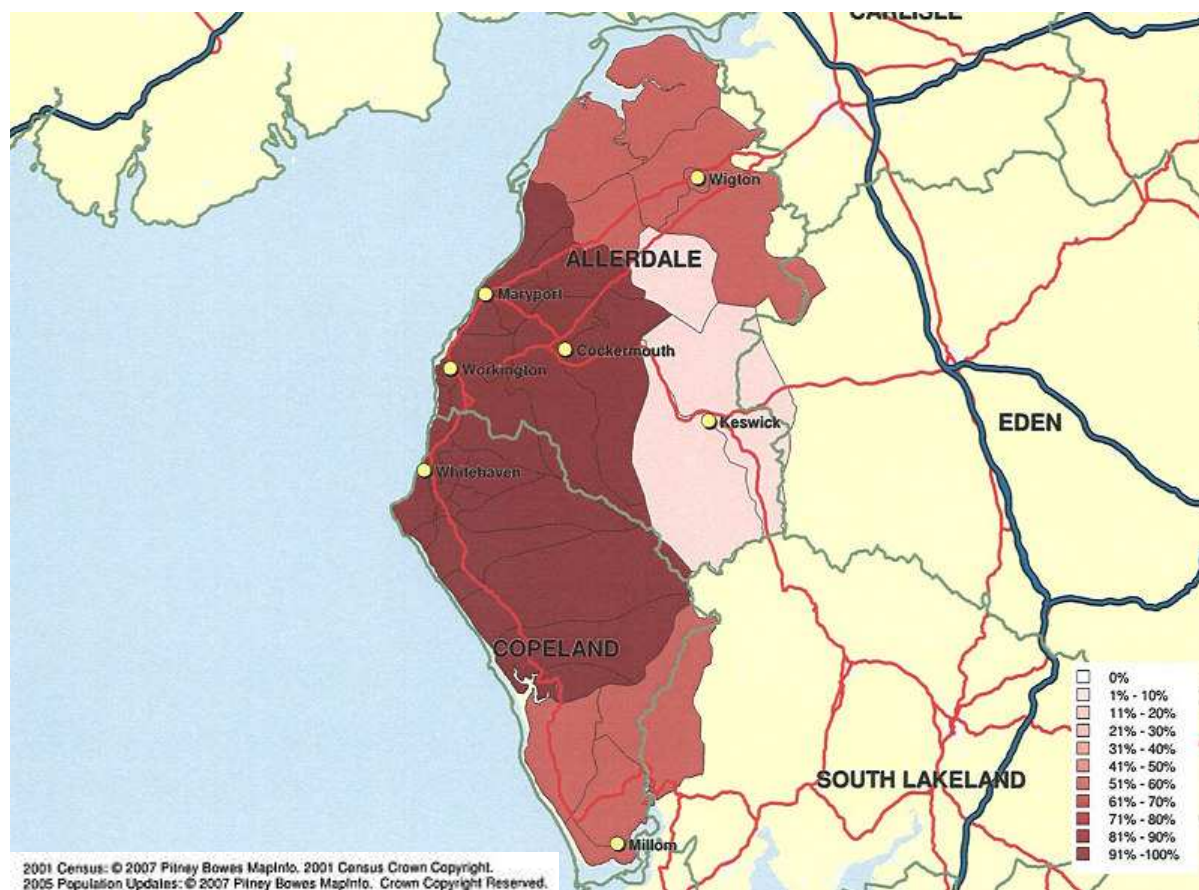
**Table 6.12: West Cumbria Chemist Goods Market Share Analysis - 2008**

Zone	Wigton	Maryport	Cockermouth	Keswick	Workington	Whitehaven	Copeland Central	Millom	Total
<b>Study Area</b>	<b>57.3%</b>	<b>91.6%</b>	<b>94.5%</b>	<b>10.7%</b>	<b>93.1%</b>	<b>94.2%</b>	<b>91.6%</b>	<b>56.5%</b>	<b>81.1%</b>
<i>Allerdale</i>	<i>57.3%</i>	<i>90.5%</i>	<i>94.5%</i>	<i>10.7%</i>	<i>91.4%</i>	<i>6.4%</i>	<i>4.3%</i>	<i>0.0%</i>	<i>46.5%</i>
<i>Copeland</i>	<i>0.0%</i>	<i>1.1%</i>	<i>0.0%</i>	<i>0.0%</i>	<i>1.7%</i>	<i>87.8%</i>	<i>87.3%</i>	<i>56.5%</i>	<i>34.6%</i>

Source: NEMS West Cumbria Household Survey (May 2008)  
Excludes 'varies/ no pattern'

- 6.41 Whilst Table 6.12 indicates that facilities in Allerdale (47%) achieve a higher market share than Copeland (35%), it is notable that the influence of facilities in Copeland appears to be is greater for these types of goods than that identified for other comparison goods. Figure 6.8 illustrates the penetration levels of facilities in the West Cumbria Sub-Region.

**Figure 6.8: Penetration Level Achieved by Existing Facilities in the West Cumbria Sub-Region – Chemist Goods**



6.42 In terms of the main centres within the West Cumbria Sub-Region, Table 6.13 identifies the relative market shares achieved by each centre.

**Table 6.13: Market Shares achieved by Main Centres – Chemist Goods**

Centre	Market Share
Workington	26.7%
Whitehaven	23.9%
Cockermouth	9.0%
Warton	4.0%
Millom	3.9%
Egremont	3.4%
Maryport	3.2%
Cleator Moor	1.8%
Aspatria	1.6%
Seascale	1.6%
Silloth	1.4%

- 6.43 Table 6.13 highlights that Workington Town Centre (27%) is the most popular destination within the West Cumbria Sub-Region for shopping trips for Chemist Goods. However, the role of other centres for these types of goods is generally greater than that identified for other goods. The Household Survey results suggest that people are willing to travel less for these types of goods. This is understandable as these goods are readily available throughout the Sub-Region.
- 6.44 The Household Survey suggests that less than 19% of shopping trips (including internet/ online sales) are directed to facilities outside the West Cumbria Sub-Region, most notably to facilities in Carlisle (7% market share).

#### Bulky Goods Shopping

- 6.45 In addition to assessing shopping patterns for convenience goods and non-bulky comparison goods, it is also possible from the Household Survey to assess shopping patterns for 'bulky goods' within the three broad categories of: Electrical, Furniture and DIY goods.

#### Electrical Goods

- 6.46 For large electrical items, the Household Survey identifies that almost two-thirds (64%) of shopping trips are attracted to facilities within the West Cumbria Sub-Region.

**Table 6.14: West Cumbria Electrical Goods Market Share Analysis - 2008**

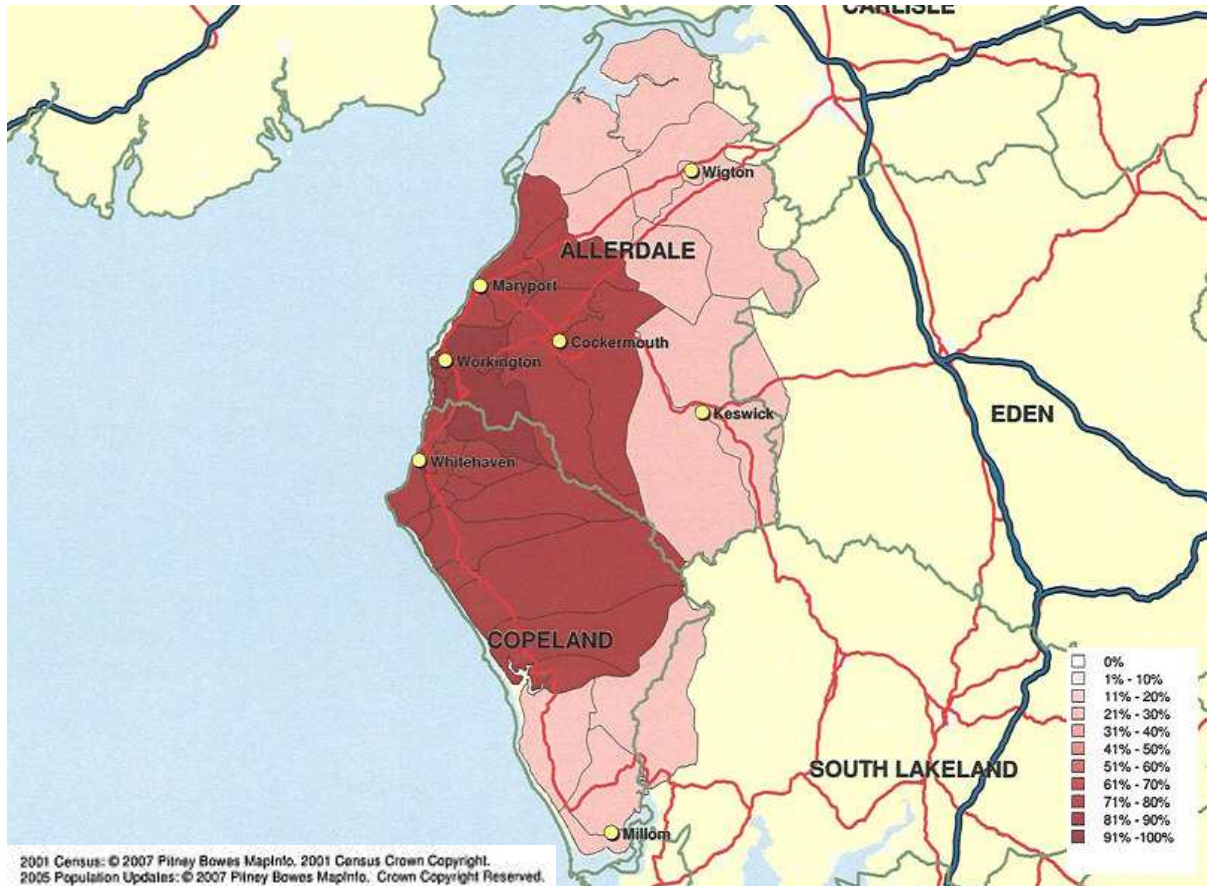
Zone	Wigton	Maryport	Cockermouth	Keswick	Workington	Whitehaven	Copeland Central	Millom	Total
<b>Study Area</b>	<b>28.3%</b>	<b>72.3%</b>	<b>76.7%</b>	<b>22.4%</b>	<b>81.1%</b>	<b>78.8%</b>	<b>76.3%</b>	<b>24.3%</b>	<b>64.4%</b>
<i>Allerdale</i>	<i>28.3%</i>	<i>72.3%</i>	<i>74.5%</i>	<i>21.2%</i>	<i>79.8%</i>	<i>31.5%</i>	<i>29.2%</i>	<i>3.2%</i>	<i>46.5%</i>
<i>Copeland</i>	<i>0.0%</i>	<i>0.0%</i>	<i>2.2%</i>	<i>1.2%</i>	<i>1.3%</i>	<i>47.3%</i>	<i>47.1%</i>	<i>21.1%</i>	<i>17.9%</i>

Source: NEMS West Cumbria Household Survey (May 2008)  
Excludes 'varies/ no pattern'

- 6.47 Table 6.14 indicates that facilities in Allerdale (47%) are the most popular destination within the West Cumbria Sub-Region. This compares to facilities in Copeland achieving a market share of 18%. Figure 6.9 illustrates the penetration levels achieved by facilities in the West Cumbria Sub-Region.



**Figure 6.9: Penetration Level Achieved by Existing Facilities in the West Cumbria Sub-Region – Electrical Goods**



6.48 Table 6.15 indicates the market shares achieved by the main centres within the West Cumbria Sub-Region.

**Table 6.15: Market Shares achieved by Main Centres – Electrical Goods**

Centre	Market Share
Workington	27.9%
Whitehaven	16.0%
Wigton	1.6%
Millom	1.5%
Cockermouth	1.2%
Maryport	1.1%
Aspatia	0.3%
Egremont	0.2%
Seascale	0.2%
Silloth	0.1%

6.49 Table 6.15 highlights that Workington is clearly the dominant centre for shopping trips for electrical goods, achieving a market share (28%) that is larger than the collective market share of all other centres identified in Table 6.15. As previously highlighted, it is important to note that the Household Survey results may overstate the market shares achieved by existing centres given that most of the large-format retailers are located at established retail parks such as Derwent Howe Retail Park, which is identified to achieve a market share of only 14% for these types of goods. This is despite the retail park comprising a Currys and Comet store. Consequently, respondents may indicate Workington rather than a specific retail park and therefore the response will be recorded as Workington Town Centre. This issue is considered in greater detail in Section 11 of this report.

6.50 With regard to the identified leakage to facilities outside the West Cumbria Sub-Region (excluding internet or mail order), facilities in Carlisle are identified to be the most popular (11%) followed by Barrow-in-Furness (4%).

#### *Furniture Goods*

6.51 For Furniture Goods, the Household Survey identified that facilities in the West Cumbria Sub-Region achieve a market share of 70% of shopping trips undertaken in the Study Area. Table 6.16 provides a breakdown of the market share achieved by facilities on a local authority by local authority basis within the Study Area.

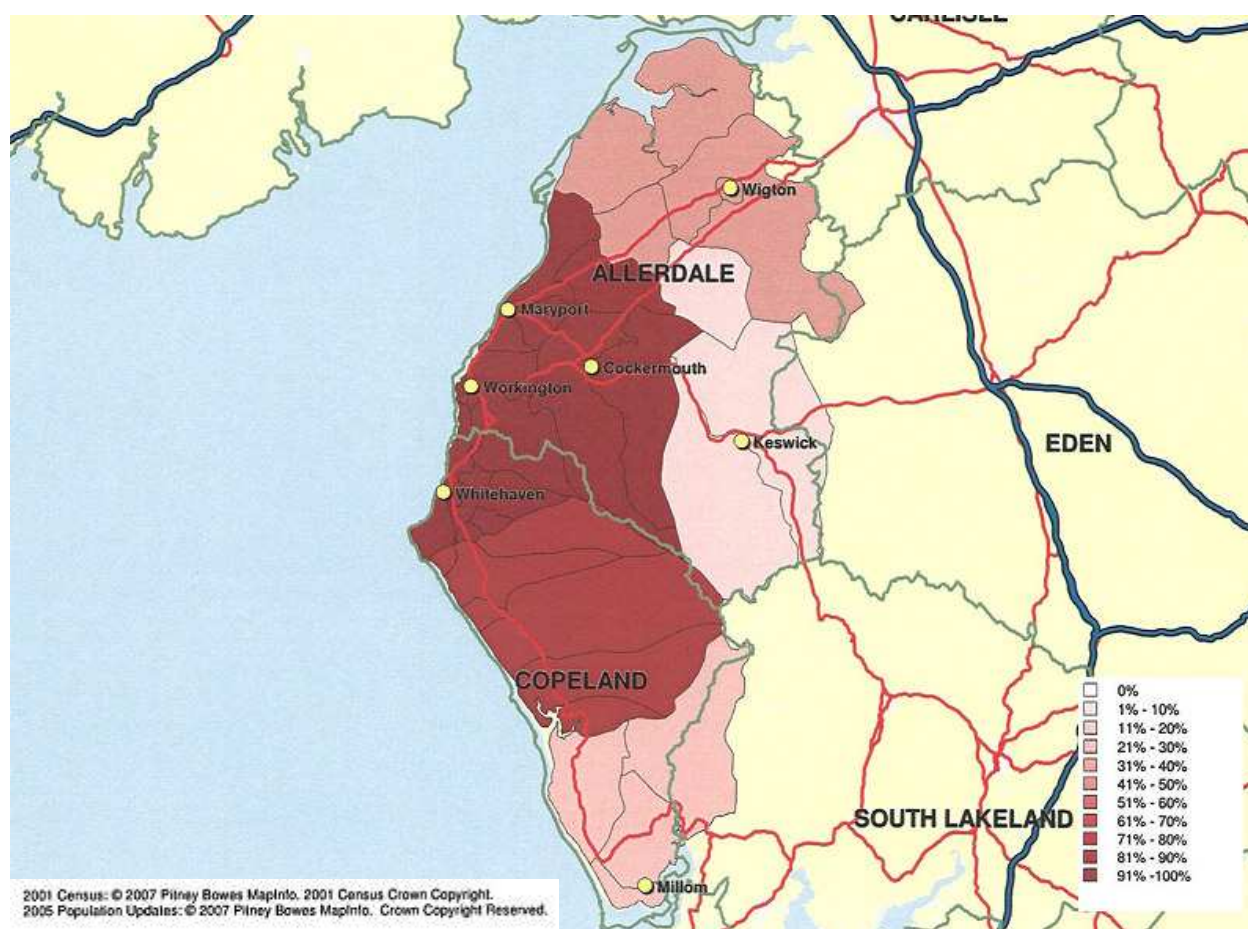
**Table 6.16: West Cumbria Furniture Goods Market Share Analysis – 2008**

Zone	Wigton	Maryport	Cockermouth	Keswick	Workington	Whitehaven	Copeland Central	Millom	Total
<b>Study Area</b>	<b>34.1%</b>	<b>83.1%</b>	<b>83.5%</b>	<b>20.1%</b>	<b>81.6%</b>	<b>86.5%</b>	<b>78.6%</b>	<b>29.9%</b>	<b>70.4%</b>
Allerdale	34.1%	77.1%	82.2%	18.7%	79.1%	27.3%	25.4%	0.0%	47.4%
Copeland	0.0%	6.0%	1.3%	1.4%	2.5%	59.2%	53.2%	29.9%	23.0%

Source: NEMS West Cumbria Household Survey (May 2008)  
Excludes 'varies/ no pattern'

- 6.52 Facilities in Allerdale are identified to be the most popular destination, attracting almost half (47%) of shopping trips undertaken in the Study Area. The influence of facilities in Copeland (23%) is identified to be less reflecting the more limited retail offer. Figure 6.10 illustrates the penetration levels achieved by existing facilities in the West Cumbria Sub-Region.

**Figure 6.10: Penetration Level Achieved by Existing Facilities in the West Cumbria Sub-Region – Furniture Goods**



- 6.53 Table 6.17 provides a breakdown of the market shares achieved by the main centres in the West Cumbria Sub-Region. Again, the market shares identified should be treated with a 'note of caution' as the Household Survey is likely to have underestimated the market share achieved by retail parks and freestanding facilities and overstated the market share identified for the town centre, given that furniture provision in the Sub-Region is generally located outside established centres.

**Table 6.17: Market Shares achieved by Main Centres – Furniture Goods**

Centre	Market Share
Workington	20.0%
Whitehaven	18.1%
Maryport	6.2%
Cockermouth	4.7%
Wigton	1.9%
Millom	1.9%
Cleator Moor	0.5%
Silloth	0.1%
Egremont	0.1%

6.54 Table 6.17 indicates that Workington Town Centre is the most popular destination, attracting some 20% of shopping trips undertaken. This market share is comparable to that identified for the second most popular destination (Whitehaven - 18%).

6.55 Of the identified leakage (26%) to competing centres, the most popular destination is identified by the Household Survey to be destinations within Carlisle (16%).

#### DIY Goods

6.56 With regard to DIY shopping, the Household Survey identifies that existing facilities in the West Cumbria Sub-Region retain some 80% of shopping trips undertaken within the Study Area. The highest level of retention is identified by facilities in Allerdale (57%), which is higher than that achieved by facilities in Copeland (23%)

**Table 6.18: West Cumbria DIY Goods Market Share Analysis - 2008**

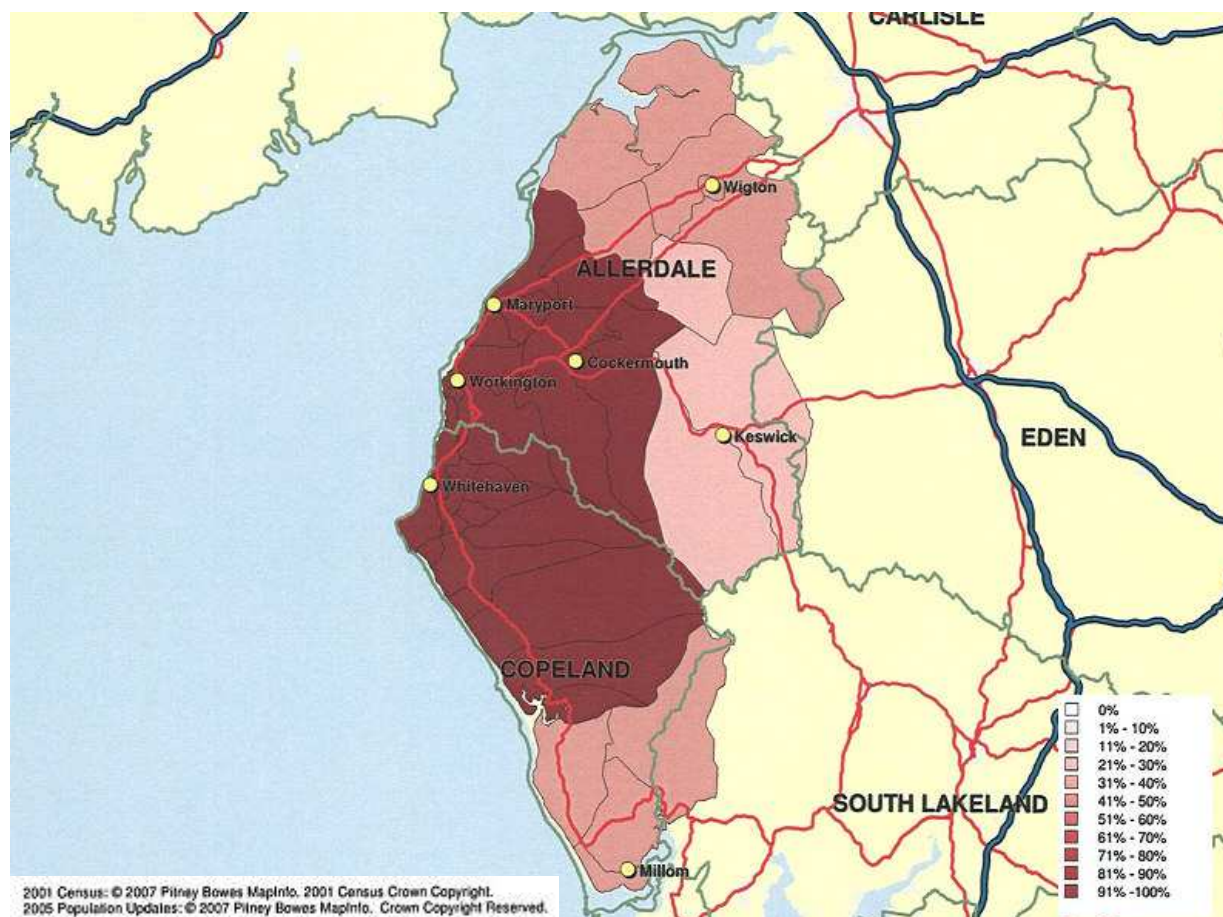
Zone	Wigton	Maryport	Cockermouth	Keswick	Workington	Whitehaven	Copeland Central	Millom	Total
<b>Study Area</b>	<b>38.5%</b>	<b>96.5%</b>	<b>91.9%</b>	<b>27.3%</b>	<b>95.7%</b>	<b>95.4%</b>	<b>96.2%</b>	<b>36.5%</b>	<b>80.2%</b>
<i>Allerdale</i>	<i>37.4%</i>	<i>96.5%</i>	<i>91.9%</i>	<i>27.3%</i>	<i>95.0%</i>	<i>33.5%</i>	<i>34.6%</i>	<i>1.4%</i>	<i>56.9%</i>
<i>Copeland</i>	<i>1.1%</i>	<i>0.0%</i>	<i>0.0%</i>	<i>0.0%</i>	<i>0.7%</i>	<i>61.9%</i>	<i>61.6%</i>	<i>35.1%</i>	<i>23.3%</i>

Source: NEMS West Cumbria Household Survey (May 2008)  
Excludes 'varies/ no pattern'

6.57 The most popular destinations within the West Cumbria Sub-Region are identified to be the B&Q store at Derwent Howe Retail Park in Workington (34%) and the Focus store on Preston Street in Whitehaven (12%). The market share achieved by defined centres for DIY goods shopping is generally less than that identified for other goods, reflecting the limited DIY retail floorspace within established centres. Of the limited leakage identified, facilities in Carlisle (8%) are the most popular. Figure 6.11 indicates the extent of the catchment area achieved by all facilities within the West Cumbria Sub-Region.



**Figure 6.11: Penetration Level Achieved by Existing Facilities in the West Cumbria Sub-Region – DIY Goods**



### Linked Trips

- 6.58 The Household Survey also asked specific questions relating to whether respondents' main food shop was part of another journey. Although the Household Survey identified that some 75% of respondents within the Study Area do not combine their main food shopping trip with another journey, of those that did, 14% stated that they combined their main food shopping trip with their journey to or from work.
- 6.59 In addition, the Household Survey sought to identify whether respondents undertook linked trips as part of their main food shop. Whilst more than half (58%) of respondents indicated that they did not undertake any other activity, of those that did, some 21% of respondents undertook non-food shopping, with 11% of respondents visiting services such as banks.
- 6.60 Moreover, of those respondents within the Study Area that do non-food shopping as part of their main food shop, Whitehaven Town Centre was identified to be the most popular (29%), followed by

Workington (24%). The popularity of centres fluctuated on a zone-by-zone basis. Within the Whitehaven Zone of those respondents who undertake non-food shopping as part of their main food shop trips, some 90% is directed to facilities in Whitehaven Town Centre. Similarly, within the Workington Zone, some 80% of linked trips undertaken are directed to facilities in Workington Town Centre.

### Internet/ Mail Order Shopping

- 6.61 The Household Survey identified that for main food purchases, just over 3% of respondents within the Study Area stated that they undertook such shopping via the internet. Of those that do use the internet, the majority (71%) purchased goods from Tesco, followed by Asda (14%).
- 6.62 The popularity of shopping online for their main food shopping was identified to be highest for respondents within the 35 to 54 year old and 18 to 34 age bands (both 4%). This compares to 2% of respondents aged 55 years or older purchasing goods via the internet.
- 6.63 In terms of clothing and footwear goods, the Household Survey identifies that 5% of respondents within the Study Area purchased these goods via the internet or mail order. Like food shopping, this was identified to be most popular for respondents aged 18 to 34 years (7%) followed by respondents aged 55 years or over (6%).
- 6.64 This market share compares to some 21% of purchases for books, CDs, DVDs, etc. being made via the internet or mail order, which is greater than the market share achieved by all facilities in Copeland (19%). This reflects the growing popularity of online purchases for these types of goods. More than a quarter (31%) of respondents aged 18 to 34 years who purchased these goods did so via the internet or by mail order.
- 6.65 In terms of small household goods, such as home furnishings, more than 7% of respondents used the internet/ mail order for their last purchase. This compares to almost 15% using the internet/ mail order for their last purchase for toys, games, bicycles and other recreational goods. Only 2% of respondents purchased chemist goods via the internet/ mail order.
- 6.66 With regard to bulkier goods, for large electrical goods some 16% of respondents made their last purchase via the internet/ mail order. Furthermore, a quarter of respondents within the 18 to 34 age



band last purchased goods via the internet/ mail order, which is higher than that identified for Workington Town Centre (24%) within this age band.

- 6.67 Less than 4% of respondents last purchased DIY goods and furniture goods via the internet/ mail order, reflecting the limited popularity of the internet/ mail order for purchasing these types of goods.
- 6.68 When asked if people used electronic home shopping (internet or TV Shopping), some 49% of respondents within the Study Area stated that they did. This increased to 75% for respondents falling within the 18 to 34 year age band and decreased to 30% for respondents aged 55 years or older.
- 6.69 Of those respondents using the internet for shopping purposes, CDs, music and DVDs was the most popular purchase, with 40% of respondents purchasing these goods. Other popular purchases include Clothes (38%), Books (28%) and major electrical items (28%).

### Summary

- 6.70 Based on the Household Survey undertaken it is possible to identify the following key findings:

### Food Shopping

- 6.71 The principal 'main food' shopping destinations in the West Cumbria Sub-Region are identified by the Household Survey to be: the Morrisons store at Derwent Drive in Workington (16%); the Tesco store on New Bridge Road in Workington (14%); the Morrisons store at Flatt Walks in Whitehaven (14%); and the Tesco store at North Shore in Whitehaven (14%). Collectively, these stores attract more than half (58%) of main food shopping trips undertaken within the Study Area and represent 70% of all main food shopping trips retained by facilities in the West Cumbria Sub-Region.
- 6.72 Overall, convenience goods facilities within the West Cumbria Sub-Region attract almost 83% of main food shopping trips undertaken by residents within the Study Area.
- 6.73 The Household Survey identified that 'top-up' convenience shopping is more localised. Within the Study Area, facilities in Allerdale attract 49% of 'top-up' shopping trips; with facilities in Copeland attracting 39% of top-up shopping trips undertaken. As a whole, facilities within the West Cumbria Sub-Region attract approximately 88% of 'top-up' shopping trips undertaken within the Study Area.
- 6.74 The patterns of convenience goods shopping in the Study Area recorded by the Household

Survey is as follows:

**Table 6.19: West Cumbria Convenience Shopping Patterns – 2008 (Study Area)**

	<b><u>Main</u></b>	<b><u>Top-up</u></b>
<b>Allerdale</b>	<b>48.2%</b>	<b>48.9%</b>
<i>Morrisons, Derwent Drive, Workington</i>	<i>15.5%</i>	<i>4.8%</i>
<i>Tesco, New Bridge Road, Workington</i>	<i>14.0%</i>	<i>6.2%</i>
<i>Sainsbury's, Station Road, Cockermouth</i>	<i>6.6%</i>	<i>5.6%</i>
<i>Somerfield, Station Road, Wigton</i>	<i>3.5%</i>	<i>3.0%</i>
<b>Copeland</b>	<b>34.5%</b>	<b>38.6%</b>
<i>Morrisons, Flatt Walks, Whitehaven</i>	<i>14.2%</i>	<i>6.9%</i>
<i>Tesco, North Shore, Whitehaven</i>	<i>14.0%</i>	<i>6.9%</i>
<i>Somerfield, Lapstone Road, Millom</i>	<i>1.8%</i>	<i>4.3%</i>
<b>WEST CUMBRIA SUB-REGION</b>	<b>82.7%</b>	<b>87.5%</b>
<b>Carlisle</b>	<b>4.8%</b>	<b>1.6%</b>
<b>Keswick</b>	<b>3.4%</b>	<b>3.8%</b>
<b>Other Outside of West Cumbria</b>	<b>5.4%</b>	<b>7.4%</b>
<b>TOTAL OUTSIDE WEST CUMBRIA</b>	<b>13.6%</b>	<b>12.8%</b>
<b>(Internet/ home delivery)</b>	<b>3.4%</b>	<b>0.1%</b>
<b>TOTAL</b>	<b>100%</b>	<b>100%</b>

- 6.75 Overall, approximately 17% of main food shopping trips (including internet/ home delivery) and 13% of 'top-up' convenience shopping trips undertaken within the Study Area are directed to facilities outside the West Cumbria Sub-Region. These are primarily directed to facilities in Carlisle.
- 6.76 It is considered that the market share achieved by all facilities within the West Cumbria Sub-Region is relatively high (83.3%) for convenience goods shopping with limited 'leakage'. The main levels of leakage within the Study Area are identified to be from the peripheral zones (Wigton Zone and Keswick). Indeed, within the Keswick Zone, which extends into the neighbouring authority, the Household Survey results suggest that some 74% of respondents visit facilities outside the West Cumbria Sub-Region.



### Non Food Shopping

- 6.77 In terms of non-bulky comparison goods shopping, facilities in the West Cumbria Sub-Region generally achieve lower market shares than those identified for food shopping. This is understandable given the strength and proximity of competing centres such as Carlisle City Centre. Although retention levels for bulky goods are generally higher than that identified for non-bulky goods, the market shares achieved remain lower than those identified for food shopping.
- 6.78 The pattern for comparison shopping within the Study Area recorded by the Household Survey is identified as follows:

**Table 6.20: West Cumbria Comparison Shopping Patterns – 2008**

	<u>Clothing &amp; Footwear</u>	<u>Books, CDs, etc.</u>	<u>Household</u>	<u>Toys, Games, etc.</u>	<u>Chemist</u>	<u>Electrical</u>	<u>Furniture</u>	<u>DIY</u>	<u>All Goods</u>
<b>Allerdale</b>	<b>42.8%</b>	<b>33.0%</b>	<b>44.9%</b>	<b>40.3%</b>	<b>46.5%</b>	<b>46.5%</b>	<b>47.4%</b>	<b>56.9%</b>	<b>44.0%</b>
<i>Workington Town Centre</i>	<i>38.4%</i>	<i>27.4%</i>	<i>30.7%</i>	<i>29.9%</i>	<i>26.7%</i>	<i>27.9%</i>	<i>20.0%</i>	<i>7.3%</i>	<i>27.7%</i>
<i>Cockermouth Town Centre</i>	<i>1.3%</i>	<i>3.0%</i>	<i>6.2%</i>	<i>4.2%</i>	<i>9.0%</i>	<i>1.2%</i>	<i>4.7%</i>	<i>4.5%</i>	<i>4.3%</i>
<i>Other Centres</i>	<i>1.1%</i>	<i>2.6%</i>	<i>3.6%</i>	<i>1.9%</i>	<i>10.7%</i>	<i>3.1%</i>	<i>8.2%</i>	<i>4.5%</i>	<i>3.9%</i>
<i>Out-of-Centre</i>	<i>2.0%</i>	<i>0.0%</i>	<i>4.4%</i>	<i>4.3%</i>	<i>0.1%</i>	<i>14.3%</i>	<i>14.5%</i>	<i>40.6%</i>	<i>8.0%</i>
<b>Copeland</b>	<b>16.1%</b>	<b>19.1%</b>	<b>19.8%</b>	<b>21.1%</b>	<b>34.6%</b>	<b>17.9%</b>	<b>23.0%</b>	<b>23.3%</b>	<b>21.4%</b>
<i>Whitehaven Town Centre</i>	<i>15.4%</i>	<i>18.5%</i>	<i>18.2%</i>	<i>20.0%</i>	<i>23.9%</i>	<i>16.0%</i>	<i>18.1%</i>	<i>7.3%</i>	<i>17.3%</i>
<i>Other Centres</i>	<i>0.7%</i>	<i>0.6%</i>	<i>1.5%</i>	<i>0.9%</i>	<i>10.7%</i>	<i>1.9%</i>	<i>2.5%</i>	<i>3.6%</i>	<i>2.7%</i>
<i>Out-of-Centre</i>	<i>0.0%</i>	<i>0.0%</i>	<i>0.1%</i>	<i>0.2%</i>	<i>0.0%</i>	<i>0.0%</i>	<i>2.4%</i>	<i>12.4%</i>	<i>1.3%</i>
<b>WEST CUMBRIA SUB-REGION</b>	<b>58.9%</b>	<b>52.1%</b>	<b>64.7%</b>	<b>61.4%</b>	<b>81.1%</b>	<b>64.4%</b>	<b>70.4%</b>	<b>80.2%</b>	<b>65.4%</b>
<b>Carlisle</b>	<b>19.6%</b>	<b>14.3%</b>	<b>14.2%</b>	<b>11.2%</b>	<b>6.8%</b>	<b>12.2%</b>	<b>16.4%</b>	<b>7.8%</b>	<b>13.9%</b>
<b>Barrow-in-Furness</b>	<b>5.3%</b>	<b>4.1%</b>	<b>5.2%</b>	<b>5.2%</b>	<b>2.3%</b>	<b>3.9%</b>	<b>4.3%</b>	<b>3.7%</b>	<b>4.3%</b>
<b>Other Outside of West Cumbria</b>	<b>11.2%</b>	<b>8.4%</b>	<b>8.4%</b>	<b>7.4%</b>	<b>7.3%</b>	<b>3.7%</b>	<b>5.6%</b>	<b>4.5%</b>	<b>8.0%</b>
<b>TOTAL OUTSIDE WEST CUMBRIA</b>	<b>36.1%</b>	<b>26.8%</b>	<b>27.8%</b>	<b>23.8%</b>	<b>16.4%</b>	<b>19.8%</b>	<b>26.3%</b>	<b>16.0%</b>	<b>26.3%</b>
<b>(Internet/ Home Delivery</b>	<b>5.0%</b>	<b>21.1%</b>	<b>7.5%</b>	<b>14.9%</b>	<b>2.2%</b>	<b>15.8%</b>	<b>3.4%</b>	<b>3.7%</b>	<b>8.4%</b>

- 6.79 The Household Survey identifies that facilities in the West Cumbria Sub-Region retain between 52% (Books, CDs, etc.) and 81% (Chemist goods) of comparison goods shopping trips undertaken within the



Study Area. Facilities in Allerdale are identified to be the main destinations within the West Cumbria Sub-Region for comparison goods shopping, reflecting the relative strength of provision, most notably within Workington Town Centre

- 6.80 Notwithstanding this, despite the relative strength of Workington Town Centre compared to other destinations within the Sub-Region, it remains evident that a notable proportion of shopping trips within the Sub-Region are being lost to competing centres elsewhere. Facilities in Copeland have a more limited role in meeting the comparison goods shopping needs of the local resident population. It is equally notable that internet shopping has had a significant impact on the retention figures for books, CDs, toys and electrical goods.

## 7.0 CHANGING SHOPPING PATTERNS

### Introduction

- 7.01 In order to assess whether shopping patterns within the West Cumbria Sub-Region have changed in recent years, this section of the report analyses the West Cumbria Retail Review (WCRR) undertaken by Roger Tym & Partners in December 2003.
- 7.02 Whilst it is notable that both this study and the WCRR have been informed by a telephone household survey, due to the methodology adopted in the WCRR direct comparisons between the two studies are not possible. Indeed, whilst this study has achieved responses within eight zones throughout the West Cumbria Study Area (which is marginally larger than that identified in the WCRR, which was based on the two authority areas) it is not clear where exactly the survey responses were achieved in the WCRR. In this respect, the WCRR considered broad shopping patterns within the two authority areas and it is not clear where the respondents were located within each authority (e.g. in Workington, or in Cockermouth, etc.) whereas this study looks at more localised shopping patterns within each Borough and just beyond and ensured that a robust sample was achieved throughout the defined Study Area. In comparison, the respondents received for the WCRR may have focused on the more populated areas of the study area (i.e. Workington and Whitehaven).
- 7.03 Similarly, the format of the questionnaires utilised in the WCRR and this study differ, most notably with regard to the questions asked on shopping habits.
- 7.04 Notwithstanding this, we set out below our assessment of the broad changes that appear to have occurred in the West Cumbria Sub-Region between 2003 and 2008.

### Changes in Shopping Patterns

#### *Convenience Goods Shopping*

- 7.05 The survey work undertaken as part of the WCRR identified that facilities in Workington and Whitehaven (both in-centre and out-of-centre) were the most popular destinations for convenience goods shopping within the Study Area. These facilities achieved market shares of 32% and 35% respectively. This reflects the findings of the recently completed Household Survey, which also identified Workington and Whitehaven to be the most popular destinations, albeit achieving lower market shares (30% and 29%



respectively). These lower market shares are likely to be reflective of the differences in approach adopted in the two studies.

- 7.06 With regard to particular stores, the 2003 study identified that in Workington the Tesco store at New Bridge Road (14%) was the most popular destination followed by the Morrisons store at Derwent Howe Retail Park (then trading as Safeway) (9%). The 2008 Household Survey results suggest that the rebranding of the Safeway to Morrisons has had a positive impact upon the performance of this store. Indeed, the 2008 survey identifies the Morrisons store to be marginally more popular than the Tesco store. In addition, the improved popularity of the Morrisons store may also be attributable to the closure of the Co-op store within Workington Town Centre, which was identified to achieve a market share of 5.4% in 2003.
- 7.07 In Whitehaven, the 2003 survey identified the Tesco store at North Shore to be the most popular (13%) followed by the Morrisons (then trading as Safeway) (11%). This compares to the 2008 Household Survey suggesting that the Morrisons store is marginally more popular than the Tesco store (13.0% compared to 12.8%). As with Workington, the rebranding of the Safeway store to Morrisons appears to have had a positive impact on its trading performance.
- 7.08 Similarly, the market share achieved by convenience goods facilities in Cockermouth has remained broadly static between 2003 and 2008 (from 9.4% to 8.7%) and is identified to be the third most popular destination within the Sub-Region for convenience goods shopping.
- 7.09 Table 7.1 provides a breakdown of the market shares achieved by the main centres and stores within West Cumbria in 2003 and 2008.

**Table 7.1: Changes in Market Share between 2003 and 2008 – Convenience Goods**

Centre/Store	Market Share	
	2003	2008
<b>WITHIN WEST CUMBRIA</b>		
<b>Workington</b>	<b>34.9%</b>	<b>30.1%</b>
<i>Tesco, New Bridge Road</i>	<i>14.2%</i>	<i>12.4%</i>
<i>Morrisons, Derwent Howe</i>	<i>9.1% ^</i>	<i>13.2%</i>
<i>Town Centre Shops</i>	<i>10.0%</i>	<i>3.1%</i>
<b>Whitehaven</b>	<b>31.9%</b>	<b>29.2%</b>
<i>Morrisons, Flattwalks</i>	<i>11.2% ^</i>	<i>13.0%</i>
<i>Tesco, North Shore</i>	<i>13.2%</i>	<i>12.8%</i>
<i>Town Centre Shops</i>	<i>7.1%</i>	<i>3.0%</i>
<b>Cockermouth</b>	<b>9.4%</b>	<b>8.7%</b>
<i>Sainsbury's, Station Road</i>	<i>5.5%</i>	<i>6.9%</i>
<b>Maryport</b>	<b>3.2%</b>	<b>3.0%</b>
<i>Co-op, Curzon Street</i>	<i>2.8%</i>	<i>2.0%</i>
<b>Wigton</b>	<b>1.7%</b>	<b>4.6%</b>
<b>Aspatria</b>	<b>1.1%</b>	<b>0.4%</b>
<b>Silloth</b>	<b>0.0%</b>	<b>0.8%</b>
<b>Millom</b>	<b>0.4%</b>	<b>2.5%</b>
<b>Cleator Moor</b>	<b>2.9%</b>	<b>1.4%</b>
<i>Co-op, Leconfield Street</i>	<i>2.4%</i>	<i>1.1%</i>
<b>Egremont</b>	<b>2.5%</b>	<b>1.9%</b>
<i>Co-op, Main Street</i>	<i>1.3%</i>	<i>1.9%</i>
<b>Retention within West Cumbria</b>	<b>91.0%</b>	<b>83.4%</b>
<i>Allerdale</i>	<i>51.5%</i>	<i>47.7%</i>
<i>Copeland</i>	<i>39.4%</i>	<i>35.7%</i>
<b>OUTSIDE WEST CUMBRIA</b>		
Carlisle	4.4%	4.4%
Keswick	2.5%	3.5%
Barrow	0.7%	3.2%
Internet/Home Delivery	1.0%	2.9%

Notes: Derived from WCRR (2003) and 2008 Household Survey  
^Trading as Safeway in 2003

7.10 Table 7.1 illustrates that the overall retention achieved by facilities in West Cumbria appears to have reduced since 2003, with the market share reducing from 91% in 2003 to 83% in 2008. Again, this reduction in market share is likely to be reflective of the extent of the study areas adopted in 2003 and 2008 and the differences in methodology. This reduction in market share should not be considered to suggest that more convenience goods expenditure is being lost to competing centres elsewhere.

Indeed, the market share achieved by all convenience goods facilities in Carlisle has remained broadly static since 2003. However, it is evident that the popularity of online shopping has increased since 2003 (from 1.0% to 2.9%), which reflects the trend nationally of increased popularity of this type of shopping in recent years.

### *Comparison Goods Shopping*

- 7.11 With regard to comparison goods shopping it is notable that the household survey that informed the WCRR only sought to identify shopping patterns for two categories of comparison goods (clothing/shoes and bulky goods). The 2008 Study identified shopping patterns for a wider range of goods (eight categories were identified including bulky and non-bulky goods) to reflect the different shopping patterns for different goods. For the purposes of this study, our assessment of the changes in shopping patterns is based on the categories identified by the WCRR (i.e. clothing/footwear and bulky goods) although the 2008 Household Survey broke bulky goods down into three categories (DIY, electrical and furniture) whereas the WCRR grouped all bulky goods into one category. Again, given these differences (together with the different approach adopted as outlined above) direct comparisons between 2003 and 2008 should be treated with caution.
- 7.12 In terms of bulky goods and clothing and footwear combined, the 2003 WCRR identified that existing facilities in Workington Town Centre (excluding out-of-centre facilities) achieve a market share of 33.8%. This compares to the 2008 Household Survey identifying an overall comparison goods market share of 27.3%. By including out-of-centre facilities such as Derwent Howe Retail Park these market shares to increases to 39.4% and to 35.5% respectively. Based on analysis of the survey evidence it appears that despite the significant redevelopment and improvement of Workington Town Centre since 2003 (Washington Square), the overall market share (including specifically the town centre) has declined between 2003 and 2008. However, as previously highlighted direct comparisons between the two surveys should be treated with caution.
- 7.13 However, based on shopping patterns for clothing and footwear only (which is the main focus of Workington Town Centre), the 2003 WCRR identified Workington Town Centre to achieve a market share of 27.6% for these types of goods. This compares to a market share for Workington Town Centre of 36.5% in 2008 for clothing and footwear.
- 7.14 With regard to Whitehaven, the 2003 WCRR identified an overall comparison goods market share of 15.7%. This compares to a market share of 17.4%, as identified by the 2008 Household Survey. With



regard to clothing and footwear shopping the market share of Whitehaven in 2003 is identified to have remained broadly static at 15.5% in 2003, which compares to a market share of 15.6% in 2008.

- 7.15 In terms of bulky goods, facilities in Workington were identified to achieve a market share of 41.8% in 2003, increasing to 54.0% by including out-of-centre provision, most notably Derwent Howe Retail Park. This compares to the 2008 Household Survey identifying a market share of 19.3%, increasing to 39.7% by including out-of-centre provision. Accordingly, the survey evidence suggests that the market share achieved by facilities in Workington for bulky goods appears to have reduced between 2003 and 2008. In contrast the market share of Whitehaven for bulky goods shopping has increased from 16.2% in 2003 to 18.9% in 2008.
- 7.16 Other centres within the Sub-Region such as Cockermouth and Maryport are identified to serve a more limited comparison goods role (as identified in both the 2003 and 2008 survey). The market share of facilities within Cockermouth (the third most popular destination in the Sub-Region) has increased marginally from 2.1% in 2003 to 2.7% in 2008. Table 7.2 provides a breakdown of the market share achieved by the main centres within West Cumbria in 2003 and 2008 as identified by the survey evidence.

**Table 7.2: Changes in Market Share between 2003 and 2008 – Comparison Goods**

Centre/Store	Market Share					
	2003			2008		
	Clothes	Bulky	All Goods	Clothes	Bulky	All Goods^
<b>WITHIN WEST CUMBRIA</b>						
<b>Workington</b>	<b>31.0%</b>	<b>54.0%</b>	<b>39.4%</b>	<b>40.0%</b>	<b>39.7%</b>	<b>39.8%</b>
<i>Town Centre</i>	<i>29.2%</i>	<i>41.8%</i>	<i>33.8%</i>	<i>37.9%</i>	<i>19.3%</i>	<i>27.6%</i>
<i>Out-of-centre</i>	<i>1.8%</i>	<i>13.2%</i>	<i>5.6%</i>	<i>2.1%</i>	<i>20.4%</i>	<i>12.2%</i>
<b>Whitehaven</b>	<b>15.5%</b>	<b>16.2%</b>	<b>15.7%</b>	<b>15.6%</b>	<b>18.9%</b>	<b>17.4%</b>
<b>Cockermouth</b>	<b>2.3%</b>	<b>1.7%</b>	<b>2.1%</b>	<b>1.4%</b>	<b>3.8%</b>	<b>2.7%</b>
<b>Maryport</b>	<b>0.5%</b>	<b>3.4%</b>	<b>1.5%</b>	<b>0.3%</b>	<b>2.9%</b>	<b>1.7%</b>
<b>Egremont</b>	<b>0.3%</b>	<b>0.4%</b>	<b>0.4%</b>	<b>0.6%</b>	<b>0.3%</b>	<b>0.4%</b>
<b>Wigton</b>	<b>0.3%</b>	<b>1.4%</b>	<b>0.7%</b>	<b>0.8%</b>	<b>1.9%</b>	<b>1.4%</b>
<b>Aspatria</b>	<b>0.0%</b>	<b>0.3%</b>	<b>0.1%</b>	<b>0.0%</b>	<b>0.1%</b>	<b>0.1%</b>
<b>Millom</b>	<b>0.1%</b>	<b>0.0%</b>	<b>0.1%</b>	<b>0.2%</b>	<b>2.1%</b>	<b>1.3%</b>
<b>Cleator Moor</b>	<b>0.3%</b>	<b>0.3%</b>	<b>0.3%</b>	<b>0.0%</b>	<b>0.3%</b>	<b>0.2%</b>
<b>Egremont</b>	<b>0.3%</b>	<b>0.4%</b>	<b>0.4%</b>	<b>0.6%</b>	<b>0.5%</b>	<b>0.4%</b>
<b>Other</b>	<b>3.0%</b>	<b>1.0%</b>	<b>2.3%</b>	<b>0.0%</b>	<b>0.2%</b>	<b>0.2%</b>
<b>Retention within West Cumbria</b>	<b>53.6%</b>	<b>79.1%</b>	<b>62.6%</b>	<b>58.9%</b>	<b>70.7%</b>	<b>65.4%</b>
<i>Allerdale</i>	<i>35.1%</i>	<i>60.7%</i>	<i>44.5%</i>	<i>42.5%</i>	<i>48.9%</i>	<i>46.0%</i>
<i>Copeland</i>	<i>18.5%</i>	<i>18.4%</i>	<i>18.1%</i>	<i>16.4%</i>	<i>21.8%</i>	<i>19.4%</i>
<b>OUTSIDE WEST CUMBRIA</b>						
Carlisle	24.2%	9.4%	18.8%	19.9%	12.6%	15.9%
Keswick	1.7%	2.2%	1.9%	2.4%	1.8%	2.1%
Barrow	0.9%	0.6%	0.8%	5.1%	4.4%	4.7%
Internet/Home Delivery	12.7%	7.2%	10.7%	5.0%	8.1%	6.7%

Notes: Derived from WCRR (2003) and 2008 Household Survey

- 7.17 Table 7.2 illustrates that overall existing facilities within the West Cumbria Sub-Region were identified to achieve a market share of less than 63% for comparison goods in 2003. This compares to the 2008 Household Survey identifying a market share of more than 65%. In particular the market share for clothing and footwear shopping appears to have increased since 2003 (from less than 54% to almost 59%). In contrast the bulky goods market share appears to have fallen from 79% in 2003 to less than 71% in 2008. As previously highlighted this is likely to be due to the differences in approach adopted in the two surveys in seeking to identify shopping patterns for bulky goods.



- 7.18 Both the 2003 and 2008 surveys identify that facilities within Allerdale are the most popular destinations within the Sub-Region. All facilities (both in-centre and out-of-centre) within Allerdale are identified to achieve a market share of 45% in 2003, increasing to 46% by 2008. Facilities in Copeland were identified to achieve a market share of only 18% in 2003, although this is identified to have increased marginally to 19% by 2009. Moreover, for clothing and footwear the market share of Allerdale has increased from 35% in 2003 to almost 43% in 2008, most notably with Workington Town Centre increasing from 29% in 2003 to 38% in 2008 – a 30% increase. This notable increase is likely to be attributable to the improvement in the retail offer in Workington Town Centre since 2003. In comparison, Whitehaven’s market share has remained broadly static, although increased marginally between 2003 and 2008 (from 15.5% in 2003 to 15.6% in 2008). This is likely to be reflective of the limited change in the retail offer of Whitehaven since 2003 (particularly for clothing and footwear shopping) when compared to Workington Town Centre over the same period.
- 7.19 With regard to the influence of competing facilities outside, comparison of the two surveys identifies that the level of shopping directed to facilities elsewhere (such as Carlisle) has marginally reduced, from more than 37% (including online shopping) in 2003 to less than 35% in 2008. In particular the level of shopping trips undertaken for clothing and footwear to competing facilities has reduced from more than 46% in 2003 to 41% in 2008. However, it is notable that the proportion of shopping trips directed to online facilities appears to have reduced since 2003, reducing from 10.7% to 6.7% in 2008, this appears to differ from a trend nationally of increasing popularity of online shopping and these differences may be due to the approach adopted in the surveys. In particular the 2008 Household Survey sought to identify the shopping patterns for a broader range of goods than the survey undertaken to inform the 2003 study. In particular the 2003 survey identified shopping patterns for three categories of goods, whereas the 2008 Household Survey sought to identify shopping patterns for eight different categories of comparison goods. Accordingly, direct comparisons should be treated with caution.

## Summary

- 7.20 Analysis of the surveys undertaken in 2003 and 2008 highlights that Workington and Whitehaven remain the dominant retail destinations within the West Cumbria Sub-Region. In particular Workington is a popular destination for comparison goods shopping and the significant redevelopment of the town centre (Washington Square) appears to have had a positive impact on the performance of the town centre, most notably for clothing and footwear shopping trips.



7.21 With regard to convenience goods shopping the rebranding of the Safeway stores to Morrisons in both Workington and Whitehaven since 2003 appear to have improved the trading performance of these stores, although this appears through reducing trade directed to other stores (such as the existing Tesco stores) rather than drawing more shopping trips to Whitehaven and Workington from elsewhere in the Study Area.

## 8.0 POPULATION AND EXPENDITURE

8.01 This section of the report assesses the current population and expenditure generated within the defined Study Area based on the identified eight survey zones outlined in Section 4 of this report.

### Study Area Population

8.02 The population within each postal code sector has been calculated using MapInfo AnySite data (2005 estimate). This baseline population has then been projected forward based on mid-year ONS based population estimates as identified by MapInfo for the defined Study Area.

8.03 In addition, as part of a 'sensitivity testing' two additional population scenarios, which are considered as follows:

- [Scenario 2 \('RSS projections'\)](#): The population has been projected forward based on the recommended distribution of housing provision between different parts of the North West in Table 7.1 of RSS – Allerdale Borough (outside of National Park) 4,800 additional households by 2021 and Copeland Borough (outside of National Park) 4,140 additional households by 2021.

In projecting forward future population the average household size for Cumbria of 2.3 people (2001 Census). However, given the trend both nationally and regionally of declining household sizes since 1971, it has been assumed that the average annual decline in household size recorded since 1971 (decline in household size of 0.63% per annum) will continue through to 2023. In addition, for the purposes of this assessment it has been assumed that 50% of the population created by the new households will be new residents to the West Cumbria Sub-Region.

- [Scenario 3 \('Energy Coast'\)](#): Based on interpolated growth in population within West Cumbria (between 2006 and 2026) identified under Scenario 5 of the West Coast Masterplan for the Energy Coast.
- [Scenario 4 \('Static Population'\)](#): Based on no growth in population in order to reflect historic trends.

8.04 Based on these four scenarios, Table 8.1 provides a breakdown of the resident population within the adopted Study Area. For the purposes of this assessment the same population has been assumed for

2009 (based on 2005-ONS estimates) with the different growth rates factored in for the three scenarios post 2009.

**Table 8.1: Population within Study Area (2009-2023)**

	2009	2014	2019	2023	Change (%)
Scenario 1	170,076	173,586	177,020	180,011	+6.8%
Scenario 2		173,386	178,969	181,750	+6.9%
Scenario 3		174,520	180,139	183,896	+8.1%
Scenario 4		170,076	170,076	170,076	170,076

Source: MapInfo AnySite (2008) and based on population projections identified in the West Coast Masterplan for the Energy Coast

- 8.04 Population figures (derived from MapInfo) are provided for each of the eight survey zones. For the purposes of this study, population and expenditure has been calculated at five year intervals in accordance with PPS6 (i.e. 2014 and 2019) together with 2023 in order to provide a long term assessment. [Appendix 7](#) provides a detailed breakdown of the forecast population change within each survey zone through to 2023. For the purposes of this assessment the baseline assessment is based on the population growth outlined in Scenario 1, however, reference is made to the potential implications on expenditure and 'capacity' should the forecast change in population be achieved as identified in Scenario 2 and Scenario 3.

## Retail Expenditure

- 8.05 In order to calculate convenience and comparison expenditure per person, WYG has utilised MapInfo AnySite data, which provides detailed information on local consumer expenditure and that takes into account the socio-economic characteristics of the local resident population. MapInfo is a widely accepted source of expenditure and population information and was used in the 2003 West Cumbria Retail Review completed by Roger Tym & Partners.
- 8.06 Forecasts have been derived from MapInfo Brief 08/02, which was published in September 2008. In terms of convenience goods (which include food products, alcohol and newspapers/magazines) MapInfo identifies a forecast growth rate of +1.5% per annum between 2006 and 2018 (Table 2 of Information Brief 08/02). This forecast is consistent with past trends, but is also based upon expected changes in other economic variables of interest according to historic relationships. For the purposes of this study this forecast growth rate has been utilised up to 2023.

- 8.07 For comparison goods (e.g. clothing, footwear, electrical items, furniture, etc.) MapInfo identifies a forecast growth rate of +4.0% per annum between 2006 and 2018. This forecast growth rate has been applied for the purposes of this study.
- 8.08 Using the forecast growth rates identified by MapInfo, it is possible to produce expenditure estimates for each survey zone in 2009, 2014, 2019 and 2023. This assessment takes into account both retail expenditure growth and population change.

#### Convenience Goods Expenditure

- 8.09 It is estimated that in 2009 the resident population within the Study Area generates some £298.25m of convenience goods expenditure. Based on the three different scenarios identified this population is identified to increase as follows:

	2014	2019	2023
Scenario 1:	£327.99m	£360.38m	£389.01m
Scenario 2:	£329.01m	£362.94m	£392.59m
Scenario 3:	£329.70m	£366.71m	£397.33m
Scenario 4:	£321.30m	£346.13m	£367.37m

#### *Main Food and 'Top-up' Shopping*

- 8.10 As part of the Household Survey respondents were specifically asked questions in relation to the proportion of money they spend on their main food shopping and 'top-up' food shopping. Analysis of these results indicate that within the Study Area some 83% of total convenience goods expenditure is spent on main food shopping and 17% on 'top-up' shopping (i.e. regular purchases of products such as milk, bread, etc.). However, this main/top-up split varies within the eight survey zones, ranging from 87% of convenience goods expenditure generated in Zone 4 ('Keswick') spent on main food shopping and 82% in Zone 1 ('Wigton').
- 8.11 By applying these expenditure estimates per person to the identified population of the defined Study Area, convenience goods expenditure on main food shopping is estimated to be approximately £248.47m in 2009. With regard to 'top-up' shopping trips, in 2009 the resident population within the Study Area is estimated to generate £49.78m of convenience goods expenditure.

## Comparison Goods Expenditure

- 8.12 In 2009, the resident population within the Study Area is identified to generate some £566.00m. Based on the various population scenarios identified above this is identified to increase as follows:

	2014	2019	2023
Scenario 1:	£670.73m	£814.95m	£958.07m
Scenario 2:	£672.72m	£820.50m	£966.51m
Scenario 3:	£674.12m	£829.22m	£978.42m
Scenario 4:	£656.95m	£782.50m	£904.43m

\*Makes allowance for growth in Special Forms of Trading

- 8.13 As previously highlighted, for the purposes of this study comparison goods expenditure has also been divided into eight sub-categories: 'Furniture', 'DIY', 'Electrical' – 'bulky goods' and what are referred to as non-bulky goods: 'Clothing & Footwear', 'Books, CDs, DVDs, etc.', 'Household Goods', 'Toys, Bicycles and Other Recreational Goods' and 'Chemist Goods'. Although PPS6 advises that in identifying quantitative need for additional development expenditure levels should relate to the class of goods to be sold within the broad categories of 'convenience' and 'comparison' goods' for the purposes of this assessment 'bulky' and 'non-bulky' goods have also been examined in order to provide a qualitative overview.

## West Cumbria Sub-Region's Market Share

- 8.14 Having calculated the likely levels of expenditure that are generated by the resident population within the defined Study Area it is also important to understand what proportion of this expenditure is currently attracted to retail facilities within the West Cumbria Sub-Region (i.e. Allerdale and Copeland local authority areas). These market shares may differ slightly to those outlined in Section 6 as they are based on expenditure rather than shopping trips.
- 8.15 As previously highlighted, this study has involved the completion of more than 1,000 household telephone interviews within the West Cumbria area. By analysing the results from the survey it has been possible to understand the likely levels of expenditure that is captured by facilities in the West Cumbria Sub-Region. The market shares for the various expenditure categories are highlighted in Table 8.2 and Table 8.3.

**Table 8.2: West Cumbria's Current Market Share (2008) – Convenience**

Zone	Market Share (%)		
	Main Convenience	Top-up Convenience	Total <sup>^</sup>
1 – Wigton	55.3	79.7	<b>59.8</b>
2 – Maryport	97.6	86.2	<b>95.9</b>
3 – Cockermouth	90.5	93.2	<b>91.0</b>
4 – Keswick	26.4	13.8	<b>24.8</b>
5 – Workington	99.4	95.8	<b>98.8</b>
6 – Whitehaven	98.4	96.0	<b>98.0</b>
7 – Copeland Central	95.3	89.7	<b>94.4</b>
8 – Millom	30.0	86.2	<b>38.6</b>
<b>TOTAL</b>	<b>82.4</b>	<b>87.5</b>	<b>83.3</b>

Source: Allerdale/Copeland Household Survey (May 2008)

<sup>^</sup>Based on cumulative market share of main and top-up food shopping

Based on market share of expenditure

At 2005 prices

**Table 8.3: West Cumbria's Current Market Share (2008) - Comparison**

Zone	Market Share (%)								
	Clothing & Footwear	Books, CDs, etc.	Household Goods	Toys, etc.	Chemist	Electrical	Furniture	DIY	Total <sup>^</sup>
1 – Wigton	15.7	11.7	24.7	14.6	57.2	28.3	34.2	38.6	<b>26.6</b>
2 – Maryport	67.8	63.7	78.7	71.5	92.5	72.3	83.1	96.4	<b>76.7</b>
3 – Cockermouth	56.8	51.6	74.3	73.0	94.5	76.7	83.3	93.4	<b>73.4</b>
4 – Keswick	22.8	4.7	28.2	16.3	10.7	22.4	20.2	48.5	<b>21.1</b>
5 – Workington	77.1	72.4	77.6	82.7	93.0	81.2	81.9	95.7	<b>82.2</b>
6 – Whitehaven	81.4	69.5	84.8	75.2	94.1	78.9	86.3	95.5	<b>83.0</b>
7 – Copeland Central	75.6	57.3	74.7	77.1	91.5	76.5	78.4	96.1	<b>78.6</b>
8 – Millom	4.1	4.2	15.4	9.9	56.6	24.3	29.9	40.9	<b>21.1</b>
<b>TOTAL</b>	<b>58.7</b>	<b>48.8</b>	<b>64.3</b>	<b>60.1</b>	<b>80.8</b>	<b>64.3</b>	<b>69.0</b>	<b>80.7</b>	<b>65.1</b>

Source: Allerdale/Copeland Household Survey (May 2008)

<sup>^</sup>Based on cumulative market share of all comparison goods categories

Based on market share of expenditure

At 2005 prices

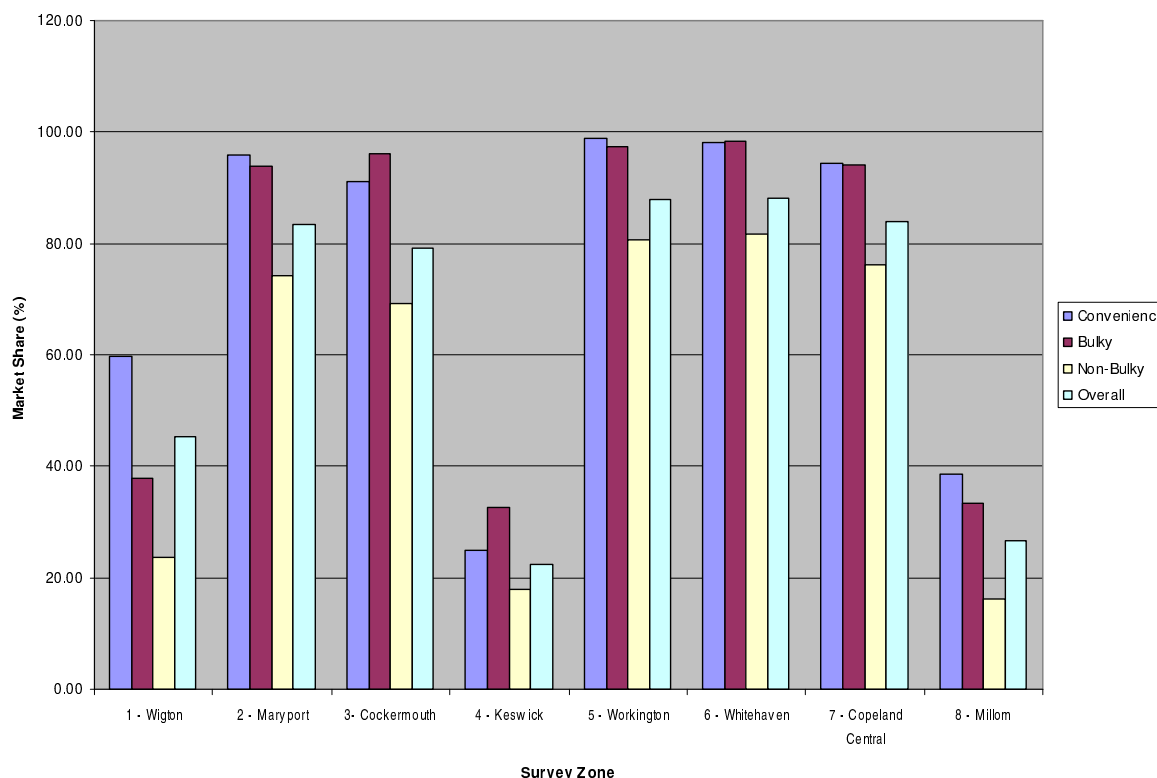
- 8.16 Table 8.2 indicates that destinations within the West Cumbria Sub-Region attract some 82% of main food shopping expenditure generated by residents within the Study Area. In terms of 'top-up' convenience shopping, existing facilities within the West Cumbria Sub-Region attract almost 88% of expenditure generated in the Study Area. This equates to £205.16m of main food expenditure and £43.48m of 'top-up' expenditure generated in the Study Area directed to destinations in the West Cumbria Sub-Region. Accordingly, facilities retain £248.64m of **convenience goods** expenditure generated in the Study Area.
- 8.17 Understandably, the level of retention differs within the different zones. Within Zone 5 ('Workington') and Zone 6 ('Whitehaven') some 98% of convenience goods expenditure is retained by facilities in the West Cumbria Sub-Region. This compares to less than 25% in Zone 4 ('Keswick') and 39% in Zone 8 ('Millom').



- 8.18 In terms of individual stores within the West Cumbria Sub-Region, the out-of-centre Morrisons store at Derwent Drive in Workington is identified to be the most popular, achieving a convenience goods turnover of £39.29m derived from the resident population within the Study Area. Other popular stores include the Morrisons store in Whitehaven (£38.83m), the Tesco store in Whitehaven (£38.19m) and the out-of-centre Tesco store in Workington (£36.92m). Outside the West Cumbria Sub-Region, facilities in Carlisle are identified to be the most popular, particularly within Zone 1 ('Wigton').
- 8.19 With regard to **comparison goods** shopping, the greatest market share achieved by existing facilities in the West Cumbria Sub-Region is for 'Chemist' and 'DIY' goods, which both attract almost 81% of expenditure generated in the Study Area. This compares to a market share of less than 50% for 'Books, CDs, DVDs, etc.'
- 8.20 Collectively, the identified 'bulky goods sector' is identified to achieve a market share of 71% (or £124.69m). This market share reflects the relative strength of bulky goods provision within the West Cumbria Sub-Region. Within the bulky goods sector facilities in the West Cumbria Sub-Region are identified to attract 64% of expenditure generated for 'Electrical Goods', which compares to a 69% market share for 'Furniture Goods' and 81% market share for 'DIY Goods'.
- 8.21 In respect of non-bulky comparison goods expenditure, existing facilities within the West Cumbria Sub-Region attract 63% (or £246.02m) of expenditure generated in the Study Area, which is lower than that achieved for bulky goods (70%). Clearly, the influence of competing centres such as Carlisle together with the internet (particularly for the purchase of Books, CDs, DVDs, etc.) for non-bulky goods shopping within the Study Area is greater than that identified for bulky goods.
- 8.22 Within the broad classification of non-bulky goods, facilities in the West Cumbria Sub-Region are identified to attract 81% of expenditure generated on 'Chemist Goods' within the Study Area. This compares to only 59% for 'Clothing & Footwear' and 49% for 'Books, CDs, DVDs, etc.'
- 8.23 Collectively (bulky and non-bulky comparison goods) existing facilities within the West Cumbria Sub-Region attract less than two thirds (64%) of all comparison goods expenditure generated in the Study Area. By including convenience goods expenditure, the overall market share of West Cumbria increases to 71% of all expenditure generated in the Study Area (both convenience and comparison goods). This equates to £616.81m of expenditure, comprising £248.64m of convenience goods expenditure and £368.17m of comparison goods expenditure.

8.24 Figure 8.1 provides a breakdown of the market share by zone for all expenditure categories.

**Figure 8.1: Comparative Market Shares by Zone**



Source: Allerdale/Copeland Household Survey (May 2008) and WYG analysis

### Forecast Growth in Expenditure Attracted to West Cumbria

- 8.25 With forecast growth in convenience expenditure predicted at +1.5% per annum after 2007 together with the estimated growth in population, it is estimated that the West Cumbria Sub-Region will experience an increase in convenience goods expenditure (up to £76m by 2023).
- 8.26 The significant increase forecast in expenditure on comparison goods (+4.0% per annum) would suggest that West Cumbria Sub-Region's market share would capture a further £257m between 2009 and 2023, which would be available for comparison retail facilities within West Cumbria Sub-Region.
- 8.27 This analysis is based on 'rolling forward' the current market shares for each category of goods identified within the Study Area. This assessment takes into account population changes and growth in retail expenditure but does not take into account expenditure generated by tourism and inflow from outside the Study Area. This approach of 'rolling forward' current market shares is in line with standard practice



and does not take into account the desirability or need to clawback leakage between centres that might be achieved through improvements in provision within and outside the Sub-Region.

8.28 In order for the West Cumbria Sub-Region to capture the significant growth in retail expenditure, it is likely that there will be a need to enhance future retail provision, thereby ensuring that this growth is not lost to competing centres and that the West Cumbria Sub-Region's future market share does not decline.

8.29 If an excess of comparison or convenience goods expenditure manifests itself within the Sub-Region, this does not translate directly into a requirement for additional floorspace. It will be necessary to take account of:

- Existing development proposals;
- Expected changes in shopping patterns (including growth of online shopping);
- The current capacity and efficiency of retail floorspace within the established centres;
- Future changes in business productivity and current development commitments; and
- Potential changes in forecast expenditure growth in the future.

## 9.0 TOURISM EXPENDITURE

### Introduction

- 9.01 Given that much of the West Cumbria Sub-Region is a popular tourist destination it is important to also take into account expenditure by tourists and residents who may live outside the defined Study Area. In this respect, an allowance for tourism expenditure directed to local retail facilities has been based on assessing the findings of the visitor survey together with the 2007 STEAM (Scarborough Tourism Activity Monitor) Reports for Allerdale and Copeland.

### Findings of the Visitor Survey

- 9.02 As outlined in Section 4 of this report as part of the survey evidence in-street surveys were undertaken in Whitehaven and Workington town centres. As part of this exercise the survey sought to identify the full post code of respondents. Accordingly, it will be possible to assess the proportion of visitors who visit the town centres from outside the defined Study Area, the purpose of their visit and their perceived strengths and weaknesses of Workington and Whitehaven.

#### *Workington Town Centre*

- 9.03 The survey undertaken of visitors to Workington Town Centre (completed in July 2008) identified that some 13% of respondents were from outside the defined Study Area.
- 9.04 Of these respondents who live outside the defined Study area the main reasons for visiting Workington were identified to be for clothes/shoe shopping (29% of respondents) followed by browsing/window shopping (19.0%) and food and grocery shopping (14.3%). Some 14% of respondents indicated that they would undertake their main food shop as part of their visit.
- 9.05 In addition to purchases on food and grocery products, some 52% of respondents who visit Workington Town Centre stated that they would also buy non-food goods, primarily clothing and footwear (48% of respondents).
- 9.06 More quality restaurants/pavement cafes, increased choice/range of shops, more speciality shops and cheaper parking were all identified as the most popular measures by visitors that would improve Workington Town Centre. It is notable that these measures differ slightly from the views of local visitors, where respondents considered that covered shopping areas and better foodstore provision



together with increased choice/range of shops and more speciality shops would improve the attraction of the town centre.

#### *Whitehaven Town Centre*

- 9.07 The survey undertaken of visitors to Whitehaven Town Centre identified that some 12% of respondents lived outside the defined Study Area – this is comparable to that identified for Workington Town Centre (13%).
- 9.08 The main reasons cited by respondents who live outside the Study Area for visiting Whitehaven was identified to be for social/leisure facilities (37%) followed by food and grocery shopping (11%). Over half (52%) of respondents indicated that they were intending to stay in Whitehaven for at least half a day, which compares to more than three-quarters (77%) of respondents who live within the Study Area staying no more than two hours.
- 9.09 In terms of measures that would improve Whitehaven Town Centre, visitors suggested that general improvements to the environmental quality (16% of respondents) and increased choice/range of shops (11%) would make Whitehaven more attractive. Indeed, the town centre environment was identified as the biggest weakness of the centre by visitors from outside the defined Study Area.

### *Annual Retail Spending Directed to Centres*

#### *Allerdale*

- 9.10 With regard to tourism expenditure directed to facilities in Allerdale the STEAM Report (2007) identifies that the tourism sector generates some 2.6million visitors per year generating some £209m of expenditure. In terms of shopping activity, the tourism industry is identified to generate some £19.2m of additional expenditure (convenience and comparison). This expenditure is directed to all facilities in the Borough. By applying a breakdown of convenience and comparison split of 70% directed to non-food shopping and 30% to food shopping, this equates to an additional £13.4m of comparison goods expenditure directed to facilities in the Borough and an additional £5.8m spent on convenience goods.
- 9.11 Based on the findings of the Household Survey, it has been assumed for this assessment that this additional expenditure is redistributed to existing centres/facilities on a *pro rata* basis. Unlike the growth forecast in expenditure generated by residents, a lower growth rate has been assumed in terms of



forecasting future growth in tourism expenditure. In this respect convenience goods expenditure is forecast to grow by +0.4% per annum and by +2.0% for comparison goods expenditure.

#### *Copeland*

- 9.12 Similarly, with regard to identifying tourism expenditure directed to facilities in Copeland Borough, the STEAM Report (2007) identifies that the tourism sector generates some 1.8 million visitors per year generating some £95m of expenditure.
- 9.13 In terms of shopping (both food and non-food), the tourism industry is identified to attract some £7.1m of additional expenditure to the Borough. Based on a convenience and comparison split of 30%/70%, this equates to an additional £2.1m of convenience goods expenditure directed to facilities in the Borough and an additional £5.0m spent on comparison goods. Again, this additional expenditure is distributed on a *pro rata* basis to existing facilities based on the findings of the Household Survey. Also, the same increase in tourism expenditure (0.4% and 2.0% respectively) is assumed for the purposes of this report.
- 9.14 This additional expenditure generated by tourism is added to the expenditure attracted to existing facilities in the Sub-Region from residents within the West Cumbria Sub-Region. The level of tourism expenditure assumed to be directed to each centre within the Borough is outlined in Section 12 of this report.

## 10.0 RETAIL CAPACITY ASSESSMENT – WEST CUMBRIA

### Introduction

10.01 The modelling for the capacity assessment has been undertaken for two different categories of expenditure. Typically these categories reflect the differences in patterns for convenience shopping and comparison shopping. This approach is advocated in PPS6, which states at paragraph 2.34 that:

**'In assessing quantitative need for additional development when preparing its development plan documents, a local planning authority should assess the likely future demand for additional retail and leisure, having regard to a realistic assessment of:**

- **Existing and forecast population levels;**
- **Forecast expenditure for specific classes of goods to be sold, within the broad categories of comparison and convenience goods and for the main leisure sectors; and**
- **Forecast improvements in productivity in the use of floorspace.'**

10.02 For the purposes of this capacity exercise, WYG has primarily examined the need for new convenience and comparison floorspace. Indicative capacity assessments are provided for 2014 together with 2019 and 2023. Any assessment in the long-term should be viewed with caution. Any identified need or capacity beyond 2014 is not justification for new retail floorspace outside of existing centres, as this could prejudice more central sites coming forward that, although not available for retail development at present, may become available between now and 2014 or after 2014.

### Capacity Formula

10.03 For all types of capacity assessment, the conceptual approach is broadly identical, although the data sources and assumptions may differ. The key relationship is Expenditure (£m) – allowing for population change and retail growth – *less* turnover (£m) – allowing for improved 'productivity' – *equals* Surplus/Deficit (£m).

**Expenditure (£m)** – the expenditure element of the above equation is calculated by taking the population within the defined Study Area and then multiplying this figure by the average annual expenditure levels for various forms of retail spending per annum. The formula is subject to a number of factors, which need to be considered to help provide the most accurate figure for that particular catchment. These include:



- Change in population;
- Growth in expenditure per person per annum; and
- Special Forms of Trading (e.g. catalogue shopping/internet).

**Turnover (£m)** – the turnover figure relates to the annual turnover generated by existing retail facilities within the Study Area. The turnover of existing facilities is calculated using Mintel Retail Rankings and/or Verdict Grocery Retailers – independent analysis which lists the sales densities (trading performance) for major retail multiples.

**Residual (£m)** – this represents the difference between the expenditure and turnover figures outlined above. A surplus figure will suggest an ‘under provision’ of retail facilities within the Study Area (which all things being equal would suggest that additional floorspace is required), whereas a deficit would represent an over provision of retail facilities (and in these circumstances it would prove difficult to justify additional floorspace).

- 10.04 Although a surplus figure is generated in monetary terms, it is possible to convert this figure into an indication of aggregate floorspace. The level of floorspace will vary dependent on the type of retail floorspace and goods sold. Indeed, retailers such as electrical retailers (which are considered a bulky goods retailer) have a much higher sales density than other bulky goods retailers such as carpet retailers and leading clothing and footwear operators (non-bulky) generally have a higher sales density than bulky goods retailers.

### West Cumbria Sub-Region

- 10.05 Based on current market shares existing facilities within the West Cumbria Sub-Region, which comprises the boroughs of Allerdale and Copeland and includes town centres, freestanding stores, local shopping parades, etc., our analysis indicates that existing facilities within West Cumbria have a convenience goods turnover of approximately £248.64m in 2009. This equates to a market share of **83.4%** of expenditure generated by residents within the Study Area.
- 10.06 Table 10.1 below indicates the current trading position compared against the ‘benchmark’ (or anticipated) turnover of existing convenience goods retail facilities in the West Cumbria Sub-Region on the basis of average sales densities, and projects this forward to 2023 using constant market share. In ‘rolling forward’ current market share against available expenditure no allowance has been made for an

increase in Special Forms of Trading for convenience goods. Although recent research undertaken by Experian suggests that the market share of non-store retail sales for convenience goods shopping could increase, it is important to note that an internet sale does not necessarily imply that items have not passed through a retail outlet. Research undertaken by Experian acknowledges some supermarkets source internet goods from existing stores and therefore the current market share identified for non-store retail sales may be an over-estimate. Therefore, for the purposes we have assumed constant market share for Special Forms of Trading within the Study Area of 2.9% as suggested by the findings of the Household Survey.

**Table 10.1: Estimated 'Capacity' for Convenience Goods Facilities – West Cumbria (Scenario 1)**

Year	Turnover - £m <sup>1*</sup>	Expenditure Available - £m <sup>2*</sup>	Surplus Expenditure - £m
2009	185.85	256.53	70.68
2014	190.54	280.95	90.41
2019	195.35	308.06	112.71
2023	199.29	332.93	133.64

Notes: <sup>1</sup> – Allows for increased productivity at +0.5% per annum  
<sup>2</sup> – Assumes constant market share 83.4% in the Study Area  
\* - Assumes that local shops are trading in equilibrium  
Allows for tourism expenditure at £7.9m  
At 2005 prices

- 10.07 Table 10.1 indicates that the convenience goods facilities in the West Cumbria Sub-Region appear to be significantly overtrading by approximately £71m. This overtrading is set to increase to more than £90m by 2014, to more than £112m by 2019 and to almost £134m by 2023 – not taking into account outstanding commitments. It is also important to note that this 'capacity' differs throughout the Sub-Region and by accommodating all the identified capacity in one location will not meet the need identified in specific parts of West Cumbria area.
- 10.08 With regard to comparison goods capacity, our analysis identified that in 2009 existing facilities within the West Cumbria Sub-Region have a comparison goods turnover of more than £368m. This equates to a market share of **65.3%** of total comparison goods expenditure generated by residents in the Study Area.
- 10.09 Although no allowance has been made for the growth in Special Forms of Trading for convenience goods, given the increase in online shopping for comparison goods (particularly for goods such as Books and CDs) an allowance has been made for growth in this sector. Indeed, as highlighted in Section 2 of this study, it is likely, given the timeframe of the study, that online shopping will continue to grow for comparison goods and will have an impact on future floorspace requirements for 'traditional' retail premises within the West Cumbria Sub-Region and beyond. It is likely that the potential growth of online retailing will have a greater impact upon smaller centres than larger regional centres that offer a

wider range of facilities (both retail and leisure). The Household Survey identified that online shopping/mail order attracts some £46.99m of comparison goods expenditure generated in the Study Area. This equates to a market share of 8.3% within the Study Area.

10.10 The Household Survey identifies different market shares achieved by the internet/mail order for the variety of comparison goods identified:

- Clothing & Footwear: 5.0% of expenditure;
  - Books, CDs, DVDs, etc.: 20.6%;
  - Small Household Goods: 7.4%;
  - Toys, Games, Bicycles, etc.: 14.8%;
  - Chemist Goods: 2.2%;
  - Electrical Goods: 15.8%;
  - Furniture Goods: 3.4%; and
  - DIY Goods: 2.8%
- All Comparison Goods: 8.3%**

10.11 The Household Survey identifies relatively high market shares achieved by online/mail order sales, particularly for 'Books, DVDs, CDs, etc.' (20.6%), 'Electrical Goods' (15.8%) and 'Toys, Games, Bicycles, etc.' (14.8%). This compares to a market share of 2.2% for 'Chemist Goods' and 2.8% for 'DIY Goods'.

10.12 Research undertaken by Experian (Retail Planner Briefing Note 5.1, November 2007) forecasts that the market share of e-tailing could increase to 12.9% by 2013. This represents a 50% increase in the market shares currently identified within the Study Area. By assuming an increase in e-tailing sales by 2014 of 12.9% and an increase to 15% by 2019 and to 20% by 2023, Table 10.2 provides a summary of comparison goods capacity in West Cumbria based on current market share. Whilst an increase in e-tailing to 20% of comparison goods expenditure represents a notable increase from the current level, given the timeframe of the study and it is considered appropriate to adopt a cautious assessment particularly in the longer-term where the impact of e-tailing is unknown.

**Table 10.2: Estimated Available Comparison Goods Expenditure – West Cumbria (Scenario 1)**

Year	Turnover + Increased Productivity – £m	Expenditure Available - £m	Surplus Expenditure - £m
2009	373.32	386.93	13.61
2014	402.17	456.96	54.79
2019	433.26	552.95	119.69
2023	459.84	647.98	188.14

Notes: Allows for increased productivity of +1.5% per annum and assumes constant market share of 65.3% in the defined Study Area and includes tourism expenditure of £18.4m  
Allows for SFT to increase from 8.3% in 2009, to 12.9% by 2014, to 15% by 2019 and to 20% by 2023, which is deducted from the overall expenditure generated  
At 2005 prices

- 10.13 Based on current market share, the West Cumbria Sub-Region is identified to have current capacity for additional comparison goods of more than £13m due to the overtrading of existing provision. By 2014, this capacity will increase to almost £55m, to £120m by 2019 and by 2023 surplus comparison goods expenditure will be more than £188m. However, this level of capacity does not take into account outstanding commitments – these are considered later in this Study.
- 10.14 Notwithstanding this, by assuming the forecast growth in expenditure continues through to 2023 and by applying an average sales density of £4,500 per sq m and taking into account forecast increases in floorspace efficiency (at +1.5% per annum), this additional expenditure could accommodate almost 11,300 sq m (net) of comparison goods floorspace by 2014. This is forecast to increase to 22,920 sq m (net) by 2018 and to more than 33,940 sq m (net) by 2023, although this is dependent upon the end-operator and excludes outstanding commitments.

### Impact of Different Population Scenarios

- 10.15 The above assessment and the capacity identified in Section 11 and 12 of this report are based on the population identified under Scenario 1, which is based on the latest ONS mid-year estimates. As previously highlighted, we have also considered the implications of the growth rates identified under Scenario 2, which relates to RSS housing assumptions and Scenario 3 where the growth in population is based on the West Coast Masterplan for the Energy Coast ('Energy Coast' population scenario).
- 10.16 Set out below is our assessment of the potential impact on future capacity for additional convenience and comparison goods floorspace based on applying the three different population scenarios.

**Table 10.3: Capacity Based on the Different Population Scenarios – West Cumbria Sub-Region**

Year	Convenience Goods				Comparison Goods			
	1 – ONS	2 – RSS	3 – Energy Coast	4 - Static	1 – ONS	2 – RSS	3 – Energy Coast	4 - Static
<b>2009</b>								
(£m)	70.68				13.61			
(sq m net)	7,070-14,135				3,025-4,535			
<b>2014</b>								
(£m)	90.41	91.91	92.49	85.48	54.79	57.44	58.35	47.14
(sq m net)	8,820-17,635	8,965-17,930	9,020-18,040	8,335-16,675	11,300-16,950	11,850-17,770	12,035-18,055	9,725-14,585
<b>2019</b>								
(£m)	112.71	115.56	118.71	101.54	119.69	124.96	130.65	100.14
(sq m net)	10,725-21,445	10,995-21,990	11,295-22,590	9,660-19,320	22,920-34,380	23,930-35,890	25,020-37,525	19,175-28,760
<b>2023</b>								
(£m)	133.64	136.48	140.43	115.45	188.14	195.57	203.35	155.03
(sq m net)	12,465-24,925	12,730-25,455	13,095-26,190	10,765-21,530	33,940-50,910	35,280-52,920	36,690-55,030	27,970-41,955

Notes: Allows for increased productivity of +0.5% per annum for convenience goods and +1.5% per annum and assumes constant market share in the defined Study Area  
 Allows for SFT to increase from 8.3% in 2008, to 12.9% by 2014, to 15% by 2019 and to 20% by 2023 for comparison goods  
 Floorspace requirement based on applying a range of £5,000 per sq m to £10,00 per sq m for convenience goods (allowing for increased productivity through to 2023) and between £3,000 per sq m to £4,500 per sq m for comparison goods (allowing for increased productivity through to 2023)  
 Capacity does not take into account outstanding commitments  
 At 2005 prices

- 10.17 Table 10.3 illustrates that by applying the higher growth in population identified under Scenario 2 and Scenario 3 the level of capacity (both in the convenience and comparison goods sector) increases. By applying the growth in population identified under Scenario 2 (RSS household projections) the convenience goods capacity by 2023 increases to more than £136m compared to capacity of £134m based on the ONS population projections. Similarly, the convenience goods capacity by 2023 identified under Scenario 3 (Energy Coast) increases to more than £140m. In contrast by assuming no increase in population (Scenario 4) the level of capacity is identified to be only £115m by 2023.
- 10.18 With regard to comparison goods expenditure capacity the differences in surplus capacity are identified to be higher by 2023, with capacity of almost £196m under Scenario 2 and £203m under Scenario 3. This compares to capacity of £188m by 2023 by applying the ONS based population projections or £155m based on a static population growth.
- 10.19 WYG consider that the ONS mid-year estimates identified under Scenario 1 provide a more cautious and realistic assessment and should be utilised in considering future capacity for additional retail floorspace in the Sub-Region.
- 10.20 Furthermore, given the current downturn in the UK economy the level of capacity identified at least in the short-term (particularly for comparison goods) should be treated with a 'note of caution'. Furthermore, given the current trading performance of existing centres within West Cumbria, such as



Workington which contains notable un-let retail space within the Washington Square scheme it may not be necessary to provide this entire floorspace requirement immediately.

- 10.21 Whilst this section of the Study identifies the market share and capacity for additional retail floorspace within the West Cumbria Sub-Region as a whole, it is also important to assess shopping patterns and the future needs on a local authority basis (i.e. Allerdale and Copeland). Accordingly, the following sections assess the current role of the main centres within West Cumbria together with shopping patterns on a more localised basis. In addition, the assessment looks in more detail at the trading performance of existing centres.



## 11.0 RETAIL CAPACITY ASSESSMENT - ALLERDALE

### Overview

- 11.01 The adopted Allerdale Local Plan (November 1999) identifies Workington, Maryport, Cockermouth, Wigton, Silloth and Aspatria as town centres and should be the focus for future retail provision (Policy RG1). Although The Local Plan highlights that Workington is the major town in Allerdale and provides an important range of retail and other services.
- 11.02 Workington Town Centre is clearly the dominant retail destination in terms of retail floorspace, comprising more than 27,800 sq m (gross) of retail floorspace (Experian Goad, August 2008<sup>5</sup>). Significant improvement to the town's retail offer has recently taken place with the development of the Washington Square scheme, which includes a new Debenhams department store.
- 11.03 Maryport is identified in the Local Plan to perform the role of a service and retail centre and is located approximately six miles north of Workington Town Centre. The centre comprises less than 8,000 sq m (gross) of retail floorspace (Experian Goad, August 2008) and serves a much lesser role than nearby Workington. Similarly, Wigton is also identified in the Local Plan as a service and retail centre for much of northern Allerdale. Retailing within the town is restricted by the surrounding population together with its proximity to Carlisle, which is located approximately 11 miles from Wigton. The town centre is identified to comprise some 7,300 sq m (gross) of retail floorspace (Experian Goad, August 2008).
- 11.04 Cockermouth is identified by the Local Plan to be attractive for retailers due to the more affluent population that it serves. This has been reflected by a number of developments that have taken place in recent years. The town centre is identified to comprise some 12,610 sq m (gross) of retail floorspace making it the second largest retail destination in the Borough.
- 11.05 The smaller centres of Silloth and Aspatria are identified as Key Service Centres (saved Joint Structure Plan Policy ST5). However, the Local Plan identifies that both centres have limited roles providing a local service centre because of the small size of the local population and their position in proximity to larger competing centres.

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<sup>5</sup> Based on occupied convenience and comparison goods floorspace only within the town centre as identified by Experian Goad



## Convenience Goods Shopping

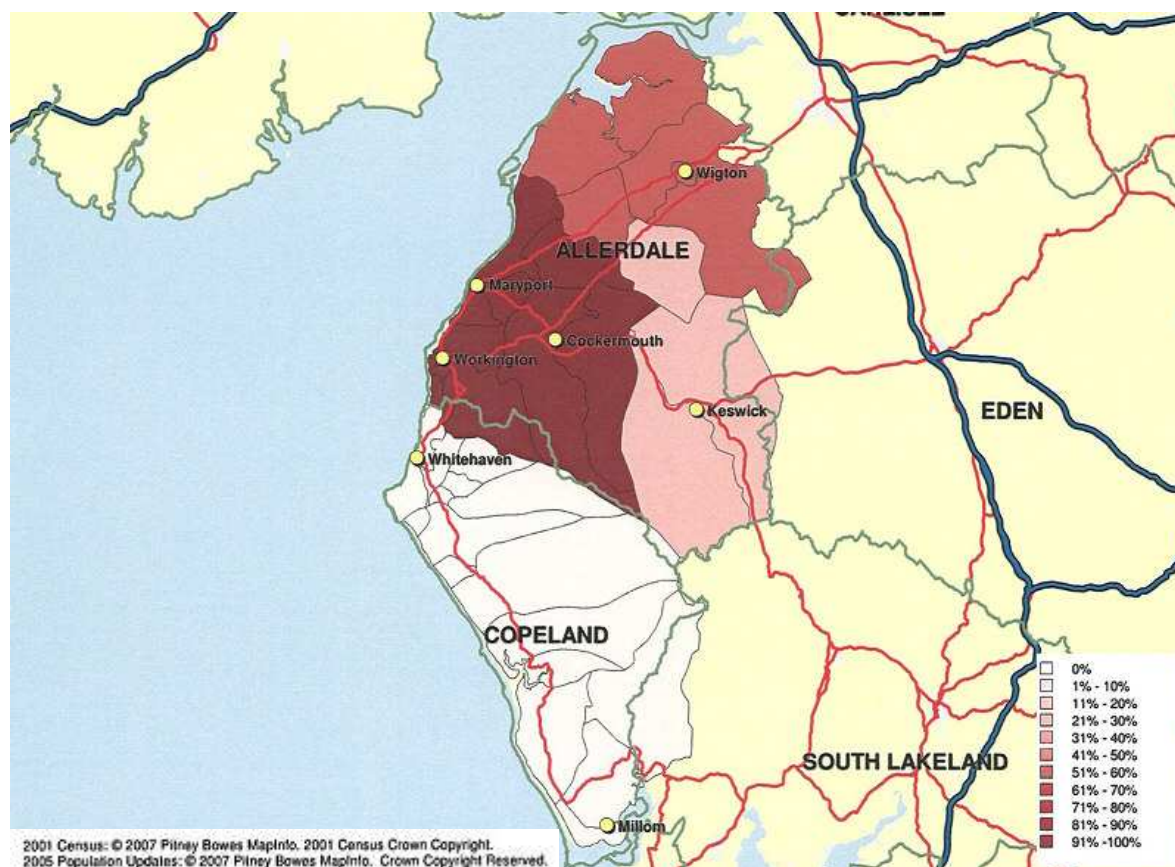
### *Existing Provision*

- 11.06 In order to ascertain the likely need for additional convenience goods floorspace within the Borough, it is important to understand the true nature of existing supply. The Borough contains a number of large-format supermarkets, including the out-of-centre Tesco (3,574 sq m gross) and Morrisons (4,356 sq m gross) stores in Workington and the edge-of-centre Sainsbury's store (2,420 sq m gross) in Cockermouth. The Borough also contains a range of smaller stores and independent retailers.
- 11.07 It is notable that the two largest stores in the Borough (Tesco and Morrisons) are located outside Workington Town Centre. Consequently, despite being the largest centre in the Borough, Workington is identified to contain less than 3,000 sq m (gross) of convenience floorspace. This is less than identified for Cockermouth (5,090 sq m gross) by including the edge-of-centre Sainsbury's store (third largest store in the Borough), which is well positioned to enable 'linked trips' to take place with other facilities in the town centre.

### *Market Shares & Capacity*

- 11.08 The Household Survey identifies that facilities in Allerdale attract **47.8%** (or £142.31m) of convenience goods expenditure generated within the Study Area. More specifically, within Zone 5 ('Workington'), existing facilities in the Borough are identified to achieve a market share of 97.8% of convenience goods expenditure generated in this zone. Existing convenience goods facilities within Allerdale are identified to achieve a main food shopping catchment of approximately 81,600 people within the Study Area. In addition, some £5.80m of convenience goods expenditure is identified to be generated by tourism. Figure 11.1 illustrates the penetration levels achieved by existing convenience goods facilities within Allerdale from the defined Study Area. As illustrated facilities draw some convenience goods expenditure from throughout the Study Area with understandably most trade derived from the northern zones, which replicates Allerdale Borough.

**Figure 11.1: Catchment of Existing Convenience Goods Facilities within Allerdale Borough**



- 11.09 In terms of individual foodstores within the Borough, the Household Survey results suggest that the out-of-centre Morrisons store in at Derwent Howe in Workington is the most popular store attracting £39.29m of convenience goods expenditure generated within the Study Area (excluding tourism expenditure). This is followed by popularity by the out-of-centre Tesco store at New Bridge Road in Workington (£36.92m) and the Sainsbury's store at Station Street at the edge-of Cockermouth (£20.55m). Collectively, these three stores retain more than two-thirds (68%) of convenience goods expenditure currently directed to facilities in the Borough.
- 11.10 In terms of capacity for additional convenience goods floorspace within the Borough, Table 11.1 provides a breakdown of the trading performance of existing foodstores within the Borough. The trading performance of existing foodstores is based on the survey derived turnover (derived from analysis of the Household Survey) against the anticipated 'benchmark'/or expected turnover (based on nationally published trading information from Mintel or Verdict).

**Table 11.1: Trading Performance of Current Foodstores in Allerdale**

Store	Gross Floorspace – sq m <sup>1</sup>	Net Floorspace – sq m <sup>2</sup>	Net Convenience – sq m <sup>3</sup>	Benchmark Turnover per sq m – £ <sup>4</sup>	Benchmark Turnover – £m	Survey Estimate – £m <sup>5</sup>
<b>Workington</b>						
Iceland, Pow Street	820	577	542	5,316	2.88	2.73
Marks & Spencer, Pow Street	-	520	520	11,492	5.98	4.35
Other	2,110	1,477	1,477	3,500	5.17	2.41
<b>Out-of-Centre</b>						
Aldi, Derwent Drive	-	746	583	3,820	2.23	3.03
Morrisons, Derwent Drive	4,356	2,850	2,280	11,064	25.23	40.89
Tesco, New Bridge Road	3,574	1,948	1,676	12,499	20.95	38.42
Other					1.61	1.61
<b>Sub-Total</b>	<b>-</b>	<b>8,118</b>	<b>7,078</b>	<b>-</b>	<b>64.05</b>	<b>93.44</b>
<b>Cockermouth</b>						
Sainsbury's, Station Street	2,420	1,331	1,010	9,616	9.71	21.39
Aldi, Low Road	1,325	795	621	3,820	2.37	4.07
Co-op Foodstore, Station Street	480	288	248	6,129	1.52	1.11
Other	2,190	1,533	1,533	3,000	4.60	0.56
<b>Sub-Total</b>	<b>-</b>	<b>3,947</b>	<b>3,412</b>	<b>-</b>	<b>18.20</b>	<b>27.13</b>
<b>Maryport</b>						
Co-op Foodstore, Curzon Street	1,500	900	774	6,129	4.74	6.28
Other	1,880	1,316	1,316	3,000	3.95	3.14
<b>Sub-Total</b>	<b>-</b>	<b>2,216</b>	<b>2,090</b>	<b>-</b>	<b>8.69</b>	<b>9.42</b>
<b>Wigton</b>						
Somerfield, Station Road	930	558	477	6,888	3.29	10.74
Co-op, King Street	750	450	387	6,129	2.37	2.48
Other	1,210	847	847	3,000	2.54	0.97
<b>Sub-Total</b>	<b>-</b>	<b>1,855</b>	<b>1,711</b>	<b>-</b>	<b>8.20</b>	<b>14.19</b>
<b>Aspatria</b>						
Co-op Foodstore, King Street						1.13
Other						0.10
<b>Sub-Total</b>					<b>1.23</b>	<b>1.23</b>
<b>Silloth</b>						
Co-op Foodstore, Caldew Street						2.31
Other						0.30
<b>Sub-Total</b>					<b>2.61</b>	<b>2.61</b>
<b>Other</b>						
Local Shops <sup>^</sup>					0.08	0.08
<b>TOTAL</b>					<b>103.06</b>	<b>148.10</b>

Notes:

- <sup>1</sup> – Gross Floorspace derived from Experian Goad (2008) or IGD Database (2006)
- <sup>2</sup> – Net floorspace based on WYG judgement and 2003 West Cumbria Retail Review
- <sup>3</sup> – Net convenience floorspace derived from Verdict Grocery Retailers (2008) where available
- <sup>4</sup> – Sales densities derived from Verdict (2008) or Mintel Retail Rankings (2008) for national multiples and WYG assessment for local shops
- <sup>5</sup> – Survey derived turnover derived from West Cumbria Household Survey (2008) and allows for tourism expenditure of £5.8m distributed on a *pro rata* basis

<sup>^</sup> - Facilities in Silloth and Aspatria together with other 'Local Shops' assumed to be trading in equilibrium  
May not add up due to rounding  
At 2005 prices

11.11 Our analysis of the Borough's market share indicates that all facilities attract £148.10m of convenience goods expenditure generated in the Study Area and by tourism. By comparing this estimate with the anticipated 'benchmark' turnover of existing facilities (£103.06m), there would appear to be an undersupply of convenience goods floorspace within the Borough. Indeed, existing facilities as a whole appear to be trading some 44% above expected company average turnover.

- 11.12 Our analysis of the performance of the main convenience goods destinations in the Borough identifies that the three largest stores (Morrisons and Tesco in Workington and Sainsbury's in Cockermouth) are trading above company average – by 62%, 83% and 120% respectively. Whilst this analysis suggests that these stores are notably overtrading it must be noted that the results of shopper surveys should be used with caution in estimating turnovers of individual stores (rather than comparative market shares). Indeed, Household Surveys tend to have a bias towards larger stores and underplay the role of smaller stores. Therefore, our assessment is based on the trading performance of all stores in the Borough.
- 11.13 In terms of capacity for additional convenience floorspace within Allerdale, Table 11.2 provides a breakdown of the capacity for additional convenience goods floorspace in monetary terms. Table 11.3 provides indicative floorspace requirements based on the capacity identified being accommodated by a range of convenience retailers.

**Table 11.2: Estimated Capacity for Additional Convenience Goods Facilities – Allerdale Borough (Scenario 1)**

Year	Turnover - £m <sup>1</sup>	Expenditure available - £m <sup>2</sup>	Surplus Expenditure - £m
2009	103.06	148.10	45.04
2014	105.66	162.70	57.04
2019	108.33	178.30	69.97
2023	110.51	193.00	82.49

Notes: <sup>1</sup> – Allows for increased turnover efficiency of +0.5% per annum  
<sup>2</sup> – Assumes constant market share at 47.8% within the Study Area and assumes tourism expenditure of £5.8m and allows for growth in expenditure of +0.4% per annum  
At 2005 prices

**Table 11.3: Quantitative Need for Additional Floorspace in Allerdale Borough**

Year	Convenience Goods (sq m net)		
	£m	Floorspace Requirement	
		Min <sup>1</sup>	Max <sup>2</sup>
2009	45.04	4,500	9,010
2014	57.04	5,565	11,130
2019	69.97	6,660	13,315
2023	82.49	7,690	15,385

Notes: <sup>1</sup> – Average sales density assumed to be £11,778 per sq m (based on the average sales density of the leading four supermarkets as identified by Verdict 2008)  
<sup>2</sup> – Average sales density assumed to be £5,000 per sq m  
Allows for increased turnover efficiency of +0.5% per annum  
At 2005 prices

- 11.14 Based on the identified undersupply of convenience goods floorspace in the Borough our assessment identifies capacity for additional convenience goods floorspace within the Borough of £45.04m in 2009 (based on current market shares). This is identified to increase to £57.04m by 2014 given the current forecast growth in expenditure and population within the Study Area. By 2019 this capacity increases to £69.97m and to £82.49m by 2023. This equates to an immediate floorspace requirement within the Borough (not including outstanding commitments) of between 4,500 sq m (net) and 9,010 sq m (net) depending upon the end operator. In the longer term (i.e. 2023) the capacity for additional convenience

goods floorspace is identified to equate to a potential floorspace requirement of between 7,690 sq m (net) and 15,385 sq m (net). It is important to note that this floorspace requirement is not available to support a single retail destination and is capacity for the Borough as a whole and is based on the population forecasts identified under Scenario 1.

### Outstanding Commitments

- 11.15 It is important to take into account outstanding commitments within the Borough for additional convenience goods floorspace. In this respect, the proposal (although not yet a commitment as it is subject to a Section 106 Agreement) is for a new Tesco store at Laundry Fields at the edge-of Workington Town Centre (8,630 sq m gross). This proposal would result in the closure of the existing Tesco store at New Bridge Road with the creation of a new larger store being located at the edge-of Workington Town Centre. This proposal will help address the imbalance between out-of-centre and edge-of/town centre convenience goods provision within Workington bring a major supermarket operator closer to the town centre. The replacement Tesco store is identified to result in an uplift in convenience goods floorspace of 1,551 sq m (3,227 sq m proposed *minus* 1,676 sq m existing). Based on a typical sales density for Tesco identified by Verdict, the proposed replacement store is identified to create an additional £19.88m in 2013.
- 11.16 In addition there is an extant permission (LPA Ref: 2/2208/0487) for the extension of retail floorspace at Derwent Howe Retail Park in Workington. With regard to convenience goods, this permission relates to an extension to the Morrisons store to 6,696 sq m (gross) in order to provide a net retail floor increase of 740 sq m. This additional floorspace is identified to have a convenience goods turnover of up to £6.71m by 2013.
- 11.17 Should the replacement Tesco store be permitted, together with the extant permission to extend the Morrisons store is implemented the turnover of outstanding commitments/proposals could be approximately £26.72m in 2014. Consequently, these development would meet almost half (47%) of the convenience goods capacity identified in the Borough by 2014.

### Qualitative Need

- 11.18 The Household Survey suggests that most households undertake two kinds of food shopping – main food shopping and ‘top-up’ food shopping). The Borough is identified to contain only one superstore (defined as comprising more than 2,500 sq m of trading floorspace in Annex A of PPS6), which is the out-of-



centre Morrisons store at Derwent Drive in Workington. Unsurprisingly, this store is identified as the most popular destination within the Borough for main food shopping.

- 11.19 Although falling just below the 2,500 sq m threshold identified by PPS6 the out-of-centre Tesco store (1,948 sq m net) at New Bridge Road in Workington also performs an important main food shopping role being identified as the second most popular destination in the Borough. Similarly, although comprising a smaller sales area (1,331 sq m net) the Sainsbury's Cockermouth is clearly the third most popular destination in the Borough and serves an important role in meeting the main food shopping needs of the local population.
- 11.20 These stores are supported by a number of smaller stores including the Iceland and M&S Foodhall in Workington Town Centre, the out-of-centre Aldi stores at Derwent Drive in Workington and at Cockermouth and a number of stores in the smaller nearby centres including the Somerfield (fourth most popular main food shopping destination in the Borough) and Co-op in Wigton and the Co-op stores in Maryport, Aspatria and Silloth. Complementing these larger stores are a number of independent and smaller convenience retailers (such as bakers, butchers, etc.) that sell a variety of convenience goods together with a number of specialist shops located throughout the Borough. Indeed, the Household Survey sought to identify the popularity of these destinations and identified that approximately a third of respondent use such facilities.
- 11.21 In addition, facilities in nearby Keswick (most notably the Booths store on Tithebarn Street) serve an important role in meeting the day-to-day convenience shopping needs of the nearby population. However, unlike larger stores such as those in Workington, facilities in Keswick are identified to have a limited catchment with the Household Survey suggesting that existing facilities draw only from residents within Zone 4 ('Keswick'), although it is likely that stores within Keswick will be used by visitors to West Cumbria (e.g. tourists, day-visitors, etc.).
- 11.22 Existing facilities within the Borough are identified to attract approximately 48% of convenience goods expenditure generated within the Study Area. This increases to 51% by including facilities in Keswick. Within the zones that best reflects the local authority of Boundary of Allerdale (zones 1, 2, 3 and 5) the market share of facilities within the Borough increases to almost 87%. This suggests limited leakage of convenience goods expenditure to competing facilities elsewhere. Even by including facilities in Keswick and extending the area to include Zone 4 ('Keswick') the market share remains at more than 86%. A breakdown of the market share of facilities for each of the five zones is set out in Table 11.4.



**Table 11.4: Market Share on a Zone-by-Zone Basis – Convenience Goods Expenditure**

Survey Zone	Market Share (%)
Wigton	59.8
Maryport	95.8
Cockermouth	91.0
Keswick	81.5
Workington	97.8

Notes: Derived from West Cumbria Household Survey and based on WYG analysis

- 11.23 Table 11.4 illustrates high levels of retention (more than 90%) by facilities in the Borough within three of the five zones. The main level of outflow is identified to be from the Wigton Zone where more than 40% (or almost £15m) of convenience goods expenditure is directed to facilities outside the Borough or spent online. Of this 'leakage' most (74%) is directed to facilities in Carlisle, which is reflective of Wigton's position between Carlisle and Workington. Consequently, there may be scope for improved provision in Wigton in order to reduce this outflow.
- 11.24 PPS6 indicates that the degree to which shops are overtrading should be taken into consideration when determining the qualitative need for new convenience floorspace. In this respect, our analysis identifies that overall all stores within the Borough are overtrading by 44% (or £44m) in 2009. This would suggest that there is a qualitative need for additional convenience goods floorspace to alleviate this overtrading.

## Comparison Goods

### *Existing Provision*

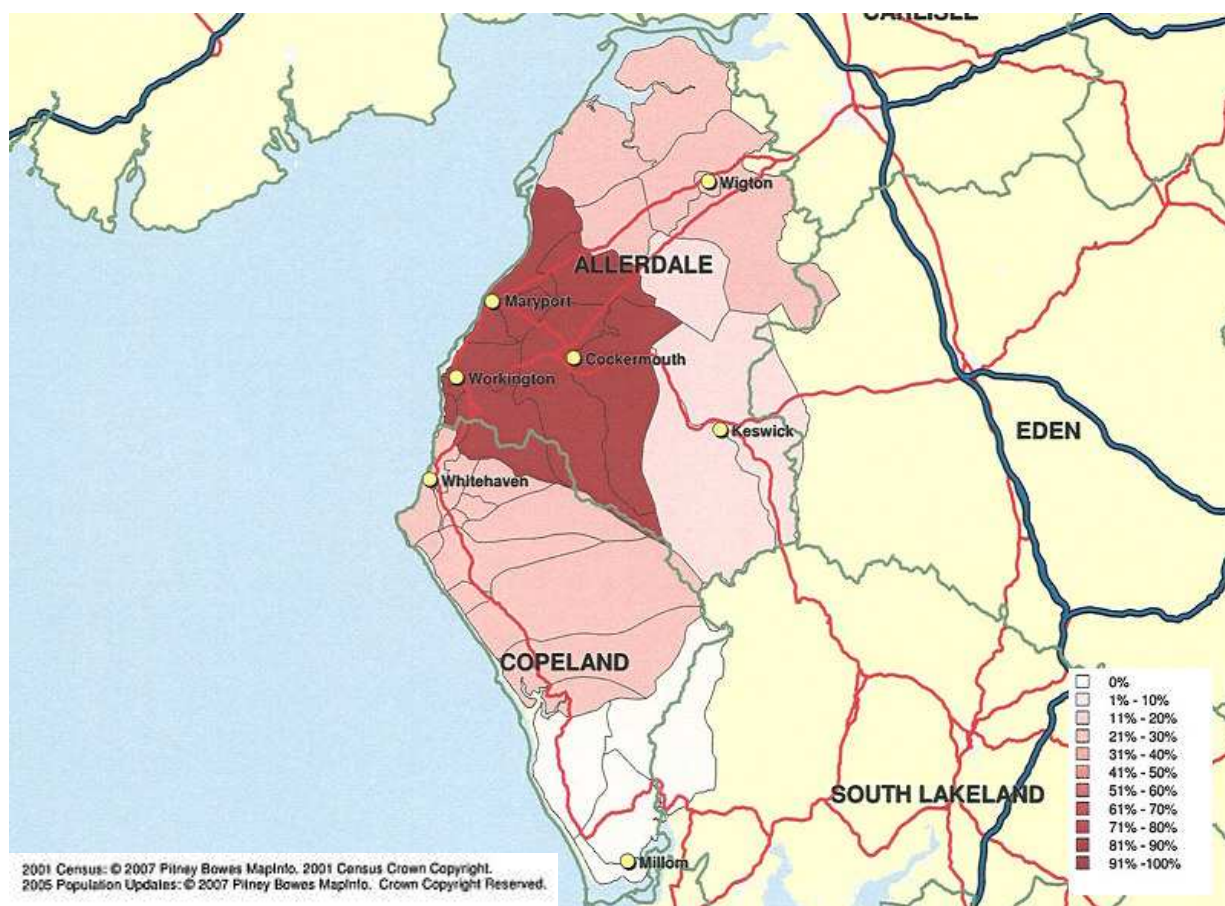
- 11.25 The main focus of comparison goods floorspace within the Borough is located within Workington Town Centre (particularly for non-bulky comparison goods), which comprises some 24,930 sq m (gross) of comparison goods floorspace (Experian Goad 2008). Indeed, significant improvement in the comparison goods offer of Workington has taken place in recent years with the completion of the Washington Square scheme within the town centre. In contrast the comparison goods offer of the smaller centres within the Borough is significantly less – Cockermouth (7,520 sq m gross); Maryport (4,560 sq m gross); and Wigton (4,470 sq m gross). These smaller centres serve a more localised catchment than Workington, which is identified by the Household Survey to draw some trade for comparison goods shopping from throughout the West Cumbria Study Area.
- 11.26 Further comparison goods floorspace is provided in the out-of-centre Derwent Howe Retail Park and within the larger supermarkets including the Morrisons and Tesco stores in Workington.



### Market Shares and Capacity

- 11.27 Analysis of the Household Survey identifies that the current level of trade passing through existing facilities within the Borough is estimated to be £247.26m in 2009 (estimated annual turnover based on applying the market share identified by the Household Survey to the level of expenditure generated in the Study Area – as outlined at Appendix 7). This represents a market share of **43.8%** within the Study Area. In addition, some £13.4m of comparison goods expenditure is also identified to be attracted to facilities in Allerdale by tourism. Figure 11.2 illustrates the penetration levels of all facilities within the Borough from within the defined Study Area and illustrates that Workington has a broader influence for comparison goods shopping than identified for convenience goods shopping (Figure 11.1).

**Figure 11.2: Penetration Levels of Existing Comparison Goods Facilities within Allerdale**



- 11.28 Table 11.5 provides an assessment of the survey derived turnover of existing facilities within the Borough and compares it against 'expected' turnover based on data published by Verdict and Mintel Retail Rankings or professional assumptions.

**Table 11.5: Trading Performance of Current Comparison Goods Floorspace in Allerdale**

Store	Gross Floorspace – sq m <sup>1</sup>	Net Floorspace – sq m <sup>2</sup>	Net Comparison – sq m <sup>3</sup>	Benchmark Turnover per sq m – £ <sup>4</sup>	Benchmark Turnover – £m	Survey Estimate – £m <sup>5</sup>
<b>Workington</b>						
Iceland, Pow Street	820	577	35	3,101	0.11	165.16
Other	24,930	21,191	21,191	5,000	105.96	
<b>Out-of-Centre</b>						
Aldi, Derwent Drive	-	746	163	3,000	0.49	-
Morrisons, Derwent Drive	4,356	2,850	570	9,104	5.19	
Tesco, New Bridge Road	3,574	1,948	272	9,578	2.61	
Dunmail Park	9,469	6,628	6,628	3,000	19.88	6.92
Clay Flatts	4,703	3,292	3,292	3,000	9.88	-
Derwent Howe Retail Park	12,116	9,693	9,693	4,000	38.77	39.04
<b>Sub-Total</b>	-			-	<b>192.69</b>	<b>211.12</b>
<b>Cockermouth</b>						
Sainsbury's, Station Street	2,420	1,331	321	7,396	2.37	-
Aldi, Low Road	1,325	795	174	3,000	0.52	-
Co-op Foodstore, Station Street	480	288	40	2,778	0.11	-
Lakes Home Centre, Low Road	2,443	1,710	1,710	2,500	4.28	0.51
Other	7,520	6,392	6,392	3,250	20.77	25.65
<b>Sub-Total</b>				-	<b>28.05</b>	<b>26.16</b>
<b>Maryport</b>						
Co-op Foodstore, Curzon Street	1,500	900	126	2,778	0.35	-
Other	4,560	3,876	3,876	2,750	10.66	10.55
<b>Sub-Total</b>	-			-	<b>11.01</b>	<b>10.55</b>
<b>Wigton</b>						
Somerfield, Station Road	930	558	81	3,617	0.29	-
Co-op, King Street	750	450	63	2,778	0.18	-
Other	4,470	3,800	3,800	2,500	9.50	9.25
<b>Sub-Total</b>	-			-	<b>9.97</b>	<b>9.25</b>
<b>Aspatia</b>						
Other						1.37
<b>Sub-Total</b>					<b>1.37</b>	<b>1.37</b>
<b>Silloth</b>						
Other						1.87
<b>Sub-Total</b>					<b>1.87</b>	<b>1.87</b>
<b>Other</b>						
Local Shops <sup>^</sup>					0.38	0.38
<b>TOTAL</b>					<b>245.34</b>	<b>260.66</b>

Notes:

- <sup>1</sup> – Gross Floorspace derived from Experian Goad (2008) or IGD Database (2006)
- <sup>2</sup> – Net floorspace based on WYG judgement and 2003 West Cumbria Retail Review
- <sup>3</sup> – Net convenience floorspace derived from Verdict Grocery Retailers (2008) where available
- <sup>4</sup> – Sales densities derived from Verdict (2008) or Mintel Retail Rankings (2008) for national multiples and WYG assessment for local shops
- <sup>5</sup> – Survey derived turnover derived from West Cumbria Household Survey (2008) and allows for tourism expenditure of £13.4m distributed on a *pro rata* basis

<sup>^</sup> - Facilities in Silloth and Aspatia together with other 'Local Shops' assumed to be trading in equilibrium  
May not add up due to rounding  
At 2005 prices

11.29 Based on comparing the survey derived comparison goods turnover against expected levels it is evident that collectively existing facilities within the Borough are overtrading by 6% (or £15.32m). Indeed, based on the findings of the survey results Workington Town Centre is identified to be trading some 56% (or £59m) above expected levels. In contrast, out-of-centre provision within Workington is identified to be undertrading by 40% (or £31m). As previously noted, it is considered that the survey

derived turnover figures should be treated with a note of caution as respondents may refer to Workington as their last retail destination but in fact may have visited a nearby out-of-centre facility such as Derwent Howe Retail Park. Notwithstanding this, given that PPS6 states that new retail development (in the first instance) should be directed to existing centres, any growth in expenditure directed to out-of-centre facilities such as Derwent Howe Retail Park should be directed to existing centres such as Workington Town Centre.

- 11.30 Based on current market shares and allowing for growth in non-retail sales, Table 11.6 estimates the available capacity for additional comparison goods floorspace in the Borough through to 2023.

**Table 11.6: Estimated Available Comparison Goods Expenditure**

Year	Turnover - £m <sup>1</sup>	Expenditure available - £m <sup>2</sup>	Surplus Expenditure - £m
2009	245.34	260.66	15.32
2014	264.30	308.57	44.27
2019	284.73	373.28	88.55
2023	302.20	437.31	135.11

Notes: <sup>1</sup> – Allows for increased turnover efficiency of +1.5% per annum  
<sup>2</sup> – Assumes constant market share at 43.8% within the Study Area and tourism expenditure of £13.4m which is forecast to grow at 2.0% per annum  
 Allows for growth in SFT for comparison goods expenditure  
 At 2005 prices

- 11.31 Table 11.6 indicates that by 2014 (based on the population growth assumptions outlined under Scenario 1) there will be some £44.27m of comparison goods expenditure available for new retail development within the Borough based on current market shares. This level of expenditure is identified to increase to £88.55m by 2019 and to £135.11m by 2023. This amount of expenditure will be available for all comparison goods floorspace (both 'bulky' and 'non-bulky') and takes into account the trading performance over of existing floorspace. This level of expenditure identified is based on current forecast growth in comparison goods expenditure being achieved through to 2023 and the assumed increase in Special Forms of Trading reaching 20% of all comparison goods expenditure by 2023.
- 11.32 In floorspace terms, although dependent upon the end operator, by assuming an average comparison goods sales density of approximately £4,500 per sq m (and allowing for increased productivity at +1.5% per annum) this capacity equates to a potential floorspace requirement currently (i.e. 2009) for approximately 3,400 sq m (net) of additional comparison goods floorspace (or approximately 4,865 sq m gross<sup>6</sup>) within the Borough not including outstanding commitments. The requirement is forecast to increase to 9,130 sq m (net) by 2014, to 16,955 sq m (net) by 2019 and to approximately 24,375 sq m (net) by 2023 just to maintain current market share – dependent upon the end operator.

<sup>6</sup> Assumes net floorspace is 70% the gross

- 11.33 PPS6 advises that quantitative need should be based on specific classes of goods to be sold (i.e. convenience and comparison) rather than specific goods such as 'bulky goods' or DIY products. However, it is possible from the Household Survey results to apply the market shares identified for 'bulky' and 'non-bulky' goods and identifies the capacity available for additional non-food retail floorspace within these two sectors.
- 11.34 Based on the Borough's current market share, existing 'bulky goods' facilities attract 48.9% (or £86.25m) of bulky goods expenditure generated within the Study Area. In addition some £4.2m of expenditure is generated by tourism (based on bulky/non-bulky split identified by MapInfo).
- 11.35 A breakdown of the market share achieved by existing facilities in the Borough on a zone-by-zone basis is set out in Table 11.7.

**Table 11.7: Breakdown of Market Shares of Allerdale Borough – Bulky Goods**

Goods	Survey Zone								Total
	Wigton	Maryport	Cockermouth	Keswick	Workington	Whitehaven	Copeland Central	Millom	
Electrical	28.3%	72.3%	74.5%	21.2%	79.9%	31.5%	29.3%	3.2%	<b>46.0%</b>
DIY	37.5%	96.4%	93.4%	48.5%	95.0%	33.5%	34.6%	1.6%	<b>56.2%</b>
Furniture	34.2%	77.1%	82.0%	18.8%	79.4%	27.2%	25.3%	0.0%	<b>46.0%</b>
<b>TOTAL</b>	<b>32.8%</b>	<b>80.4%</b>	<b>82.0%</b>	<b>27.2%</b>	<b>83.7%</b>	<b>30.6%</b>	<b>29.2%</b>	<b>1.6%</b>	<b>48.7%</b>

Notes: West Cumbria Household Survey (2008) and WYG analysis

- 11.36 Table 11.7 indicates that facilities in Allerdale Borough (excluding Keswick) are identified to retain almost 49% of bulky goods expenditure generated within the Study Area. This ranges from 46% for Electrical and Furniture Goods to 56% for DIY Goods. Unsurprisingly, the highest market share (84%) achieved by facilities in the Borough is in Zone 5 ('Workington').
- 11.37 Table 11.8 provides a breakdown of capacity for additional bulky goods floorspace within the Borough (through growth in expenditure alone) rolling forward current market share (48.9%).

**Table 11.8: Estimated Available Comparison Goods Expenditure – Bulky Goods (Scenario 1)**

Year	Turnover - £m <sup>1</sup>	Expenditure available - £m <sup>2</sup>	Surplus Expenditure - £m
2009	90.45	90.45	-
2014	97.44	106.83	9.39
2019	104.97	129.29	24.32
2023	111.41	151.52	40.11

Notes: <sup>1</sup> – Allows for increased turnover efficiency of +1.5% per annum  
<sup>2</sup> – Assumes constant market share at 48.9% within the Study Area  
 Takes into account tourism expenditure of £4.2m in 2009 increasing at 2.0% per annum  
 Allows for growth in SFT for comparison goods expenditure  
 At 2005 prices

- 11.38 Based on current market shares it is estimated that there is bulky goods capacity within the Borough of approximately £9.39m in the short-term (i.e. 2014) increasing to £24.32m by 2019 and to £40.11m by 2023.
- 11.39 By applying a typical sales density of leading 'bulky goods' retailers of approximately £3,000 per sq m (and allowing for increased productivity at +1.5% per annum), by 2014 this capacity equates to a requirement of up to 2,905 sq m (net) of floorspace within the Borough to maintain current market share. This is anticipated to increase to some 10,850 sq m (net) by 2023. Again, this level of capacity is dependent upon the end-operator.
- 11.40 In terms of non-bulky goods, the Household Survey identifies that existing facilities in the Borough achieve an overall market share of **41.9%** (or £163.20m) within the defined Study Area. This market share is identified to be lower than that achieved for bulky goods (48.9%). In addition, some £9.20m of non-bulky comparison goods expenditure is also identified to be generated through tourism. Table 11.9 provides a breakdown of market shares achieved by existing facilities in the Borough for the variety of non-bulky goods identified on a zone-by-zone basis.

**Table 11.9: Breakdown of Market Shares of Allerdale Borough – Non Bulky Goods**

Goods	Survey Zone								Total
	Wigton	Maryport	Cockermouth	Keswick	Workington	Whitehaven	Copeland Central	Millom	
Clothes	15.7%	66.8%	55.7%	22.8%	76.0%	32.7%	39.4%	1.0%	<b>42.4%</b>
Books, etc.	11.7%	62.4%	51.6%	4.7%	70.3%	11.0%	13.3%	0.0%	<b>30.0%</b>
H'Hold Goods	23.5%	78.7%	72.9%	28.2%	75.5%	28.3%	26.7%	1.3%	<b>44.2%</b>
Toys, etc.	14.6%	71.4%	71.1%	16.3%	80.7%	17.4%	28.1%	0.0%	<b>39.9%</b>
Chemist	57.2%	91.4%	94.5%	10.7%	81.3%	6.4%	4.3%	0.0%	<b>46.4%</b>
<b>TOTAL</b>	<b>23.6%</b>	<b>73.5%</b>	<b>68.6%</b>	<b>18.6%</b>	<b>78.5%</b>	<b>22.4%</b>	<b>26.6%</b>	<b>0.6%</b>	<b>41.9%</b>

Notes: West Cumbria Household Survey (2008) and WYG analysis

- 11.41 Table 11.9 indicates that in Allerdale Borough existing facilities attract between 30% for 'Books, CDs, etc.' to 46% for 'Chemist Goods'. Again, the highest level of retention is identified within Zone 5 ('Workington') where existing facilities in the Borough are identified to retain more than 78% of expenditure generated in this zone. It is notable that within Zone 6 ('Whitehaven') almost a third (32.7%) of expenditure spent on 'Clothing & footwear' Goods is directed to facilities in Allerdale (most notably Workington Town Centre). This compares to lower shares for the other non-bulky goods categories identified. A similar pattern is identified within Zone 7 ('Copeland Central'). This suggests that a number of residents within the neighbouring authority of Copeland look towards Workington Town Centre to undertake shopping for 'Clothes & footwear'.

- 11.42 In terms of the identified outflow of expenditure, the influence of Carlisle (particularly in Zone 1) has a significant impact on shopping patterns in this zone, particularly for 'Clothing & footwear'.
- 11.43 Again, based on growth alone, Table 11.10 provides a breakdown of capacity for additional bulky goods floorspace within the Borough based on rolling forward current market share (41.9%).

**Table 11.10: Estimated Available Comparison Goods Expenditure – Non Bulky Goods (Scenario 1)**

Year	Turnover - £m <sup>1</sup>	Expenditure available - £m <sup>2</sup>	Surplus Expenditure - £m
2009	172.40	172.40	-
2014	185.72	203.64	17.92
2019	200.08	246.29	46.21
2023	212.35	288.49	76.14

Notes: <sup>1</sup> – Allows for increased turnover efficiency of +1.5% per annum  
<sup>2</sup> – Assumes constant market share at 41.9% within the Study Area  
 Accounts for tourism expenditure at £9.2m that is forecast to grow at +2.0% per annum  
 Allows for growth in SFT for comparison goods expenditure  
 At 2005 prices

- 11.44 Based on current market share there in the short-term there is demonstrable capacity of £17.92m available to support additional non-bulky comparison goods floorspace in the Borough by 2014. This is identified to increase to £46.21m by 2019 and to £76.14m by 2023. By applying an average non-bulky goods turnover of £5,000 per sq m (although this sales density is very much dependent upon the end operator) this equates to floorspace requirements of 3,330 sq m (net) by 2014 increasing to 12,360 sq m (net) by 2023.

### Outstanding Commitments

- 11.45 Whilst our analysis identifies capacity for additional convenience and comparison goods floorspace within the Borough between 2009 and 2023, it is important to take into account outstanding commitments for additional retail floorspace. As previously highlighted there is an extant permission for the redevelopment and extension of existing floorspace at Derwent Howe Retail Park in Workington. This extant permission will include an element of comparison goods floorspace as part of the extension to the existing Morrisons store together with the reconfiguration of the Halfords unit to provide three separate units of 827 sq m (gross) and a new retail unit of 929 sq m (gross). This consent is identified to have a comparison goods turnover of up to £9m by 2014.
- 11.46 In addition, the proposed new Tesco store will also provide an uplift in comparison goods floorspace to that which already exists of some 1,749 sq m (net) – 2,021 sq m proposed against 272 sq m existing. Based on the expected comparison goods sales density for Tesco (as identified by Verdict 2008) this



additional comparison goods floorspace is identified to have a potential turnover of approximately £18m by 2014.

- 11.47 Consequently, outstanding commitments together with proposals (if permitted) could have a comparison goods turnover of up to £25m in 2009. These commitments would meet the current need for additional floorspace in the Borough (c. £15m) and more than half (61%) of the identified capacity for additional comparison goods floorspace in the Borough by 2014. However, given the geography of these commitments (focused in and around Workington) there is likely to be scope for improved comparison goods provision elsewhere in the Borough to meet a need more locally and provide sustainable shopping patterns.

### Qualitative Need

- 11.48 Allerdale Borough provides a broad range of 'non-bulky' comparison goods floorspace most of which is located within Workington Town Centre. However, the market share achieved for all facilities for non-bulky goods shopping (42%) is less than that identified for bulky goods shopping (49%). Indeed, the influence of larger centres nearby such as Carlisle together with the popularity of internet shopping for certain goods is identified to be greater for non-bulky goods than it is for bulky goods. This is particularly the case in the peripheral zones that fall within the administrative boundary of Allerdale, most notably Zone 1 ('Wigton').
- 11.49 Of the non-bulky goods expenditure retained by facilities in the Borough, most (73%) is directed to Workington Town Centre, which is identified as the most popular retail destination in the West Cumbria Sub-Region. It is evident that the recent development at Washington Square has reinforced Workington's role as retail destination. Indeed, within the survey zones that reflect the administrative area of Allerdale (zones 1, 2, 3 and 5), existing facilities within the Borough are identified to achieve a market share of 62% within this narrower area. However, it is notable that there are a number of units within this development are currently vacant. Therefore, it is considered that the full occupancy of these units should be the main strategy for the Council rather than seeking to create additional floorspace elsewhere in Workington. The full occupancy of this development is likely to improve the quality of non-bulky retail offer.
- 11.50 In terms of the other defined centres within the Borough these serve a much lesser retail role as reflected by the findings of the Household Survey. Although it would be desirable to improve the market



shares of these centres, any increase in market share will be affected by the strength and proximity of Workington Town Centre and larger centres outside the Borough, including Carlisle.

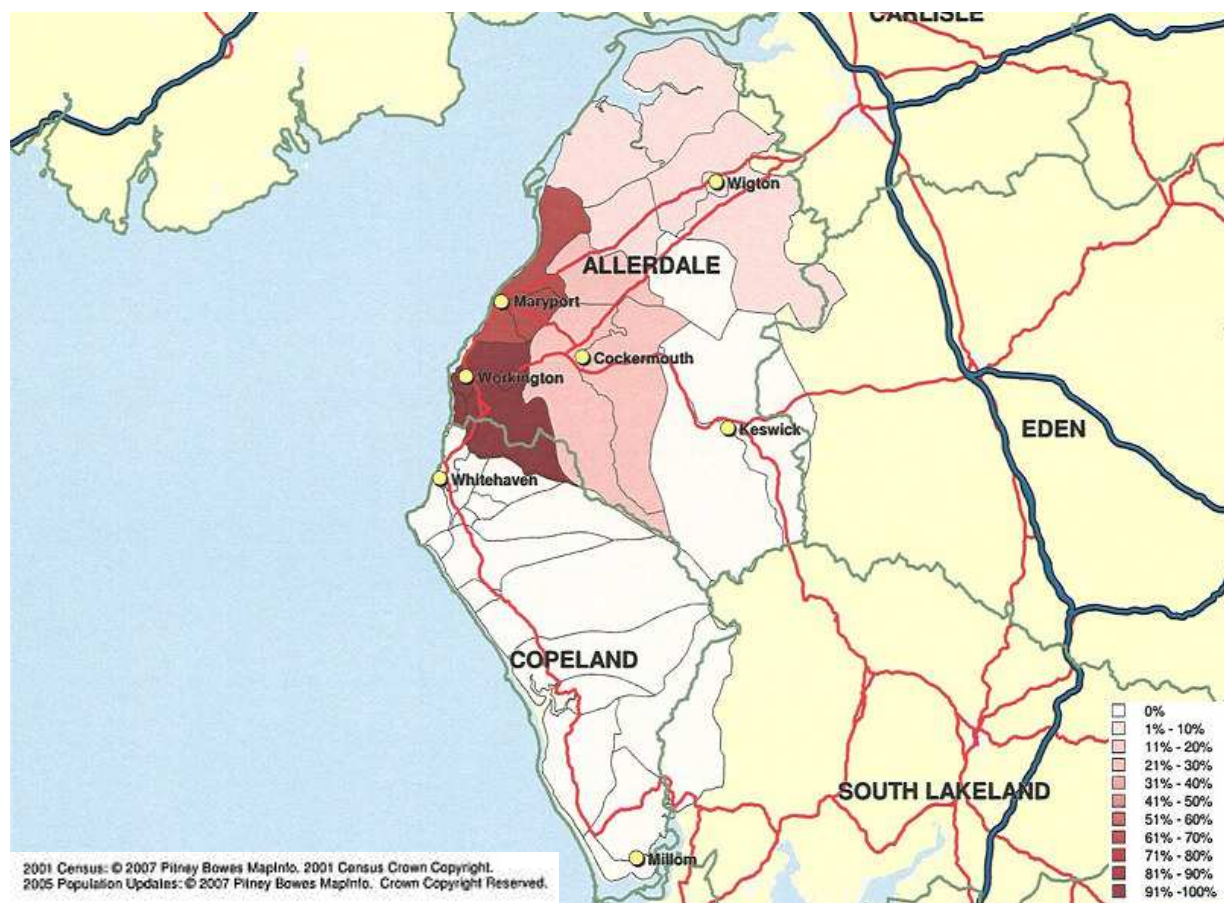
- 11.51 As previously highlighted, with regard to bulky goods (i.e. electrical, furniture, DIY, etc.) the Household Survey results suggest that facilities in the Borough achieve a higher market share than that for non-bulky goods. Indeed, within the survey zones that best represents the local authority area of Allerdale (zones 1, 2, 3 and 5) the market share of facilities in the Borough for bulky goods increases to 70%. This compares to 62% for non-bulky goods. Accordingly, only 30% of expenditure generated in this narrower area is spent at destinations elsewhere (including 7% spent online). Given this relatively low level of outflow of expenditure, which is primarily lost from Zone 1 ('Wigton'), there is no clear qualitative need for additional bulky goods provision within the Borough. Indeed, the Borough currently contains a range of bulky goods retailers including Focus, B&Q, Currys, Comet and DFS.

## Role of Existing Centres

### *Workington Town Centre*

- 11.52 Workington is identified as the largest town centre (in retail terms – inc. convenience and comparison floorspace) both within the Borough and the wider West Cumbria Sub-Region. However, in terms of convenience goods shopping existing facilities are identified to be located out-of-centre (namely the Morrisons store at Derwent Howe and Tesco store at New Bridge Road). The extant permission to provide a new and larger Tesco store at Laundry Fields (an edge-of-centre location) is likely to help existing businesses to benefit from linked trips between convenience goods shopping and other shopping and activities.
- 11.53 Given this, existing facilities within Workington Town Centre are identified to achieve a convenience goods turnover of only £9.13m in 2009 (excluding tourism spend), which equates to a market share of only 3.1% within the Study Area. By including nearby out-of-centre provision, Workington's market share is identified to increase to **30.1%** within the Study Area. Facilities in Workington are identified to achieve a main food shopping catchment within the Study Area of approximately 54,750 people in 2009. In addition, some £3.9m of convenience goods expenditure is identified to be directed to facilities in Workington from tourism. By including expenditure attracted through tourism, existing facilities within Workington are identified to achieve a convenience goods turnover of £93.44m in 2009. Figure 11.3 and Table 11.11 illustrates the penetration levels achieved by existing convenience goods facilities (both in-centre and out-of-centre) within Workington.

**Figure 11.3: Penetration Levels of Existing Convenience Goods Facilities in Workington**



**Table 11.11: Market Share Analysis – 2008 (Convenience Goods)**

Zone	Wigton	Maryport	Cockermouth	Keswick	Workington	Whitehaven	Copeland Central	Millom
Workington	11.1%	65.2%	22.9%	8.6%	<b>95.4%</b>	2.7%	1.0%	0.9%

Notes: derived from West Cumbria Household Survey (2008)

- 11.54 By rolling forward current market share (30.1%), Table 11.12 identifies that given the overtrading of existing convenience goods floorspace in Workington (as outlined at Table 11.1) there is an immediate capacity of more than £29m in 2009, increasing to more than £37m by 2014 (assuming no change in current market share). It is expected most of this capacity by 2014 (at current market shares) could potentially be met by the new Tesco store at Laundry Fields (if permitted) and the extant permission to extend the existing Morrisons store, which are identified to achieve a collective convenience goods turnover of more than £33m by 2014.

**Table 11.12: Estimated 'Capacity' for Convenience Goods Facilities – Workington (Scenario 1)**

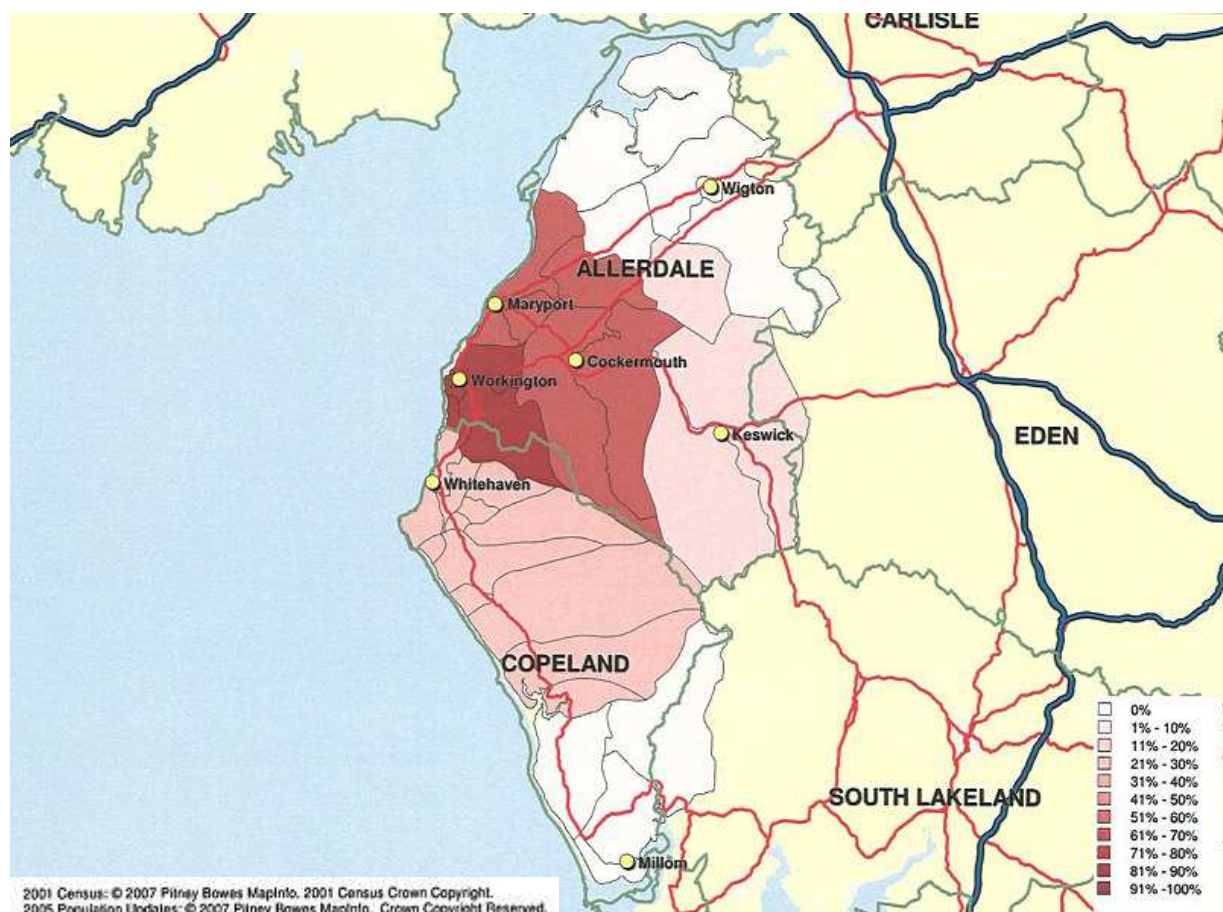
Year	Turnover - £m <sup>1*</sup>	Expenditure Available - £m <sup>2*</sup>	Surplus Expenditure - £m
2009	64.05	93.44	29.39
2014	65.67	102.70	37.03
2019	67.33	112.53	45.20
2023	68.68	121.21	52.53

Notes: <sup>1</sup> – Allows for increased productivity at +0.5% per annum

<sup>2</sup> – Assumes constant market share 30.1% in the Study Area and allowing for tourism expenditure of £3.9m which is forecast to grow at 0.4% per annum  
At 2005 prices

- 11.55 In contrast to Workington's limited convenience goods shopping role (based on town centre floorspace only), Workington Town Centre is identified to attract some £154.03m of comparison goods expenditure generated in the Study Area. This equates to a market share of 27.2% - the highest of all centres within the Sub-Region.
- 11.56 By including edge-of-centre and out-of-centre facilities within Workington (including Derwent Howe Retail Park), its turnover increases to £200.25m in 2009, which equates to a market share **35.4%** within the Study Area. In addition, some £10.9m of comparison goods expenditure is identified to be generated by tourism. Figure 11.4 and Table 11.13 illustrates the influence of facilities within Workington for comparison goods shopping.

**Figure 11.4: Penetration Levels of Existing Comparison Goods Facilities in Workington**



**Table 11.13: Market Share Analysis – 2008 (Comparison Goods)**

Zone	Warton	Maryport	Cockermouth	Keswick	Workington	Whitehaven	Copeland Central	Millom
Workington	8.9%	58.7%	41.0%	14.5%	<b>77.5%</b>	24.0%	26.1%	0.8%

Notes: derived from West Cumbria Household Survey (2008)

- 11.57 As illustrated at Table 11.2 existing comparison goods floorspace in Workington (both in-centre and out-of-centre) is overtrading by more than £18m (or 10%) in 2009. Given this current overtrading, based on existing market share, our analysis identifies (Table 11.12) that this capacity could increase £42.56m by 2014. This equates to a floorspace capacity of approximately 8,780 sq m (net). By 2019 this capacity is identified to increase to £78.98m (or 15,120 sq m net) and to £117.14m (or 21,130 sq m net) by 2023. Whilst outstanding commitments and proposals within Workington are identified to meet most (78%) of the immediate capacity for additional comparison goods floorspace, by assuming no change in market share, in the longer term there appears to be scope for some additional comparison goods floorspace (c. £86m).

**Table 11.14: Estimated 'Capacity' for Comparison Goods Facilities – Workington (including growth directed to out-of-centre provision) – Scenario 1**

Year	Turnover - £m <sup>1*</sup>	Expenditure Available - £m <sup>2*</sup>	Surplus Expenditure - £m
2009	192.69	211.12	18.43
2014	207.58	250.14	42.56
2019	223.62	302.60	78.98
2023	237.35	354.49	117.14

Notes: <sup>1</sup> – Allows for increased productivity at +1.5% per annum  
<sup>2</sup> – Assumes constant market share 35.5% in the Study Area and tourism expenditure of £10.9m which is forecast to grow at 2.0% per annum  
 At 2005 prices

11.58 Whilst the above assessment identifies capacity for additional comparison goods floorspace in Workington, as highlighted in the 'health check' contained at Appendix 5 there are some 39 vacancies within Workington Town Centre accounting for some 5,750 sq m of floorspace – this has increased further given the ongoing downturn in the retail sector since the survey was undertaken with the closure of Woolworths store (c. 1,000 sq m) within the town centre. Many of these vacancies are located within the recently developed Washington Square scheme. Therefore, whilst our analysis suggests that existing comparison goods floorspace is trading well there remains a notable level of vacant floorspace within parts of the core retailing area of the town centre. Given this, the suggested strong performance of the town centre should be treated with a 'note of caution' and future forecast growth identified to be directed to Workington should be seek to reduce these vacancies rather than seeking to create major new retail floorspace, particularly in the short-term. It is important for the overall vitality and viability of Workington Town Centre that the Washington Square is successful and any improvement in the retail offer elsewhere in Workington could undermine the success of this important town centre redevelopment.

#### *Maryport Town Centre*

11.59 The comparison goods retail offer of Maryport is much more limited and its role is clearly influenced by its proximity to Workington Town Centre. Existing facilities are identified to achieve a comparison goods turnover of £10.01m in 2009, which equates to a market share of only **1.8%**. In addition, facilities in Maryport are also identified to attract some £0.54m of comparison goods expenditure generated through tourism. Accordingly, existing facilities in Maryport are identified to achieve a comparison goods turnover of £10.55m in 2009. Table 11.15 highlights the market shares achieved by facilities in Maryport from each zone within the defined Study Area.

**Table 11.15: Market Share Analysis – 2008 (Comparison Goods)**

Zone	Wigton	Maryport	Cockermouth	Keswick	Workington	Whitehaven	Copeland Central	Millom
Maryport	0.9%	<b>14.6%</b>	1.6%	0.0%	0.5%	0.3%	0.0%	0.0%

Notes: derived from West Cumbria Household Survey (2008)



11.60 Analysis of the survey evidence suggests that existing comparison goods floorspace in Maryport is trading marginally below expected levels (£11.01m compared to £10.55m in 2009). Given this undertrading together with the low market share achieved by facilities in Maryport, even by allowing for forecast increases in expenditure, Table 11.16 identifies capacity by 2019 of less than £2m. Even in the long-term (i.e. by 2023) this is identified to increase to only £3.46m. This represents a floorspace requirement of only 430 sq m (net) in 2019 (based on assuming a reduced average sales density of £3,500 per sq m to reflect the type of retailers that would be attracted to Maryport). This is identified to increase to only 800 sq m (net) by 2023, although dependent upon the end operator.

**Table 11.16: Estimated 'Capacity' for Comparison Goods Facilities – Maryport (Scenario 1)**

Year	Turnover - £m <sup>1*</sup>	Expenditure Available - £m <sup>2*</sup>	Surplus Expenditure - £m
2009	11.01	10.55	-
2014	11.86	12.01	0.15
2019	12.78	14.52	1.74
2023	13.56	17.02	3.46

Notes: <sup>1</sup> – Allows for increased productivity at +1.5% per annum

<sup>2</sup> – Assumes constant market share 1.7% in the Study Area and tourism expenditure of £0.55m increasing at 2.0% per annum  
At 2005 prices

11.61 The convenience goods offer of Maryport is comparable to that identified for comparison goods attracting a turnover of £9.05m in 2009 within the Study Area, which is comparable to a comparison goods turnover of £10.01m. However, this equates to a market share of **3.0%**, with most of this expenditure attracted to the Co-op Foodstore on Curzon Street (£6.03m). Existing facilities in Maryport are identified to achieve a main food shopping catchment of approximately 5,250 people within the Study Area in 2009. By allowing for tourism expenditure (£0.37m), the turnover of existing facilities in Maryport is identified to increase to £9.42m. Figure 11.6 and Table 11.17 illustrates the limited influence of existing facilities within Maryport for convenience goods shopping.

**Figure 11.6: Penetration Levels of Existing Convenience Goods Facilities in Maryport**



**Table 11.17: Market Share Analysis – 2008 (Convenience Goods)**

Zone	Wigton	Maryport	Cockermouth	Keswick	Workington	Whitehaven	Copeland Central	Millom
Maryport	1.8%	<b>27.3%</b>	1.6%	0.0%	0.5%	0.0%	0.0%	0.0%

Notes: derived from West Cumbria Household Survey (2008)

- 11.62 Existing provision is identified (Table 11.1) to be trading marginally above expected level (£9.42m against £8.69m – a difference of only £0.73m). Despite this slight overtrading and the identified growth in convenience goods expenditure forecast within the Study Area through to 2023 there is identified to be capacity (at current market shares) of only £2.74m by 2023, which will support only a modest increase in retail provision at current market shares (Table 11.18).



**Table 11.18: Estimated 'Capacity' for Convenience Goods Facilities – Maryport (Scenario 1)**

Year	Turnover - £m <sup>1*</sup>	Expenditure Available - £m <sup>2*</sup>	Surplus Expenditure - £m
2009	8.69	9.14	0.45
2014	8.91	10.21	1.30
2019	9.13	11.20	2.07
2023	9.32	12.06	2.74

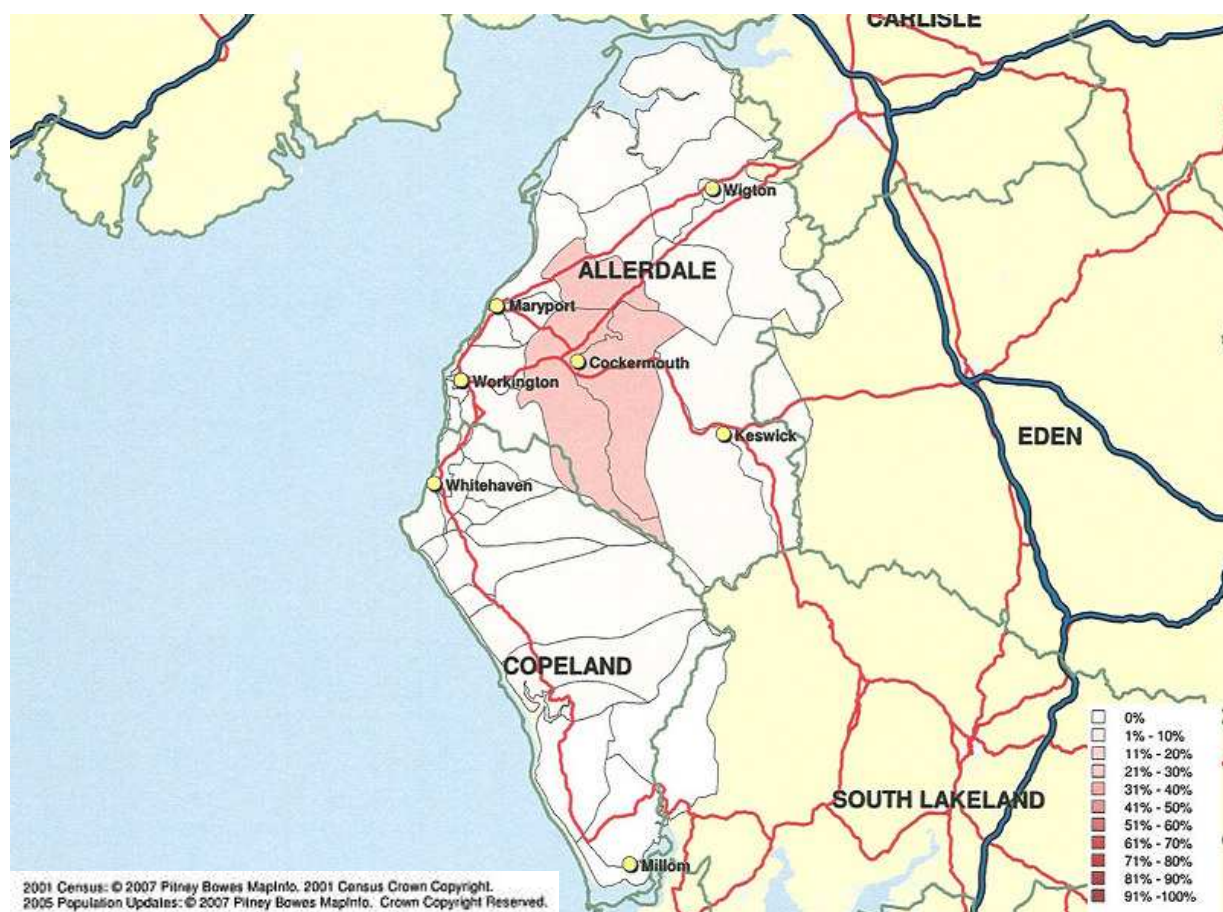
Notes: <sup>1</sup> – Allows for increased productivity at +0.5% per annum

<sup>2</sup> – Assumes constant market share 3.0% in the Study Area and tourism expenditure of £0.37m which is forecast to increase at 0.4% per annum  
At 2005 prices

### Cockermouth

- 11.63 Cockermouth is identified to be the second largest retail destination within the Borough. The town centre is identified to achieve a comparison goods turnover of £24.81m in 2009 (by including the out-of-centre Home Centre on Low Road - £0.48m). This equates to a market share within the Study Area of **4.4%**. Facilities in Cockermouth are also identified to attract some £1.35m of tourism expenditure in 2009. Figure 11.7 and Table 11.19 illustrates the penetration levels achieved by existing comparison goods facilities within Cockermouth.

**Figure 11.7: Penetration Levels of Existing Comparison Goods Facilities in Cockermouth**



**Table 11.19: Market Share Analysis – 2008 (Comparison Goods)**

Zone	Wigton	Maryport	Cockermouth	Keswick	Workington	Whitehaven	Copeland Central	Millom
Cockermouth	1.8%	1.8%	<b>29.6%</b>	4.2%	1.4%	0.5%	1.2%	0.0%

Notes: derived from West Cumbria Household Survey (2008)

- 11.64 In terms of trading performance, our assessment (Table 11.5) identifies that existing comparison goods floorspace in Cockermouth is broadly trading at expected levels, albeit undertrading by some 7% (an expected turnover of £28.05m against a survey derived turnover of £26.16m).
- 11.65 Based on current market shares our assessment (Table 11.20) identifies capacity in 2014 of less than £1m. This capacity is forecast to increase to £4.96m by 2019 and to £9.39m by 2023. By applying an average sales density of £3,250 per sq m this equates to a floorspace requirement of 1,315 sq m (net) in 2019, increasing to 2,345 sq m (net) by 2023.

**Table 11.20: Estimated 'Capacity' for Comparison Goods Facilities – Cockermouth (Scenario 1)**

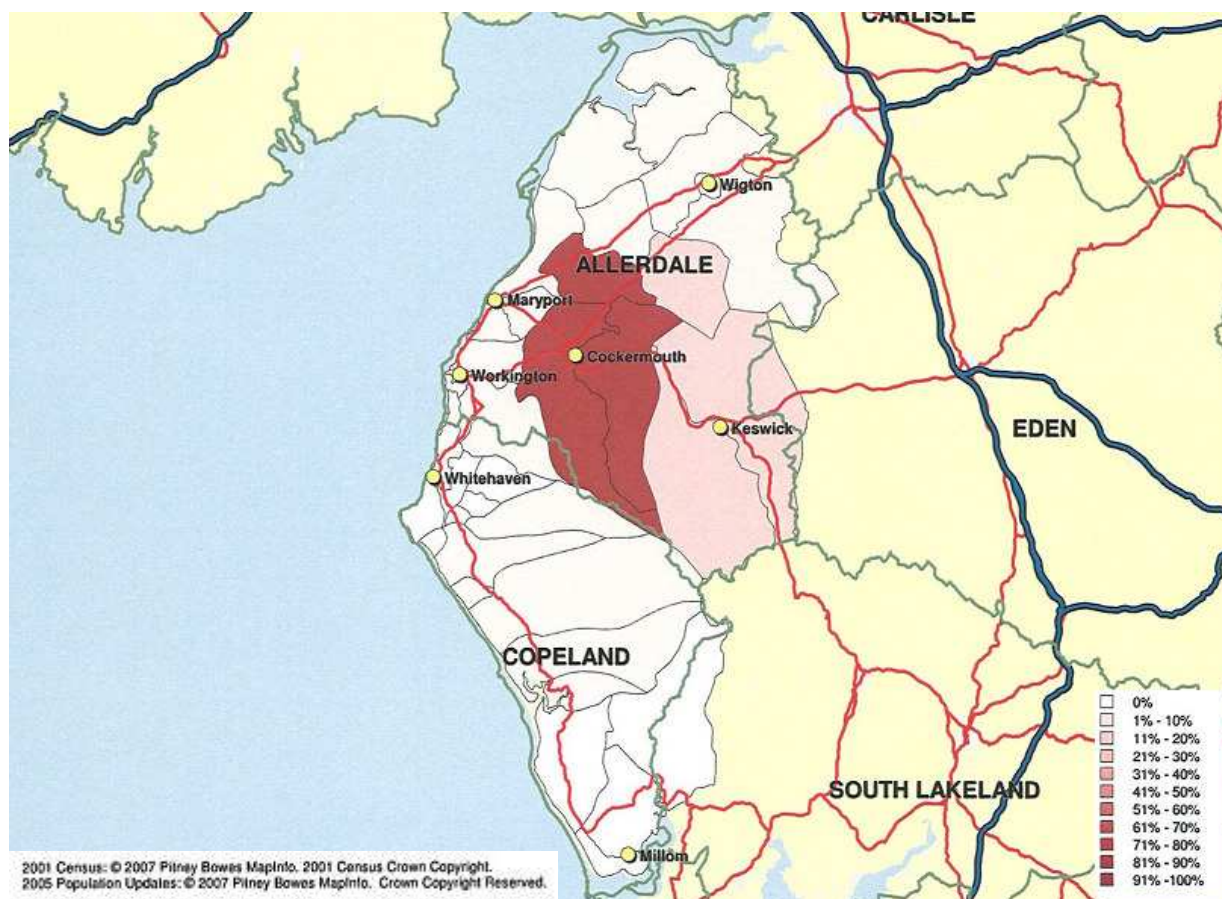
Year	Turnover - £m <sup>1</sup>	Expenditure Available - £m <sup>2</sup>	Surplus Expenditure - £m
2009	28.05	26.16	-1.89
2014	30.22	31.00	0.78
2019	32.55	37.51	4.96
2023	34.55	43.94	9.39

Notes: <sup>1</sup> – Allows for increased productivity at +1.5% per annum

<sup>2</sup> – Assumes constant market share 4.4% in the Study Area and tourism expenditure of £1.35m growing at 2.0% per annum  
At 2005 prices

- 11.66 The convenience goods offer of Cockermouth is anchored by the edge-of-centre Sainsbury's store on Station Street, which is identified to be the third most popular convenience goods destination in the Borough. Existing facilities within Cockermouth are identified to attract some £26.07m of convenience goods expenditure generated in the Study Area. This turnover equates to a market share of **8.7%** in 2008 within the Study Area and existing convenience goods facilities within Cockermouth are identified to achieve a main food shopping catchment of approximately 14,630 people within the Study Area in 2009. Figure 11.8 and Table 11.21 illustrates the extent of the catchment of existing facilities in Cockermouth.

**Figure 11.8: Penetration Levels of Existing Convenience Goods Facilities in Cockermouth**



**Table 11.21: Market Share Analysis – 2008 (Convenience Goods)**

Zone	Wigton	Maryport	Cockermouth	Keswick	Workington	Whitehaven	Copeland Central	Millom
Cockermouth	3.4%	3.0%	<b>65.6%</b>	11.5%	1.8%	0.0%	1.0%	0.0%

Notes: derived from West Cumbria Household Survey (2008)

- 11.67 Of the identified convenience goods expenditure currently directed to Cockermouth it is notable that some 79% (or £20.55m) is identified to be directed to the Sainsbury's store. In addition, some £1.06m of convenience goods expenditure is also identified to be attracted to Cockermouth through tourism.
- 11.68 Existing convenience goods provision within Cockermouth is identified to be overtrading by 49% (or £9m). In particular the Sainsbury's store is identified to be trading approximately twice the expected level. Given this overtrading, our assessment of future capacity (Table 11.22) for additional convenience goods floorspace identifies capacity by 2014 of some £10.96m – assuming no change in current market share. This is identified to increase to £13.32m by 2019 and to £15.44m by 2023.

**Table 11.22: Estimated 'Capacity' for Convenience Goods Facilities – Cockermouth (Scenario 1)**

Year	Turnover - £m <sup>1*</sup>	Expenditure Available - £m <sup>2*</sup>	Surplus Expenditure - £m
2009	18.20	27.13	8.93
2014	18.66	29.62	10.96
2019	19.13	32.45	13.32
2023	19.52	34.96	15.44

Notes: <sup>1</sup> – Allows for increased productivity at +0.5% per annum

<sup>2</sup> – Assumes constant market share 8.7% in the Study Area and tourism expenditure of £1.06m forecast to grow at 0.4% per annum  
At 2005 prices

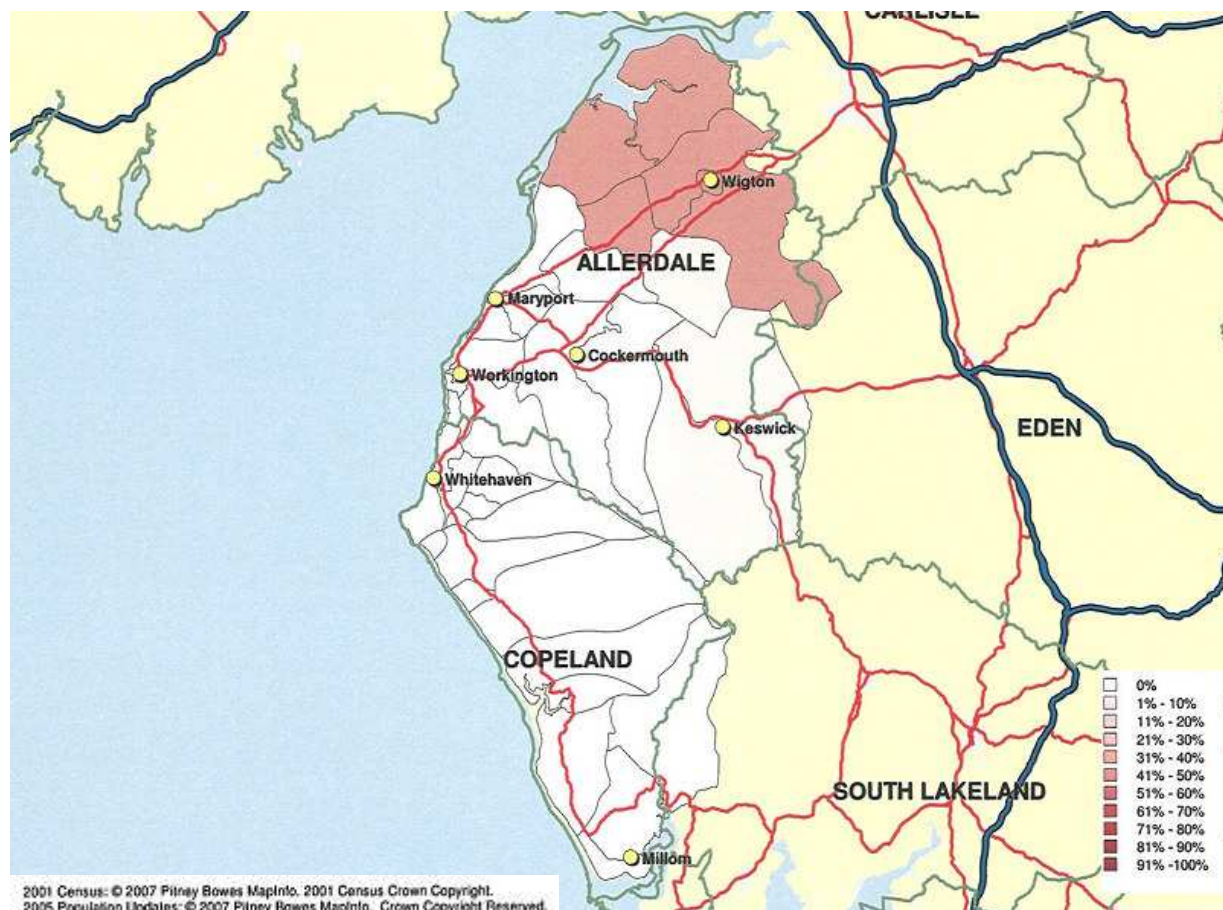
- 11.69 Whilst the capacity outlined in Table 11.22 suggests scope for improvement to the convenience goods offer of Cockermouth, it is not known at this stage the potential impact of improved offer in Workington. Indeed, currently more than a quarter (26%) of main food shopping trips undertaken in Zone 3 ('Cockermouth') is directed to facilities in Workington, most of which are to the existing Tesco store. Therefore, a significant improvement in the convenience goods offer of Workington (as proposed at Laundry Fields) may draw more expenditure that is currently directed to Cockermouth to Workington.
- 11.70 Notwithstanding this, based on current market shares the capacity identified equates to a potential convenience goods floorspace requirement of between 1,070sq m (net) and 2,140 sq m (net) in 2014. This is forecast to increase to between 1,440 sq m (net) and 2,880 sq m (net) by 2023 – dependent upon the end operator.

### Wigton

- 11.71 The convenience goods offer of Wigton is identified to be dominated by the Somerfield store on Station Road. Overall, all facilities within Wigton are identified to achieve a convenience goods turnover of £13.63m, of which more than 75% of this turnover is identified to be directed to the Somerfield store. All facilities within Wigton are identified to achieve a market share of **4.5%** within the defined Study Area. Existing facilities in Wigton are identified to achieve main food shopping catchment of approximately 7,110 people within the Study Area. In addition, some £0.56m of convenience goods expenditure is identified to be generated through tourism. Figure 11.9 and Table 11.23 illustrate the extent of the catchment of existing convenience goods facilities in Wigton.



**Figure 11.9: Penetration Levels of Existing Convenience Goods Facilities in Wigton**



**Table 11.23: Market Share Analysis – 2008 (Convenience Goods)**

Zone	Wigton	Maryport	Cockermouth	Keswick	Workington	Whitehaven	Copeland Central	Millom
Wigton	<b>34.6%</b>	0.0%	0.0%	4.6%	0.0%	0.0%	0.0%	0.0%

Notes: derived from West Cumbria Household Survey (2008)

- 11.72 Existing convenience goods facilities within Wigton are identified to be overtrading by almost £6m (or 73%) after allowing for tourism expenditure (Table 11.1). This is identified to increase to more than £9m by 2023. This overtrading suggests capacity for additional convenience goods floorspace in Wigton (at current market share) of between 675 sq m (net) and 1,350 sq m (net) in 2014, increasing to between 870 sq m (net) and 1,735 sq m (net) by 2023. However, it is important to note that this level of capacity is based on current market share. Consequently, any improvement in convenience goods provision elsewhere (most notably in Carlisle and Workington) is likely to have an impact on the market share currently achieved by facilities in Wigton.

**Table 11.24: Estimated 'Capacity' for Convenience Goods Facilities – Wigton (Scenario 1)**

Year	Turnover - £m <sup>1*</sup>	Expenditure Available - £m <sup>2*</sup>	Surplus Expenditure - £m
2009	8.20	14.19	5.99
2014	8.41	15.33	6.92
2019	8.62	16.80	8.18
2023	8.80	18.10	9.30

Notes: <sup>1</sup> – Allows for increased productivity at +0.5% per annum

<sup>2</sup> – Assumes constant market share 4.5% in the Study Area and tourism expenditure of £0.56m forecast to grow at 0.4% per annum  
At 2005 prices

11.73 The comparison goods offer of Wigton is not as strong as that identified for convenience goods. Existing floorspace is identified to achieve a comparison goods turnover of some £8.77m, equating to a market share within the Study Area of only **1.5%**. In addition, facilities in Wigton are identified to attract some £0.48m of additional comparison goods expenditure generated through tourism resulting in an overall comparison goods turnover of £9.25m in 2009. Table 11.25 highlights the market shares achieved by facilities in Wigton on a zone-by-zone basis.

**Table 11.25: Market Share Analysis – 2008 (Comparison Goods)**

Zone	Wigton	Maryport	Cockermouth	Keswick	Workington	Whitehaven	Copeland Central	Millom
Wigton	<b>11.5%</b>	0.0%	0.1%	1.4%	0.0%	0.1%	0.0%	0.1%

Notes: derived from West Cumbria Household Survey (2008)

11.74 Our analysis identifies that existing comparison goods floorspace in Wigton (Table 11.5) is trading marginally below expected levels (£9.92m compared to a survey derived turnover of £9.25m). By rolling forward current market shares, given the undertrading of existing floorspace our assessment identifies no capacity until after 2014. Even by 2019 there is identified limited capacity for additional comparison goods floorspace (c. £1m) increasing to less than £3m by 2023. This capacity would support only a modest increase in comparison goods floorspace in the long-term based on current market share.

**Table 11.26: Estimated 'Capacity' for Comparison Goods Facilities – Wigton (Scenario 1)**

Year	Turnover - £m <sup>1*</sup>	Expenditure Available - £m <sup>2*</sup>	Surplus Expenditure - £m
2009	9.97	9.25	-0.72
2014	10.74	10.59	-0.15
2019	11.57	12.81	1.24
2023	12.28	15.00	2.72

Notes: <sup>1</sup> – Allows for increased productivity at +1.5% per annum

<sup>2</sup> – Assumes constant market share 1.5% in the Study Area and tourism expenditure of £0.48m growing at 2.0% per annum  
At 2005 prices

### Aspatia

11.75 The retail offer in Aspatia is very limited reflecting its current role within the network of centres. Within the convenience goods sector, existing facilities are identified to attract only £1.19m of expenditure generated in the Study Area. This equates to a market share of only **0.4%**. Existing facilities within

Aspatia are identified to achieve a main food shopping catchment of only 230 people within the Study Area. Even by allowing for tourism expenditure (£0.04m) the overall turnover of existing facilities increases to only £1.23m. Given this limited market share, there is limited scope for additional convenience goods floorspace in Aspatia. Table 11.27 highlights the limited market share achieved by existing facilities in Aspatia on a zone-by-zone basis.

**Table 11.27: Market Share Analysis – 2008 (Convenience Goods)**

Zone	Wigton	Maryport	Cockermouth	Keswick	Workington	Whitehaven	Copeland Central	Millom
Aspatia	<b>2.5%</b>	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%

Notes: derived from West Cumbria Household Survey (2008)

- 11.76 Similarly, within the comparison goods sector existing facilities are identified to achieve a turnover of only £1.30m, which equates to a market share of only **0.2%**. Again, given this limited market share there no clear need for significant retail development in Aspatia. Table 11.28 illustrates the market share achieved by facilities in Aspatia within the Study Area.

**Table 11.28: Market Share Analysis – 2008 (Comparison Goods)**

Zone	Wigton	Maryport	Cockermouth	Keswick	Workington	Whitehaven	Copeland Central	Millom
Aspatia	<b>1.4%</b>	0.1%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%

Notes: derived from West Cumbria Household Survey (2008)

## Role of Keswick

- 11.77 Keswick is identified to serve an important role in meeting the needs of the local population. In terms of convenience goods shopping existing facilities are identified to achieve a turnover of £10.35m in 2009, which equates to a market share of **3.5%** within the Study Area. It is notable that all this trade is derived from Zone 4 ('Keswick') reflecting the limited catchment of facilities but also the important role facilities in Keswick play in this part of the Study Area achieving a main food shopping catchment population of approximately 5,400 people. Indeed, within Zone 4 existing facilities are identified to retain some 57% of convenience goods expenditure generated in this zone. The remaining expenditure is predominantly directed to facilities in Cockermouth (12%), Workington (9%) and Penrith (9%).
- 11.78 The convenience goods offer of Keswick includes a Booths store on Tithebarn Street and a Co-op store on St James Court together with a range of smaller stores, independent retailers and a market. The attraction of facilities in Keswick for convenience goods shopping provide an important role in meeting the day-to-day needs of the local population reducing the need for local residents travelling to facilities elsewhere.



- 11.79 Facilities in Keswick are also identified to serve an important role for comparison goods shopping achieving a turnover of some £16.12m. This equates to a market share of **2.8%** within the Study Area. However, unlike shopping patterns for convenience goods, facilities in Keswick draw some trade from elsewhere in the Study Area rather than just from Zone 4 ('Keswick'). However, it remains that more than 80% of comparison goods expenditure attracted to facilities in Keswick is derived from Zone 4 ('Keswick').
- 11.80 Clearly, Keswick currently serves an important role in serving the shopping needs of the local population within this part of West Cumbria. Consequently, its current role should be maintained and where appropriate enhanced to ensure its continued vitality and viability.
- 11.81 In addition, Keswick is also a major centre for tourism in the north lakes. Consequently, in addition to serving the local needs of the resident population it also serves the needs of visitors and tourists, which contributes to its retail economy. The continued success of Keswick as a tourist destination should also be maintained and where possible enhanced.

## Summary

- 11.82 Within the Borough and the wider West Cumbria Sub-Region, Workington Town Centre plays an important role in meeting the needs of the local population. Within the Study Area, existing facilities in Workington achieve a market share of 30% for convenience goods shopping and 36% for comparison goods shopping. These are the highest market share achieved by any centre in the Sub-Region.
- 11.83 Given the popularity of Workington as a retail destination (particularly for comparison goods shopping following the development of the Washington Square scheme) it is considered that Workington Town Centre should continue to be the main focus for further retail development in Allerdale and has established as the strongest retail centre within West Cumbria. In particular it is important that the recently completed Washington Square scheme is successful and the quality and profile of the retail offer improves rather than seeking to provide significantly more retail floorspace in Workington.
- 11.84 In terms of convenience goods shopping, the current proposal to relocate the existing Tesco store from an out-of-centre location to an edge-of-centre location will help address the imbalance in the convenience goods offer, which is primarily currently located in an out-of-centre location.



11.86 Elsewhere within the Borough the smaller centres of Cockermouth, Aspatria, Wigton and Maryport serve a more localised role. In particular, Cockermouth, due to the existing Sainsbury's store at the edge-of the town centre (which is identified to be trading above expected levels) serves an important convenience goods role and, although to a lesser extent, a comparison goods role for the local population. Indeed, Cockermouth is identified to be ranked third in the network of centres within the West Cumbria Sub-Region sitting below the larger centres of Workington and Whitehaven. Therefore, it is important that the current role of Cockermouth is maintained in the future.

## 12.0 RETAIL CAPACITY ASSESSMENT – COPELAND

### Overview

- 12.01 The Adopted Copeland Local Plan identifies Whitehaven as the main town centre in the Borough and it is identified to be the largest centre in the Borough and the second largest in the West Cumbria Sub-Region, comprising more than 23,000 sq m of retail floorspace (Experian Goad, 2008).
- 12.02 The retail offer of smaller centres within the Borough include Egremont (2,580 sq m), Millom (7,190 sq m) and Cleator Moor (2,170 sq m) are identified to provide a more localised role. Policies within the Local Plan seek to concentrate development within established centres.

### Convenience Goods Shopping

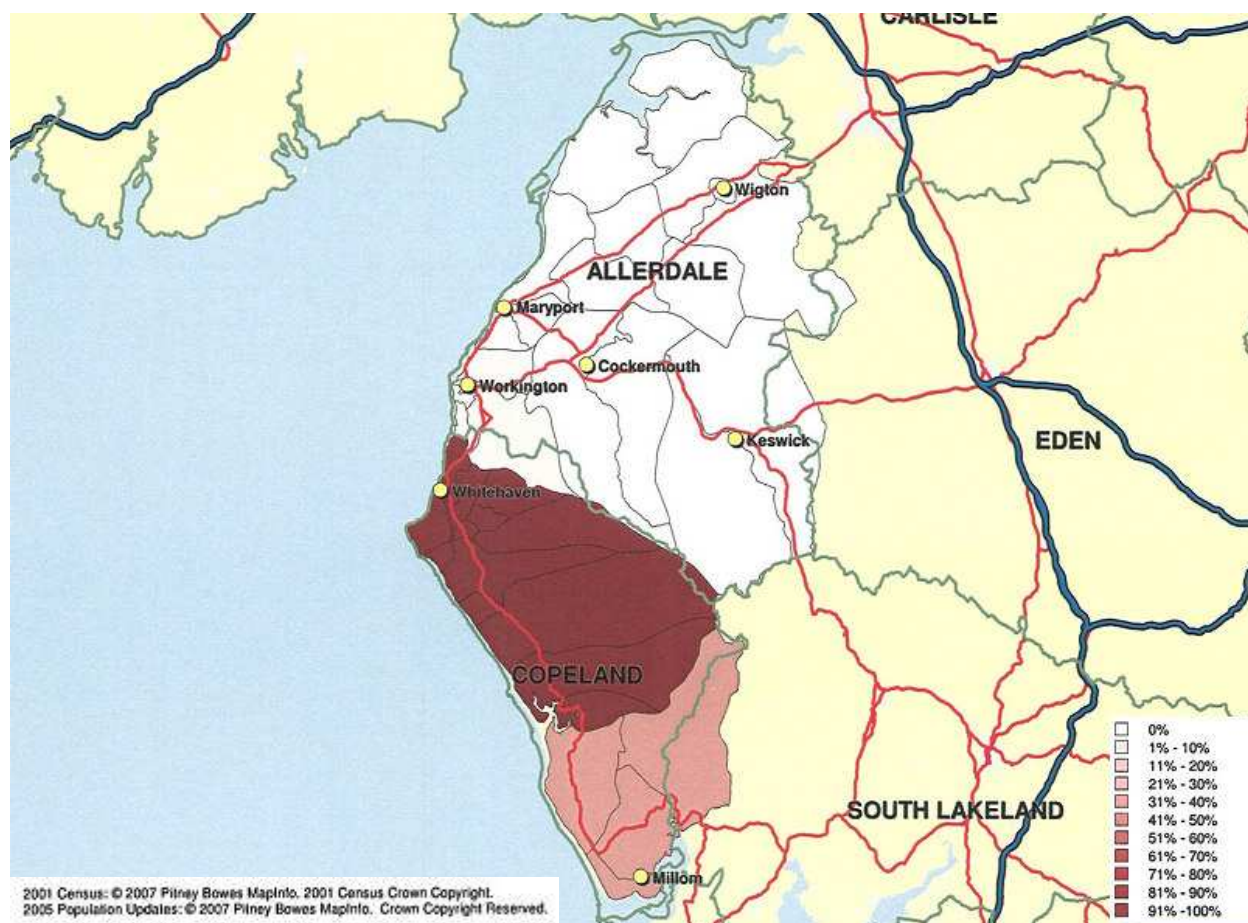
#### *Existing Provision*

- 12.03 Convenience retailing within the Borough is dominated by the out-of-centre Morrisons store at Flatt Walks and the Tesco store at North Shore, which are both in Whitehaven. Other convenience retailers within the Borough include Aldi, Iceland, Lidl and Netto stores also in Whitehaven together with a number of stores within the nearby smaller centres in the Borough, including a Co-op and Somerfield in Millom and Co-op stores in Cleator Moor and Egremont. Further convenience goods floorspace provided in smaller convenience stores and a range of independent and specialist facilities throughout the Borough.

#### *Market Shares and Capacity*

- 12.04 The Household Survey identifies that all facilities within Copeland Borough attract **35.4%** of convenience goods expenditure generated in the Study Area. This compares to facilities in Allerdale achieving a market share within the Study Area of 47.8%. Figure 12.1 illustrates the extent of the catchment area of existing convenience goods facilities in Copeland within the Study Area.

**Figure 12.1: Penetration Levels of Existing Convenience Goods Facilities in Copeland**



- 12.05 Within zones 6, 7 and 8 of the defined Study Area, which best reflects the local authority area of Copeland (although Zone 6 'Whitehaven' contains some of the southern urban area of Workington) existing facilities in the Borough attract almost 85% of convenience goods expenditure generated in this narrower area. This suggests that there is limited outflow of expenditure that is generated in the Borough to competing centres elsewhere.
- 12.06 Overall, all facilities within Copeland are identified to achieve a convenience goods turnover of £106.33m in 2009. Analysis of the Household Survey identifies that for main food shopping, facilities in the Borough have an identified catchment population of approximately 59,000 people in 2009. Our analysis also identifies that existing facilities within the Borough attract some £2.1m of convenience goods expenditure generated by tourism/visitors, resulting in an overall convenience goods turnover of £108.43m in 2009.



- 12.07 In terms of individual stores within the Borough, the Household Survey identifies that the existing Morrisons store at Flatt Walks in Whitehaven is the most popular destination attracting £39.60m of convenience goods expenditure generated within the Study Area and allowing for tourism expenditure. This is closely followed by the Tesco store at North Shore in Whitehaven, which is identified to achieve a convenience goods turnover of £38.94m. Collectively these two stores account for 74% of total convenience goods expenditure attracted to all facilities within the Borough.
- 12.08 These two stores are clearly the dominant destinations in the Borough, with the third most popular destination being the Somerfield store in Millom, which is identified to achieve a convenience goods turnover of £6.53m from the defined Study Area and allowing for tourism expenditure. The existing Co-op store in Egremont (£5.64m) is also identified to be relatively popular destination within the Borough being the fourth most popular destination in Copeland.
- 12.09 In terms of capacity for additional convenience goods floorspace within Copeland Borough, Table 12.1 provides a breakdown of the trading performance of the leading stores within the Borough.

**Table 12.1: Trading Performance of Current Foodstores in Copeland**

Store	Gross Floorspace – sq m <sup>1</sup>	Net Floorspace – sq m <sup>2</sup>	Net Convenience – sq m <sup>3</sup>	Turnover per sq m – £ <sup>4</sup>	Benchmark Turnover – £m	Survey Estimate – £m <sup>5</sup>
<b>Whitehaven</b>						
Aldi, Preston Street	-	840	656	3,820	2.51	2.93
Iceland, Preston Street	-	1,020	958	5,316	5.09	1.67
Lidl, Bridges Retail Park	1,303	782	613	2,735	1.68	0.30
Netto, The Ginns	1,400	1,000	700	5,773	4.04	2.51
Morrisons, Flatt Walks	4,716	2,830	2,258	11,064	24.98	39.60
Tesco, North Shore	4,273	2,273	1,828	12,499	22.85	38.94
Other	1,790	1,253	1,253	3,500	4.39	2.88
<b>Sub-Total</b>	-			-	<b>60.45</b>	<b>88.83</b>
<b>Millom</b>						
Co-op, Lapstone Road	230	161	138	6,129	0.85	0.78
Somerfield, Lapstone Road	1,560	1,092	933	6,888	6.43	6.53
Other	550	385	385	3,000	1.16	0.31
<b>Sub-Total</b>	-	<b>1,638</b>	<b>1,456</b>	-	<b>8.44</b>	<b>7.62</b>
<b>Cleator Moor</b>						
Co-op Foodstore, Leconfield Street	-	1,020	877	6,129	5.38	3.26
Other	610	427	427	3,000	1.28	1.01
<b>Sub-Total</b>	-	<b>1,447</b>	<b>1,304</b>	-	<b>6.66</b>	<b>4.27</b>
<b>Egremont</b>						
Co-op Foodstore, Main Street	790	553	476	6,129	2.92	5.64
Other	1,190	833	833	3,000	2.50	0.29
<b>Sub-Total</b>	-	<b>1,386</b>	<b>1,309</b>	-	<b>5.42</b>	<b>5.93</b>
<b>Other</b>						
Local Shops <sup>^</sup>					1.82	1.82
<b>TOTAL</b>					<b>82.79</b>	<b>108.43</b>

Notes: <sup>1</sup> – Gross Floorspace derived from Experian Goad (2008) or IGD Database (2006)  
<sup>2</sup> – Net floorspace based on WYG judgement and 2003 West Cumbria Retail Review  
<sup>3</sup> – Net convenience floorspace derived from Verdict Grocery Retailers (2008) where available  
<sup>4</sup> – Sales densities derived from Verdict (2008) or Mintel Retail Rankings (2008) for national multiples and WYG assessment for local shops  
<sup>5</sup> – Survey derived turnover derived from West Cumbria Household Survey (2008)  
<sup>^</sup> – Facilities in Silloth and Aspatria together with 'Local Shops' assumed to be trading in equilibrium  
 May not add up due to rounding  
 At 2005 prices

12.10 Our analysis of the Borough's current market share indicates that it attracts approximately £108.43m of convenience goods expenditure generated within the defined Study Area. By comparing this estimate with the anticipated 'benchmark' turnover of existing facilities (£82.79m), there would appear to be an under-supply of convenience goods retail facilities by approximately £25.64m.

12.11 It is apparent from examination of the trading performance of existing stores within the Borough that the two largest stores (Morrisons and Tesco) are overtrading. The Morrisons store at Flatt Walks is identified to be overtrading by some £14.62m (or 59%), whereas the Tesco store at North Shore is overtrading by 70% (or £16.09m). In contrast with other stores within the Borough are identified to be predominantly undertrading, including the Lidl store at Bridges Retail Park in Whitehaven (82%) and Co-op in Cleator Moor (39%). However, as previously highlighted smaller convenience retailers and local shops within the Borough may be underrepresented by the Household Survey, which tend to be biased towards larger

stores and do not fully take into account the role of a number of smaller shops particularly for day-to-day purchases. Given this, the trading performance of individual stores should be considered with caution. It is likely that the overtrading identified at some of the larger stores has been overstated and the performance of smaller stores has been underestimated by the Household Survey. Despite this, this assessment considers provision as a whole and the Household Survey results suggests that existing provision as a whole is overtrading by almost 25%.

- 12.12 Table 12.2 considers the likely need for additional convenience goods facilities within the Borough through to 2023 based on current market shares. Table 12.3 provides indicative floorspace requirements based on the capacity identified being accommodated by a range of convenience retailers.

**Table 12.2: Estimated Capacity for Additional Convenience Goods Facilities – Copeland Borough (Scenario 1)**

Year	Turnover - £m <sup>1</sup>	Expenditure available - £m <sup>2</sup>	Surplus Expenditure - £m
2009	82.79	108.43	25.64
2014	84.88	118.25	33.37
2019	87.02	129.76	42.74
2023	88.78	139.93	51.15

Notes: <sup>1</sup> – Allows for increased turnover efficiency of +0.5% per annum  
<sup>2</sup> – Assumes constant market share at 35.4% within the Study Area and tourism expenditure of £2.1m growing at 0.4% per annum  
 At 2005 prices

**Table 12.3: Quantitative Need for Additional Floorspace in Copeland Borough (Scenario 1)**

Year	Convenience Goods (sq m net)		
	£m	Floorspace Requirement	
		Min <sup>1</sup>	Max <sup>2</sup>
2009	25.64	2,565	5,130
2014	33.37	3,255	6,510
2019	42.74	4,065	8,130
2023	51.15	4,770	9,540

Notes: <sup>1</sup> – Average sales density assumed to be £11,778 per sq m (based on the average sales density of the leading four supermarkets as identified by Verdict 2008)  
<sup>2</sup> – Average sales density assumed to be £5,000 per sq m  
 Allows for increased turnover efficiency of +0.5% per annum  
 At 2005 prices

- 12.13 In the short term (i.e. up to 2014) our analysis identifies that there is capacity for approximately £33.37m (or at least 3,255 sq m net) of additional convenience goods floorspace within the Borough based on current market share. By 2023 this capacity increases to £51.15m, which equates to a potential floorspace requirement of at least 4,770 sq m (net).
- 12.14 It is important to note that this capacity is based on current market shares. In this respect, given that there is a proposal for a significantly larger Tesco store at Laundry Fields in Workington, there is the potential for this store to draw more expenditure to Workington from Copeland. However, it is important to highlight that permission exists for a new Tesco store in Whitehaven, which (if implemented) is likely



to help offset any increased expenditure directed to Workington due to improvements in its retail offer. Furthermore, it is evident that most expenditure currently lost from Copeland to competing facilities elsewhere is predominantly to Barrow. Given this, any significant improvement in the convenience goods offer in Workington is likely to have limited impact on the current market share achieved by facilities in Whitehaven.

## Outstanding Commitments

- 12.15 Within Copeland Borough the main commitment for additional convenience goods floorspace is the extant permission for the replacement Tesco store on the existing site granted in 2008. The consent relates to a new store of 8,057 sq m (gross) with sales floorspace of 4,503 sq m, which comprises some 2,837 sq m of convenience goods floorspace and 1,666 sq m of comparison goods floorspace. This compares to the existing store (which will be replaced) comprising 1,828 sq m of convenience goods floorspace and 455 sq m of comparison goods floorspace.
- 12.16 Accordingly, the uplift in convenience goods floorspace permitted of 1,045 sq m net (2,873 sq m – 1,828 sq m) equates to a convenience goods turnover of some £13.46m in 2014, increasing to £14.07m by 2023 (based on improved productivity of +0.5% per annum). Consequently, this commitment is identified to absorb 40% of the capacity identified in 2014 resulting in residual capacity of approximately £20m within the Borough.

## Qualitative Need

- 12.17 The Borough is identified to contain two superstores (as defined by PPS6), the Morrisons and Tesco stores in Whitehaven. As previously highlighted, collectively these stores dominate convenience goods shopping within the Borough, attracting more than three-quarters of convenience goods expenditure generated in the Study Area that is directed to facilities in the Borough.
- 12.18 These superstores are supported by a number of smaller stores both in Whitehaven and at smaller centres elsewhere in the Borough.
- 12.19 Facilities in the Borough are identified to attract approximately 85% of convenience goods expenditure generated in zones 6, 7 and 8, which broadly equates to the local authority boundary of Copeland. Accordingly, there is identified to be only limited outflow in expenditure from this narrower area, which is directed primarily (80%) to facilities in Barrow-in-Furness, in particular from Zone 8 ('Millom'). This is to be expected given the proximity of facilities in Barrow-in-Furness to residents in this zone. Given this

high retention level there appears to be no clear qualitative need for improved provision in order to 'clawback' this outflow.

- 12.20 However, improved convenience goods provision within the Borough will help to address the current overtrading of existing convenience goods floorspace. As previously highlighted, the two main stores in Whitehaven are identified to be overtrading.

## Comparison Goods

### *Existing Provision*

- 12.21 Existing comparison goods provision within the Borough is focused in Whitehaven, which is identified to be the second largest retail destination in the West Cumbria Sub-Region in terms of comparison goods floorspace. Experian Goad identifies some 21,510 sq m of comparison goods floorspace within Whitehaven against 24,930 sq m in Workington. Elsewhere in the Borough, Millom is identified to comprise 4,850 sq m of comparison goods floorspace, Cleator Moor 1,560 sq m of comparison goods floorspace and Egremont 1,070 sq m of comparison goods floorspace.

### *Market Shares and Capacity*

- 12.22 The Household Survey results suggest that existing facilities within the Borough achieve a comparison goods turnover (both bulky and non-bulky) of approximately £121.27m from the Study Area. This represents a market share of approximately **21.3%** within the Study Area. This compares to facilities in Allerdale achieving a market share of some 44% within the Study Area, which is more than double that achieved by facilities in Copeland. In addition, facilities in Copeland are identified to attract some £5.0m of comparison goods expenditure through tourism/visitors. By taking into account tourism expenditure, the overall turnover increases to £126.27m. Figure 12.2 illustrates the extent of the comparison goods catchment area of all facilities within the Borough for comparison goods shopping.

**Figure 12.2: Penetration Levels of Existing Comparison Goods Facilities in Copeland**



12.23 Table 12.4 provides an assessment of the survey derived turnover of existing facilities within the Borough and compares it against 'expected' turnover estimates.

**Table 12.4: Trading Performance of Current Comparison Goods Floorspace in Copeland**

Store	Gross Floorspace – sq m <sup>1</sup>	Net Floorspace – sq m <sup>2</sup>	Net Comparison – sq m <sup>3</sup>	Turnover per sq m – £ <sup>4</sup>	Benchmark Turnover – £m	Survey Estimate – £m <sup>5</sup>
<b>Whitehaven</b>						
Morrisons, Flatt Walks	4,716	2,830	572	9,104	5.21	-
Tesco, North Shore	4,273	2,273	445	9,578	4.26	0.17
Other	21,510	18,284	18,284	5,000	91.42	102.03
<b>Out-of-Centre</b>						
Bridges Retail Park	2,145	1,502	1,502	3,000	4.51	0.90
Focus, Preston Street	2,300	1,610	1,610	1,089	1.75	6.84
Aldi, Preston Street	-	840	184	3,000	0.55	-
Iceland, Preston Street	-	1,020	62	3,101	0.19	-
Lidl, Bridges Retail Park	1,303	782	169	3,000	0.51	-
Netto, The Ginns	1,400	1,000	300	3,000	0.90	-
<b>Sub-Total</b>	-	-	-	-	<b>109.30</b>	<b>109.94</b>
<b>Millom</b>						
Co-op, Lapstone Road	230	161	23	2,778	0.06	-
Somerfield, Lapstone Road	1,560	1,092	159	3,617	0.58	-
Other	4,850	4,123	4,123	2,500	10.31	8.02
<b>Sub-Total</b>	-	-	-	-	<b>10.95</b>	<b>8.02</b>
<b>Cleator Moor</b>						
Co-op Foodstore, Leconfield Street	-	1,020	143	2,778	0.40	-
Other	1,560	1,326	1,326	2,500	3.32	2.31
<b>Sub-Total</b>	-	-	-	-	<b>3.72</b>	<b>2.31</b>
<b>Egremont</b>						
Co-op Foodstore, Main Street	790	553	77	2,778	0.21	-
Other	1,070	910	910	2,500	2.28	4.50
<b>Sub-Total</b>	-	-	-	-	<b>2.49</b>	<b>4.50</b>
<b>Other</b>						
Local Shops <sup>^</sup>					1.52	1.52
<b>TOTAL</b>					<b>127.98</b>	<b>126.27</b>

Notes: <sup>1</sup> – Gross Floorspace derived from Experian Goad (2008) or IGD Database (2006)  
<sup>2</sup> – Net floorspace based on WYG judgement and 2003 West Cumbria Retail Review  
<sup>3</sup> – Net convenience floorspace derived from Verdict Grocery Retailers (2008) where available  
<sup>4</sup> – Sales densities derived from Verdict (2008) or Mintel Retail Rankings (2008) for national multiples and WYG assessment for local shops  
<sup>5</sup> – Survey derived turnover derived from West Cumbria Household Survey (2008)  
<sup>^</sup> – Facilities in Silloth and Aspatria together with 'Local Shops' assumed to be trading in equilibrium  
Takes account tourism expenditure of £5.0m  
May not add up due to rounding  
At 2005 prices

12.24 Based on comparing the survey derived comparison goods turnover against expected levels it is evident that collectively existing facilities are trading broadly at expected levels (£127.98m against £126.27m) in 2009.

12.25 By rolling forward Copeland Borough's market share, it is possible to examine the likely level of additional comparison goods floorspace required in order to maintain current market share. It is forecast that between 2009 and 2023, an additional £84.40m will be available for comparison goods floorspace in the Borough.

12.26 Table 12.5 below estimates the likely expenditure that will be available for new comparison goods floorspace within Copeland Borough by 2023 based on current market shares.

**Table 12.5: Estimated Available Comparison Goods Expenditure (Scenario 1)**

Year	Turnover - £m <sup>1</sup>	Expenditure available - £m <sup>2</sup>	Surplus Expenditure - £m
2009	127.98	126.27	-1.71
2014	137.87	148.39	10.52
2019	148.53	179.67	31.14
2023	157.64	210.67	53.03

Notes: <sup>1</sup> – Allows for increased turnover efficiency of +1.5% per annum  
<sup>2</sup> – Assumes constant market share at 21.3% within the Study Area and tourism expenditure of £5.0m growing at 2.0% per annum  
 Allows for growth in SFT for comparison goods expenditure  
 At 2005 prices

12.27 Table 12.5 indicates that in the short-term (2014) there will be some £10.52m of comparison goods expenditure available for new retail floorspace based on current market share. This level of expenditure is identified to increase in the longer-term (2023) to £53.03m. This level of capacity will be available for all comparison goods within the whole Borough.

12.28 Although dependent upon the end-operator (e.g. retail warehousing, national multiples, independents, etc.) by assuming an average comparison goods sales density of approximately £4,500 per sq m, this equates to a potential floorspace requirement of 2,200 sq m (net) of additional comparison goods floorspace by 2014 (or 3,140 sq m gross<sup>7</sup>). This requirement is identified to increase to nearly 5,990 sq m (net) by 2019 and to more than 9,600 sq m (net) by 2023. However, capacity in the long term should be treated with caution.

12.29 In terms of bulky goods, the Household Survey identifies that existing facilities in Copeland Borough achieve a market share of **21.8%** (or £38.44m) of bulky goods expenditure generated within the defined Study Area. In addition, existing facilities are identified to attract some £1.57m of bulky comparison goods floorspace.

12.30 A breakdown of the market share achieved by existing facilities in the Borough on a zone-by-zone basis is contained at Table 12.6.

<sup>7</sup> Assumes net floorspace is 70% gross



**Table 12.6: Breakdown of Market Shares of Copeland Borough – Bulky Goods**

Goods	Survey Zone							
	Wigton	Maryport	Cockermouth	Keswick	Workington	Whitehaven	Copeland Central	Millom
Electrical	0.0%	0.0%	2.2%	1.2%	1.3%	47.3%	47.2%	21.1%
DIY	1.1%	0.0%	0.0%	0.0%	0.7%	62.0%	61.5%	39.3%
Furniture	0.0%	6.0%	1.3%	1.4%	2.5%	59.1%	53.0%	29.9%
<b>TOTAL</b>	<b>0.3%</b>	<b>2.1%</b>	<b>1.3%</b>	<b>1.0%</b>	<b>1.6%</b>	<b>55.3%</b>	<b>53.0%</b>	<b>29.5%</b>
								<b>21.8%</b>

Notes: West Cumbria Household Survey (2008) and WYG analysis

- 12.31 Within the Study Area existing facilities within Copeland Borough are identified to attract between 18% of Electrical Goods expenditure generated in the Study Area and 25% of DIY Goods expenditure generated in the Study Area. The highest market shares are identified to be within Zone 6 ('Whitehaven') and Zone 7 ('Copeland Central') where more than half of bulky goods expenditure generated in these zones is attracted to facilities in the Borough. The market shares lower significantly in zones 1 through to 5 (less than 3% market share achieved in each), which is reflective of these zones falling within the natural catchment of facilities in Allerdale rather than Copeland.
- 12.32 Table 12.7 provides a breakdown of capacity for additional bulky goods floorspace within the Borough based on rolling forward current market share (21.8%).

**Table 12.7: Estimated Available Comparison Goods Expenditure – Bulky Goods**

Year	Turnover - £m <sup>1</sup>	Expenditure available - £m <sup>2</sup>	Surplus Expenditure - £m
2009	40.01	40.01	-
2014	43.10	47.28	4.18
2019	46.43	57.26	10.83
2023	49.28	67.15	17.87

Notes: <sup>1</sup> – Allows for increased turnover efficiency of +1.5% per annum  
<sup>2</sup> – Assumes constant market share at 21.8% within the Study Area  
 Allows for tourism expenditure of £1.57m that is forecast to grow at +2.0% per annum  
 Allows for growth in SFT for comparison goods expenditure  
 At 2005 prices

- 12.33 Based on current market shares it is estimated that there is bulky goods capacity within the Borough of approximately £4.18m in the short-term (i.e. 2014) increasing to £10.83m by 2019 and to £17.87m by 2023. By applying a typical sales density of leading 'bulky goods' retailers of approximately £3,000 per sq m, by 2014 this capacity equates to a requirement of up to 1,295 sq m (net) of floorspace within the Borough to maintain current market share. This is anticipated to increase to more than 4,835 sq m (net) by 2023. Again, this level of capacity is dependent upon the end-operator and does not take into account outstanding commitments.
- 12.34 In terms of non-bulky goods, the Household Survey identifies that existing facilities in the Borough achieve an overall market share of **21.1%** (or £82.83m) within the defined Study Area. This market share is identified to be comparable to that achieved for bulky goods (21.8%). Table 12.8 provides a

breakdown of market shares achieved by existing facilities in the Borough for the variety of non-bulky goods identified on a zone-by-zone basis.

**Table 12.8: Breakdown of Market Shares of Copeland Borough – Non Bulky Goods**

Goods	Survey Zone								Total
	Wigton	Maryport	Cockermouth	Keswick	Workington	Whitehaven	Copeland Central	Millom	
Clothes	0.0%	1.0%	1.1%	0.0%	1.1%	48.8%	36.2%	3.1%	<b>16.3%</b>
Books, etc.	0.0%	1.3%	0.0%	0.0%	2.1%	58.6%	44.0%	4.2%	<b>18.8%</b>
H'Hold Goods	1.2%	0.0%	1.4%	0.0%	2.1%	56.5%	47.9%	14.1%	<b>20.2%</b>
Toys, etc.	0.0%	0.0%	1.9%	0.0%	2.0%	57.8%	49.0%	9.9%	<b>20.2%</b>
Chemist	0.0%	1.1%	0.0%	0.0%	1.7%	87.7%	87.2%	56.6%	<b>34.4%</b>
<b>TOTAL</b>	<b>0.2%</b>	<b>0.7%</b>	<b>1.0%</b>	<b>0.0%</b>	<b>1.6%</b>	<b>59.4%</b>	<b>50.4%</b>	<b>15.8%</b>	<b>21.1%</b>

Notes: West Cumbria Household Survey (2008) and WYG analysis

- 12.35 Table 12.8 indicates that in Copeland Borough existing facilities attract between 16% for 'Clothes & footwear.' to 34% for 'Chemist Goods'. Again, the highest level of retention is identified within Zone 6 ('Whitehaven') and Zone 7 ('Copeland Central') where existing facilities in the Borough are identified to retain more than 50% of expenditure generated in these zones. It is notable that facilities within Copeland Borough appear to have a lesser influence on shopping patterns than that identified by facilities in Allerdale (in particular Workington). Indeed, unlike facilities in Allerdale, which attract some shopping trips from each of the eight zones comprising the Study Area (including Zone 8 'Millom') facilities in Copeland attract no or very few shopping trips from some of the zones that comprise the defined Study Area.
- 12.36 In terms of the identified outflow of expenditure from zones 6,7 and 8, which equates to the core catchment of facilities in Copeland, the influence of Workington (particularly in Zone 6 and 7) and facilities in Barrow-in-Furness from Zone 8 ('Millom') have the greatest influence on shopping patterns in this narrower area. Within this area existing facilities in Copeland achieve a market share of 49.7%.
- 12.37 Table 12.9 provides a breakdown of capacity for additional bulky goods floorspace within the Borough based on rolling forward current market share (21.1%) based on growth in expenditure alone.

**Table 12.9: Estimated Available Comparison Goods Expenditure – Non Bulky Goods**

Year	Turnover - £m <sup>1</sup>	Expenditure available - £m <sup>2</sup>	Surplus Expenditure - £m
2009	86.26	86.26	-
2014	92.93	101.22	8.29
2019	100.11	122.56	22.45
2023	106.25	143.70	37.45

Notes: <sup>1</sup> – Allows for increased turnover efficiency of +1.5% per annum  
<sup>2</sup> – Assumes constant market share at 21.1% within the Study Area  
 Allows for tourism expenditure of £3.43m that is forecast to grow at +2.0% per annum  
 Allows for growth in SFT for comparison goods expenditure  
 At 2005 prices



- 12.38 Based on current market share, in the short-term there is demonstrable capacity of £8.29m available to support additional non-bulky comparison goods floorspace in the Borough. This is identified to increase to £22.45m by 2019 and to £37.45m by 2023. By applying an average non-bulky goods turnover of £5,000 per sq m (although this sales density is very much dependent upon the end operator) this equates to floorspace requirement of 1,540 sq m (net) by 2014 increasing to 6,080 sq m (net) by 2023.

### Outstanding Commitments

- 12.39 As previously highlighted there is an extant permission to replace the existing Tesco store at North Shore. The uplift in net comparison goods floorspace of the replacement store is identified to be 1,211 sq m (1,666 sq m proposed – 455 sq m existing). This additional comparison goods floorspace is identified to have a potential comparison goods turnover of £12.69m in 2014, increasing to £13.67m by 2019 and to £14.50m by 2023. Consequently, this commitment will meet all the identified capacity (£10.66m) identified in the Borough by 2014 and more than 40% of the identified capacity by 2018.

### Qualitative Need

- 12.40 In the non-bulky goods sector facilities in the Borough attract some 21.1% of expenditure generated by residents within the Study Area. Whilst this increases to almost 50% within the narrower core catchment of Copeland (zones 6, 7 and 8) it is evident that significant outflow is being lost to competing centres elsewhere, namely Workington and Barrow-in-Furness. Whilst some outflow of expenditure is expected given the strength and proximity of competing provision, there appears a qualitative need to improve and enhance the quality of the comparison goods offer within the Borough. However, it is important that any improvement in the retail offer is appropriate in scale to the centre and catchment that it serves. Furthermore, any development should contribute to improving the vitality of established centres and help reduce the need for local residents to travel elsewhere.
- 12.41 In terms of comparison goods retailing, facilities in the Borough achieve a comparable market share for bulky goods (21.8%) to that identified for non-bulky goods (21.1%) within the Study Area. However, even within the survey zones that best reflects Copeland Borough (i.e. zones 6, 7 and 8) the market share of existing facilities increases to only 31.6%. Accordingly, there is a significant level of outflow of expenditure from the Copeland area to facilities elsewhere. Again, this outflow is directed primarily to facilities in Workington and at Barrow-in-Furness.

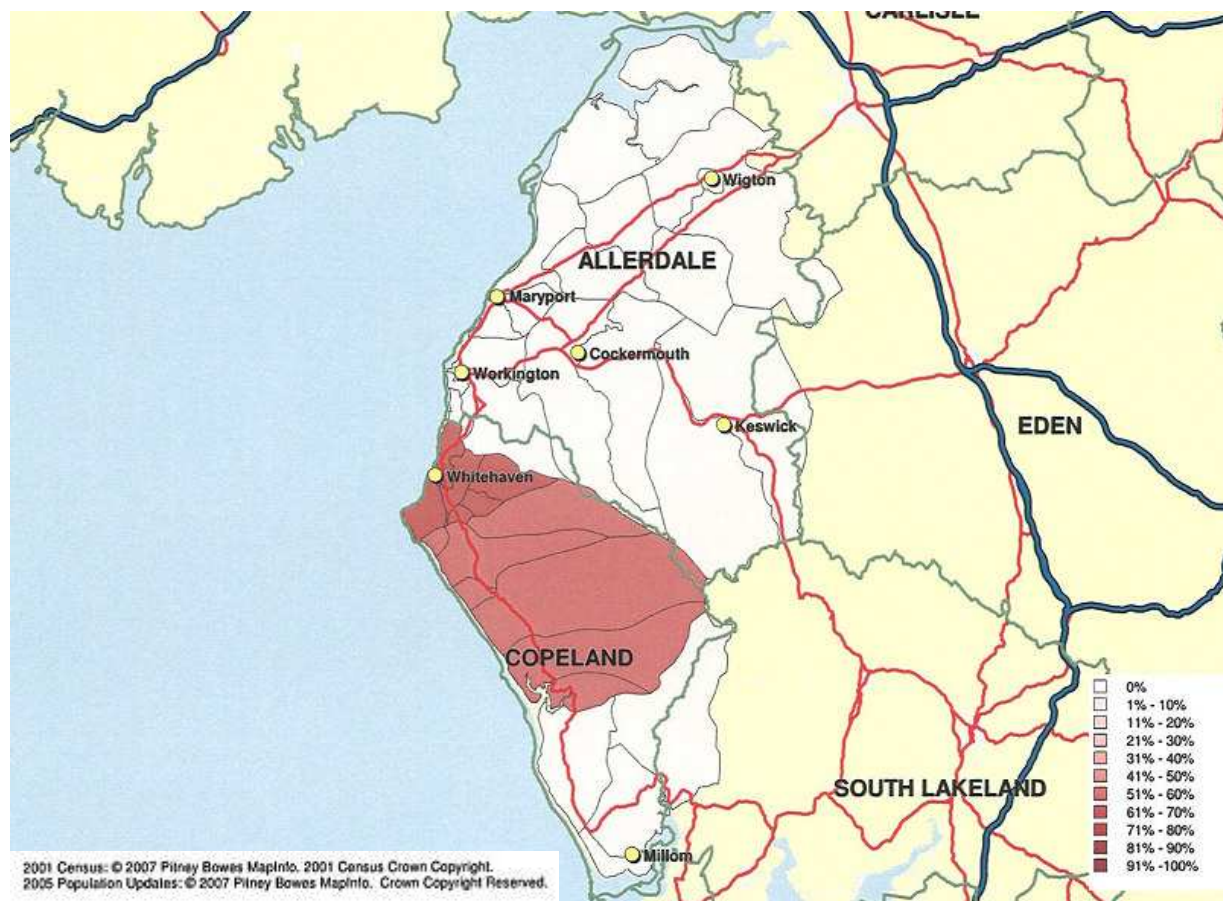
- 12.42 Given that there is significant bulky goods expenditure being directed to facilities outside Copeland Borough (including to facilities outside the West Cumbria Sub-Region) there appears some scope to improve the bulky goods retail offer in Copeland.

## Role of Existing Centres

### *Whitehaven*

- 12.43 Whitehaven is identified to be the second largest retail centre in the West Cumbria Sub-Region based on comparison goods floorspace within the town centre (as identified by Experian Goad). Analysis of the Household Survey identifies that Whitehaven Town Centre achieves a comparison goods turnover of £97.99m in 2009 from the defined Study Area. This equates to a market share of 17.2%. In addition, facilities in Whitehaven are identified to attract some £4.04m of expenditure generated through tourism. By taking into account tourism expenditure this results in an overall turnover of some £102.03m. In terms of trading performance our assessment identifies Whitehaven Town Centre to be trading broadly at expected level (£102.20m against an expected turnover of £100.89m).
- 12.44 By taking into account out-of-centre provision such as Bridges Retail Park, this comparison goods turnover increases to £105.58m within the Study Area. This increased turnover equates to an overall market share of **18.5%**. Figure 12.3 and Table 12.10 illustrate the extent of the catchment of all comparison goods facilities within Whitehaven (both in centre and out-of-centre).

**Figure 12.3: Penetration Levels of Existing Comparison Goods Facilities in Whitehaven**



**Table 12.10: Market Share Analysis – 2008 (Comparison Goods)**

Zone	Wigton	Maryport	Cockermouth	Keswick	Workington	Whitehaven	Copeland Central	Millom
Whitehaven	0.2%	1.0%	1.1%	0.3%	1.5%	<b>56.8%</b>	41.4%	1.4%

Notes: derived from West Cumbria Household Survey (2008)

- 12.45 By rolling forward current market share our assessment (Table 12.11) identifies capacity by 2014 of some £11.15m. This capacity is identified to increase to £29.23m by 2019 and to £48.36m by 2023. Based on applying an average sales density of £4,500 per sq m (and allowing for increases in productivity at +1.5% per annum) this capacity equates to a requirement for approximately 2,300 sq m (net) in 2014. This increases to 5,600 sq m (net) in 2019 and to 8,725 sq m (net) by 2023. It is notable that the identified capacity by 2014 will be met by the extant permission to replace the existing Tesco store, which is identified to result in an additional comparison goods turnover of £12.69m by 2014. This results in residual capacity in 2018 of £15.56m increasing to £33.85m by 2023, which equates to a potential floorspace requirement of 6,105 sq m (net) in 2023.

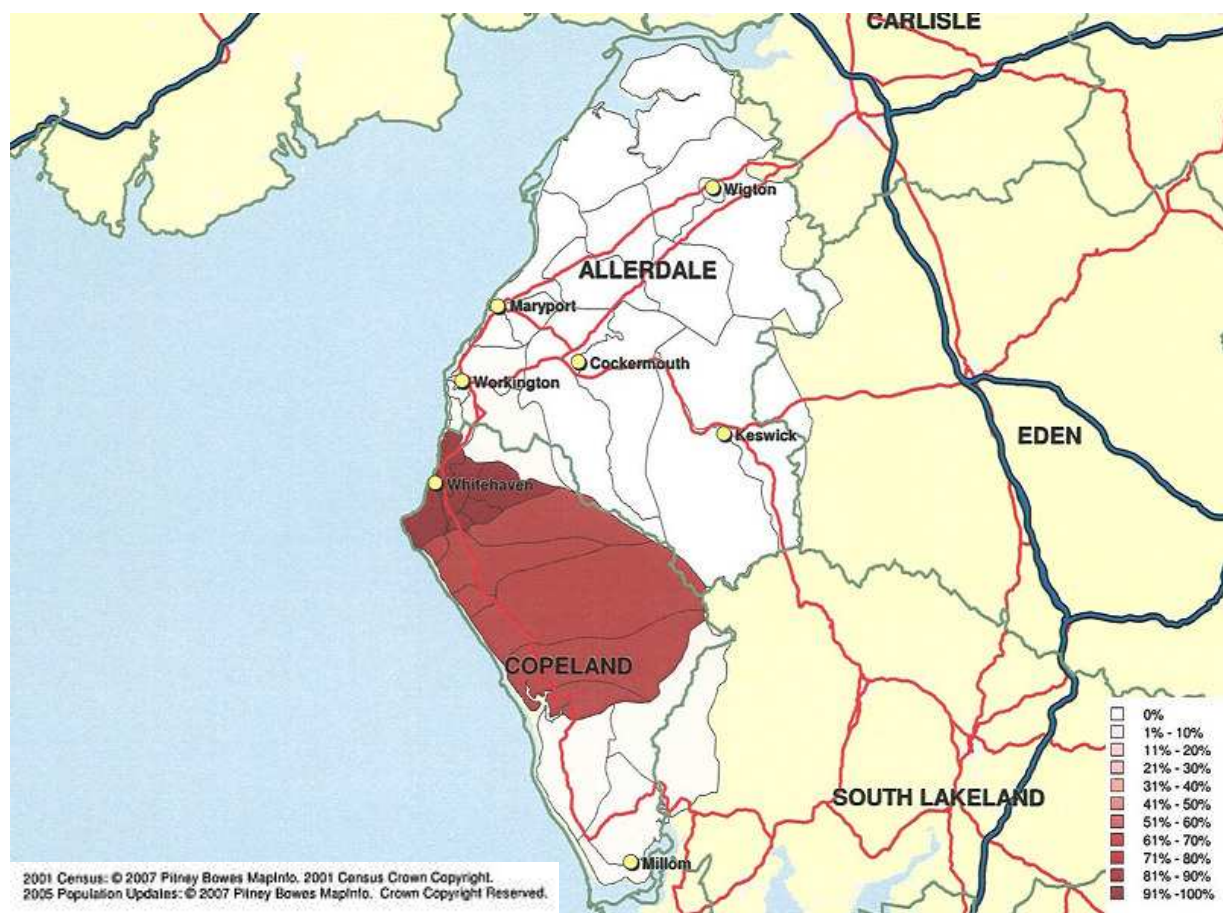
**Table 12.11: Estimated Available Comparison Goods Expenditure – Whitehaven (including growth directed to out-of-centre provision)**

Year	Turnover - £m <sup>1</sup>	Expenditure available - £m <sup>2</sup>	Surplus Expenditure - £m
2009	109.30	109.94	0.64
2014	117.75	128.90	11.15
2019	126.85	156.08	29.23
2023	134.63	182.99	48.36

Notes: <sup>1</sup> – Allows for increased turnover efficiency of +1.5% per annum  
<sup>2</sup> – Assumes constant market share at 18.5% within the Study Area  
 Allows for tourism expenditure of £4.36m that is forecast to grow at +2.0% per annum  
 Allows for growth in SFT for comparison goods expenditure  
 At 2005 prices

12.46 In terms of convenience goods shopping, existing facilities are identified to achieve a convenience goods turnover of £87.11m in 2009 from within the Study Area (including in-centre and out-of-centre facilities). This convenience goods turnover equates to a current market share of **29.0%**. Facilities in Whitehaven are identified to achieve a main food shopping catchment of approximately 52,975 people within the Study Area. In addition, facilities in Whitehaven are identified to attract some £1.72m of convenience goods expenditure generated by tourism, resulting in an overall turnover of £88.83m. Figure 12.4 and Table 12.12 illustrate the extent of convenience goods shopping facilities in Whitehaven.

**Figure 12.4: Penetration Levels of Existing Convenience Goods Facilities in Whitehaven**



**Table 12.12: Market Share Analysis – 2008 (Convenience Goods)**

Zone	Wigton	Maryport	Cockermouth	Keswick	Workington	Whitehaven	Copeland Central	Millom
Whitehaven	0.0%	0.0%	0.0%	0.0%	1.0%	89.2%	68.7%	2.8%

Notes: derived from West Cumbria Household Survey (2008)

- 12.47 Our assessment of the trading performance of convenience goods floorspace within Whitehaven (Table 12.1) identifies that existing floorspace is identified to be overtrading by 47% (or £28m). The expected turnover is identified to be £60.45m, which compares to a survey derived turnover of £88.83m. The main levels of overtrading are identified to be the two large-format stores (Tesco and Morrisons).
- 12.48 Given this overtrading our assessment (Table 12.13) identifies immediate convenience goods capacity in Whitehaven (at current market shares) of £28.37m. This is forecast to increase to £34.89m by 2014, to £42.76m by 2019 and to £49.81m by 2023. This level of capacity equates to a potential floorspace requirement of between 2,770 sq m (net) and 5,530 sq m (net) in 2014, increasing to between 4,645 sq



m (net) and 9,290 sq m (net) by 2023. However, this is dependent upon current market share. In this respect, it is not certain what impact improved convenience goods provision in Workington may have on existing shopping patterns in the Sub-Region.

- 12.49 Also, as previously highlighted, there is an extant permission to replace the existing Tesco store at North Shore, which is identified to create an uplift in convenience goods turnover of £13.46m by 2014. By taking into account this commitment, there remains a residual capacity within Whitehaven in 2014 of some £21.43m, increasing to £35.73m by 2023. This is sufficient to support between 2,090 sq m (net) and 4,180 sq m (net) in 2014, increasing to between 3,330 sq m (net) and 6,665 sq m (net) by 2023.

**Table 12.13: Estimated Capacity for Additional Convenience Goods Facilities – Whitehaven**

Year	Turnover - £m <sup>1</sup>	Expenditure available - £m <sup>2</sup>	Surplus Expenditure - £m
2009	60.45	88.83	28.38
2014	61.98	96.87	34.89
2019	63.54	106.30	42.76
2023	64.82	114.63	49.81

Notes: <sup>1</sup> – Allows for increased turnover efficiency of +0.5% per annum

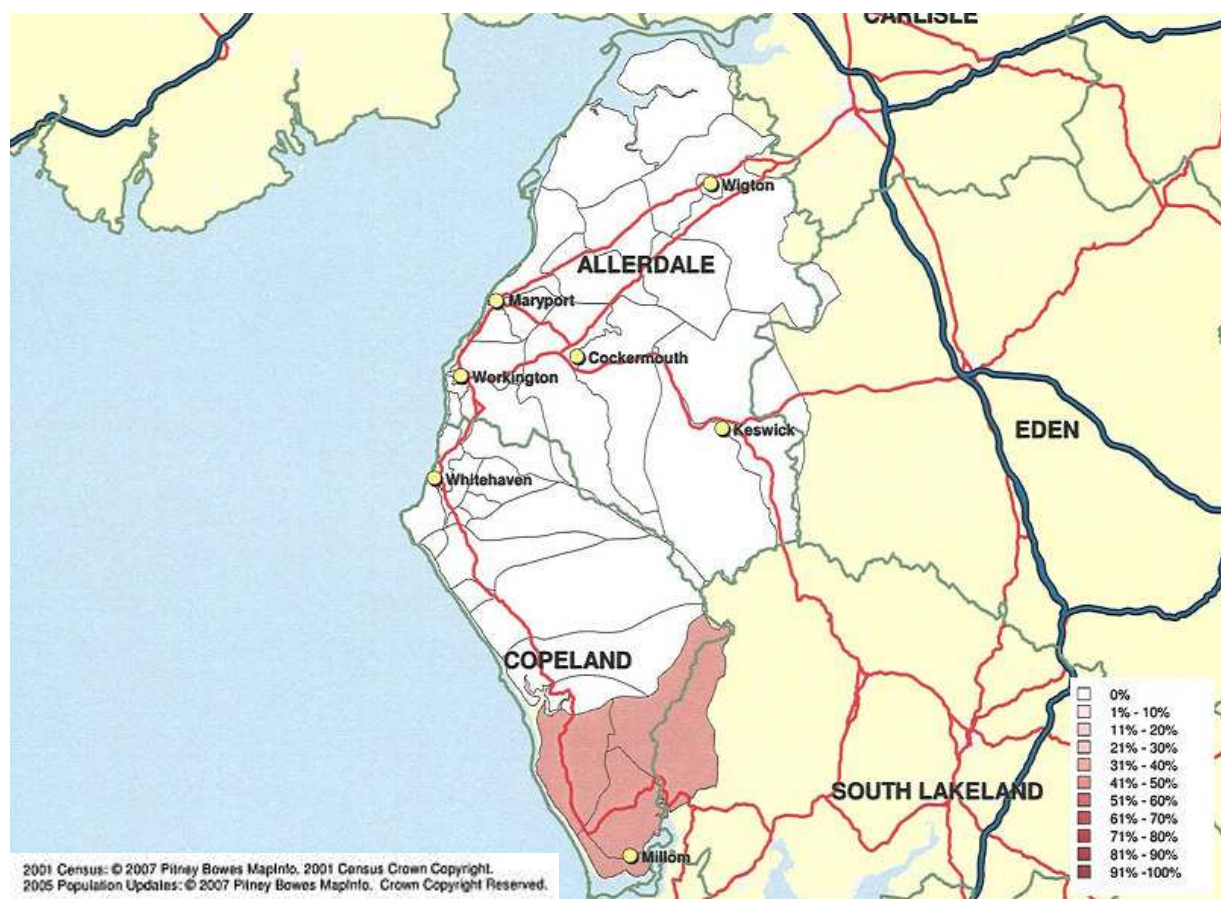
<sup>2</sup> – Assumes constant market share at 29.0% within the Study Area and tourism expenditure of £1.72m growing at 0.4% per annum  
At 2005 prices

### Millom

- 12.50 The retail offer in Millom is much more limited when compared to Whitehaven. Existing retail facilities are identified to achieve a convenience goods turnover of only £7.46m in 2009, equating to a market share of **2.5%**. Existing facilities in Millom are identified to achieve a main food shopping catchment in the Study Area of only 3,100 people. The convenience goods offer of Millom is dominated by the Somerfield store on Lapstone Road, which attracts 85% of convenience goods expenditure currently directed to facilities in Millom. In addition, facilities in Millom are identified to attract some £0.16m of expenditure generated through tourism, resulting in an overall turnover of some £7.62m. Figure 12.5 and Table 12.14 illustrate the market share achieved by facilities in Millom on a zone-by-zone basis and highlights the limited trade draw of Millom from the wider Study Area.



**Figure 12.5: Penetration Levels of Existing Convenience Goods Facilities in Millom**



**Table 12.14: Market Share Analysis – 2008 (Convenience Goods)**

Zone	Wigton	Maryport	Cockermouth	Keswick	Workington	Whitehaven	Copeland Central	Millom
Millom	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	<b>34.9%</b>

Notes: derived from West Cumbria Household Survey (2008)

12.51 As outlined at Table 12.1, analysis of the Household Survey results suggests that existing convenience goods facilities in Millom are trading below expected level (by 10%, or £0.82m). Given this undertrading there is considered to be limited scope for additional convenience goods floorspace based on current market share. However, it is notable that within Zone 8 ('Millom') over half (52%) of main food shopping trips undertaken in this zone are directed to facilities in Barrow, most notably to the Asda store at Walney Road (29%). Given this, there may be some scope to increase Millom's market share in the future through appropriate provision.

- 12.52 With regard to the comparison goods sector, existing facilities in Millom are identified to achieve a turnover of £7.70m. This equates to a market share of **1.4%** within the defined Study Area. Table 12.15 illustrates the market share achieved by existing facilities within Millom from the defined Study Area.

**Table 12.15: Market Share Analysis – 2008 (Comparison Goods)**

Zone	Wigton	Maryport	Cockermouth	Keswick	Workington	Whitehaven	Copeland Central	Millom
Millom	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	<b>18.6%</b>

Notes: derived from West Cumbria Household Survey (2008)

- 12.53 In addition, facilities in Millom are identified to attract some £0.32m of comparison goods expenditure generated through tourism, resulting in an overall comparison goods turnover of £8.02m in 2009. The analysis outlined at Table 12.4 identifies that existing comparison goods floorspace is undertrading.
- 12.54 Given this undertrading based on current market shares there is no clear demonstrable need for additional floorspace until 2023 and then the level of capacity is very limited (Table 12.16).

**Table 12.16: Estimated Available Comparison Goods Expenditure – Millom**

Year	Turnover - £m <sup>1</sup>	Expenditure available - £m <sup>2</sup>	Surplus Expenditure - £m
2009	10.95	8.02	-2.93
2014	11.80	9.74	-2.06
2019	12.71	11.80	-0.91
2023	13.49	13.83	0.34

Notes: <sup>1</sup> – Allows for increased turnover efficiency of +1.5% per annum  
<sup>2</sup> – Assumes constant market share at 1.4% within the Study Area and tourism expenditure of £0.32m growing at 2.0% per annum  
 Allows for growth in SFT for comparison goods expenditure  
 At 2005 prices

### *Cleator Moor*

- 12.55 As with Millom, existing retail provision within Cleator Moor is limited achieving a convenience goods turnover of £4.17m in 2009, which equates to a market share of only **1.4%** within the defined Study Area. The convenience goods offer is dominated by the Co-op store on Leconfield Street, which attracts 77% of convenience goods expenditure directed to facilities in Cleator Moor. In addition, existing facilities are identified to attract a limited amount of tourism expenditure (£0.16m). Table 12.17 illustrates the limited catchment of existing convenience goods facilities within Cleator Moor.

**Table 12.17: Market Share Analysis – 2008 (Convenience Goods)**

Zone	Wigton	Maryport	Cockermouth	Keswick	Workington	Whitehaven	Copeland Central	Millom
Cleator Moor	0.0%	0.0%	0.0%	0.0%	0.0%	<b>5.5%</b>	0.6%	0.0%

Notes: derived from West Cumbria Household Survey (2008)

- 12.56 In addition to the limited market share, existing convenience goods floorspace is identified to be trading below expected level (by 36%). Given this undertrading, our analysis identifies that there is no clear need for additional convenience goods retail floorspace within Cleator Moor based on current market shares.
- 12.57 The comparison goods offer of Cleator Moor is also identified to be limited, achieving a turnover of only £2.22m, which equates to a market share of only **0.4%** within the Study Area. Table 12.18 illustrates the market share achieved by existing comparison goods facilities in Cleator Moor on a zonal basis.

**Table 12.18: Market Share Analysis – 2008 (Comparison Goods)**

Zone	Wigton	Maryport	Cockermouth	Keswick	Workington	Whitehaven	Copeland Central	Millom
Cleator Moor	0.0%	0.0%	0.0%	0.0%	0.1%	<b>1.1%</b>	<b>1.1%</b>	0.0%

Notes: derived from West Cumbria Household Survey (2008)

- 12.58 By allowing for some tourism expenditure (identified to be only £0.09m) the overall turnover of the comparison goods offer of Cleator Moor increases to £2.31m in 2009. Our assessment (Table 12.4) identifies that existing comparison goods floorspace is trading some 38% (or £1.41m) below expected levels. Given the limited current role of Cleator Moor as a comparison goods retail destination together with the undertrading of existing floorspace there appears no clear demonstrable need for additional comparison goods floorspace based on current market shares through to 2023.

### *Egremont*

- 12.59 The retail offer of Egremont is also limited achieving a convenience goods turnover of £5.81m, which equates to a market share of **1.9%** within the Study Area. Existing convenience goods facilities in Egremont are identified to achieve a main food shopping catchment within the Study Area of approximately 3,210 people in 2009. In addition, some £0.12m of convenience goods expenditure is identified to be generated through tourism, resulting in an increased turnover of £5.93m in 2009. Table 12.19 illustrates the market shares achieved by facilities in Egremont for all zones within the Study Area.

**Table 12.19: Market Share Analysis – 2008 (Convenience Goods)**

Zone	Wigton	Maryport	Cockermouth	Keswick	Workington	Whitehaven	Copeland Central	Millom
Egremont	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	<b>18.5%</b>	0.0%

Notes: derived from West Cumbria Household Survey (2008)

- 12.60 Overall, existing convenience goods floorspace is identified to be marginally overtrading by 9% (or £0.51m) in 2009. Given this overtrading together with the forecast growth in convenience goods expenditure, at 2014 there is identified to be limited capacity of £0.79m by 2014, which increases further to £1.71m by 2023. This level of capacity would support a limited increase in the convenience goods offer of Egremont (c. 320 sq m net by 2023).

**Table 12.20: Estimated Capacity for Additional Convenience Goods Facilities – Egremont**

Year	Turnover - £m <sup>1</sup>	Expenditure available - £m <sup>2</sup>	Surplus Expenditure - £m
2009	5.42	5.93	0.51
2014	5.56	6.35	0.79
2019	5.70	6.97	1.27
2023	5.81	7.52	1.71

Notes: <sup>1</sup> – Allows for increased turnover efficiency of +0.5% per annum

<sup>2</sup> – Assumes constant market share at 1.9% within the Study Area and tourism expenditure of £0.12m growing at 0.4% per annum  
At 2005 prices

- 12.61 Existing facilities in Egremont are identified to achieve a comparison goods turnover of £4.32m, which equates to a market share of only **0.8%** within the Study Area. By allowing for tourism expenditure (of £0.18m) this turnover increases to £4.50m in 2009. Table 12.21 illustrates the limited market shares achieved by comparison goods facilities in Egremont within the defined Study Area.

**Table 12.21: Market Share Analysis – 2008 (Comparison Goods)**

Zone	Wigton	Maryport	Cockermouth	Keswick	Workington	Whitehaven	Copeland Central	Millom
Egremont	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	<b>6.5%</b>	0.0%

Notes: derived from West Cumbria Household Survey (2008)

- 12.62 Our assessment of the trading performance of existing comparison goods floorspace in Egremont (Table 12.4) identifies that existing facilities are trading above expected levels (by 81%, or £2m). This would suggest that Egremont is performing relatively strongly as a comparison goods destination, albeit attracting shoppers from only a limited catchment, drawing all its trade from Zone 8 ('Millom'), which is not surprising.
- 12.63 Despite the limited market share achieved by facilities in Egremont, given the overtrading of existing floorspace there is an immediate capacity for some £2.01m available for additional comparison goods floorspace at current market share. This is forecast to increase to £2.90m by 2014, to £3.86m by 2019 and to £4.85m by 2023 – as illustrated by Table 12.22. This level of capacity could support a modest expansion of the retail offer of Egremont of c. 1,075 sq m (net) in 2014, increasing to 1,575 sq m (net) by 2023 based on applying an average sales density of £2,500 per sq m and allowing for increased productivity of +1.5% per annum.

**Table 12.22: Estimated Available Comparison Goods Expenditure – Egremont**

Year	Turnover - £m <sup>1</sup>	Expenditure available - £m <sup>2</sup>	Surplus Expenditure - £m
2009	2.49	4.50	2.01
2014	2.68	5.58	2.90
2019	2.89	6.75	3.86
2023	3.07	7.92	4.85

Notes: <sup>1</sup> – Allows for increased turnover efficiency of +1.5% per annum  
<sup>2</sup> – Assumes constant market share at 0.8% within the Study Area and tourism expenditure of £0.19m growing at 2.0% per annum  
 Allows for growth in SFT for comparison goods expenditure  
 At 2005 prices

12.64 In addition it is also possible to analyse further the findings of the Household Survey results to assess shopping patterns in more detail within the Copeland Central Zone where Egremont is located in order to identify whether there are specific patterns within this zone. In this respect, unsurprisingly facilities in Egremont draw most trade from the immediate surrounding area (post code sector CA22 2), attracting some 90% of main food shopping trips directed to facilities in Egremont from this area. A similar pattern is identified for 'top-up' shopping although facilities in Egremont (most notably the Co-op Foodstore on Main Street) do also draw some trade from elsewhere within the Copeland Central Zone (i.e. CA20 1 and CA21 2). Similar patterns are identified for comparison goods shopping, although as previously highlighted the market share achieved by facilities is lower than that identified for convenience goods shopping. The findings of the Household Survey suggests that the trade draw attracted to facilities in Egremont is predominantly derived from the southern part of the Copeland Central Zone (post code sectors CA21 2, CA22 2 and CA20 1) whereas nearby Cleator Moor draws most of its trade from the northern part of the Copeland Central Zone together with the adjoining Whitehaven Zone.

### Retail Role of Other Centres in Copeland

12.65 In addition to the main centres in the Borough outlined above a number of smaller centres including Seascale and Gosforth that also serve an important role in meeting the day-to-day needs of the local catchment. As would be expected these centres do not provide the range of retail provision currently available in Whitehaven or other centres such as Egremont and Millom.

#### Seascale

12.66 As with a number of smaller centres within the Borough, the retail offer of Seascale is limited (both for convenience and comparison goods shopping) comprising predominantly local independent shops. Within the convenience goods sector, existing facilities are identified to achieve a convenience goods turnover of £1.06m of expenditure generated in the Study Area. This equates to a market share of less than 0.4% - the lowest of all centres within Copeland. Given this low market share, existing facilities within Seascale are identified to attract a main food shopping catchment population of only 208 people

within the Study Area. Given this limited market share, there is limited scope for additional convenience goods floorspace in Aspatria. Table 12.23 highlights the limited market share achieved by existing facilities in Seascale on a zone-by-zone basis.

**Table 12.23: Market Share Analysis – 2008 (Convenience Goods)**

Zone	Wigton	Maryport	Cockermouth	Keswick	Workington	Whitehaven	Copeland Central	Millom
Seascale	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%	3.4%	0.0%

Notes: derived from West Cumbria Household Survey (2008)

- 12.67 Similarly, within the comparison goods sector existing facilities are identified to achieve a turnover of only £1.46m, which equates to a market share of only **0.3%**. Again, given this limited market share there no clear need for significant retail development in Seascale. Table 12.24 illustrates the market share achieved by facilities in Seascale within the Study Area.

**Table 12.24: Market Share Analysis – 2008 (Comparison Goods)**

Zone	Wigton	Maryport	Cockermouth	Keswick	Workington	Whitehaven	Copeland Central	Millom
Seascale	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%	0.0%

Notes: derived from West Cumbria Household Survey (2008)

### Gosforth

- 12.68 Given the very limited role as a retail destination Gosforth was not identified by the Household Survey results as a retail destination for local residents. This does not mean that existing retail facilities within Gosforth together with other smaller centres and rural shops do not serve some of the day-to-day needs of the local community.
- 12.69 Despite their limited roles, the Council should seek to ensure that these centres are maintained and continue to serve an important role for the local community, particularly for those with limited accessibility, there is no real need to significantly expand their retail offer.

### Summary

- 12.70 Facilities within the Borough are identified to serve an important convenience and comparison goods shopping role. The convenience goods offer is dominated by the Morrisons store at Flatt Walks and the Tesco store at North Shore, both of which are located in Whitehaven, which provide popular main food shopping destinations. These stores are supplemented by a range of smaller stores and independent traders (including farm shops) elsewhere in the Borough that also contribute to the retail offer of Copeland.





- 12.71 The comparison goods offer within the Borough is focused in Whitehaven, with other centres within the Borough such as Egremont and Millom serving a more limited retail role and not offering the range of goods available in Whitehaven. However, given the rural location of a number of these smaller centres they serve an important role in meeting some of the day-to-day needs of the local residents without the need to travel elsewhere. Consequently, the continued vitality and viability of these centres should be supported. It is evident that the attraction of facilities in Workington (within the northern part of the Borough) and facilities in Barrow (in the southern part of the Borough) have a significant impact on comparison goods shopping within Copeland. This not surprising given the strength of Workington as a comparison goods destination when compared to Whitehaven and the proximity of facilities in Barrow, particularly for residents living in the Millom area of the Borough.
- 12.72 Notwithstanding the evident 'leakage' of expenditure currently being directed to facilities outside the Borough, based on current market shares there is identified to be scope for both further convenience and comparison goods floorspace.

## 13.0 PRINCIPAL FINDINGS AND RECOMMENDATIONS

### Introduction

- 13.01 This section of the report seeks to summarise the evidence gathered as part of this study. As can be seen from the analysis undertaken there is anticipated to be significant capacity across the Sub-Region for additional retail floorspace through to the year 2023. In addition, the analysis undertaken identifies that there is a qualitative need within parts of the Sub-Region to enhance and improve existing retail provision in order to provide more sustainable shopping patterns.
- 13.02 With this in mind, it is important that Allerdale and Copeland Councils are pro-active in seeking to accommodate the needs identified whilst also ensuring that the vitality and viability of existing centres within the Sub-Region is maintained and enhanced. This section therefore summarises the key findings of the assessments of need and provides recommendations on the most appropriate strategy for incorporation within Local Development Frameworks.

### Short term Economic Conditions

- 13.03 The plight of the retail and leisure industry is seldom out of the headline news at present and the short term prospects for growth appear to be extremely limited. The difficulty in forecasting potential growth over the next 14 years is that all too often the key focus is on the short term with little regard to the likely demand that will be generated when the economy recovers.
- 13.04 Recent evidence has shown that significant growth in retail expenditure can be achieved when the market is particularly strong which helps 'offset' and short term decline that occurs during recessionary periods. Therefore, year on year growth is averaged out over the longer term as there is more certainty as to what the overall demand for retail facilities might be.
- 13.05 As highlighted in this report, the forecasts that have recently been published at the national level do not fully reflect the true impact of the 'credit crunch' as they were prepared in September 2008 when the United Kingdom was only just entering the current recession that the country is now in. However, it must be recognised that whilst the short term prospects for economic growth may be very uncertain this evidence base report seeks to provide advice on the need for retail facilities over the longer term through to 2023.



- 13.06 Therefore, rather than concluding that there is unlikely to be any need for future retail and leisure development in the key towns within West Cumbria, this study provides evidence as to when future needs may be triggered and how current commitments within the key centres will meet identified needs in the short to medium term.
- 13.07 Clearly, the issues affecting each of the centres that have been assessed as part of this study will differ considerably depending upon current performance and the ability for each centre to not only improve its performance but accommodate new development in the future where necessary.
- 13.08 One important outcome of the current economic recession is the focus on convenience goods retailing and the need to provide adequate choice and support for sustainable shopping patterns. The most recent forecasts for retail expenditure demonstrate that the amount of spend per head per annum on convenience goods is actually set to increase in the short term as consumers adjust their spending patterns in this recessionary period. By eating out less frequently and taking 'packed lunches' instead of purchasing sandwiches it is expected that more money will be spent in convenience goods stores in the future.
- 13.09 Set against an emerging policy background (Draft PPS6) which seeks to encourage competition, enhance consumer choice and ensure that in the future retail facilities are provided to meet the day to day needs of local communities it is evident that the need for future convenience goods facilities within West Cumbria will need to be addressed in the short to medium term.
- 13.10 Shorter term prospects for comparison goods development has clearly been impacted by the current recession and high profile closures of retailers such as Woolworths have resulted in uncertainty over the future health of the high street and town centres as a whole. As can be seen from the evidence gathered within this report although Workington has recently benefited from significant investment in the form of Washington Square the high number of vacancies which still remain within the scheme and that are now appearing throughout the rest of the centre suggest that the centre faces significant challenges in the short term to reverse this trend and ensure that Washington Square develops into a successful and vibrant shopping centre development at the heart of the town centre.
- 13.11 Clearly the strategy in the short term (over the next five years) must be to focus as much expenditure growth (however small) on established centres to support letting of vacant premises and offset any further closures that may occur within the next 12 months.

## Retail 'Capacity' (Quantitative Need)

### *Convenience Goods*

- 13.12 The market share achieved by all convenience goods facilities within the Sub-Region derived from the Study Area is approximately 83% in 2009. This suggests that there is limited expenditure directed to competing facilities elsewhere (c. £50m in 2009), which understandably is predominantly derived from Zone 1 –Wigton and Zone 8 – Millom, where residents are located in close proximity to the competing centres of Carlisle and Barrow-in-Furness.
- 13.13 Based on current market shares, our analysis identifies capacity in the short-term (i.e. 2014) of some £90m within the Sub-Region, increasing to £134m by 2023. This compares to outstanding commitments within Allerdale and Copeland (including the proposal for a new Tesco store at Laundry Fields at the edge of Workington Town Centre, which is still subject to a Section 106 Agreement) having a combined convenience goods turnover of approximately £40m in 2014, increasing to more than £43m by 2023.
- 13.14 Whilst outstanding commitments will meet almost half (44%) of the identified convenience goods capacity within the Sub-Region, based on current market shares there remains notable residual capacity for additional convenience goods floorspace.
- 13.15 The level of capacity identified is available for the Sub-Region as a whole (both Allerdale and Copeland Boroughs). However, as outlined in the report there is a greater need for improved provision to meet a specific need to provide more appropriate distribution of facilities and reduce overtrading of certain stores.
- 13.16 Within Allerdale Borough existing facilities are identified to achieve a market share of 48% within the Study Area and a 94% market share within zones 1 to 5 of the Study Area, which broadly equates to the administrative area of Allerdale. Based on current market shares there is identified to be capacity within the Borough as a whole of some £57m in 2014, increasing to £70m by 2019 and to £82m by 2023. This level of capacity compares to outstanding commitments (including the proposed new Tesco store at Laundry Fields) achieving a convenience goods turnover of approximately £27m in 2014. The proposal at Laundry fields will also have the positive impact of addressing the imbalance between in-centre/edge-of-centre provision and out-of-centre provision within Workington. Accordingly, our assessment identifies residual capacity of approximately £30m in 2014, increasing to £54m by 2023.

13.17 Within Copeland Borough, existing facilities retain approximately 35% of convenience goods expenditure generated in the Study Area. Within zones 6 to 8, which broadly reflects the administrative boundary of Copeland, existing facilities achieve a market share of 85%. Based on current market shares there is identified to be convenience goods capacity within the Borough as a whole of some £33m in 2014, increasing to £43m by 2019 and to £51m by 2023. The outstanding commitment to provide an enlarged replacement Tesco store in Whitehaven (uplift in convenience goods turnover of approximately £13m in 2014) will meet some of this capacity identified; there will remain residual capacity of £20m in 2014 increasing to £37m by 2023.

#### *Comparison Goods*

13.18 The market share achieved by all comparison goods facilities within the Sub-Region is identified to be approximately 65% in 2009. Again, of the identified expenditure generated in the Study Area that is directed to facilities elsewhere (c. £196m in 2009) most is derived from Zone 1 – Wigton and Zone 8 – Millom. Although almost a quarter (24%) of this expenditure is spent online, reflecting the growing popularity of this form of shopping throughout the UK.

13.19 By assuming that this market share remains constant and allowing for increases in online shopping, this assessment identifies that there will be capacity of some £55m in 2014 to support additional comparison goods floorspace. This capacity is forecast to increase to £120m by 2019 and to £188m by 2023. Existing commitments (including the proposed new Tesco store at Laundry Fields) with an estimated turnover of approximately £27m in 2014, are identified to absorb almost half (49%) of the identified capacity in the short-term (i.e. 2014) at current market share. In the longer term, there is identified to be residual capacity of approximately £91m in 2019, increasing to £157m by 2023. However, this level of capacity should be treated with caution given the ongoing downturn in the global economy and the potential impact this may have on future growth in expenditure.

13.20 In terms of capacity within Allerdale Borough, existing facilities are identified to retain 35% of comparison goods expenditure generated in the Study Area. Within zones 1 to 5, which broadly equates to the Borough boundary, existing facilities retain almost 60% of expenditure. Based on these market shares, there is identified to be capacity by 2014 of some £43m, increasing to £79m by 2019 and to £118m by 2023. Outstanding commitments within the Borough (c. £27m in 2014) will absorb much (63%) of the identified capacity in the short-term. However, by 2023, even after taking into account outstanding commitments, there is identified to be capacity of approximately £87m within the Borough assuming no change in market share.



- 13.21 Within Copeland Borough, existing facilities retain 21% of comparison goods expenditure generated in the Study Area and 50% within zones 6 to 8 of the defined Study Area. Unlike convenience goods shopping, it is notable that Workington has an influence on non-food shopping patterns within the Borough, achieving a market share of 21% within zones 6 to 8, compared to achieving only a 2% market share for convenience goods shopping.
- 13.22 Based on current market shares there is identified to be capacity of almost £11m in 2014, increasing to £31m by 2019 and to £53m by 2023. Outstanding commitments, which are identified to achieve a comparison goods turnover of almost £13m by 2014, will meet the identified need in the short-term. However, given the forecast growth in comparison goods expenditure even after taking into account outstanding commitments there is identified to be residual capacity in the Borough of £17m by 2019 and £38m by 2023 that is available to support additional comparison goods floorspace.

#### *Summary*

- 13.23 Table 13.1 provides a summary of 'capacity' (excluding outstanding commitments/proposals) for additional retail floorspace in the Sub-Region and the respective boroughs that comprise the West Cumbria Sub-Region.



**Table 13.1: Capacity for Additional Retail Floorspace within the West Cumbria Sub-Region (2009-2023)**

	Surplus Expenditure (£m)				Potential Floorspace Requirement (sq m net)			
	2009	2014	2019	2023	2009	2014	2019	2023
<b>Convenience Goods</b>								
Allerdale Borough	45.04	57.04	69.97	82.49	4,500-9,010	5,56-11,130	6,660-13,315	7,690-15,385
Workington	29.39	37.03	45.20	52.53	2,940-5,880	3,610-7,220	4,300-8,600	4,900-9,800
Cockermouth	8.93	10.96	13.32	15.44	890-1,790	1,070-2,140	1,265-2,535	1,440-2,880
Maryport	0.45	1.30	2.07	2.74	45-90	125-250	195-390	255-510
Wigton	5.99	6.92	8.18	9.30	600-1,200	675-1,350	780-1,555	865-1,735
Copeland Borough	25.64	33.37	42.74	51.15	2,565-5,130	3,255-6,510	4,065-8,130	4,770-9,540
Whitehaven	25.58	34.89	42.76	49.81	2,560-5,115	3,400-6,805	4,070-8,135	4,645-9,290
Millom	-	-	-	-	-	-	-	-
Egremont	0.51	0.79	1.27	1.71	50-100	75-155	120-240	160-320
Cleator Moor	-	-	-	-	-	-	-	-
<b>Comparison Goods</b>								
Allerdale Borough	15.32	44.27	88.55	135.11	3,064-5,105	8,220-13,700	15,260-25,435	21,935-36,560
Workington	18.43	42.56	78.98	117.14	3,685-6,140	7,900-13,180	13,610-22,685	19,020-31,700
Cockermouth	-	0.78	4.96	9.39	-	145-240	855-1,425	1,525-2,540
Maryport	-	0.15	1.74	3.46	-	25-45	300-500	560-935
Wigton	-	-	1.24	2.72	-	-	215-355	440-735
Copeland Borough	-	10.52	31.14	53.03	-	1,955-4,700	5,365-8,945	8,610-14,350
Whitehaven	0.64	11.15	29.23	48.36	130-215	2,070-3,450	5,035-8,395	7,850-13,085
Millom	-	-	-	0.34	-	-	-	55-90
Egremont	2.01	2.90	3.86	4.85	400-670	540-900	665-1,110	785-1,310
Cleator Moor	-	-	-	-	-	-	-	-

Notes: WYG (2009)  
 Floorspace requirement based on an average sales density of between £5,000 - £10,000 per sq m for convenience goods and allowing for increased productivity of +0.5% per annum  
 Floorspace requirement based on an average sales density of between £3,000 - £5,000 per sq m for comparison goods and allowing for increased productivity of +1.5% per annum  
 At 2005 prices

- 13.24 The retail capacity outlined in Table 13.1 is based on current market shares. Accordingly, should improvement in the retail offer take place within the Sub-Region/Borough this could have an impact on market shares/capacity elsewhere. For example, should an improvement in the convenience goods offer take place in Wigton to reduce the need for local residents to travel elsewhere this would have an impact on capacity for additional retail floorspace elsewhere, such as in Workington. Therefore, any application for new retail development within the Sub-Region will need to take into account commitments/proposals elsewhere, both within the Borough and within and outside the Sub-Region given the potential impact on future shopping patterns.



## Qualitative Need

### *Convenience Goods*

- 13.25 Whilst it is acknowledged that across the Sub-Region as a whole there is a reasonable provision of main food shopping destinations with limited expenditure being directed to competing facilities elsewhere, there are specific needs for improved distribution of facilities within the Sub-Region to provide more sustainable shopping patterns. Furthermore, many of the main food shopping destinations within the Sub-Region (which are focused in Cockermouth, Whitehaven and Workington) are identified by the survey evidence to be overtrading.
- 13.26 In this respect, it is considered that there is a need for improved convenience goods provision within the Borough in order to alleviate current overtrading and reduce the need of local residents to travel to facilities elsewhere. With regard to Allerdale, the proposed new Tesco store at Laundry Fields will help alleviate the overtrading of existing provision. In addition, there also appears scope to improve the provision elsewhere in the Borough including at Cockermouth to address the overtrading of the Sainsbury's store and improve consumer choice and at Maryport and Wigton to reduce the need for local residents to travel elsewhere. Similarly, within Copeland there appears a qualitative need to improve the main food shopping provision in Whitehaven given the overtrading of existing floorspace. In addition, appropriate improvements elsewhere in the Borough such as in Millom will help provide an improved distribution of facilities. Any improvement to the offer within the south of the Borough will also help reduce the need for local residents to travel elsewhere such as to facilities in Whitehaven or Barrow-in-Furness. However, any development needs to be appropriate in scale to the centre and catchment that it is intended to serve.

### *Comparison Goods*

- 13.27 Although the market share achieved by comparison goods facilities (65%) is less than that identified for convenience goods (83%) it is evident that existing facilities perform a relatively strong comparison goods shopping role. As would be expected, expenditure attracted to facilities outside the Sub-Region primarily originates from the peripheral areas, most notably in the northern (Wigton) and southern (Millom) parts of the Sub-Region, which is understandable given their proximity to Carlisle and Barrow-in-Furness respectively.
- 13.28 The survey evidence suggests that Workington is the dominant destination within the Sub-Region for comparison goods shopping. Indeed, the recent redevelopment of the town centre (Washington Square)

has had a positive impact on the vitality and viability of the centre and has resulted in a notable increase in the market share achieved by the town centre since 2003 for clothing and footwear. However, it is notable that there remains a number of prominent vacant units within the town centre that need to be occupied in order for Washington Square to be a success.

- 13.29 Whitehaven is identified to be the second most popular comparison goods destination, although its influence as a comparison goods shopping role is notably less than that identified for Workington. Indeed, the survey evidence identifies that Workington draws customers from a broader area than Whitehaven reflecting the differences in retail offer particularly in terms of 'high street' shops. Given the significant improvement that has taken place in Workington it is unlikely that Whitehaven will be able to compete directly with Workington. Therefore, WYG considers that it would be more appropriate for Whitehaven to develop a specialist retail offer that differs to that in Workington, which will contribute to the vitality and viability of the centre. In addition, where possible, the links between Whitehaven's shopping role and its tourism and leisure activity should be improved together with improvements to the public realm to help support potential combined activities.
- 13.30 Smaller centres within the Sub-Region are performing a much more limited role when compared to Workington and Whitehaven. However, there is a need to improve the retail offer within these centres in order to meet some of the day-to-day needs of the local population instead of residents travelling to nearby larger centres. Again, any development will be appropriate in scale and be reflective of the centre's position within the network of centres in the Sub-Region.
- 13.31 In relation to large-format bulky goods retailing, existing facilities within the Sub-Region are identified to attract more than 70% of expenditure generated (48% by facilities in Allerdale and 22% by facilities in Copeland), which compares to an overall market share for comparison goods of 65%. Given this, there is relatively limited bulky goods expenditure directed to facilities outside the Sub-Region (22% of expenditure generated excluding expenditure directed to online sales). Given current shopping patterns together with current commercial activity within the retail warehouse sector there appears no clear qualitative (at least in the short term) for further bulky goods retail floorspace within West Cumbria.

### Relationship of the Respective Retail Roles of Workington and Whitehaven

- 13.32 The survey evidence undertaken as part of this study has identified that Workington and Whitehaven are the dominant retail destinations in the Sub-Region. The current role of both these centres as convenience goods destinations (by including out-of-centre facilities) are very similar achieving turnovers

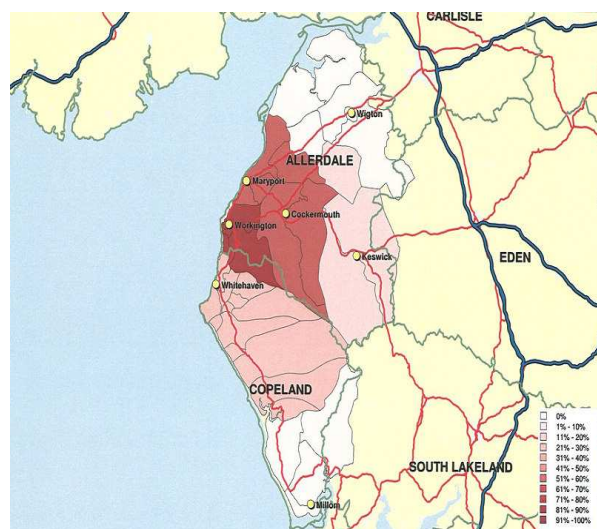
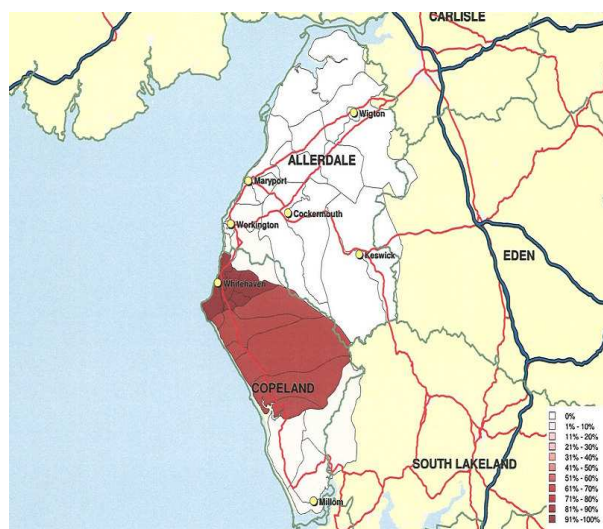
of £93m and £89m respectively within the Study Area and including tourism expenditure. As illustrated in the analysis at Section 11 and 12 of this report the catchments for both centres are primarily reflective of the local authority areas with limited shopping trips being made from Whitehaven to Workington and vice versa. This is to be expected given that the convenience goods offer in both centres is very similar (containing Morrisons and Tesco stores together with a range of smaller facilities) and the fact that people generally travel shorter distances for convenience goods shopping.

- 13.33 In contrast, for comparison goods shopping it is evident that Workington clearly has a greater influence on shopping patterns within the Sub-Region. Indeed, the analysis identifies that facilities in Workington achieve a comparison goods turnover of more than £211m in 2009, which is almost double that achieved by facilities in Whitehaven (£110m). Analysis of the survey evidence suggests that the recent Washington Square development within Workington Town Centre (which includes a Debenhams department store) has improved the performance of the town centre. By comparing the market share of facilities in Workington to Whitehaven for clothing and footwear goods (which are considered traditional town centre goods) the market share of Workington has increased since 2003 from 31% to 40% in 2008, whereas Whitehaven's market share has remained static. Furthermore, it is notable that whilst there is limited interrelationship between residents in Allerdale and Copeland for convenience goods shopping, for comparison goods (as illustrated at Figure 13.1 and Figure 13.2) Workington Town Centre is identified to draw shoppers from a much broader area than Whitehaven.

**Figure 13.1: Catchment of Workington/Whitehaven for Comparison Goods Shopping**

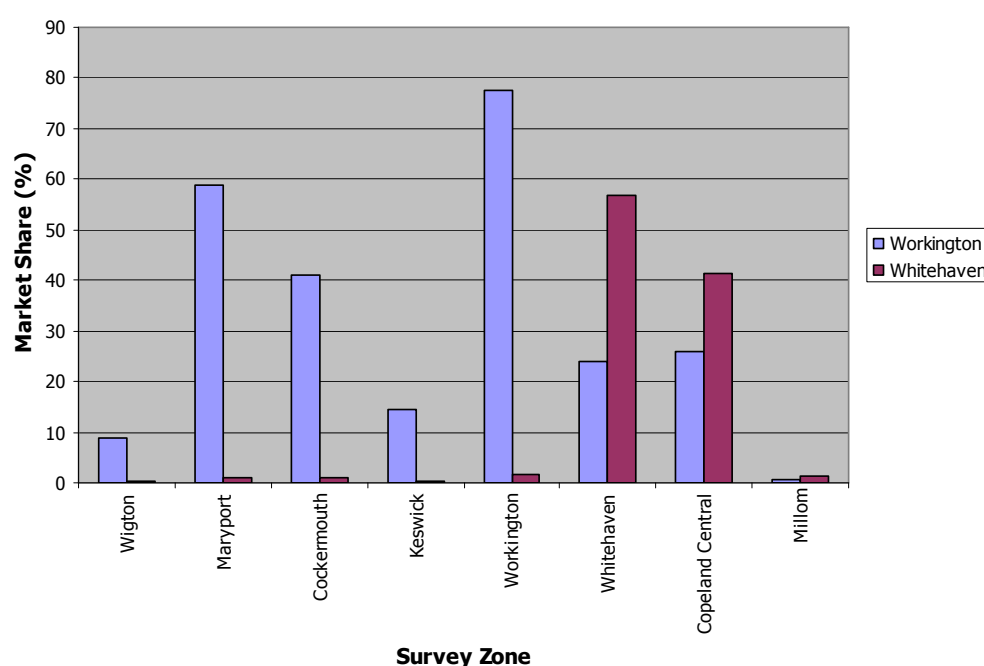
WHITEHAVEN

WORKINGTON



13.34 As illustrated at Figure 13.1 and Figure 13.2, Whitehaven achieves very low market shares within five of the eight zones that comprise the Study Area, drawing most of its trade from the Whitehaven (57%) and Copeland Central (41%) zones. Unlike Whitehaven, facilities in Workington are identified to draw notable comparison goods expenditure from throughout the Study Area, including from the Whitehaven (24%) and Copeland Central (26%) zones. Accordingly, the survey evidence suggests that a significant proportion of local residents within these zones bypass Whitehaven and travel to Workington for their comparison goods shopping. These market shares are even higher for clothing and footwear shopping (31% and 37% of respondents within these zones travel to Workington compared to 49% and 31% travelling to Whitehaven). These shopping patterns reflect the differing roles the centres now play in meeting the needs of the sub-regional population.

**Figure 13.2: Comparison Goods Market Shares of Facilities in Workington/Whitehaven on a Zonal Basis**



13.35 The differing roles of Whitehaven and Workington as comparison goods retail destinations are likely to have an impact on the future roles of the two centres. Given the current downturn in the retail economy together with the close proximity of the two centres it is unlikely that key retail attractors would wish to be represented in both centres (e.g. Debenhams). The close proximity of both centres means it will be impossible for both Workington and Whitehaven to establish similar roles with similar retailers within effectively the same broad catchment. Therefore, as part of any future strategy which is advanced for

both centres in West Cumbria it will be important to establish the future role and function of each centre at the outset and understand how the two centres can complement each others role and function rather than seek to compete with each other. In this respect, it is important that Whitehaven seeks to fulfil a different role and complement the current and future role of Workington. However, both centres should be considered the equal within the sub-regional retail hierarchy and it is important that Whitehaven is not subservient to nearby Workington.

- 13.36 In terms of comparison goods shopping, it is evident that Workington is now the dominant centre and the implementation of Washington Square will reinforce this role in the future. The centre could be considered a 'functional' retail destination offering larger flexible retail units that meet the needs of modern retailers. In comparison, Whitehaven's role is heavily influenced by its historic past. The centre's ability to respond to modern retailers requirements is limited and the fine grain of the historic urban fabric means that large sites for development in the centre are few and far between. However, there is a real opportunity within Whitehaven to build upon these assets and help shape the centre's future role and function as a tourist/day visitor destination supported by a strong independent retail sector which is unique to Whitehaven and West Cumbria.
- 13.37 However, in order to successfully achieve this, Whitehaven will have to secure its own 'brand' or 'identity' which can be easily sold as part of any future marketing or town centre management exercise. This will enable people to differentiate between the role and function of Workington which will be dominated by national multiples and the role and function of Whitehaven which could be targeted at more specialist shopping needs.
- 13.38 If both centres are to successfully achieve these roles in the future then it is evident that more of the growth in expenditure for comparison goods is likely to be targeted to Workington to support the future success of Washington Square. In comparison, whilst it may not be necessary for numerous sites to be identified in Whitehaven in the short to medium term for new retail development it is fundamental that a strategy is put in place early on to identify how the key assets of the centre can be exploited through more effective town centre management. There is also a requirement to improve the range and quality of town centre facilities within both Whitehaven and Workington and enhance the public realm. Possible improvements include better signage, access and movement through the centres.



## Role of Existing Centres

- 13.39 Based on the analysis undertaken it is possible to identify the hierarchy or network of centres within the West Cumbria Sub-Region.
- 13.40 The total turnover of the 11 centres considered as part of this study within the West Cumbria Sub-Region is identified to be £398.54m (convenience and comparison) excluding tourism expenditure. Table 13.2 summarises the hierarchy, turnover, retail floorspace and the market share achieved by the main centres within the West Cumbria Sub-Region.

**Table 13.2: Hierarchy and Market Share of the Main Centres within the West Cumbria Sub-Region**

Centre	Floorspace (sq m)	Convenience Turnover (£m)	Comparison Turnover (£m)	Total Turnover (£m)	Market Share in Study Area (%)	Market Share Amongst Centres (%)
1. Workington^	27,860	9.12	156.67*	165.79	19.2	41.6
2. Whitehaven^^	23,300	1.94	97.99	99.93	11.6	25.1
3. Cockermouth	12,610	26.07	24.33	50.40	5.8	12.6
4. Wigton	7,360	13.63	8.77	22.40	2.6	5.6
5. Maryport	7,940	9.05	10.01	19.06	2.2	4.8
6. Millom	7,190	7.46	7.70	15.16	1.8	3.8
7. Egremont	2,580	5.81	4.32	10.13	1.2	2.5
8. Cleator Moor	2,170	4.17	2.22	6.39	0.7	1.6
9. Silloth	-	2.50	1.77	4.27	0.5	1.1
10. Seascale	-	1.06	1.46	2.52	0.3	0.6
11. Aspatria	-	1.19	1.30	2.49	0.3	0.6
<b>TOTAL</b>	<b>-</b>	<b>82.00</b>	<b>316.54</b>	<b>398.54</b>	<b>46.2</b>	<b>100.0</b>

Notes: WYG (2009)

Excludes tourism expenditure

\* Includes Matalan, Solway Road

Floorspace derived from Experian Goad/WYG survey and based on occupied convenience and comparison goods floorspace only

^ Excludes Derwent Howe Retail Park, Dunmail Park and Tesco New Bridge Road

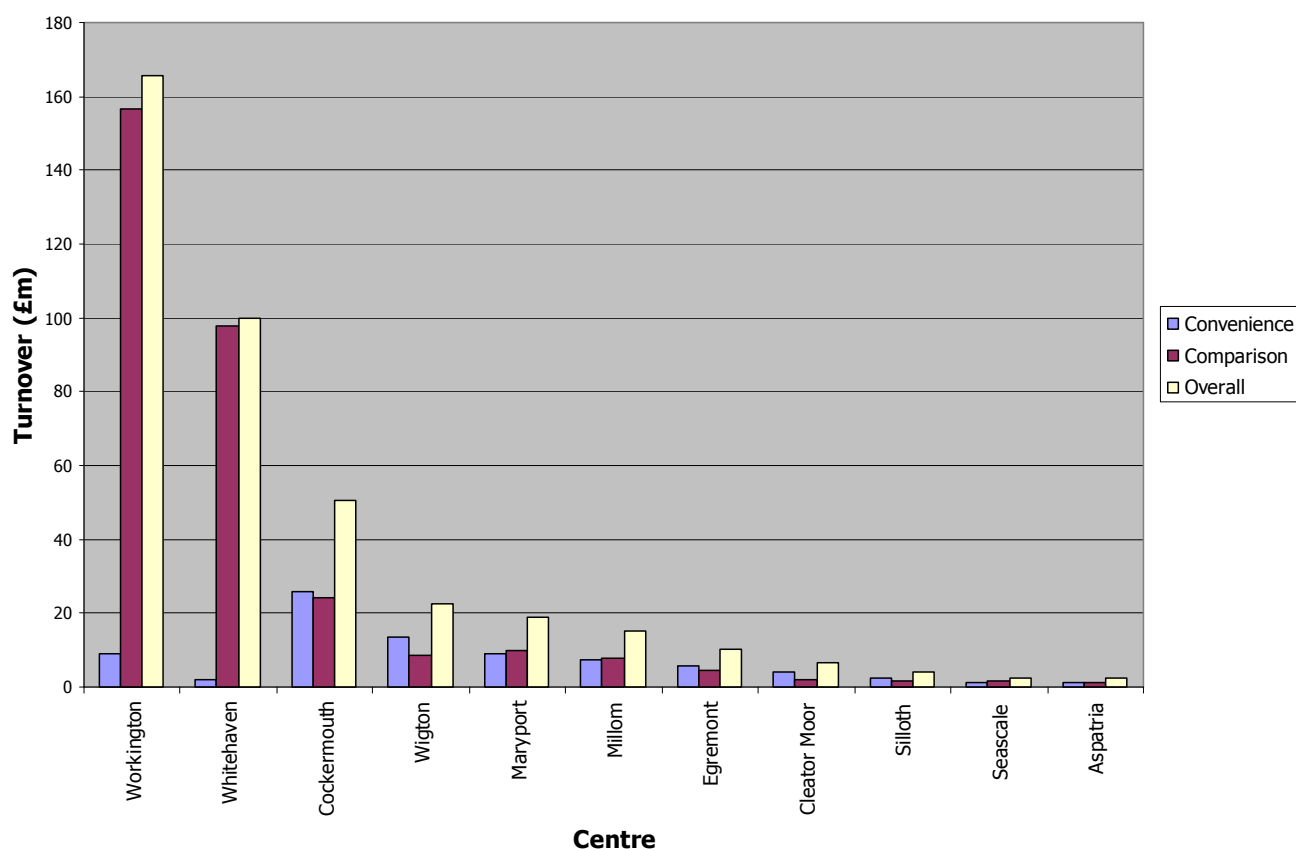
^^ Excludes Morrisons, Tesco, Aldi, Bridges Retail Park and Netto

At 2005 prices

- 13.41 Our analysis indicates that Workington Town Centre is the dominant destination within the West Cumbria Sub-Region, achieving an overall market share within the Study Area of 19%. In addition, strong retail provision (both convenience and comparison) is located nearby including at Derwent Howe Retail Park, which further contributes to its retail offer.
- 13.42 Of the total retail expenditure retained by the main centres within the Sub-Region (excluding out-of-centre facilities, other smaller centres, etc.) more than 40% is attracted to Workington Town Centre. However, it is notable that the turnover of Workington Town Centre comprises approximately 94% comparison goods and 6% convenience goods. This reflects the limited convenience goods offer within the town centre and the fact that the main provision (Tesco and Morrisons) is located out-of-centre. The proposed relocation of the Tesco from an out-of-centre location to an edge-of-centre location at Laundry Fields will help address this imbalance.

13.43 Similarly, Whitehaven Town Centre, although it is the second most popular destination in the Sub-Region achieving an overall market share of almost 12%, most of the turnover (98%) is generated by the comparison goods sector. In this respect, the main convenience goods provision (Tesco, Morrisons, etc.) is located outside the defined town centre. Figure 13.3 illustrates the market shares achieved by the main centres within the Sub-Region.

**Figure 13.3: Retail Turnover Achieved by Main Centres within the West Cumbria Sub-Region**



Source: WYG (2009)

13.44 Each of the main centres within the West Cumbria Sub-Region serve both a convenience and comparison goods shopping role at varying levels. Workington and Whitehaven are clearly the dominant retail destinations (as reflected in the Adopted RSS), followed by Cockermouth. These centres should continue to be the main focus of further retail development within the Sub-Region.



## Key Recommendations and Future Role of Existing Centres

- 13.45 The retail strategy contained within the respective Local Development Frameworks (LDFs) should reflect the overall objectives of PPS6, including the need to promote the vitality and viability of existing centres, by planning for their growth and development. They should also have regard to the wider objectives of other strategies relating to the Sub-Region. These include the adopted Regional Spatial Strategy, which identify Workington/Whitehaven as the main centres within the Sub-Region.
- 13.46 There is likely to be a requirement for significant additional floorspace in the longer term, even after taking account existing commitments, and development plan documents should seek to identify areas where new development could potentially be accommodated.
- 13.47 The policy approach contained within the Allerdale and Copeland LDFs in relation to convenience and comparison retailing should seek to encourage new facilities in existing centres of a scale consistent with their current role and function and which assist in maintaining their vitality and viability. It will clearly be important for any new proposals to be considered in the context of the conclusions of this study and the key PPS6 tests, including need, the sequential approach, impact and accessibility.
- 13.48 However, as highlighted above, it will be important for future development plan documents prepared for West Cumbria to clearly define the role and function of the key centres and explain how they may develop their role and function within the sub-regional hierarchy. The future complementary nature of both Workington and Whitehaven has been explored above. However, in order for Whitehaven to achieve its full potential and establish a specialist role alongside the more dominant retail destination of Workington, it will be fundamental that actions are put in place which can assist in this overall vision or objective.
- 13.49 One option would be to consider the preparation of an Area Action Plan for the Town Centre which would help crystallise the vision for the centre and identify areas which would be a priority for action and implementation. This policy document could then be supported by an active town centre management regime which will be fundamental to the future success of Whitehaven.
- 13.50 The purpose of Town Centre management is to provide a co-ordinated pro-active way of ensuring that the issues that are often overlooked that contribute to vital and viable centres are tackled effectively. These partnerships can take many forms but often the most successful involve representatives from all key stakeholders that have an interest in a town centre and potentially could also contribute funding.

The stakeholders often also represent a diverse range of activities within the centre which extend beyond the dominant retail sector.

13.51 The majority of town centre management initiatives are established at first to deal with key issues such as:

- The quality of the environment
- Security, and
- Marketing.

13.52 Although each town centre management regime will reflect the needs and requirements of the centre that they are seeking to improve, it is evident that issues relating to improving the quality of the environment and marketing are usually central to their overall success.

13.53 From the research undertaken as part of this study, it is evident that for centres such as Whitehaven (whose vitality and viability is heavily reliant upon its strong independent retailing sector) the need to establish some form of town centre management partnership will be critical to the medium to long term health of the town centre. The strong independent retail offer will ideally be part of a balanced and mixed offer in the town (not just niche shops). Marketing and promotion of the centre will also be fundamental if the centre is to establish itself as a tourist destination building on the significant investment that has already occurred at the harbour. Whilst town centre management sits outside the LDF process, it can play a fundamental role in implementing the strategy that is often established in key DPDs.

### Implementation and Monitoring

13.54 It is important that any future planning application for the improved retail provision in the Sub-Region should be supported by a detailed retail assessment, based upon the baseline evidence contained within this study, or any subsequent updates. The supporting information will also need to demonstrate that there would not be any material adverse impact upon the vitality and viability of any existing centres, taking into account any strategies for the regeneration of such centres and that any development accords with the sequential approach of in-centre first, followed by edge-of-centre sites.

13.55 The recommendations and projections within this study are intended to inform each Councils LDF strategies regarding new retail development, and to assist development control decisions. The study

provides a broad overview of the potential need for further retail development up to 2023. However, projections are subject to uncertainty and forecasts may need to be amended to reflect emerging changes as and when new information becomes available.

13.56 In this context, we would recommend that this study should be updated every three to four years time and the floorspace projections rolled forward. The following key assumptions should be updated as necessary:

- Population projections;
- Local expenditure estimates (information from MapInfo or other recognised providers);
- Growth rate assumptions for expenditure per capita (information from MapInfo or other recognised data provides);
- Forecast increases in turnover to floorspace efficiency;
- The impact of potential increases in home and internet shopping;
- Existing retail floorspace and average turnover to floorspace densities (floorspace surveys and turnover data from Mintel and Verdict); and
- Implemented development within and around the Boroughs.

13.57 It may be appropriate to undertake an updated household survey, should there be approvals and implementation in the intervening period of any major development proposals within and in the vicinity of the Sub-Region, which could significantly affect shopping patterns.

13.58 In addition, and taking account guidance in PPS6, it is also appropriate to review the vitality and viability of existing centres on a regular basis. This should be informed by a regular update of the survey of ground floor uses in the main centres in the Boroughs. This will allow the Councils to analyse the mix and diversity of uses in the centres, vacancy levels, any deficiencies which may arise, and the overall performance of the centres over time, and should be used to inform the review and preparation of policies and proposals.



## GLOSSARY OF TERMS

<b>Capacity -</b>	Retail capacity in terms of this report refers to surplus/deficit of expenditure (£m) which represents the difference between the expenditure and turnover of the identified facilities.
<b>Study Area -</b>	This represents the household survey area, which is based on postal sectors.
<b>MapInfo (AnySite) -</b>	The database used to identify population, expenditure and socio-economic breakdown of the study area population.
<b>Comparison Goods -</b>	Comparison goods relate to items not obtained on a frequent basis, these include clothing, footwear, household and recreational goods (Table 3, Annex A, PPS6).
<b>Furniture Goods -</b>	<i>Includes all consumer expenditure on furniture, floor coverings and household textiles such as beds, sofas, tables , cupboards, bed linen, curtains, towels, lamps, mirrors, etc. – as defined by MapInfo – Explanatory Volume 2005 Expenditure</i>
<b>DIY Goods -</b>	<i>Includes all consumer expenditure on hardware, DIY, decorators' supplies and garden centre type goods. This category includes products such as hammers, saw, screwdrivers, wallpaper, plumbing items, floorboards, ceramic tiles, plants, pots, turf for lawns, etc.</i>
<b>Electrical Goods -</b>	<i>All consumer retail expenditure on domestic electrical and gas appliances, such as washing machines, dryers, dishwashers, ironing and press machines, cookers, freezers and fridge-freezers, coffee makers, radios, televisions, DVD players, etc.</i>
<b>Clothing &amp; Footwear –</b>	<i>All consumer retail expenditure on shoes and other footwear, garments for men, women, children and infants either ready-to-wear or made-to-measure, underwear, ties, handkerchiefs, scarves, etc.</i>





<b>CDs, DVDs, Books, etc. –</b>	<i>Includes pre-recorded and blank media such as records and compact discs; pre-recorded and unrecorded tapes, cassettes, video cassettes, diskettes and CD-ROMs, books, scrapbooks, dictionaries, etc.</i>
<b>Household Goods –</b>	<i>Includes household textiles and soft furnishings, china, glassware, jewellery and other miscellaneous goods such as greeting cards, notebooks, pens, pencils, etc.</i>
<b>Recreational Goods –</b>	<i>All consumer retail expenditure on bicycles and tricycles (excluding toy bicycles), musical instruments, sports equipment, camping equipment, toys of all kinds including dolls, soft toys, etc.</i>
<b>Chemist Goods -</b>	<i>All consumer retail expenditure on prescription and non-prescription drugs, adhesive and non-adhesive bandages, first-aid kits, hot-water bottles, toilet shops, sponges, etc.</i>
<b>Convenience Goods -</b>	Convenience goods relate to everyday essential items including confectionary, food, drinks, newspapers and magazines (Table 3, Annex A, PPS6).
<b>Expenditure per Capita -</b>	This is the average spend of each person within the defined study area on a variety of retail goods.
<b>Expenditure -</b>	Expenditure is calculated by taking the population within a defined area and then multiplying this figure by average annual expenditure levels for various forms of goods.
<b>Expenditure Forecasts -</b>	<p>This assessment has been undertaken using the 'goods based' approach as prescribed in PPS6, the information on consumer retail expenditure forecasts have been derived from MapInfo (2008).</p> <p>Forecasts based on the anticipated increase in expenditure per annum for a both convenience and comparison goods as identified by MapInfo (+1.5% per annum (2007 to 2018) for convenience goods, +4.0% per annum (2007 to 2018) for comparison goods.</p>



<b>Gross Floorspace -</b>	This represents the level of total floorspace or footprint of a specific development (i.e. sales area, storage, checkouts, café, display, etc).
<b>Net Floorspace -</b>	This entails the level of internal area devoted to the sale of goods.
<b>Market Share -</b>	Market shares derived from the household survey results, which are based on either the proportion of shopping trips or the proportion of expenditure attracted to a particular centre/facility.
<b>National Multiple -</b>	This is a retail or service operator which is or part of a network of nine or more outlets.
<b>Price Base -</b>	The price base for the study is 2005; all prices are or have been adjusted to 2005 in order to be consistent.
<b>Rates of Productivity -</b>	This takes into account the potential for existing retail floorspace to improve their turnover productivity (e.g. smaller goods could be sold from a smaller area for more money, increased opening hours, etc.).
<b>Sales Density -</b>	Retail capacity figures are expressed in term of floorspace, relying on the application of assumed sales density figures to the surplus expenditure identified. This is based on the typical turnover of a store by square metre/foot.
<b>Special Forms of Trading -</b>	Defined by MapInfo as expenditure not directed to traditional floorspace such as the internet, mail order, party plan and vending machines and other non-store activity such as market and road-side stalls.
<b>Trade Draw -</b>	This refers to the level of trade attracted to a particular facility/centre.
<b>Turnover -</b>	The turnover figure relates to the annual turnover generated by existing facilities.
<b>Prime A Rents -</b>	Zone A rents (the rental value of the first six metres depth of floorspace in retail outlets from the shop window). It provides a comparable indicator of the



strength of individual outlets. As retailers consider rent to reflect the margin between turnover and operational costs (plus profit), the better the trading prospects the higher the rent that the operator will be willing to pay.

**Yield -** A 'yield' represents the relationship between the rental income that a property is likely to command and its capital value, expressed as a percentage.

**GOAD Plans-** Provide accurate retail information on town centres, shopping areas, out-of-town retail parks and outlet villages in the UK. Provides information on fascia name, retail category, floorspace, and exact location of all retail outlets and vacant premises.

**GOAD Reports -** Provide a snap-shot of the retail status or demographic make-up of Goad surveyed 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.

**Convenience (GOAD) -** GOAD defines this category as land uses including bakers, butchers, CTN, fishmongers, convenience store, frozen foods, greengrocers, grocers and delicatessens, health foods, markets, off licences, shoe repairs, supermarkets,

**Comparison (GOAD) -** GOAD defines this category as antique shops, art and art dealers, booksellers, carpets and flooring, catalogue showrooms, charity shops, chemist and drugstores, children's and infants wear, clothing general, crafts, gifts, china and glass, cycles and accessories, department and variety stores, DIY and home improvement, electrical and other durable goods, florists, footwear, furniture fitted, furniture general, gardens and equipment, greeting cards, hardware and household goods, jewellery, watches and silver, ladies and menswear and acc., ladies wear and accessories, leather and travel goods, menswear and accessories, music and musical instruments, music and video recordings, newsagents and stationers, office supplies, other comparison goods, photographic and optical, second-hand goods, books, etc., sports, camping and leisure goods, telephones and accessories, textiles and soft furnishings,



toiletries, cosmetics and beauty products, toys, games and hobbies, vehicle and motorcycle sales and vehicle accessories

**Retail Service -**

GOAD defines this clothing and fancy dress hire , dry cleaners and launderettes, filling stations, health and beauty, opticians, photo processing, photo studio, post offices, repairs, alterations and restoration, travel agents, TV, cable and video rental, vehicle rental, vehicle Repairs and Services and video tape rental

**Leisure Service -**

GOAD defines this category as bars and wine bars, bingo and amusements, cafes, casinos and betting offices, cinemas, theatres and concert halls, clubs, disco, dance and nightclubs, fast food and take away, hotels and guest houses, public houses, restaurants, and sports and leisure facilities

**Financial Service -**

GOAD defines this category as building societies, building supplies and services, business goods and services, employment and careers, financial services, legal services, other business services, printing & copying, property services and retail banks.

**FOCUS Report-**

Is a database which is used by the commercial development industry. It provides market information on retail availability within specific town centres and retail parks. Up to date retailer requirements and deals is available.

**Management Horizons -**

Management Horizons Europe: UK Shopping Index (2008) considers approximately 7,000 retail venues in the UK, including town centres, stand alone malls, retail warehouse parks and factory outlet centres, based on a scoring system that considers the strength of multiples and anchor stores located within each venue.

**Town**

Town centre will usually be the second level of centres after city centres and, in many cases, they will be the principal centre of centres in a local authority's area. In rural areas they are likely to be market towns and other centres of similar size and role which function as important service centres, providing a range of facilities and services for extensive rural catchment areas. In planning



the future of town centres, local planning authorities should consider the function of different parts of the centre and how these contribute to its overall vitality and viability. (Table 1, Annex A, PPS6).

## **District**

District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library. (Table 1, Annex A, PPS6).

## **Local**

Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette. In rural areas, large villages may perform the role of a local centre. (Table 1, Annex A, PPS6).

## **Town Centre** (i.e. types of centre identified in Table 1)

Defined area, including the primary shopping area and areas of predominantly leisure, business and other main town centre uses within or adjacent to the primary shopping area. The extent of the town centre should be defined on the proposals map. (Table 2, Annex A, PPS6).

## **Primary Shopping Area**

Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are contiguous and closely related to the primary shopping frontage). The extent of the primary shopping area should be defined on the proposals map. Smaller centres may not have areas of predominantly leisure, business and other main town centre uses adjacent to the primary shopping area, therefore the town centre may not extend beyond the primary shopping area. (Table 2, Annex A, PPS6).



<b>Primary Frontage</b>	Primary frontages are likely to include a high proportion of retail uses. (Table 2, Annex A, PPS6).
<b>Secondary Frontage</b>	Secondary frontages provide greater opportunities for a diversity of uses. (Table 2, Annex A, PPS6).
<b>Edge-of-Centre</b>	<p>For retail purposes, a location that is well connected to and within easy walking distance (i.e. up to 300 metres) of the primary shopping area.</p> <p>For all other main town centre uses, this is likely to be within 300 metres of a town centre boundary<sup>17</sup>.</p> <p>In determining whether a site falls within the definition of edge-of-centre, account should be taken of local circumstances. For example, local topography will affect pedestrians' perceptions of easy walking distance from the centre. Other considerations include barriers, such as crossing major roads and car parks, the attractiveness and perceived safety of the route and the strength of attraction and size of the town centre. A site will not be well connected to a centre where it is physically separated from it by a barrier such as a major road, railway line or river and there is no existing or proposed pedestrian route which provides safe and convenient access to the centre. (Table 2, Annex A, PPS6).</p>
<b>Out-of-Centre</b>	A location which is not in or on the edge of a centre but not necessarily outside the urban area. (Table 2, Annex A, PPS6).
<b>Out-of-Town</b>	An out-of-centre development outside the existing urban area. (Table 2, Annex A, PPS6).