GVA

Final Report

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Carlisle Retail Study

Carlisle City Council

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1. INTRODUCTION

1.1 GVA was appointed by Carlisle City Council in February 2012 to prepare a city-wide retail study. The study seeks to provide a comprehensive picture of current local shopping and leisure patterns and identify the potential requirements for new floorspace within the city in accordance with the emerging Local Plan.

1.2 The main terms of reference for the assessment are as follows:

- To understand the existing shopping and leisure behaviour of local residents living within the city and the wider sub-region and to identify convenience, comparison and bulky expenditure patterns through commissioning a detailed household survey.
- To undertake a healthcheck assessment of the city centre, qualitatively appraising it against previous healthcheck exercises.
- To assess the future quantitative capacity and qualitative need for additional retail and leisure floorspace within the city, having regard to new and planned developments / commitments.
- To provide strategic advice on the overall future retail need and confirm an appropriate forward development strategy for Carlisle.

1.3 The study is informed by detailed independent survey exercises, including a full shopper survey of visitors to Carlisle city centre to inform a qualitative review and a catchment-wide household telephone survey to inform quantitative modelling.

1.4 The in-centre shopper survey has been designed in conjunction with the City Council to determine:

- The profile of visitors and shoppers to the city centre.
- The strengths and weaknesses of the city centre in terms of the existing retail offer, wider facilities and town centre environment.
- Patterns of usage for the city centre (i.e. frequency of visits, modal split, dwell times).
- Suggested qualitative improvements which would persuade shoppers to visit or stay in the city centre more frequently.

1.5 The household telephone survey exercise informs the quantitative component of the study, identifying the current market share performance of the city and its individual stores. The ability to quantify the survey results in monetary terms enables a detailed understanding of the implications for potential expenditure growth in relation to existing and planned retail floorspace provision.

1.6 The results of the full quantitative analysis and qualitative appraisal (including healthcheck assessment) along with the identification of planned and proposed improvements in competing centres, are drawn together to provide a set of recommendations to enable the Council to proactively plan for future development.

1.7 The conclusions of the update study do however represent a 'point-in-time' assessment of performance and opportunity. The quantitative need identified should be used to inform policy which will endure over the short to medium term as required. It will however be important that the Council continues to monitor the health of its principal centres through its forward planning function, adopting and revisiting the strategy to address changing circumstances as the emerging Local Plan progresses.

REPORT STRUCTURE

1.8 In accordance with the terms of the Study Brief this report is structured as follows:

PART ONE – BACKGROUND DETAIL AND CONTEXT

- **Section 2 – Retail Trends**; summarises the current market conditions and developments within the retail and leisure sector.
- **Section 3 – Planning Policy Framework**; sets out the emerging national and local planning policy framework which will guide forward policy development.

PART TWO – QUALITATIVE ASSESSMENT

- **Section 4 – Healthcheck Assessment**; assesses the performance of the city centre against vitality and viability criteria set out in the PPS4 best practice guidance. The assessment seeks to comparatively assess and benchmark Carlisle against available local and regional data and provide a baseline for future monitoring.
- **Section 5 – In-Centre Shopper Survey**; draws out the main qualitative results of the comprehensive in-centre survey undertaken within the city centre.

PART THREE – QUANTITATIVE ASSESSMENT

- **Section 6 – Retail Capacity Methodology**; sets out the methodology underpinning the quantitative capacity modelling exercise.
- **Sections 7 and 8** - **Retail Analysis and Strategy**; reviews the current and future retail performance and market shares of the city centre and out-of-centre retail destinations in Carlisle in respect to convenience and comparison retail provision.
- **Section 9 – Leisure Assessment**; summarises local residents existing leisure patterns for different leisure activities including cinema, gym and socialising.

PART FOUR – CONCLUSIONS AND STRATEGIC ADVICE

- **Section 10 – Conclusions**; sets out our recommendations in terms of forward strategy.

1.9 The update study is intended to provide a sound basis on which to progress with the emerging Local Plan. The next two chapters therefore set out the current background context in terms of the economic outlook and planning policy framework.

2. RETAIL AND LEISURE TRENDS

2.1 The study update has been commissioned in part to assess the impact of the current economic climate on future retail needs in the district. In assessing quantitative and qualitative need for new provision, it is relevant to consider the wider economic and social trends likely to influence retailing in the study area moving forwards. This section therefore examines key trends and drivers for change in the retail industry and outlines those of particular relevance to the district. Our review draws on a range of published data sources including research by Verdict, Mintel and Experian.

ECONOMIC OUTLOOK

2.2 The latest advice published by Experian (Retail Planner 9, September 2011) presents a bleak picture for the economy as the recovery from the recession runs out of steam and new data released points to further weakness. It is anticipated that household spending will continue to be constrained by subdued disposable income growth and a weak labour market. Pressures on disposable incomes will limit the extent to which consumers are able to save and consumers will therefore be more considered with their spending decisions and seeking to achieve best value for money. In many circumstances, the cost-savings offered by the Internet will be more readily seized.

2.3 Overall, consumers will remain cautious with spending not only on discretionary items but also on needs, cutting wastage, which will impact on food & grocery volumes. There will be an increased focus on buying efficiently. Big ticket and home-related purchases will remain low, particularly as uncertainty continues to drive house prices and volumes down, as many are reluctant to move.

2.4 As the housing market recovers (expected 2013), certain sectors (e.g. home furnishing and DIY) will benefit from pent up demand. However, it is anticipated that sales through the town centre will remain weak with online and out of centre retailers continuing to take a greater share and the pent-up demand for furniture, floor coverings and electricals. Space and store numbers in town centre locations is also expected to decline as retailers drive efficiencies by closing underperforming space. These trends are discussed in more detail below.

THE INTERNET / 'E-TAILING'

2.5 Consistent with wider economic trends, growth in e-Retail declined in 2009 as a result of the recession reducing consumer demand. Austerity cuts on the spending ability of the most prolific online shoppers (35-44 year olds) also had an impact on reduced demand during this period. Overall the pace of growth in online shopping is set to slow down significantly as the channel matures and competition increases[1].

2.6 Despite overall more modest levels of growth in online shopping, there will continue to remain reasonable pressure on traditional bricks and mortar retailers. Shoppers are able to select their own retail mix online and shopping centres and high streets will need to compete with this choice, which is not only driven by price and range, but also service and expertise. Online shopping has driven expectations of convenience and service upwards and customers are expecting more from in-store ambience to tempt them to make a purchase[2]. Town centres and high streets will increasingly have to provide a shopping 'experience' that the Internet is unable to match.

2.7 Trends also show that the online and in-store shopping channels are becoming gradually more blurred as shoppers increasingly research purchases online or in stores which are increasingly becoming showrooms. According to Verdict, in 2010, 63% of shoppers researched goods online before purchasing in stores, an increase from 54% in 2007. At the same time, it is estimated that 29% of consumers researched purchases in store before buying online, representing a huge increase from 13% in 2007[3].

NEW TECHNOLOGIES

2.8 Technological advances will continue to drive changes in retailing, with greater interactions between work, entertainment, social networking and shopping using mobile devices. QR codes (Quick Response codes) have increased consumer and retailer interaction and engagement, enabling customers to scan QR barcodes on their mobiles to gain direct access to the product website, marketing, competitions and product information.

2.9 Smartphones will provide contactless payment services using Near Field Communications (NFC) technology. This will allow customers to make payments via instore terminals

[1] Verdict Research, "Retail Futures H1 2011 - e-Retail", March 2011
[2] Verdict Research, "How Britain Shops: Overall 2011", March 2011
[3] Verdict Research, "UK e-Retail 2011", May 2011

making the payment process more convenient. Starbucks is set to launch contactless and mobile payment services in the UK in 2012.

2.10 Retailers are also developing ‘augmented reality' technology which will merge the physical and virtual worlds to allow retailers (such as Ikea and Tesco) to provide an interactive view of how products such as televisions or furniture, will look in consumers own homes or provide 3D projections of life size products.

2.11 Fashion retailers including Net-a-Porter and Clarks are already using augmented reality technology through pointing smartphones and tablets at an image or advertisement which triggers video content on the mobile device. This technology brings static adverts to life and allows consumers to view catwalk runways, video advertisements and product information, and to make purchases. Augmented reality will provide an interactive advertising platform for retailers, who will use this technology to break down the barriers between online and in-store shopping.

2.12 While the Internet and new technologies pose challenges to the high street, retailers are constantly looking for ways to exploit the trading opportunities available through offering a multichannel shopping experience. The advantages offered by physical stores, in terms of the experience and immediacy of products, will see a network of key stores remain a fundamental component of retailers' strategies to develop a more coherent and integrated multichannel proposition.

SALES EFFICIENCY

2.13 An efficiency growth rate represents the ability of retailers to increase their productivity and absorb higher than inflation increases in their costs (such as rents, rates and service charges) by increasing their average sales densities. The application of a turnover ‘efficiency' growth rate is a standard approach used in retail planning studies and in is accordance with good practice.

2.14 Although hard quantitative evidence is limited, comparison businesses in particular have, over time, increased sales densities by achieving improvements in productivity in the use of floorspace. Analysis of past data is difficult as sales densities increases have been affected by changes in the use of retail floorspace over the last 20 years, with higher value space-efficient electrical goods replacing lower value space intensive goods, the growth in out-of-centre retailing, a number of one-off events like Sunday-trading and longer opening hours and the very strong growth of retail expenditure relative to the growth in floorspace.

2.15 Following the recession many retailers have struggled to increase or even maintain sales density levels and, together with other financial problems, have led some retailers into closure. With the expectation of weaker expenditure growth, sales density growth is also expected to be lower than previous estimates, unless retailers accelerate store closures and more existing retail stock is taken out of use.

2.16 Based on continuing trends towards more modern, higher density stores and the demolition of older inefficient space, Experian expect an efficiency growth rate of 1.7% per annum for comparison goods over in the next 16 years. This is about half the rate seen during the boom of the 1990s.

2.17 Scope for sales density increases is much more limited for convenience goods as expanding store portfolios (particularly over the next five years) will increasingly overlap with the catchment of existing stores and result in the cannibalisation of existing sales. For convenience goods, an efficiency growth rate of 0.4% per annum between 2012 and 2017, and 0.2% per annum post 2017 has therefore been incorporated into our analysis set out in later sections.

OPERATOR SPACE REQUIREMENTS

2.18 One of the major trends to emerge from the economic downturn has been the decline in the amount of retail space in town centre locations. This is, in part, a consequence of the harsh economic conditions forcing out independent retailers whose margins became too tight to survive and some multiples which have either collapsed or their store portfolios have shrunk after entering a pre-pack administration. These losses have not been offset by new developments, as many town centre schemes have been put on hold or revised downwards in scale. With online presence allowing national coverage, it is expected that retailers will remain cautious about expansion.

2.19 As retailers cut back on space to improve efficiencies and online becomes a more important channel, a new model is emerging in town centres. Retailers are moving towards opening larger flagship stores in strategic locations which are supported by smaller satellite stores and transactional websites. The larger flagships will accommodate the fuller range while smaller stores will offer a more select range supplemented by Internet kiosks allowing access to the wider range.

2.20 This model offers many advantages such as lower property costs, more efficient logistics and being able to open stores where there is a high level of demand despite there being space restrictions. Such models are already being trialled by retailers including

Debenhams and House of Fraser. The first House of Fraser.com store, comprising just 140 sqm, opened at Hammerson's Union Square Shopping Centre, Aberdeen in October 2011, followed by a second in Liverpool in November 2011. It is reported that the retailer will open similar stores in locations with strong web sales, but without a store presence. Marks & Spencer is also trialling a boutique offer with sample ranges of clothing combined with online video and ordering capabilities.

OUT-OF-CENTRE PRESSURES

2.21 As retailers opt to develop stores in the most strategic and cost effective locations, there has been a notable resurgence to out-of-centre destinations which offer the benefit of lower rents, better space and in most cases, free parking. According to Verdict, out-of-town is the only channel which has seen store numbers increase consistently since 2000. BIS report that the number of out-of-centre stores has increased by up to c.1,800 (25%) since 2000; whilst the number of town centre stores fell by almost 15,000 between 2000 and 2009, the majority of which are likely to have been in 'high street' locations.

2.22 John Lewis for example, has developed a number of out-of-town stores through its At Home format. The retailer currently operates six At Home stores, although a new store is due to open in Tamworth in October 2012, and reports suggest that by end of 2012 the retailer will have increased its out-of-town portfolio to ten stores. Other retailers including H&M and Primark are also reported to be seeking to expand their portfolios in out-of-centre locations.

FOODSTORES

2.23 In the convenience sector, space expansion is high on the agenda for many grocers. Verdict estimate that between 2010 and 2015, the leading grocers will increase their space by 2 million sqm - almost double that of the new space opened between 2005 and 2010. In 2011, Tesco and the Co-operative gained a presence in every postcode in the UK[4], the latter through its acquisition of Somerfield.

2.24 The continuing fall out of independents from the market will provide further opportunities for the expansion of the leading brands. Smaller store formats are becoming more of a focus as top up shopping is becoming increasingly popular – a response to consumers being discouraged from travelling long distances by high fuel prices and as more are

[4]Verdict Research, "UK Food and Grocery Retailers 2011", September 2011

shopping online for staple goods. Following in the path of Tesco and Sainsbury's, Asda, Morrisons and Waitrose are all in the process of expanding smaller concept stores.

THE ROLE OF THE TOWN CENTRE

2.25 The town/city centre has been the main shopping channel for the last 30 years. However, its role is set to change dramatically. Emerging trends suggest that it will be used more for leisure and social activities with more bars, restaurants, food outlets and community spaces opening in vacant units.

2.26 These trends are of major importance to the city's shopping centres which will need to adapt to this broader role by broadening their non-retail offer. Data from the Local Data Company indicates that town centres with more non-retail outlets have seen an improvement in their performance. Between 2009 and 2011, 114 towns improved their town centre score and reduced their vacancy rate and of these, 60.5% had a lower proportion of retail outlets.

2.27 As retailers improve their multichannel offer, existing foodstores more traditional town centre stores will be used more to support e-retailing with click and collect points and safe drop boxes for customers to collect their online orders as well as satellite stores opening for customers to make online purchases. As demand for retail floorspace declines, it is anticipated that more secondary and tertiary space which suffers from lower levels of footfall, will increasingly be converted into residential uses.

2.28 In order to ensure that town centres have a viable function moving forwards, it will be important for Councils to aim to drive footfall to turn around their town centres and improve dwell time to increase awareness of offers and impulse purchases. This can be achieved by getting a better understanding of the catchment area and what local people want, improving the mix of retail and non-retail outlets in the centre to make them stay longer, and holding commercial, cultural and community events to create a 'unique selling point' for the town centre to differentiate it form the competition and encourage people to visit. Council's will also need to promote the wider area, to encourage further investment in jobs, and in the town centre, to persuade residents to spend their money in the area and support the town further.

2.29 Smaller town centres have already been greatly impacted by the pull of larger, higher order shopping destinations, leading to a higher vacancy rate and weaker performance. For these centres, it will be increasingly important to create a differentiated offer, tailored to the local catchment and to encourage residents to shop and socialise more locally.

OVERALL SUMMARY

2.30 It is evident that the traditional high street faces a number of challenges not least from the tightening of retail spend and changing consumer behaviour but also from increasing competition posed by the Internet and out-of-centre developments. Whilst the future is uncertain, in light of the challenge currently faced, strategies which support the high street are considered ever more vital.

2.31 Whilst the town centre 'first' strategy must continue to prevail, strategies in some instances will need to adopt a degree of pragmatism and at worst consider the process of managing decline of some centres, particularly secondary ones, given the ongoing process of consolidation in the retail sector.

3. PLANNING POLICY FRAMEWORK

NATIONAL PLANNING POLICY FRAMEWORK (NPPF)

3.1 National Planning Policy Framework was adopted in late March 2012 and has replaced Planning Policy Statement 4: *Planning for Sustainable Economic Growth*. The PPS4 practice guidance on need, impact and sequential assessments does however remain as an informative tool for both plan making and development management functions.

TOWN CENTRE VITALITY AND VIABILITY

3.2 The NPPF (Section 2) specifies that planning policy should promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. Local Planning Authorities (LPAs) are directed to:

- Recognise town centres as the heart of their communities and pursue policies to support their viability and vitality.
- Define a network of hierarchies and the extent of town centres and primary shopping areas.
- Promote competitive town centres that provide customer choice and a diverse retail offer which reflects the individuality of town centres.
- Retain and enhance existing markets, ensuring they remain attractive and competitive.
- Allocate appropriate in-centre sites which are not compromised by limited site availability. If it is not possible to ensure a sufficient range of suitable sites, appropriate edge of centre sites that are well connected to a town centre should be allocated.
- Where town centres are in decline, local authorities should plan positively for their futures and encourage economic activity.

3.3 The long-standing sequential test is retained in the NPPF albeit that there is increased emphasis on LPAs to ensure an available supply of sites.

EVIDENCE BASE REQUIREMENTS

3.4 LPAs are directed by NPPF to ensure that the Local Plan is based on adequate, up-to-date and relevant evidence. In relation to planning to meet business requirements, LPAs are required to have a clear understanding of business needs within the economic markets operating in and across their area. LPAs are directed to use the evidence base to assess (amongst others):

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

3.5 Whilst the NPPF constitutes a material consideration which LPAs should take into account from the date of publication (late March), the policy provisions and directions of the NPPF should inform the preparation of plans either through partial review or by preparing a new statutory development plan.

REGIONAL SPATIAL STRATEGY

3.6 Whilst the Government has announced its intention to revoke Regional Spatial Strategies (RSS), the NPPF confirms that RSS remains part of the statutory development plan under Section 38(6) of the Planning & Compulsory Purchase Order 2004.

3.7 Regional Spatial Strategy for the North West (RSS 13) was adopted in September 2008 and provides a framework for development and investment in the region in the period to 2021. The RSS establishes a broad vision for the region, priorities for growth and regeneration, and policies to achieve sustainable development across a wide range of topics including jobs and transport. The overarching policies relevant to the emerging retail study are summarised below:

- **DP1 - Spatial Principles** sets out the principles which underpins RSS and specifies that all statutory plans individual proposals should seek to promote sustainable communities and sustainable economic development; optimise use of existing infrastructure by managing travel demand and increasing accessibility; marry opportunity and need; and promote environmental quality.

- **DP2 – Sustainable Communities** seeks to foster (amongst others) sustainable relationships between homes, workplaces and other concentrations of regularly used services and facilities.
- **DP3 – Sustainable Economic Development** specifies that such development should be supported and promoted. Reductions of economic, environmental and other social inequalities should also be encouraged at the local level.
- **DP4 – Optimising Use of Existing Resources and Infrastructure** specifies that priority should be given to developments in locations which build upon existing concentrations of activities and existing infrastructure; and do not require major investment in new infrastructure. The policy also articulates the sequential approach to development, prioritising the use of previously developed land.
- **DP5 / RT2 – Managing Travel Demand** requires development to 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. Safe and sustainable access by public transport should be promoted and influence locational decisions.
- **W5 – Retail Development** seeks to define a hierarchy of centres where retail development should be encouraged to ensure a sustainable distribution of retail facilities. Carlisle is identified as a main sub-regional centres (along with another 24 centres) where comparison retailing facilities should be enhanced and encouraged to ensure a sustainable distribution of high quality retail facilities.
- **RDF1 – Spatial Priorities** emphasises the requirement of addressing regeneration and specifies that development may be acceptable if it satisfies other policies, notably DP1 – DP9 where relevant.
- **CNL1 – Overall Spatial Policy** details that plans and strategies in Cumbria should (amongst others) focus major developments in Carlisle and other main towns including Barrow, Whitehaven and Workington.
- **CNL2 – Sub-Area Priorities** focuses plans and strategies on (amongst others) supporting sustainable growth in Carlisle through building upon its significant potential to attract sustainable development into Cumbria. The city is emphasises as the sub-regional centre for shopping and leisure, serving Cumbria and parts of Scotland and North East England. Any new development is however required to be compatible with the conservation and enhancement of the historic city centre.

4. HEALTHCHECK ASSESSMENT

4.1 The National Planning Policy Framework states that comprehensive up-to-date monitoring of town centre performance is essential in enabling planning authorities to improve the vitality and viability of town centres and effectively plan for the future.

4.2 A detailed healthcheck assessment has therefore been completed for Carlisle city centre as set out below. Floorspace (fascia) surveys have been undertaken for Longtown and Brampton in addition to existing defined local centres; the survey plans for these centres is provided at Appendix 4 for reference.

A) DIVERSITY OF USES

4.3 The 2009 Study update (as per the 2006 study before it) was specifically commissioned to update the quantitative capacity projections for the city and did not include an updated healthcheck assessment. There is consequently no recent baseline against which to assess the changing composition and performance of the city centre.

EXPERIAN GOAD ASSESSMENT (MAY 2011)

4.4 The current floorspace (fascia) composition of the city centre is set out below and is based on the latest Experian GOAD category report and plan (May 2011)[5].

TABLE 1 – CARLISLE CITY CENTRE FLOORSPACE COMPOSITION

Retail Sector	Floorspace (gross)	City Centre Average (%)	National GOAD Average (%)
Convenience	**7,302 sqm**	5.19%	11.49%
Comparison	**61,046 sqm**	43.4%	29.65%
Retail Service	**4,970 sqm**	3.54%	5.76%
Leisure Service	**26,069 sqm**	18.54%	18.19%
Financial Service	**8,547 sqm**	6.08%	6.72%
Vacant	**16,035 sqm**	11.40%	8.07%
TOTAL	**123,969 sqm**		-

[5] The Table excludes Public Services, Health & Medical Services, Religious Services, Transport Services, General Offices, Industrial Activities, Unclassified Buildings and Wholesale Trade categories detailed on the Experian GOAD Category Report.

4.5 In headline terms the Experian Goad report identifies the following:

- The proportion of convenience provision in the city centre is below the national GOAD average; this is to be expected given that Carlisle city centre performs a sub-regional comparison shopping role rather than for convenience goods. The under-representation also reflects the predominant top-up function of the city centre and the prevailing strength of out-of-centre foodstore provision across the city.
- Comparison retail provision is however significantly above the national GOAD average in terms of quantum of floorspace.
- The quantum of vacant floorspace is above the national GOAD average (11.40% compared to 8.07%).

4.6 The Experian GOAD report also sets out the number of outlets[6] occupied by a particular use as follows:

TABLE 2 – CARLISLE CITY CENTRE – NUMBER OF OUTLETS

Retail Sector	Number of Outlets	City Centre Average (%)	National GOAD Average (%)
Convenience	**23**	4.56%	7.02%
Comparison	**178**	35.32%	29.38%
Retail Service	**52**	10.32%	11.77%
Leisure Service	**108**	21.42%	19.18%
Financial Service	**40**	7.94%	9.58%
Vacant	**66**	13.10%	10.65%
TOTAL	**467**		-

4.7 The survey identifies that the number of outlets dedicated to convenience floorspace is considerably below the GOAD average whereas comparison floorspace remains above. The number of vacant outlets is proportionate to the quantum of floorspace presently unoccupied and does not suggest for example that most vacant units are small.

[6] As per previous footnote – not all Experian GOAD Categories included for reporting purposes.

GVA FLOORSPACE SURVEY UPDATE (MARCH 2012)

4.8 In order to ensure a robust up-to-date assessment, GVA updated the existing GOAD survey (May 2011) to take account of changes in floorspace / fascia composition in the intervening period.

4.9 The survey is based on the city centre boundaries defined in the adopted Local Plan and also take account of upper trading floors. A review of the Experian GOAD database identifies that the survey only includes gross floorspace relating to an individual building footprint rather than including the number of trading floors. The exclusion of upper trading floorspace is therefore not accounted for in the Experian GOAD figures and therefore results in an under-estimation of floorspace in the city centre.

TABLE 3 – CARLISLE CITY CENTRE – FLOORSPACE SURVEY (GVA UPDATE)

Retail Sector	Floorspace (gross)	City Centre Average (%)[7]	National GOAD Average (%)
Convenience	**6,950 sqm[8]**	5.83%	11.49%
Comparison	**100,780 sqm**	62.38%	29.65%
Retail Service	**4,730 sqm**	2.93%	5.76%
Leisure Service	**24,420 sqm**	15.11%	18.19%
Financial Service	**6,330 sqm**	3.92%	6.72%
Vacant	**15,880 sqm**	9.83%	8.07%
TOTAL	**159, 090 sqm**	**100%**	**-**

4.10 As the table shows, when upper trading floors are taken into account, the quantum of comparison floorspace significantly increases from c. 61,000 m^2 to c. 100,000 m^2 (gross). This has a significant impact on the forward capacity modelling exercise.

4.11 The other principal changes between the Experian GOAD survey and the GVA Update are as follows:

- The quantum of convenience floorspace in the city centre has decreased by c. 352 m^2 (gross).
- The quantum of retail service floorspace has decreased by c. 240 m^2 (gross);

[7] City centre average based on quantum of floorspace relative to the overall total and therefore does not correspond with the Experian GOAD figures (should not be compared on a like-for-like basis) given that floorspace relating to Public Services, Health & Medical Services, Religious Services, Transport Services, General Offices, Industrial Activities, Unclassified Buildings and Wholesale Trade categories not taken into account.

[8] Excludes City Centre Markets (GOAD estimate: 2,470 m^2 gross).

- Leisure floorspace has decreased by 1,649 m^2 (gross); and
- Vacant floorspace has decreased by 155 m^2 (gross).

4.12 The only notable floorspace between the Experian GOAD survey and the GVA Update are the significant increase in comparison floorspace resulting from the inclusion of upper trading floors and the decrease in leisure floorspace which is attributable to the exclusion of the Court Square and Englishgate / Botchergate areas which are to the south of The Crescent outside of the existing adopted Local Plan boundary. The area along Botchergate in particular has a concentration of leisure uses including the cinema multiplex and associated bars, pubs and restaurants (local and national multiple chains).

4.13 Notwithstanding the floorspace changes arising from solely counting the floorspace within the defined city centre boundaries, the wider changes in our view reflect the natural change in composition within the city centre rather than any specific deficiency.

EDGE-OF-CENTRE/ OUT-OF-CENTRE RETAIL PROVISION

4.14 There are a number of comparison shopping retail destinations outside of the city centre boundaries defined in the adopted Local Plan as follows:

- **Kingstown Retail Park**; located a considerable distance to the north of the city centre adjacent to the M6 motorway (junction 44), the out-of-centre retail park includes Comet, Argos Extra, Homebase and Curry's / PC World. A certificate of lawfulness has however recently been issued to enable Hobbycraft and Next at Home to occupy a vacant unit (split). A separate Asda foodstore (as described below) is located to the rear of the retail park.
- **Hardwicke Circus**; is a relatively small edge-of-centre retail warehouse development which is located a short distance to the north of the city centre (physically separated by Georgian Way). Existing retailers include standalone DFS and Wickes DIY stores.
- **London Road Retail Park**; the out-of-centre retail park is located to the south east of the city centre primary shopping area and includes B&Q Mini-Warehouse, Pets at Home, Laura Ashley and Maplin Electronics.
- **St Nicholas Gate Retail Park**; the out-of-centre retail park is located around 600 metres to the south east of the city centre. The retail park comprises Toys R Us, Halfords, Carpetright, Asda (former Netto) and Brantano. Planning permission exists to amalgamate existing vacant units to accommodate a foodstore.

- **Madford Retail Park**; the retail park is located to the west of the city centre. Whilst located in an edge of centre location in distance terms it is physically divorced from the city centre by virtue of the railway station and River Caldew. The retail park comprises a Lidl foodstore, Storey Carpets and textile shops Dunelm and Ponden Mill.
- **Station Road Retail Park**; located in close proximity to Madford Retail Park, the park accommodates Staples and Matalan stores.
- **Currock Road Retail Park**; the out-of-centre retail park is located to the south of the city centre. The park includes The Range outlet in addition to leisure uses including bowling and health & fitness centre.

4.15 In addition to the main retail park destinations, there are a number of existing and planned large free-standing foodstores across the city as follows:

- **Asda Kingstown** (north of city); full-range store comprising 5,312 m^2 net sales.
- **Tesco Warwick Road** (east of city); full-range store comprising 4,118 m^2 net sales.
- **Morrison's Kingstown** (north of city); full-range store comprising 4,191 m^2 net sales.

4.16 In addition to existing provision, there are a number of planned foodstore schemes in out-of-centre locations including:

- **Sainsbury's Caldewgate** (west of city); new full-range store presently under construction comprising 5,514 m^2 net sales.
- **Tesco Viaduct Road** (east of city); extant planning permission for a new medium sized foodstore of 2,415 m^2 net sales.
- **St Nicholas Retail Park** (south of city); planning permission for 2,975 m^2 net foodstore through amalgamation of three existing retail units.

4.17 A new district centre is also planned at Morton to the south west of the city to meet planned new residential development and address the present spatial deficiency in provision. The new district centre, which has outline planning permission, includes a new main foodstore anchor of 5,574 m^2 net sales.

B) RETAILER REPRESENTATION

4.18 In quantitative terms, the latest Experian GOAD Category report (May 2011) identifies the following multiple retailer representation within the city centre:

TABLE 4 – CARLISLE CITY CENTRE – MULTIPLE RETAILERS FLOORSPACE

Retail Sector	Floorspace (gross)	City Centre Average (%)	National GOAD Average (%)	No. Outlets	City Centre Average (%)	National GOAD Average (%)
Convenience	**4,097**	5.53%	21.13	13	6.37%	10.55%
Comparison	**48,560**	65.50%	46.21%	112	54.90%	42.67%
Retail Service	**1,728**	2.33%	4.82%	16	7.84%	9.70%
Leisure Service	**11,130**	15.01%	14.84%	34	16.67%	18.86%
TOTAL	**65,515**			**175**		

4.19 The table clearly shows the dominance of comparison retailing in the city centre, reflecting its sub-regional status. The city centre convenience offer is predominantly orientated towards top-up food shopping with a Tesco Metro store on Blackfriars Street complemented by the M&S Foodhall on English Street, Iceland and Farmfoods on Lowther Street as well as local independent grocery stores. Outside of the city centre, the new Sainsbury's store under construction at Caldewgate will result in all four mainstream convenience operators (Asda, Tesco and Morrison's) and discounters (Aldi and Lidl) being represented in Carlisle. The only mainstream retailers not present in the city are the higher order operators such as Waitrose and EH Booth.

4.20 The comparison (non-food) retail offer in the city centre reflects its sub-regional status with national multiples including mid-range clothes retailers such as Next, H&M, Marks & Spencer, River Island, Top Shop, Dorothy Perkins and Burtons present. The main department store anchors in the city centre are House of Fraser, BhS, Marks & Spencer and Debenhams. There is also a Hooper's department store although it has recently been announced that the store would close in summer 2012.

4.21 In terms of the lower end of the market, there are a range of discount fashion and homeware operators (Wilkinson's, B&M Bargains etc.) within the city centre complemented by edge / out-of-centre provision including Matalan.

4.22 Whilst the retail units around the Lanes Shopping Centre are relatively modern (Debenhams and H&M), the majority of retailers occupy small units on English Street.

House of Fraser and Marks & Spencer stores in the city centre trade over multiple floors and in the case of Marks & Spencer store three historically separate buildings which have been amalgamated.

4.23 Given that key comparison retail anchors are continuing to upsize to bigger floorplate units in larger centres so as to stock more product lines, benefit from economies of scale and consolidate on a regional basis with fewer but larger stores, the provision of larger floorplates may assist in increasing product lines available and potentially claw-back some expenditure which is presently flowing from the city (notwithstanding the high retention levels that the capacity modelling assessment identifies later on in the report).

4.24 As a sub-regional centre, Carlisle lacks prominent operators such as Primark (the in-centre shopper survey indicates local residents demand for a Primark store), Zara and mid-to-higher range international fashion retailers (All Saints, Reiss, Ted Baker, Diesel etc.).

C) RETAILER REQUIREMENTS

4.25 Retailer requirements are subject to a number of external factors and should only be used as an indication of commercial interest in a centre rather than an overall indication of the commercial attractiveness of a centre to retailers or potential occupiers. It should be noted that several larger national retailers do not actively publish requirements.

4.26 There are a number of retailer requirements in Carlisle including Chiquito, Greggs, McDonalds and Frankie and Benny's.

TABLE 5 – CARLISLE RETAILER REQUIREMENTS

Retailer	Requirement (m^2)	
	From	To
Chiquito	344	464
Blue Apple	74	344
Greggs Plc	46	139
Toni & Guy	70	116
Tragus	278	418
The Chinese Buffet	557	1,393
McDonalds Restaurants	330	330
Bargain Book Time	139	278
Savers Health and Beauty	163	232
Phase Eight	65	186

PR Books	139	278
Frankie & Benny's	344	464

4.27 Whilst the commercial interest in Carlisle should be welcomed, the requirements would not deliver any significant qualitative enhancement or attract new visitors to the city. Indeed, *PROMIS* identifies that Carlisle has a slightly low level of demand for city of its size and status. This may in part be attributable to the historic constraints of the city centre.

D) RENTAL LEVELS / COMMERCIAL YIELDS

4.28 The *PROMIS* database identifies that agents estimate prime (Zone A) rents in Carlisle city centre are around £120 / ft^2 at present; this represents no change since the end of 2010. The *Promis* database also details that local property agents consider prime retail yields to be at 6% in spring 2011; this represented no change on the previous six months. Historically, the prime yield has fluctuated from 5.5% in 2000 to 4.5% (2006) and 7% (2009).

E) COMPARATIVE ANALYSIS

4.29 The *VenueScore* Ranking Index, produced by the *Javelin Group*, is based on the total number of national non-food or comparison retail multiples located within a centre. Utilising a system of weighting, the Venue Score analysis reflects the range and quality of national retailers represented in a centre. The results for Carlisle relative to other comparable sub-regional centres in Cumbria and the North West are set out below.

TABLE 5 – VENUESCORE CENTRE HIERARCHY (2006 – 2011)[9]

Centre	2006		2007		2009		2010		2011	
	Score	Rank	Score	Rank	Score	Rank	Score	Rank	Score	Rank
CARLISLE	178	66	175	69	188	85	183	81	184	94
WORKINGTON	66	344	83	276	81	293	77	306	82	331
LANCASTER	126	149	133	137	144	154	150	128	156	140
GLASGOW	536	1	538	1	688	1	658	1	678	1

[9] 2008 VenueScore unavailable to GVA

PRESTON	207	37	211	35	243	44	240	41	283	29
NEWCASTLE	267	15	266	15	387	10	364	11	395	12

4.30 The *VenueScore* ranking identifies that Carlisle has declined from 66 rank in 2006 to 94 rank in 2011. To put the performance of the city centre in context, it ranks in 2011 at a similar level to centres such as Nuneaton, Inverness and Basildon and below centres such as Chelmsford (rank 89) and Sunderland (rank 85).

4.31 In contrast, the ranking system identifies Preston, which is a comparable sub-regional centre in the North West, as improving from 37 to 29 rank in the same period (notwithstanding that the planned Tithebarn scheme created a significant degree of commercial uncertainty).

4.32 Whilst Carlisle's decline in ranking is due in part to other centres improving its comparison-based retail offer, a number of factors including The Lanes shopping centre extension coming forward (2000) which would have absorbed many retailer requirements, the failure to meet commercial requirements and deliver more modern retail floorplates have also contributed to the decline. This is corroborated by *PROMIS* analysis which identifies that Carlisle is under-performing for a city centre of its size and potential catchment.

F) ACCESSIBILITY

4.33 The city centre is extremely well accessed by public transport. The railway station is situated immediately to the south west of the city centre primary shopping area (English Street and Botchergate thoroughfares). Appropriate bus provision to the wider sub-region is also available.

4.34 Unusually for a city centre of its size, there is a large potential walk-in catchment from the surrounding residential areas, including Botcherby and Caldewgate.

4.35 As with many historic city centres, the capacity and availability of car parking provision (public or private; on or off street) is a critical matter. Whilst there are a number of car parks serving the city centre including The Lanes (600 parking spaces), Lower Viaduct (450 parking spaces), Town Dyke Orchard (253 parking spaces) and Devonshire Walk (330 parking spaces), the local perception, as highlighted in the in-centre shopper survey, is that car parking availability and costs are importance 'push-pull' factors in relation to visiting the city centre.

4.36 The city centre is also well connected to the strategic road network with links to junctions 43 and 44 of the M6 along Warwick Road (A69) or Kingstown (A7). The completion of the northern relief road has significantly improved accessibility and the potential southern relief road would deliver further enhancements if realised.

I) PEDESTRIAN FLOWS

4.37 A detailed footfall assessment has been completed at agreed survey locations within the city centre over two days in April. A plan showing the pedestrian footfall locations is provided at Appendix 5 for reference.

4.38 The footfall surveys lasted for 5 minutes per survey location counting footfall in both directions, and continuous circuits of the town centre were completed between 10am and 4pm over the two survey days.

TABLE 6 – FOOTFALL COUNTS SUMMARY

Location	Wed 18th April	Sat 21st April	Total Count
1. Outside Wilkinson's	101	603	704
2. Outside Ann Summers	180	1064	1244
3. Outside Greggs	161	352	513
4. Outside Early Learning Centre	138	326	464
5. Junction of St. Cuthbert's Lane / English Street	177	205	382
6. Outside BHS	196	922	1118
7. Outside Celebrations	165	481	646
8. Outside Gamestation	157	646	803
9. Outside Edinburgh Woollen Mill	62	83	145
10. Junction of Grapes Lane, between O' Briens & KFC	169	281	450
TOTAL	**1506**	**4963**	**6469**

4.39 The highest levels of pedestrian footfall were recorded to outside Ann Summers (1,244 over the two days, predominantly on the Saturday) and outside BHS (1,118 people over the two days, again with the majority on Saturday); this is not surprising given the two survey locations are at the main junction with the city centre primary shopping area.

4.40 The levels of footfall recorded at location 1 outside the Wilkinson's store were also high (101 and 603 respectively). The lowest levels of footfall were recorded at location 10 on the junction of Grapes Lane, between O'Briens and KFC; this potentially reflects the location of the survey point relative to the city centre. Low pedestrian footfall was also recorded at location 9 outside Edinburgh Woollen Mill.

4.41 There is a stark contrast between the levels of footfall mid-week and on a Saturday, with footfall significantly high on a Saturday reflecting peak shopping times and visits. A future update of the survey based on the same locations will enable a comparative exercise to be undertaken.

5. IN-CENTRE SHOPPER SURVEY

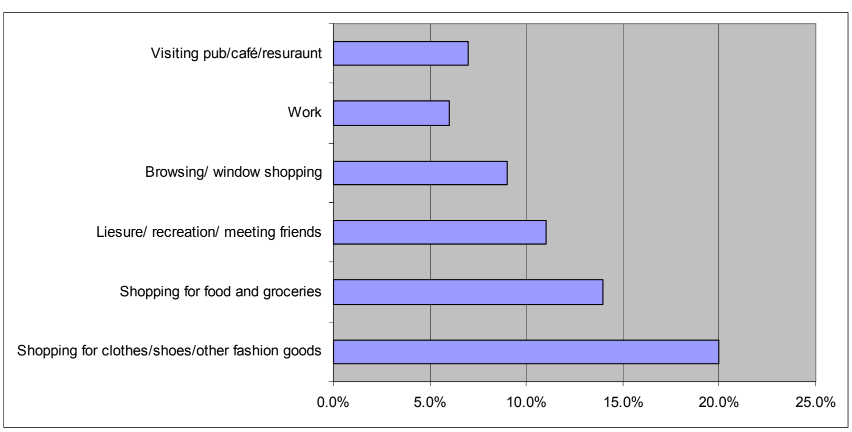
5.1 In order to inform our wider qualitative review and enable to preparation of an appropriate strategy for Carlisle town centre, a total of 100 in-centre shopper surveys were undertaken in April 2012. As detailed in the introduction to the report, the shopper surveys were commissioned in order to establish;

- The profile of visitors and shoppers to the town centre;
- Views on the strengths and weaknesses of the two centre, including suggested qualitative improvements;
- Patterns of usage (i.e. frequency of visits, modal split, dwell times); and
- Opinions of accessibility, environmental quality and perceptions of safety.

5.2 The surveys were spread across several days in order to capture a wide cross-section of regular town centre users and visitors. This section provides an overview of responses and, where possible.

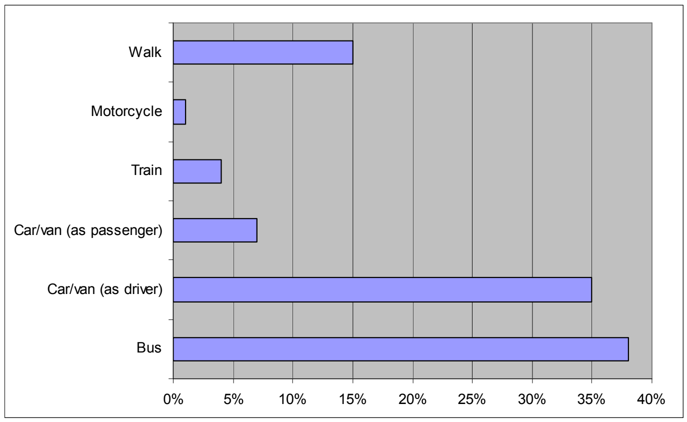
PURPOSE OF VISIT

5.3 The table below summarises the main responses. However, in headline terms, when asked what their primary purpose of visit was into the town centre, 20% of respondents stated they were shopping for clothes, shoes or other fashion goods with a further 14% shopping for food and groceries. Other main reasons for visiting the town centre included leisure and recreation (11%), browsing and window shopping (9%) and for work (7%). Only a small number of respondents (2.6%) had no particular purpose of visit.



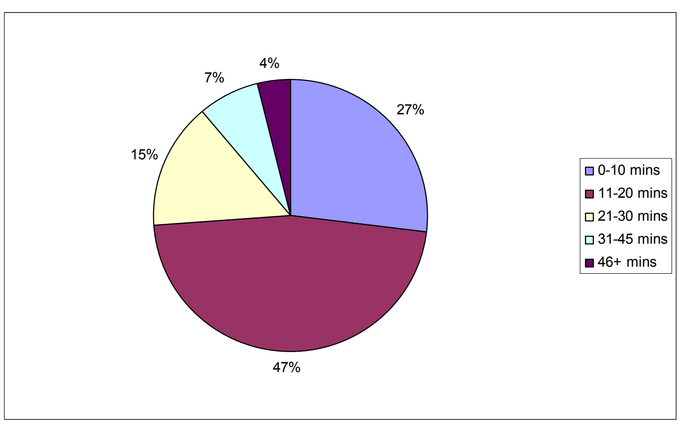
MODE OF TRAVEL

5.4 The main mode of travel into Carlisle city centre was by bus (38%), closely followed by car users (as driver) (35%). Other forms of travel included walking (15%) with much smaller numbers travelling by train (4%) and motorcycle (1%). The low level of train usage is slightly surprising given the sub-regional catchment that the city serves and the central location of the railway station adjacent to the city centre primary shopping area.



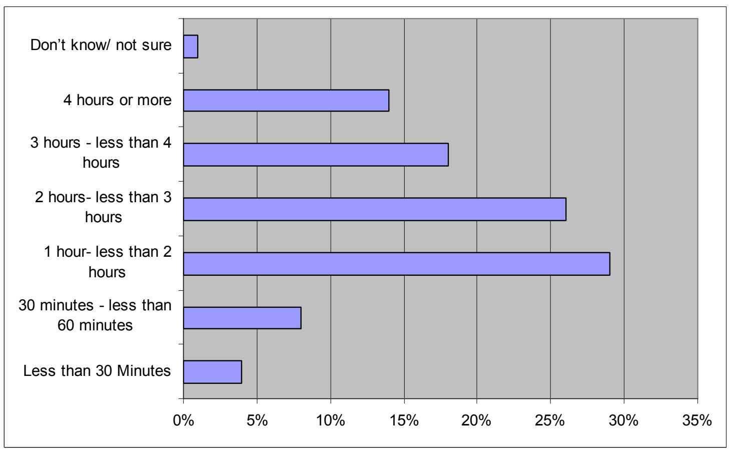
JOURNEY TIMES

5.5 Most respondents (47%) took only 11-20 minutes to travel into the city centre. The potential walk-in catchment that the city centre serves is highlighted by over one quarter (27%) of respondents travel time being 0 - 10 minutes. A further 15% travelled between 21 – 30 minutes.



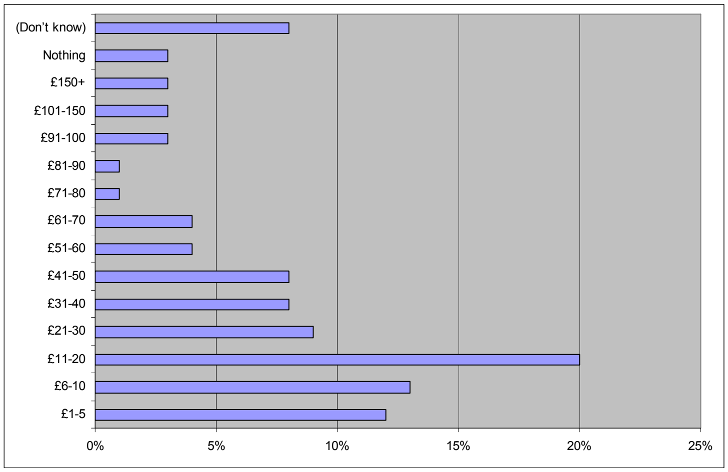
DWELL TIME

5.6 In terms of how long respondents were going to stay in the city centre during their visit, the highest number of respondents (29%) intended to stay between 1 to 2 hours. A further 26% were to stay in the city centre between 2-3 hours with a further 18% between 3 to 4 hours. The dwell time figures in part reflect the regional shopping, administrative and service function of Carlisle within the wider region.



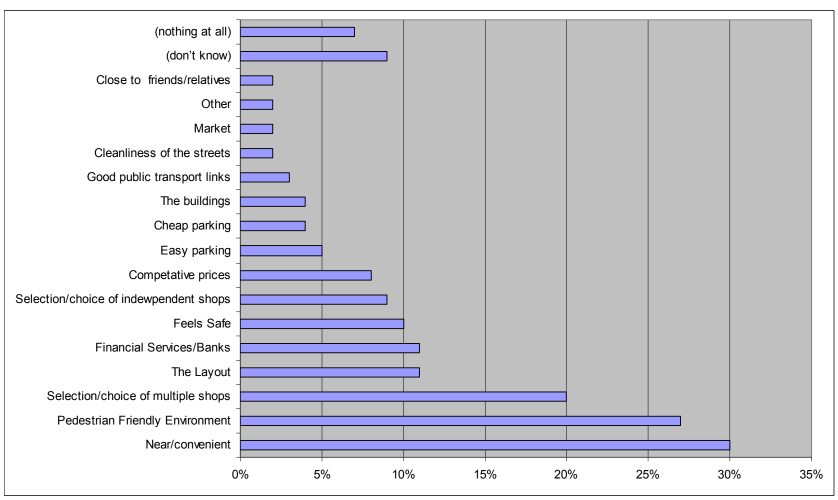
EXPENDITURE

5.7 A fifth of respondents (20%) expected to spend between £11-20 on their visit to the city centre. The remainder of responses were spread more evenly across the spending range with only 3% expecting to spend nothing at all on their visit. The relatively low spend potentially reflects the current economic climate.



MAIN CENTRE LIKES

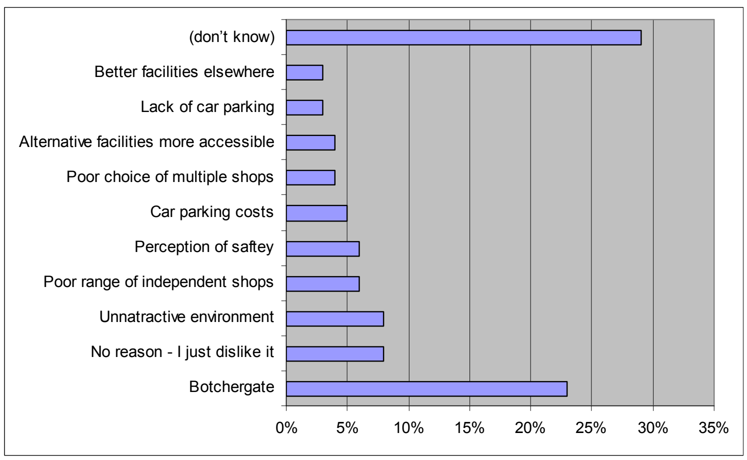
5.8 Most respondents (30%) 'liked' the city centre as it was convenient and in close proximity. The city centre pedestrian friendly environment (27%) was the second largest response followed by the selection and choice of multiple retailers (20%). Other responses included the city centre layout (11%), its financial services and banks (11%) and the perception of safety (10%).



MAIN DISLIKES

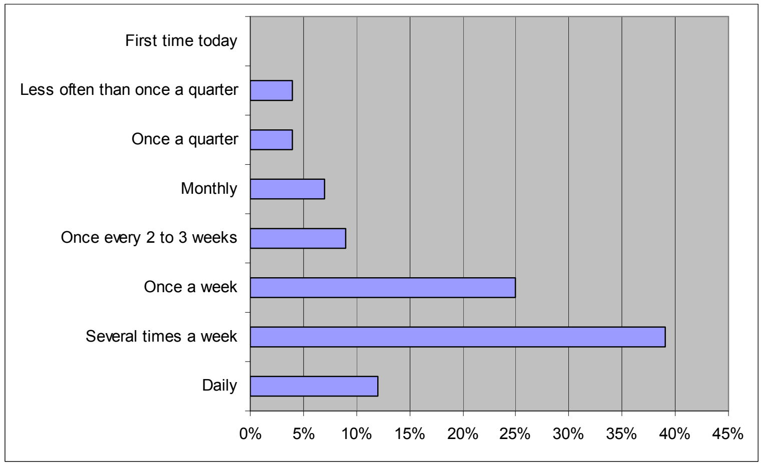
5.9 Most respondents did not have a particular view on what they disliked most about the city centre; whilst the level of response is high it is not unusual for a sub-regional centre given that a significant number of respondents are from outside the city.

5.10 After the 'don't know' responses, the main identified 'dislike' for the city centre (23%) was the Botchergate area which has becoming increasingly occupied by non-retail uses including evening economy uses (pubs, bars etc.). There are also several vacant units along Botchergate which undermine the attractiveness of the entrance to the city centre from the south. The other main concerns related to the unattractive environment (8%) of the city centre. Car parking costs and availability of spaces is also a notable concern.



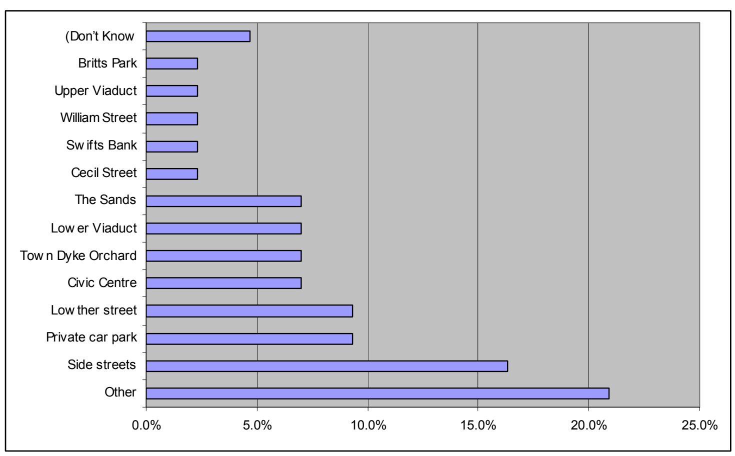
FREQUENCY OF VISITS TO CITY CENTRE

5.11 Most respondents (39%) visited the city centre several times per week; this reflects the higher order service and administrative function of the centre and also its potential walk-in catchment. A quarter (25%) of respondents visited the centre once a week with a further 12% visiting daily.

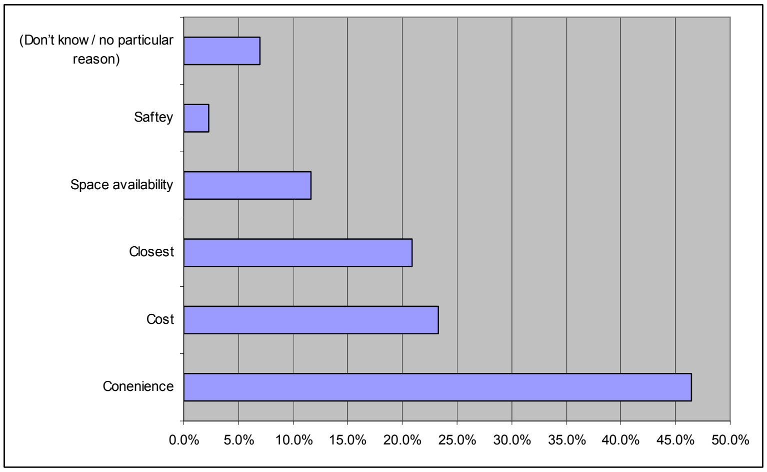


PARKING

5.12 In terms of where respondents parked if they visited the city centre by car, most respondents specified that they parked on-street (16.3%), followed by privately owned car parks (9.3%) and then Lowther Street (9.3%). The privately owned car park response is likely to include The Lanes car park which is not specifically identified in the survey response but which is extremely well used at peak shopping times in particular.

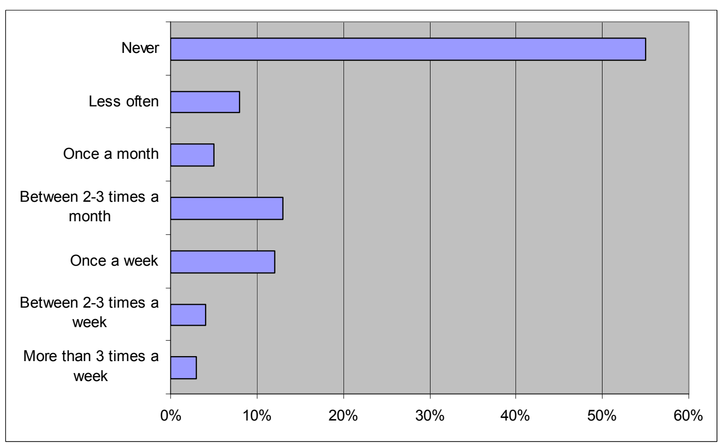


5.13 When asked why they parked where they regularly park, most respondents cited convenience (46.5%) followed by cost (23.3%) and proximity (20.9%).



EVENING ECONOMY

5.14 When asked how frequently respondents visit Carlisle in the evening, whilst over half (55%) confirmed that they never visit, most visited between 2 to 3 times per month and 12% visited once a week.



TRAVEL

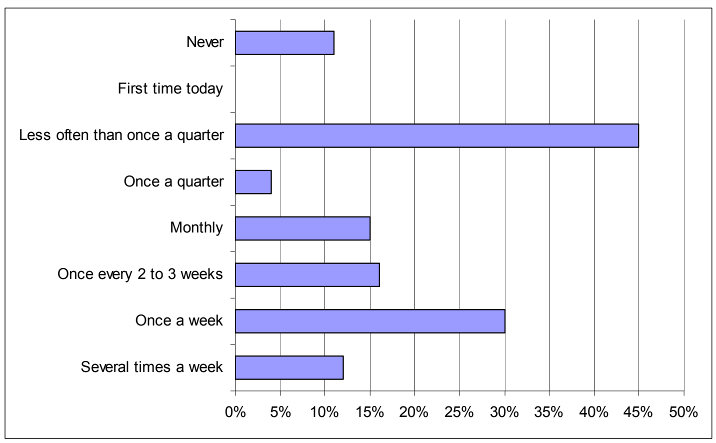
5.15 In terms of travelling to the city centre for leisure activities in the evening, the travel patterns were relatively equally split between public transport (33%), private car (31%) and walking (27%).

REASON FOR VISITING/NOT VISITING IN THE EVENING

5.16 Most respondents (71%) visited Carlisle in the evening to visit a bar / pub / club. The second most popular reason was to visit a restaurant (24%) with a further 22% visiting the cinema. The main reason people did not visit the city centre in the evening was that they do not socialise (36%) whereas 29% of respondents considered Carlisle city centre to be too far away; this potentially reflects the large sub-regional catchment the centre serves.

MARKET

5.17 When asked the frequency of visits to the city centre market hall, most respondents visited relatively infrequently (45% visiting less than once every quarter). A third of respondents did however visit on a weekly basis whilst 11% never visited the market altogether.

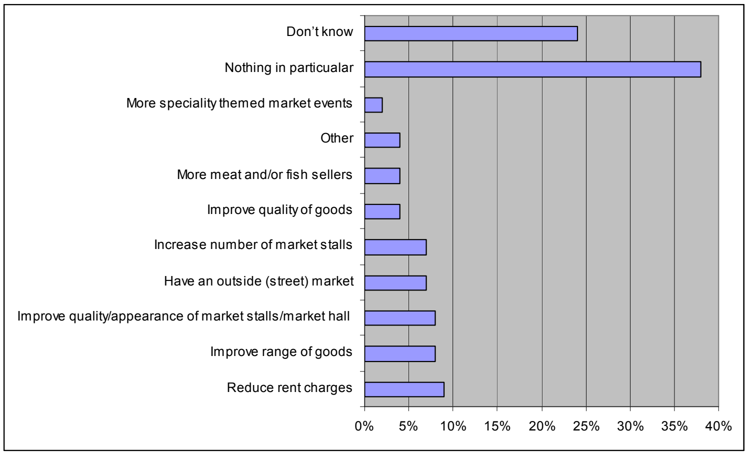


QUALITY OF THE MARKET

5.18 Most respondents (59%) considered that the quality of the city centre market was good. Positively, only 6% of respondents considered that the market was poor quality.

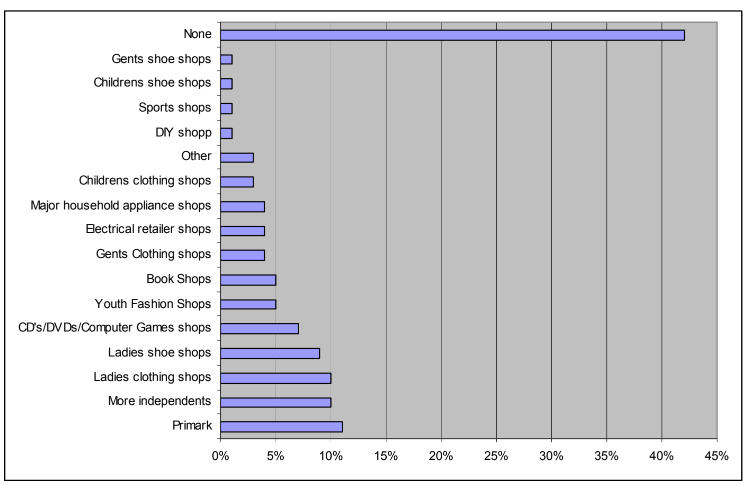
IMPROVEMENTS TO THE MARKET

5.19 When asked what improvements to the quality and range of the market would persuade them or their households to visit more often, aside from no changes or don't knows, 9% of respondents stated reduced rent charges whilst 8% stated improving improved quality of goods and improved quality/appearance of the market stalls/market hall.



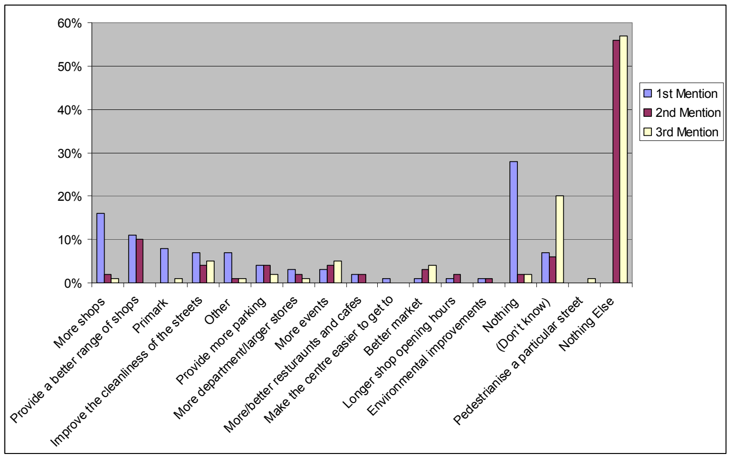
CITY CENTRE – SUGGESTED RETAIL IMPROVEMENTS

5.20 When asked what retail provision would persuade respondents to shop in Carlisle city centre more often, aside from suggesting no improvements, the main responses were for a Primark store (11%), more independent shops (10%) and more ladies clothing shops (also 10%). The responses for the provision of both multiple chain stores and independent shops is similar across many centres but is particularly relevant to Carlisle given the relatively small-scale of national fashion shops in the city centre.



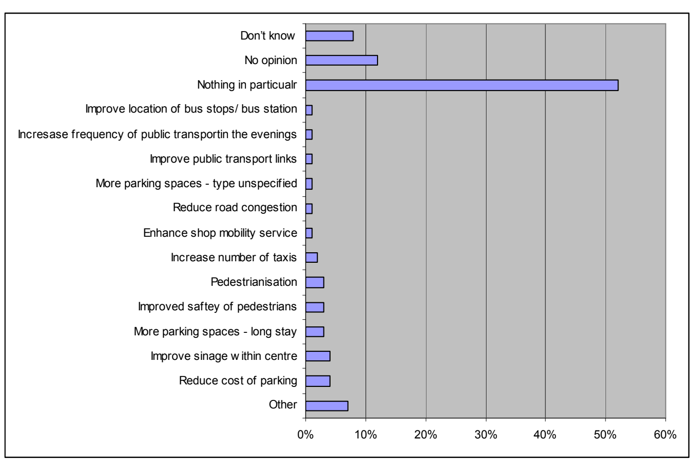
CITY CENTRE – MAIN (GREATEST IMPROVEMENTS)

5.21 When asked what three main things would make the greatest improvements to Carlisle city centre, as highlighted in the table below, aside from suggesting no improvements, most responses were for more shops (16%), a better range of shops (11%) and specifically attracting Primark to the city centre (8%).



IMPROVEMENTS TO TRANSPORT

5.22 The main improvements to transport and access to the city centre are relatively well spread across parking, congestion, signage and public transport.



6. RETAIL CAPACITY METHODOLOGY

6.1 The quantitative assessment adopts a conventional step-by-step methodology, drawing upon the results of the household telephone survey to understand existing shopping patterns and to model existing flows of available expenditure to the main retail destinations within Carlisle and the wider sub-region (extending into Scotland and North East England).

6.2 Having established the baseline position, the quantitative capacity modelling exercise goes on to establish the performance of the city centre and its main stores. The methodology, data inputs and assumptions adopted in the assessment exercise are set out below.

1) STUDY AREA DEFINITION

6.3 The study area and individual catchment zones for the study have been defined on the basis of local geography (topography, accessibility etc.) and with reference to the catchment zones defined within the 2009 Carlisle Retail Study (update to 2000 Study).

6.4 The original catchment zones in and around Carlisle have been maintained for consistency and to enable comparative assessment. However, the eastern catchment zones (Rural North and Yorkshire Dales) have been extended to include the small towns of Haltwhistle and Alston.

6.5 All catchment zones are defined on the basis of individual postcode sectors, so as to generate population and expenditure data from the *Experian Micromarketer* system (derived from ONS 2010 mid-year estimates)[10]. A schedule of the postcodes forming the respective survey zones is set out in the catchment plan provided at Appendix 1.

[10] Experian Retail Planner Note 9 (September 2011)

2) HOUSEHOLD TELEPHONE SURVEY

6.6 The household telephone survey data is a key input into the expenditure, modelling and capacity elements of the exercise. The 2000 Study completed a total of 1,000 household surveys in the wider sub-region.

6.7 Given the inclusion of the Haltwhistle and Alston settlements within the study area, a total of 1,125 household (telephone) surveys have been completed in this instance to ensure a robust statistical accuracy of +/- 2.9% at the 95% confidence level. The survey results have however been weighted in order to take account of the resident population in each respective zone as follows:

CATCHMENT ZONE	RECOMMENDED SAMPLE
Zone 1 - Carlisle	200 Surveys
Zone 2 – Carlisle East	100 Surveys
Zone 3 – Rural North	100 Surveys
Zone 4 – Rural South	100 Surveys
Zone 5 - Keswick	75 Surveys
Zone 6 – Yorkshire Dales	75 Surveys
Zone 7 – Allerdale	75 Surveys
Zone 8 – Copeland	75 Surveys
Zone 9 – Gretna	100 Surveys
Zone 10 – Langholm	75 Surveys
Zone 11 – Lockerbie / Moffat	75 Surveys
Zone 12 – Dumfries	75 Surveys
TOTAL SURVEYS	**1,125 Surveys**

6.8 The survey has been designed to establish household shopping habits in terms of convenience (main food / top-up), comparison and bulky goods expenditure. The results of the two types of food shopping questions are merged through the application of a weighting (75% main food; 25% top-up food shopping split), which reflects the estimated proportion of expenditure accounted for main (bulk) and daily top-up food shopping.

This produces a composite pattern of convenience spending, enabling the identification of each main centre and foodstore market share.

6.9 With regards to comparison goods, the survey was designed to pick up shopping patterns for the following categories:

COMPARISON GOODS	BULKY DURABLE GOODS
• Clothing, Footwear and Other Fashion Goods	• Furniture, Floor Coverings and Household Textiles
• Personal Goods (i.e. Jewellery, Watches, Medical Goods and Therapeutic Appliances)	• DIY, Decorating Goods and Garden / Pet Products
• Small Domestic Appliances (i.e. Kettles, Hairdryers, Tableware and Glassware)	• Major Household Appliances (i.e. Washing Machines, Fridges and Cookers)
• Books, CDs, DVDs and Computer Games	• Large Electrical Goods (i.e. TV, Hi-Fi, Radio, Photographic and Computer Equipment)
• Recreational Goods (i.e. Bicycles, Games, Toys, Sports and Camping Equipment and Musical Instruments)	

6.10 The results of all these questions were merged using weighting to reflect the amount of per capita expenditure in the identified survey zones for each of the different categories of goods.

6.11 In addition, the household survey also sought to understand where people presently go to pursue their main leisure activities (cinema, eating out etc.). The survey also sought to determine customer / visitor profile, mode of travel, the attraction and a number of attitudinal questions determining what users think about the retail and leisure offer, environmental quality and their perception of safety.

3) DATA VARIABLES

Estimates of Population in the Survey Area

6.12 The population estimates and forecasts for each of the survey zones are derived from the *Experian Micromarketer* database (2010 ONS and Price Base). The population estimates are based on trend-line projections from the 2001 Census results and are calibrated to Local Authority District targets on the most recently available Government household and population data. The population estimates are updated annually to allow for changes in housing stock and residual population.

Available Expenditure in the Survey Area

Expenditure

6.13 The latest *Experian Micromarketer* data (Briefing Note 9, September 2011) was used to provide estimates of per capita expenditure on convenience and comparison goods in 2010 prices. The following growth rates are applied to the baseline population and expenditure (per capita) figures[11]:

	2011	2012	2012-2018	2019-2026
Convenience Goods Expenditure Growth	-0.3%	-0.4%	0.5% (p.a.)	0.6% (p.a.)

	2011	2012	2013	2014-2026
Comparison Goods Expenditure Growth	0.5%	1.6%	2.1%	3.0% (p.a.)

6.14 Relevant deductions for special forms of trading (e.g. expenditure not available to spend in the shops[12]) have also been made on the following basis:

	2011	2012	2014	2021	2026
Convenience Goods SFT Deduction	4.2%	4.6%	5.4%	6.3%	6.8%
Comparison Goods SFT Deduction	10%	10.9%	12.3%	12.7%	12.7%

6.15 The adjusted expenditure figures are applied to the population forecasts to obtain the total available expenditure within each of the defined survey zones.

Floorspace Data

6.16 The floorspace data for the city centre is drawn from an Experian Goad survey report (relevant to reflect the adopted Local Plan city centre boundary) and updated through an on-site survey (April 2012).

[11] Based on Experian Briefing Note 9 (September 2011)
[12] Experian define SFTs as expenditure that does not take place in shops, such as that via mail order houses, door to door salesmen and stalls and markets. It also includes spending using digital TV and over the Internet.

6.17 Floorspace figures for provision outside of the city centre (or indeed wider Experian Goad mapping) is drawn from a variety of sources including Institute of Grocery Distribution (IGD) reports.

6.18 We have also sought to identify the proportion of any non-food floorspace within the main convenience stores in the wider locality through utilising the latest published data (i.e. *Verdict* and *Mintel*) and our own store visits.

Benchmark Turnovers

6.19 In order to review the current performance of the city centre as a retail destination and also its main stores, we have firstly modelled their existing performance and turnover through the household survey data, and secondly compared their existing turnover with estimates of trading at company average levels.

6.20 The company average trading levels have been calculated from average (goods-based) sales density figures obtained from *Mintel Retail Rankings* and *Verdict*.

Sales Density Improvements (Trading Efficiency)

6.21 In assessing the capacity for future retail floorspace we have assumed that the efficiency with which existing floorspace is being used will improve over time. The following efficiency improvements have been modelled on the basis of the latest published Experian information:

Growth	2011-2012	2012-2018	2019-2026
Convenience Goods Sales Density (£/m^2)	0% (p.a.)	0.4% (p.a.)	0.2% (p.a.)
Comparison Goods Sales Density (£/m^2)	0% (p.a.)	1.7% (p.a.)	1.7% (p.a.)

6.22 We consider the sales density increases to be conservative and robust, reflecting the current nature of provision within Carlisle city centre and the present short to medium term trading / economic conditions.

4) Baseline Capacity Review

6.23 Applying the results of the household telephone survey to population, expenditure and floorspace data inputs detailed in the previous section, it is possible to model the performance and market share of the city centre, main foodstores and retail park destinations.

6.24 In accordance with the Study Brief requirements, the baseline quantitative capacity (which is generated by population and expenditure growth alone), is presented on strategic dates according with the lifespan of the emerging Local Plan.

5) Enhanced Capacity Review

6.25 Having established the baseline capacity position, we then go on to consider what may be achievable in terms of potential increases in market share and thus quantitative capacity.

6.26 In assessing the potential for market share increase, our judgement is informed by our understanding of the current performance of the city centre and its realistic catchment; the stated opinions and preferences of the catchment population; the role and function of the centres within the retail hierarchy; and emerging development proposals in competing centres.

6.27 The forward capacity exercise is undertaken on a quantitative basis and informed by:

1. An adjustment in existing market shares prompted by the potential for new floorspace or changes in the market share retained by a centre through the clawback of expenditure presently flowing outside the catchment.
2. The potential for a redistribution of any overtrading surplus from existing stores which are over-performing against their company benchmark turnover.

6.28 It should be noted however that the potential uplift in expenditure only represents actual capacity if retail proposals and operators that emerge can genuinely qualitatively add to the existing retail offer of a town centre by strengthening its attractiveness so as to achieve the envisaged improvements in market share.

6.29 Any market share enhancement assessment should be viewed against the positive planning policy framework provided by NPPF. Therefore, should proposals emerge for the development of new retail facilities within the primary shopping area of the town centre then the application should be considered on its merits, having particular regard to the qualitative uplift that proposals could potentially achieve.

6.30 In the same respect, there is no NPPF based policy support for the diversion of trade from sequentially preferable central locations to new provision which is outside of a centre and is likely to lead to the loss of trade and wider benefits included linked shopping trips and footfall within a centre.

7. CONVENIENCE RETAIL ANALYSIS

7.1 Notwithstanding brand loyalty, shoppers usually travel to their nearest and most accessible foodstore or town centre to undertake the main (bulk) shopping. In contrast, top-up shopping for daily perishables (milk, bread etc.) is more localised in its nature with shoppers likely to buy daily goods from local convenience shops near to their home.

7.2 The existing convenience provision within Carlisle city centre (including Tesco Metro, M&S, Iceland and local independents) is relatively limited in scale and is predominantly oriented towards top-up shopping. The main (bulk) food destinations in the city are the large out-of-centre Tesco (Warwick Road), Morrison's (Kingstown Road) and Asda (Kingstown Retail Park) stores. The main discount operators (Aldi and Lidl) are also well represented in the city. A network of smaller convenience stores within local centres meets local top-up needs.

MAIN FOOD SHOPPING

7.3 There is a main food expenditure pot of £110.9m in the Carlisle catchment (zone 1); this is projected to rise to £133.9m by 2030 (£13.0m total growth).

7.4 The capacity modelling exercise (Table 5a, Appendix 2) indicates that the existing convenience provision in Carlisle city centre (as defined on the adopted Local Plan proposals map) performs a relatively minor main food function with a 7.2% (£8.0m) market share from the Carlisle catchment (survey zone 1). The Tesco Metro (4.1% / £4.5m) is the most popular city centre convenience location.

7.5 Outside of the city centre, main food shopping is largely dominated by three large out-of-centre foodstores:

- **Tesco Warwick Road** (east of the city centre); the store claims a 30.6% (£33.9m) market share from the Carlisle catchment (survey zone 1). This is in addition to notable market shares from the Rural North (18.9% / £6.7m) and Rural South (63% / £9.5m) catchments; the market share draw from these catchments reflects the stores prominent location adjacent to the M6 (junction 43).
- **Morrison's Kingstown** (north of the city centre); the store claims a 32.1% (£35.6m) market share from the Carlisle catchment. The store also draws strongly from the Rural North (33.7% / £11.9m) and Langholm (24.3% / £1.6m) catchments.

- **Asda Kingstown** (north of the city centre); given that the store is located at the northern extent of city, the store only secures a 15.8% (£17.5m) market share from the Carlisle catchment. The store does however draw a notable trade from the Rural North (25.3% / £8.9m), Gretna (20.4% / £5.0m) and Langholm (38.6% / £2.6m).

7.6 When the market share of smaller stores outside of the city centre (including discounters) are taken into account along with the main foodstores and the city centre, then the city as a whole retains 98% (£108.5m) of all main food expenditure arising in zone 1.

7.7 The overall retention level does however vary across the other survey zones, as follows:

- **Carlisle West (survey zone 2) -** 50.7% (£22.4m) main food retention;
- **Rural North (survey zone 3)**; - 84.2% (£29.7m) main food retention;
- **Rural North (survey zone 4)**; 89% (£13.4m) main food retention;
- **Gretna (survey zone 9)**; 39.8% (£9.7m) main food retention; and
- **Langholm (survey zone 10)**; 81.4% (£5.4m) main food retention.

7.8 In all other zones the overall retention level for provision in Carlisle is below 10%. Given the extremely high levels of main food retention, there are negligible outflows of expenditure (leakage) to other centres.

7.9 Brampton, Longtown and Dalston perform extremely limited main food shopping roles; the household survey does not identify Longtown and Brampton as achieving any main food market share whilst Dalston (Co-Op) only secures a 1.1% (£0.5m) market share from the Carlisle West catchment (survey zone 2). It is however possible since the household survey was completed that Dalston now retains a greater main food market share as the existing Co-Op store was being redeveloped and increased in size. The enhanced store has subsequently opened for trading.

TOP-UP FOOD SHOPPING

7.10 There is a total of £212.5m of top-up food expenditure arising in the study area (survey zones 1 – 12). The expenditure pot for the Carlisle catchment (survey zone 1) is £36.9m. The available expenditure in the Carlisle West (£14.7m), Rural North (£11.8m) and Rural South (£5.0m) catchment is significantly less.

7.11 The localised nature of top-up shopping is highlighted by the survey results (Table 5b, Appendix 2) for the Carlisle catchment (survey zone 1) which details the following:

- **City Centre**; existing provision retains 16% (£5.9m) of top-up spend. Local independent shops claim a notable 5.3% (£2.0m) market share although slightly below Tesco Metro (5.9% / £2.2m));
- **Main Foodstores**; retains 50.9% (£18.8m). The main destinations are Tesco Warwick Road (10.1% / £3.7m) and Co-Op Wigton Road (13% / £4.8m); this reflects the prominent location of the respective stores on main commuter routes out of the city. The Morrison's and Asda stores at Kingstown perform a more limited top-up role.
- **Local Centres**; retain a total of 18.5% (£6.8m). Blackwell Road in Currock is a prominent top-up destination (6.5% / £2.4m).

7.12 When the market share of the city centre, main foodstores and local provision is combined, the city retains 85.4% (£31.5m) of all top-up expenditure arising in the Carlisle catchment (survey zone 1).

7.13 The overall market share that Carlisle claims from surrounding catchment is however significantly reduced from the main food retention levels. The city only secures the following:

- **Carlisle West (survey zone 2) –** 18.1% (£2.7m) top-up food retention;
- **Rural North (survey zone 3)**; - 21.2% (£2.5m) top-up food retention; and
- **Rural South (survey zone 4)**; 50.6% (£2.5m) top-up food retention.

7.14 Longtown (16.9% / £2.0m) and Brampton (29.2% / £3.4m) perform notable top-up shopping roles in the Rural North catchment whereas Dalston claims a 9.1% (£1.3m) market share from the Carlisle West catchment.

7.15 Carlisle retains below 10% of top-up spend arising in other catchments (Gretna etc.) in the overall study area.

OVERALL MARKET SHARE [MAIN AND TOP-UP COMBINED]

7.16 Combining the main food and top-up market shares together, the capacity modelling assessment (Table 5c, Appendix 2) identifies the following:

- **City Centre**; existing provision retains 9.4% (£13.9m) of total convenience spend arising in the Carlisle catchment (survey zone 1). Tesco Metro retains an overall 4.6% (£6.7m) market share;

- **Main Foodstores**; retain 80.8% (£119.3m) of total convenience spend from the Carlisle catchment. Morrison's Kingstown (25.9% / £38.2m) and Tesco Warwick Road (25.5% / £37.6m) retain just over 50% of spend arising in the catchment. Asda Kingstown performs a less prominent role (12.2% / £17.9m) whilst all other stores, including discounters, retain below 5% each.
- **Local Centres**; retain 4.6% (£6.8m) of all convenience expenditure arising in the Carlisle catchment (survey zone 1).

7.17 Given that the overall retention level for existing provision in Carlisle from its immediate catchment (survey zone 1) is 94.9% (£140.0m) then there is clearly extremely limited possibilities for any further market share enhancement. In assessing foodstore commitments later in the report it is clear that new provision will re-distribute expenditure away from existing provision rather than achieving market share enhancement.

7.18 In terms of the other surrounding catchments, existing provision in Carlisle retains the following overall market shares:

- **Carlisle West (survey zone 2) –** 42.6% (£25.0m);
- **Rural North (survey zone 3)**; - 68.5% (£32.2m); and
- **Rural South (survey zone 4)**; 79.4% (£15.6m).

7.19 Carlisle also retains just over one third of total convenience spend (£10.4m) arising in the Gretna catchment and 63.5% (£5.6m) from the Langholm catchment.

7.20 Brampton has a 7.3% (£3.4m) market share from the Rural North catchment with Longtown retaining 4.2% (£2.0m) from the same catchment. Dalston retain 3.1% (£1.8m) from the Carlisle West catchment.

INDIVIDUAL STORE PERFORMANCE

7.21 Given that it is difficult to accurately quantify the performance of smaller retailers (particularly independent stores) given the lack of published sales data, the capacity modelling assessment (Table 6, Appendix 2) only seeks to quantify the performance of mainstream convenience retailers.

7.22 On the basis of the main food and top-up expenditure patterns identified through the household survey exercise, the capacity modelling exercise identifies the following trading performance of the three main foodstores within Carlisle as follows:

- **Tesco Warwick Road (out-of-centre)**; achieves a survey-based turnover of £63.4m. This is £29.5m above its benchmark of £33.8m and suggests that the store is significantly overtrading.
- **Morrisons Kingstown (out-of-centre)**; achieves a survey-based turnover of £67.2m. This is £28.5m above its benchmark of £38.7m and suggests that the store is significantly overtrading.
- **Asda Kingstown (out-of-centre)**; achieves a survey-based turnover of £52.3m. This is £7.9m above its benchmark of £44.4m and suggests that the store is significantly overtrading.

7.23 In relation to other smaller mainstream stores in Carlisle, the capacity modelling assessment identifies a relatively mixed performance:

- **Tesco Metro Blackfriar Street (city centre)**; trading £13.2m below expected company benchmark of £21.2m. The turnover of the store is however likely to be supplemented by significant lunch-time spend.
- **Asda St Nicholas Gate (former Netto)**; store is identified to be trading c. £8.6m below its expected company benchmark of £12.2m. The significant under-performance may be attributable to the relatively new supermarket style format and that the store may also be attracting more top-up convenience trade than identified in the survey.
- **Aldi Kingstown and London Road (both out-of-centre)**; both stores identified to be overtrading by £4.7m and £3.5m respectively.
- **Lidl Charlotte Street (edge-of-centre)**; overtrading by £1.5m above its benchmark.

7.24 The trading position and performance of the main foodstores in the city is however likely to significantly change given the number of foodstore commitments, as set out below.

FOODSTORE COMMITMENTS

7.25 Whilst the overtrading position of the three mainstream foodstores in the city (Tesco Warwick Road, Morrison's Kingstown and Asda Kingstown) would ordinarily generate a quantitative and qualitative justification to explore the need for new foodstore provision, there are a number of foodstore commitments (Table 7, Appendix 2) which are likely to come forward and rebalance existing convenience shopping patterns, as follows:

- **Tesco Upper Viaduct Estate (out-of-centre)**[13]; new foodstore of 3,715 m^2 gross (2,415 m^2 net sales of which 80% dedicated to convenience). The store is projected to have a benchmark turnover of £24.8m (2012).
- **Sainsbury's Caldewgate (out-of-centre)**[14]; new foodstore of 8,886 m^2 gross (5,514 m^2 net sales of which 68% dedicated to convenience). The store is projected to have a benchmark turnover of c. £47m (2012).
- **Morton District Centre (new centre allocation)**[15]**;** new district centre development comprising mainstream foodstore anchor extending to 8,175 m^2 gross (5,574 m^2 net sales of which 60% dedicated to convenience). The store is projected to have a benchmark turnover of £40.1m (2012). There is presently no end occupier.
- **St Nicholas Gate Retail Park (out-of-centre)**; amalgamation of units 4 to 6 of the existing retail park to create a foodstore unit of 4,300 m^2 gross (2,975 m^2 net sales of which 63% dedicated to convenience). The store is projected to have a benchmark turnover of £22.5m (2012). There is presently no end occupier.

7.26 The development of a new Tesco foodstore in Wigton (Allerdale BC)[16] within the Carlisle West catchment is also likely to have a notable impact on turnover performance of main foodstores in Carlisle by reversing current expenditure flows. The approved Tesco store would be 4,334 m^2 gross and would comprise 1,486 m^2 (net) convenience and 836 m^2 (net) comparison floorspace.

BASELINE CAPACITY

7.27 When the total turnover of all convenience provision within the city is projected forward against future population and expenditure growth, the capacity assessment (Table 8a, Appendix 2) identifies that a quantitative need for new convenience provision is only available in the latter stages (post 2021) of the emerging Local Plan period. The capacity identified in 2030 (c. 1,300 m^2 net) would be sufficient to support a smaller format store operated by a mainstream retailer (Asda, Morrison's, Tesco or Sainsbury's) or discount format stores (Aldi, Lidl etc.)

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[13] LPA ref. 99/0842
[14] LPA ref. 09/0512
[15] LPA ref. 10/0917
[16] LPA ref. 2009/0500 – subject to S106 Agreement

7.28 However, this headline capacity position does not take account of foodstore commitments (Table 7, Appendix 2), as detailed below.

CAPACITY - COMMITMENTS

7.29 Whilst the identified levels of overtrading at the existing out-of-centre foodstores in the city (Tesco, Morrison's and Asda) would ordinarily generate both a quantitative and qualitative requirement for new provision, there are a number of foodstore commitments in the city (Table 7, Appendix 2) which will substantially reduce existing overtrading towards more sustainable levels (trading equilibrium).

7.30 The existing foodstore commitments will enhance local competition and choice as well as addressing current spatial imbalances in main foodstore provision in the city; Asda and Morrison's are located to north of the city whilst Tesco is located to the east adjacent to the M6. The Sainsbury's Caldewgate (under construction) and the approved Morton district centre scheme will better serve the west and southern parts of the city.

7.31 In addition to the commitments, given that the capacity modelling assessment identifies that existing convenience provision within Carlisle presently retains 98% of all main food expenditure arising within its immediate catchment (survey zone 1), there is no realistic potential to achieve market share enhancement.

7.32 The city also secures significantly high main food market shares from its immediate rural hinterland (c. 85% - 90% main food market shares from the Rural North and Rural South catchments) and it is extremely doubtful that any new provision could achieve any further substantive market share increases. Indeed the current main food expenditure inflows from the Carlisle West catchment to foodstores in the city will be reduced if the approved Tesco store in Wigton opens.

7.33 On the basis of committed schemes and the realistic lack of potential for market share enhancement, the capacity assessment (Table 8b, Appendix 2) identifies no quantitative or qualitative need for the Council to proactively plan for new convenience provision in the city over the emerging Local Plan period. This position should however be reviewed in the latter stages of the emerging Local Plan period once trading patterns settle down following the opening of the new foodstores.

FORWARD STRATEGY

7.34 On the basis of current foodstore commitments, the capacity assessment identifies no requirement for the Council to proactively plan for new convenience provision in the city over the emerging Local Plan period through to 2030. However, this position should be monitored through an update to this study once the committed foodstore schemes are trading and regular main food shopping patterns are established.

7.35 The main strategic implication arising from the study is the need to ensure the delivery of the Morton district centre scheme in order to address the existing spatial deficiencies in foodstore provision in the south of the city. The existing district centre allocation for Morton should therefore be retained through the emerging replacement Local Plan. The retained allocation will ensure that the site / scheme benefits from appropriate policy protection as an 'in-centre' location in sequential terms.

7.36 Maintaining the district centre allocation will also ensure that any future foodstore or retail applications, particularly to the south of the city, which come forward outside of the development plan process will be required to demonstrate that it would not undermine the planned delivery of the Morton scheme nor adversely impact upon its trading viability going forward.

7.37 With the exception of Morton, existing and planned foodstore provision in the city is predominantly located outside of defined centres. There is no requirement to formally identify the existing out-of-centre foodstores as centres for the purposes of NPPF.

7.38 The existing network of local centres are identified as performing an top-up function for local residents in both the city and the wider rural hinterland and the Council should seek to maintain the convenience offer within the local centres as appropriate.

8. COMPARISON RETAIL ANALYSIS

8.1 In contrast to convenience shopping patterns which tend to be more localised in nature, comparison shopping is destination based with shoppers prepared to travel further to shop for clothing, fashion and personal items; these sectors are therefore key drivers and the primary determinants in choice of destination. Expenditure is therefore more mobile and less restricted to a local catchment or particular centre.

8.2 The survey findings summarised below do however identify that Carlisle, as a sub-regional centre, serves a relatively large hinterland which to a large extent is devoid of any meaningful competition from sub-regional (Workington and Whitehaven) and regional centres (Newcastle, Metro Centre, Glasgow, Manchester and Trafford Centre).

8.3 The centre therefore acts in relative geographical isolation in comparison to other sub-regional centres in the North West of comparable scale and offer. This lack of competition manifests itself in relatively high levels of expenditure retention and may to a certain extent reflect the lower propensity for local residents to travel significant distances for comparison goods given the current economic climate (declining available spend and higher travel costs).

OVERALL COMPARISON MARKET SHARE

8.4 There is a total of c. £1,067.6 million of comparison goods expenditure arising within the study area as a whole (survey zones 1 to 12) in 2012; this is projected to rise to £1,263.5 million by 2018 and £1,920.9 million in 2030. The Carlisle catchment (survey zone 1) which is drawn tightly to the existing urban area has a total of £193.4m available in 2012, rising to £233.6m in 2018 and £369.4m by 2030.

8.5 The capacity modelling exercise (Table 15, Appendix 3) identifies the following overall comparison market shares:

- **Zone 1 – Carlisle**; the city centre retains 70.3% (£135.9m) of all comparison expenditure arising in its immediate catchment (survey zone 1). Retail parks in the city retain a further 21.6% (£41.8m). There are extremely limited outflows of expenditure from the Carlisle zone to surrounding centres and retail destinations in the sub-region (i.e. Gretna Gateway 1.1% / £2.1m draw).

- **Zone 2 – Carlisle West**; the city centre retains 56.1% (£44.8m) of all comparison expenditure arising in the zone. Retail parks in Carlisle claim a further 17.9% (£14.3m). The main alternative destinations in the zone are Wigton (6.6% / £5.3m) and Workington (3.7% / £3.0m).
- **Zone 3 – Rural North**; the city centre retains 46.4% (£30.1m). Longtown and Brampton retain 0.9% (£0.6m) and 1.3% (£0.8m) respectively. Retail parks in Carlisle perform a more prominent role with a 31.3% (£20.4m) overall market share. The main alternative destination is Newcastle-upon-Tyne (4.3% / £2.8m).
- **Zone 4 – Rural North**; the city centre retains 65.2% (£18.4m). Retail parks secure a further 20.5% (£5.8m). Newcastle-upon-Tyne claims a 2.4% (£0.7m) market share.

8.6 As to be expected, the overall comparison market share of the city centre does however decrease from the most distant catchment zones in the sub-region. The survey results do however indicate that the city centre claims a 40.5% (£30.8m) market share from the Yorkshire Dales catchment (survey zone 6), 50.3% (£21.0m) from Gretna (survey zone 9) and 53.5% (£6.1m) from Langholm (survey zone 10). The city centre market share from Allerdale, Copeland and Dumfries catchments in particular is below 15%.

8.7 Overall, the city centre secures a £373.6m market share from the study area (survey zones 1 to 12); this equates to 35.3% of all comparison goods spend. Retail parks secure £108.0m of expenditure (10.1% market share).

INDIVIDUAL COMPARISON GOODS MARKET SHARE

8.8 The overall market share secured by the city centre does however hide variances in retention levels for individual comparison goods. The table (drawn from Tables 6 – 14, Appendix 3) below highlights the market share that the city centre achieves for 'high street' style comparison goods (principally clothing and personal goods) and bulky based goods (furniture, major household appliances, DIY goods and audio-visual goods).

COMPARISON GOODS	ZONE 1 (CARLISLE)	ZONE 2 (CARLISLE WEST)	ZONE 3 (RURAL NORTH)	ZONE 4 (RURAL SOUTH)
CLOTHING	86.2% (£46.4m)	80.6% (£16.6m)	65.9% (£5.9m)	81.5% (£5.9m)
PERSONAL GOODS	85.1% (£14.9m)	60% (£4.4m)	61.0% (£3.3m)	76.8% (£2.1m)
BOOKS, CDs & DVDs	86.1% (£11.1m)	80.4% (£5.0m)	58.0% (£3.0m)	80.4% (£1.8m)
FURNITURE	73.1% (£16.2m)	59.5% (£5.5m)	56.4% (£4.5m)	74.1% (£2.6m)
DIY	41.5% (£7.3m)	23.6% (£2.1m)	12.2% (£0.9m)	19.8% (£0.7m)
MAJOR HOUSEHOLD	58.3% (£2.6m)	31.1% (£0.4m)	38.6% (£0.4m)	59.0% (£0.3m)
AUDIO-VISUAL	47.6% (£8.6m)	27.3% (£1.9m)	25.3% (£1.5m)	53.0% (£1.2m)

8.9 The table shows that the city centre performs strongly in relation to 'high street' comparison but weaker in relation to bulky goods. The lower levels of market share retention for bulky goods is however to be expected given that bulky goods provision is usually located on out-of-centre retail warehouse parks and that there is a concentration of such destinations in and around Carlisle.

BASELINE QUANTITATIVE CAPACITY

A) CITY CENTRE CAPACITY

8.10 When the existing turnover of the city centre (c. £373.6m in 2012) is projected forward on a constant market share (no change) basis, the capacity modelling assessment (Table 18a, Appendix 3) identifies relatively limited short term quantitative need but substantive quantitative need in the latter phases of the emerging Local Plan as follows:

	2014	2018	2021	2030
NET SALES REQUIREMENT	**c. 1,550 m²**	**c. 5,500 m²**	**c. 8,600 m²**	**c. 18,700 m²**

8.11 The growth in floorspace need is predominantly attributable to projected population and expenditure growth.

8.12 This headline capacity position does not however take into account of the turnover of comparison floorspace within committed foodstore schemes in the city (Table 17,

Appendix 3). If the comparison turnover of the commitments is applied against the current city centre turnover position, the headline capacity (Table 18b, Appendix 3) is significantly reduced, as follows:

	2014	2018	2021	2030
NET SALES REQUIREMENT	**-5.700 m²**	**-1,700 m²**	**c. 1,400 m²**	**c. 11,500 m²**

8.13 As the table indicates, there is only a positive need for new comparison retail provision in the city centre after 2021 (c. 1,400 m² net) with substantive capacity at the end of the emerging Local Plan period in 2030 (c. 11,500 m² net).

8.14 At the outset, it should however be noted that the 'with commitments' capacity for the city centre is very much a 'worst-case' scenario given that the comparison retail offer within the committed foodstore schemes is qualitatively distinguishable from the city centre mainstream comparison retail offer.

8.15 In reality, the breadth and depth of choice of comparison goods (i.e. clothing, electrical etc.) within foodstores is extremely limited, predominantly own brand, orientated towards value and geared towards impulse purchases carried out during main food shopping.

8.16 Therefore, on this basis, the trading impacts of the comparison floorspace within the committed foodstore schemes is unlikely to predominantly fall on the city centre but instead on existing out-of-centre foodstores in the city (principally Asda Kingstown, Morrison's Kingstown and Tesco Warwick Road).

8.17 Consequently, the 'with commitments' capacity identified for the city centre should be treated as a very much worst case scenario and the Council should build sufficient flexibility into its emerging Local Plan policies to proactively plan for a greater quantum of comparison retail floorspace within the range identified between the 'with' and 'without' commitments capacity (c. 11,500 m² to c. 18,700 m² in 2030).

B) CITY-WIDE CAPACITY

8.18 Adopting a similar approach as above, when the turnover of all comparison retail facilities / destinations within Carlisle (including city centre, retail parks, foodstores and local centres) is projected forward on a constant market share basis, the baseline capacity modelling exercise (Table 20, Appendix 3) identifies the following (excluding commitments):

	2014	2018	2021	2030
NET SALES REQUIREMENT	**c. 2,000 m²**	**c. 7,100 m²**	**c. 11,100 m²**	**c. 24,100 m²**

8.19 However, when commitments are taken into account, the capacity for new comparison retail provision across the city as a whole is substantially reduced until the latter phases of the emerging Local Plan as follows:

	2014	2018	2021	2030
NET SALES REQUIREMENT	**-5,200 m²**	**-100 m²**	**c. 3,900 m²**	**c. 16,900m²**

8.20 Given that the capacity projections are based on a constant market share basis, the potential for market share enhancement is considered below. The assessment in particular focuses on the city centre market share performance given that a '*do nothing*' scenario is likely to lead to a relative decline in the overall competitiveness of the city centre given current constraints (lack of available modern floorspace, retailers in constrained units, unsatisfied retailer requirements etc.).

C) THE POTENTIAL FOR IMPROVEMENT – MARKET SHARE ENHANCEMENT

8.21 The quantitative capacity assessment identifies no immediate need for the Council to proactively plan for new comparison provision in the city centre in the early phase of the emerging Local Plan (i.e. to 2018). This is primarily due to the comparison retail turnover claims of committed foodstore schemes in the city; this is however a very much worst case scenario.

8.22 The assessment does however identify significant capacity on both a city centre and city-wide basis beyond 2021 even when commitments are taken into account; this capacity is generated on the basis of forward population and expenditure growth rather than any substantive change in the performance of retail facilities in primarily the city centre or the wider city as a whole.

8.23 With specific regard to the city centre, the modelling exercise identifies that it is performing well with a c. 70% overall comparison goods market share from its immediate catchment (survey zone 1 is drawn tight to Carlisle urban area). When the market share of existing out-of-centre provision in the city is taken into account (21.6%), there is extremely limited leakage from the city itself.

8.24 Importantly, the city centre achieves high market shares for key individual goods sectors including clothing (86.2%), personal goods (85.1%) and recreational goods (74.2%) from its immediate catchment (survey zone 1). The city centre is therefore more than adequately meeting the main comparison shopping needs of its immediate local catchment.

8.25 The positive performance in quantitative terms does however mask several deficiencies in the city centre offer identified through in the qualitative elements of the study (healthcheck and in-centre survey), as follows:

- Although the city centre accommodates most mainstream high street fascias (River Island, M&S, Next etc.), the retailers currently trade from very small retail units which reduce the fashion product lines that can be stocked in comparison to larger stores. There is potentially latent demand for existing comparison retailers to 'up-size'.
- With the exception of Debenhams which occupies a modern unit adjoining The Lanes shopping centre, existing department stores in the city centre (particularly M&S and House of Fraser) presently occupy historic units over multiple floors. The M&S store for example comprises three separate but interlinked buildings.
- There is a stated desire by local residents and visitors for an enhanced range of multiple shops including a Primark department store in Carlisle.
- The city centre lacks some of the mid-to-higher range fashion retailers normally associated with higher order sub-regional centres; this may in part be attributable to a lack of suitable available retail accommodation in the city centre.

8.26 Consequently, whilst the historic nature of the city centre is a significant asset and attraction in itself, it is also restricting the ability of existing retailers to expand their offer whilst also constraining realistic development opportunities to create new modern retail floorspace which would attract new retailers to the city centre (i.e. realising the unsatisfied operator requirements for the city).

8.27 On this basis, we consider that there is realistic potential to improve the market share performance of the city centre in order to better enable it to assume its intended sub-regional role for the wider local area. A step-change in the city centre fashion offer is particularly required to address current constraints / deficiencies.

8.28 The city centre currently achieves an overall market share of 35.3% (£373.6m) from the overall defined study area (survey zones 1 – 12). We have therefore sought (Table 19a, Appendix 3) to model an incremental but realistic enhancement in the market share performance of the city centre from the 35.3% level at present to 37.5%; this relatively small increase generates an additional c. £26.8m of comparison expenditure to support new retail provision.

8.29 The additional expenditure arising from the market share increase would generate the following floorspace requirement under the 'with' and 'without' commitments scenarios:

	2014	2018	2021	2030
NET SALES REQUIREMENT [WITHOUT COMMITMENTS]	**c. 7,000 m²**	**c.11,250 m²**	**c. 14,600 m²**	**c. 25,400 m²**
NET SALES REQUIREMENT [WITH COMMITMENTS]	**-200 m²**	**c. 4,000 m²**	**c. 7,400 m²**	**c. 18,200 m²**

8.30 The increase in market share will however only be achieved if any new city centre scheme which emerges is of sufficient quality in terms of design and prospective retail anchors so as to genuinely facilitate an improvement in comparison retail provision.

8.31 Whilst the potential 'up-sizing' of existing retailers into larger more modern floorspace configurations would generate qualitative benefits (enhanced range of goods etc.), substantial displacement of existing retailers could potentially have some adverse impacts on the city centre if existing retail accommodation within the primary shopping area becomes vacant and available. As previously detailed, existing national multiple retailers currently occupy relatively historic and in some cases constrained units in the city centre and it may be difficult to ensure effective re-use of the existing retail units if they were vacated; this would obviously generate major city centre management issues.

8.32 The primary aim of any potential quantitative (physical expansion) of the city centre should be to provide new modern retail units to attract new retailers (i.e. Primark) who are not presently represented in Carlisle. New provision which complements and qualitatively enhances the existing city centre comparison retail offer (particularly clothing and fashion) would be more likely to genuinely achieve the potential increase in market share rather than displacement / duplication of existing retailers.

8.33 Therefore, notwithstanding that quantitative need only arises in the mid to latter phases of the emerging Local Plan period, it is our view in light of the qualitative-based indicators and current deficiencies / constraints that the Council should proactively identify suitable sites in the emerging Local Plan. The identification of sites to accommodate new substantial retail development within the city centre should accord with the floorspace capacity identified under the market share enhancement scenario (e.g. c. 18,200 m^2 net by end of the emerging Local Plan period in 2030).

FORWARD STRATEGY

8.34 Given the key requirement in NPPF for Council's to ensure an appropriate supply of suitable sites to meet identified needs, it is recommended that the Council seek to commission an up-to-date masterplan of the city centre to establish potential site opportunities for new comparison retail-led development.

8.35 This is particularly pertinent given that the existing city centre is extensively covered by a conservation area designation with a number of listed buildings and structures. These historic constraints allied to its narrow street pattern and surrounding (relatively dense) residential areas means that there are relatively few development site opportunities available without significant physical intervention into the historic core of the city.

8.36 Therefore, it will be particularly important for any assessment of potential site opportunities identified through the city centre masterplan to genuinely establish (as advocated by the retained PPS4 practice guidance):

- The physical quantum of retail development that could be realistically accommodated on a site (gross floorspace);
- The constraints to development (land ownership, physical limitations etc.); and
- The realistic timescales for the sites to come forward and be viably delivered (cost, delivery and market factors).

8.37 Subject to completing this masterplanning exercise, if appropriate deliverable sites are identified then the Council should promote the opportunities on a 'twin track' basis in terms of site allocation through the emerging Local Plan process and through preparation of site-specific development briefs as appropriate.

8.38 However, if no realistic opportunities to expand or complement the existing city centre primary shopping area are identified within realistic timescales then the Council should in accordance with NPPF seek to identify suitable edge-of-centre or failing that out-of-centre sites which are in the most sustainable / accessible locations to accommodate the need identified.

EDGE / OUT OF CENTRE

8.39 Carlisle, unlike many other centres, has retained a viable distinction and balance between the city centre which is predominantly orientated towards high street comparison retail and edge / out of centre retail parks (Kingstown, Madford, St Nicholas Gate etc.) which are currently orientated to bulky durable retail goods.

8.40 Nationally however there has been significant activity towards broadening the use of traditional bulky goods retail warehouse parks to 'open A1' retail so as to accommodate traditional high street comparison retailers.

8.41 Any proposals for comparison retail (high street style in particular) which emerge outside of the initial masterplan and subsequent Local Plan process should, in accordance with NPPF, demonstrate that it would not generate a significant adverse impact on in-centre trade or undermine planned investment in the city centre if appropriate sequentially preferable site opportunities which are suitable and deliverable within realistic defined timescales are identified.

8.42 There is a real prospect that new out-of-centre high street comparison retail provision could have significant adverse impacts on the city centre by either attracting existing key retail anchors to relocate or absorbing the current demand from retailers not presently represented within the city (thereby impacting on the potential commercial viability of delivering in-centre regeneration opportunities which have longer gestation periods).

8.43 Therefore, until the outcome of the city centre masterplan exercise is known, there is no need or justification for the Council to identify edge or subsequently out-of-centre sites through the emerging Local Plan period.

9. LEISURE ASSESSMENT

9.1 This section reviews the existing leisure facilities within Carlisle, focusing in particular on the cinema, gym/health and fitness and evening economy provision (restaurants and bars). In order to inform the assessment, we have drawn upon the results of the survey exercises, which were designed to establish where residents regularly visit for leisure activities.

9.2 Having established the principal leisure destinations for local residents, the surveys also asked what improvements to the quality and range of leisure facilities would persuade households to visit Carlisle city centre more often. The main suggested improvements to leisure facilities inform a wider qualitative-based assessment of leisure provision.

CINEMA

9.3 As with retailing, mainstream cinema operators are increasingly located in larger sub-regional centres which serve large catchments and offer opportunities for linked shopping and leisure trips. The main cinema in Carlisle is operated by Vue and is located off Botchergate to the immediate south of the city centre primary shopping area. The cinema, which opened in June 2000, has 7 screens with a capacity of 1,734 seats. There are a number of family orientated theme restaurants located within the scheme.

9.4 Given the existing modern cinema provision in the city centre, the household survey results identify the following:

- A total of 52.2% of local residents (across all survey zones 1 – 12) confirmed that they attend the cinema as a regular leisure activity. Of those a total of 48.7% stated they visited the Vue Cinema at Botchergate.
- More specifically, almost all local residents (99%) in the immediate Carlisle catchment (survey zone 1) visited the Vue Botchergate cinema.
- The Vue cinema is the primary destination for local residents in most of the catchment zones in the wider study area (survey zones 2 – 12). The market shares vary from 98.1% in the Rural East catchment (survey zone 4) to just 4.9% in the Allerdale (survey zone 7) and Copeland (survey zone 8) catchments; the relatively low market shares from these respective catchments is to be expected given that the centres are located a considerable geographical distance away and that there is an existing cinema facility (Plaza) in Workington.

- Other destinations outside of the district which attract notable market shares from the wider study area include the Alhambra in Penrith and Odeon in Dumfries.

9.5 On the basis of household survey results, it is clear that the relatively modern Vue Botchergate cinema facility on the edge of the city centre is adequately meeting local residents' current needs in both quantitative and qualitative terms. The cinema facility is also centrally located so as to encourage increased dwell time within the city centre and encourage linked trips. Whilst there are some environmental management issues arising from the concentration of bars, restaurants and takeaways along Botchergate and London Road, it is clear that the cinema anchors the city centre leisure offer.

9.6 There is no overriding need for the Council to proactively plan for new cinema provision through the emerging Local Plan process. If alternative proposals emerge outside of the development plan process they should be assessed on the basis of the NPPF tests.

GYM/HEALTH AND FITNESS

9.7 Carlisle has a well established network of relatively modern public health and fitness facilities around the city. The main provision includes The Sands Centre, Trinity Leisure Centre, The Pools and Morton Pool. The publicly run facilities are complemented by a number of private facilities including DW Fitness to the south of the city centre on Currock Road and Bannatyne's Health Club to the north off Kingstown Road.

9.8 In terms of the most regularly visited destinations, the survey results identify the following:

- A total of 26.3% of people stated they visited the gym / health and fitness centre as a regular leisure activity.
- Local residents in the Carlisle catchment (survey zone 1) are broadly split in terms of attending public or private facilities; DW Fitness (private) is the most popular location (38.1%), followed by the Sands Centre (public facility - 20.6%) and Bannatyne's (private facility - 11.1%).
- The Sands Centre is the most regularly visited facility (31.3%) for local residents in the Carlisle West catchment (survey zone 2) with DW and Bannatyne's attracting 18.8% and 12.5% of visits regularly.
- The Sands and Bannatyne's are the joint most visited facilities (18.2%) for local residents in the Rural North catchment (survey zone 3).

- DW Fitness is the main destination for local residents (30.8%) in the Rural West South catchment; this reflects its prominent location on the main A6 route of the city to the south. The Sands and Bannatyne's attract 7.7% (each) of visits.
- The private facilities, particularly DW Fitness, attract some trade from the wider rural hinterland. The sphere of influence of facilities in the city does however significantly decrease the further away a catchment zone is from Carlisle; this is however to be expected given alternative facilities in other surrounding centres.

9.9 In terms of forward strategy through the emerging Local Plan, the main private-sector gym facilities in the city (DW Fitness and Bannatyne's) are located outside of the city centre. Therefore, in qualitative terms, a new centrally located facility would generate wider benefits to the city centre.

9.10 There are however long-standing plans (full planning permission granted in November 2010) to redevelop the existing Sands Centre on the edge of the city centre. The Council should seek to work with its regeneration partners to continue to promote the redevelopment of the centre as appropriate.

RESTAURANTS

9.11 As detailed in cinema overview, there is a concentration of family orientated theme restaurants (national chains) located around the existing Vue Botchergate cinema to the south of the city centre. The lower end of Lowther Street and The Crescent also has national theme chain restaurants including Pizza Express and Nando's.

9.12 In terms of the survey results, a total of 75.7% of respondents stated they regularly eat out as a leisure activity. Unsurprising, Carlisle city centre is the primary location for local residents in its immediate catchment (e.g. 90.1% of respondents in survey zone 1 eat out in the city centre). The city centre also attracts most residents in the immediate rural hinterland (54.3% in survey zone 2, 58.9% in survey zone 3 and 73.3% in survey zone 4). The primacy of the city centre decreases significantly further in relation to the more outlying catchment zones.

9.13 With respect to forward strategy, whilst the city centre restaurant offer is generally commensurate with that expected for a sub-regional centre, it is presently lacking a number of prominent national restaurant chain operators (i.e. Zizzi, Wagamama and Strada (amongst others)). Whilst a restaurant cluster is already informally emerging in the southern parts of the city centre (Lowther Street etc.) outside of the primary shopping area, the Council may through it is exploration of potential city centre regeneration opportunities to meet the need identified, seek to incorporate a leisure based hub to deliver a genuine mixed-use opportunity. The provision of a new restaurant quarter, subject to commercial market interest / testing, would complement existing local and national chain provision.

PUBS / LATE NIGHT ESTABLISHMENTS

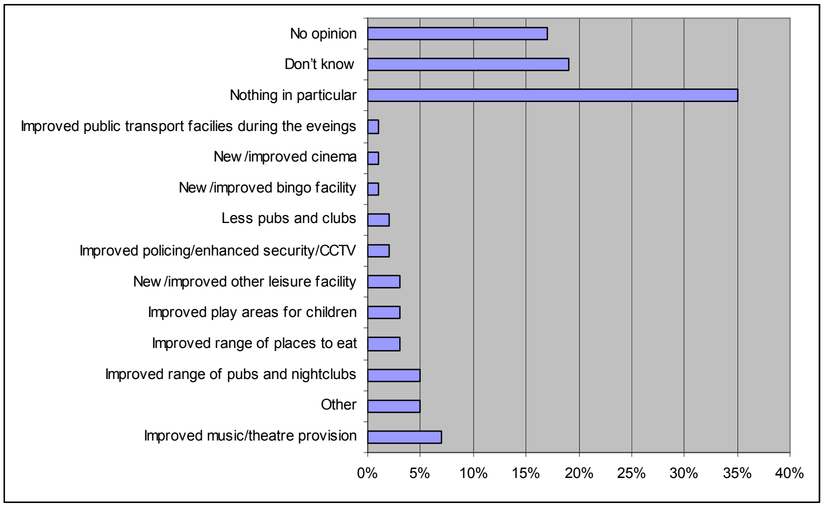
9.14 The main concentration of bars and late night establishments is located to the south of the city centre along Botchergate. The current offer comprises a mix of traditional public houses alongside theme bars.

9.15 In terms of the survey results, a total of 54.6% of respondents within the overall study area (survey zones 1 – 12) regularly visited pubs and late night establishments as a leisure activity. As with restaurants, the city centre was identified as the most popular location to socially drink for local residents in the city (91.8% of respondents from Zone 1). The visitation levels reduced significantly for all other outlying catchment areas (e.g. 44.9% for residents in the Carlisle West (survey zone 2) catchment); this is not to be unexpected however given potential travel distances and the cost of private travel outside of normal public transport operating hours.

9.16 In terms of policy and town centre strategy development, whilst the city centre would continue to benefit from a shift towards more family orientated establishments to further increase dwell time and the potential for linked trips in the city centre, the main emphasise for the Council should be to maintain and effectively manage the existing provision within its planning (maintain / update fascia policies) and licensing functions (appropriate management of environmental and amenity).

SUGGESTED IMPROVEMENTS TO LEISURE AND ENTERTAINMENT FACILITIES

9.17 With respect to what general improvements to the quality of the leisure and entertainment offer in the city centre that would persuade local residents to visit more often, aside from no suggested improvements / no opinion, the main headline suggestions are set out in the table below:



9.18 As the table highlights, there is no overriding suggested improvement although the notable suggested improvements in terms of forward city centre strategy are as follows:

- Improved Music and Theatre provision with 28.6% of responses from survey zone 1; this was also the main suggestion from all other catchment zones;
- Improving the range of places to eat (4% from survey zone 1; 5% from survey zone 2);
- New / improved cinema (3.5% from survey zone 1);
- New swimming pool (3.5% from survey zone 1); and
- Improved play areas for children (6% from survey zone 1).

9.19 Whilst the suggested swimming pool enhancement is likely to be addressed by the planned redevelopment of The Sands Centre, the Council should investigate the potential to enhance the existing music / theatre provision in the city centre in accordance with its local cultural strategy (as recommended by PPS4 practice guidance (Appendix C)).

10. CONCLUSIONS

10.1 The study has been commissioned to assess the future need for new retail and leisure provision within Carlisle. The study is informed by a healthcheck assessment and robust survey-based exercises (household telephone and in-centre shopper surveys) in order to provide a comprehensive evidence base for the City Council and its regeneration partners to proactively plan for future growth of Carlisle city centre.

10.2 On the basis of the outputs of the respective assessments and with the aim of proactively planning for the enhancement of Carlisle as a vital and vibrant city centre destination, we set out specific recommendations below.

CONVENIENCE

10.3 The capacity modelling exercise identifies that existing convenience provision within the city presently retains almost all (c. 95% overall retention) convenience expenditure arising within its immediate catchment (survey zone 1 reflects the urban area). The large out-of-centre foodstores also serve a wider catchment area extending beyond Carlisle.

10.4 All large foodstores in the city are identified to be significantly overtrading against expected company benchmark averages. Whilst the levels of overtrading would ordinarily generate a quantitative and qualitative need, there are a number of major foodstore commitments across the city which will reduce existing overtrading towards sustainable levels whilst delivering genuine choice and competition for local residents.

10.5 The Sainsbury's Caldewgate (under construction) and the approved Morton district centre scheme in particular should address spatial deficiencies in the west and south of the city (existing Asda and Morrison's to the north of the city; Tesco to the east).

10.6 On the basis of commitments and the lack of realistic scope to enhance market share, there is no need for the Council to plan for new foodstore provision.

10.7 In terms of wider strategy, the existing district centre allocation for Morton should be retained through the emerging Local Plan in order to provide sufficient policy protection to ensure that the foodstore anchor is delivered. Any additional foodstore proposals which come forward, particularly to the south of the city, should be thoroughly assessed to ensure that the proposal does not undermine the delivery of the Morton store and its trading performance going forward.

10.8 The Council should however explore the potential to introduce a wider range of complementary retail and service uses as part of the Morton district centre scheme to meet the wider needs of existing and future residents.

10.9 The existing network of local centres should also be maintained as appropriate given the important top-up based function they perform. The exact boundaries of the local centres should however be identified on the emerging Local Plan proposals map (inset plan schedule etc.) so as to enable appropriate assessment of any subsequent proposals.

COMPARISON

10.10 The city centre retains 70.3% (£135.9m) of all comparison expenditure arising within its catchment (survey zone 1). The overall turnover of the city centre (£373.6m) is 35.3% of all expenditure arising within the overall study area (survey zones 1 – 12).

10.11 Projecting this turnover forward on a constant market share basis, the assessment identifies limited need until the latter phase of the emerging Local Plan (18,700 m^2 net by 2030). This headline figure is significantly reduced (c. 11,500 m^2 net by 2030)by commitments; this is very much a worst case scenario however given that the proposed foodstores are unlikely to materially impact on the city centre due to the qualitative distinction in terms of the nature of offer.

10.12 Whilst the centre is performing well, the baseline position effectively reflects a '*no change*' scenario. Qualitative indicators, including the survey exercises and healthcheck assessment, identify that the city centre is not achieving its full potential; this is due to existing constraints including its historic core (asset but restricts change / expansion), small retail units and department stores occupying multiple level units.

10.13 Therefore, in order to deliver a genuine step change in the performance of the city centre to enable it to better perform its sub-regional function, an increase in the overall market share from 35.3% to 37.5% (c. £26.8m expenditure uplift) has been assessed. This uplift generates capacity for c. 25,400 m^2 net by 2030 (c. 18,200 m^2 with commitments).

10.14 The market share enhancement will only be achieved if the new provision which comes forward is of genuine quality to add to the existing clothing and fashion offer in particular. The balance between attracting new retailers to the city and facilitating new opportunities for existing retailers to upsize will however be particularly important to ensure that any new scheme does not lead to displacement of retailers from the existing PSA.

10.15 On this basis, given the NPPF emphasis on ensuring suitable and ultimately deliverable site opportunities to meet identified needs, the Council should commission a new masterplan to assess potential opportunity sites in the city centre. If appropriate in-centre sites cannot be identified within deliverable timeframes, edge and thereafter out-of-centre sites should be identified in accordance with the NPPF / PPS4 practice guidance criteria.

10.16 Until the city centre masterplanning exercise is complete, it is recommended that the Council seek to resist any out-of-centre development comprising high street comparison retail (clothes and fashion in particular). There is a real prospect of out-of-centre retail development generating adverse impacts on city centre in terms of loss of trade, loss of key retail anchors and ultimately planned investment in the city centre should appropriate sites be identified.

LEISURE

10.17 The city centre has a well established leisure offer with a modern Vue cinema multiplex located a short distance to the south of the primary shopping area on Botchergate. A number of national chain family orientated restaurants are located by the cinema and around The Crescent and southern part of Lowther Street.

10.18 Notwithstanding the existing provision, there are a number of national chain restaurants not presently represented in the city and The Council should actively investigate the physical potential and commercial demand to incorporate new leisure uses as part of any retail-led expansion of the city centre should an appropriate site be identified through the forward masterplanning exercise.

10.19 In terms of health and fitness provision, the survey results generally indicate a balance between visiting public and private facilities. In terms of public facilities, planning permission remains extant for the redevelopment of The Sands leisure centre on the edge of the city centre. The realisation of the redevelopment proposals would obviously deliver qualitative benefits in terms of an enhanced modern facility.

10.20 With respect to private sector facilities, existing provision is located out-of-centre and there may be qualitative advantages in securing a new facility within the city centre. The benefits of a new private facility in the city centre, particularly a budget gym operator, would however need to be balanced against the potential impacts on the delivery of redeveloped Sands facility given potentially similar fee / membership cost profiles.

10.21 The main suggested improvement to the city centre leisure however arising from the survey exercises is the provision of enhanced music and theatre destinations. The Council should investigate the potential for enhancement of existing provision as part of its wider cultural strategy.

DEVELOPMENT MANAGEMENT

CITY CENTRE BOUNDARIES

10.22 Overall, on the basis of the updated city centre survey fieldwork, it is considered that the existing city centre primary shopping area boundaries defined in the existing adopted Local Plan remain appropriate. The continued inclusion of the southern part of Lowther Street and around The Crescent within the city centre PSA should however be reviewed given the limited retail offer within this area (predominantly non-retail uses including restaurants and hot food takeaways).

10.23 Any proposed extensions to the city centre PSA should emerge from the outcome of the proposed masterplanning exercise.

LOCAL CENTRE BOUNDARIES

10.24 As detailed in the convenience summary above, boundaries for defined local centres should be formalised as either separate inset plans or on the wider proposals map in order to ensure certainty should any applications come forward. The suite of local centre plans set out at Appendix 4 should provide the basis for defining the boundaries as appropriate.

IMPACT THRESHOLD

10.25 NPPF (paragraph 26) confirms that local planning authorities (LPAs) should require an impact assessment for any retail, leisure and office proposals which are outside of a (town) centre and not in accordance with an up-to-date Local Plan. The 'default' nationally set floorspace threshold of 2,500 m^2 should apply in the absence of any locally set floorspace threshold.

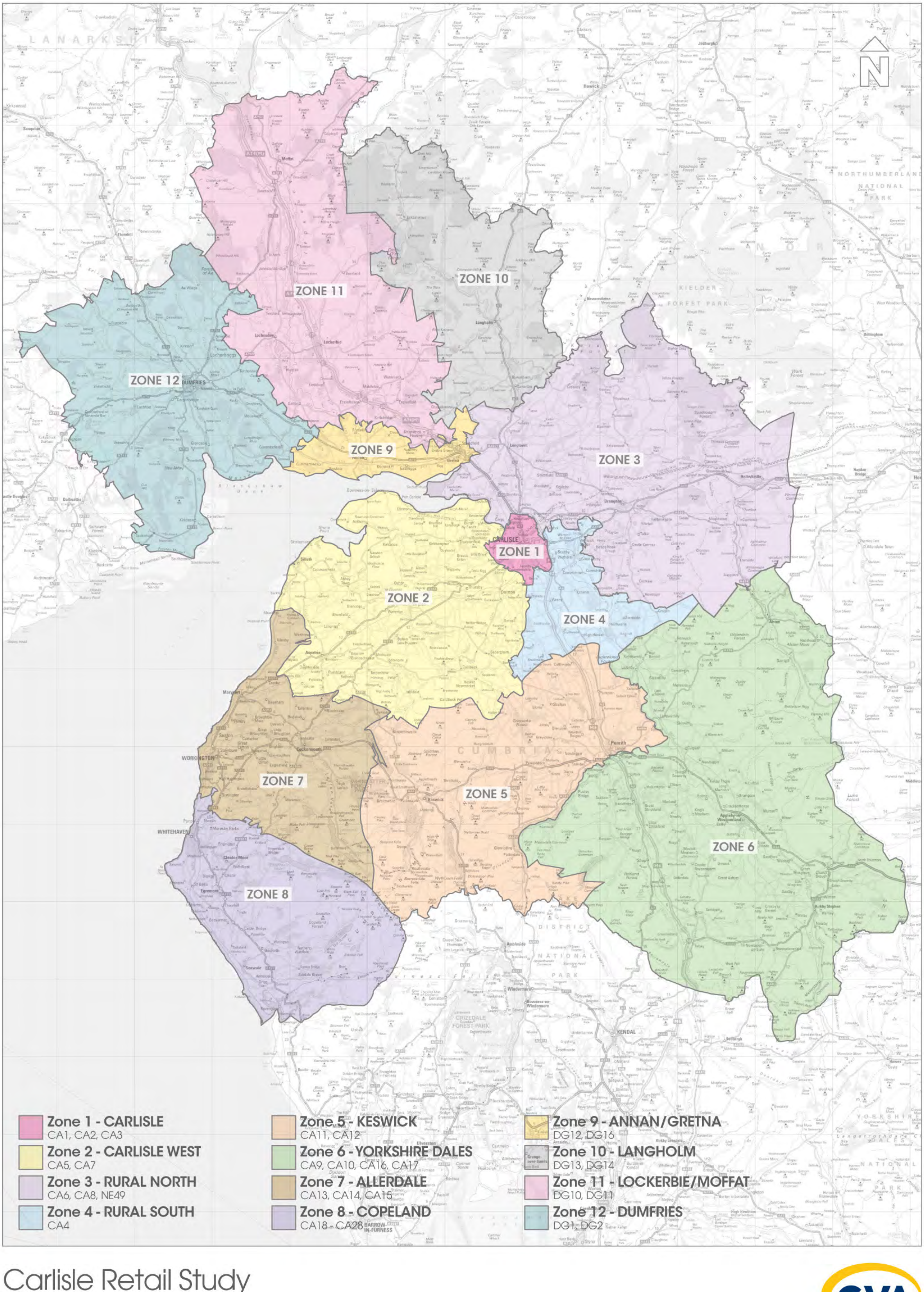
10.26 On the basis of our on-site survey fieldwork, which included a floorspace and fascia survey of the city centre and local centres, we recommend that the Council should adopt a local floorspace threshold of 200 m^2 (gross) for both convenience and comparison retail.

10.27 In relation to convenience retail, the on-site surveys identify that existing provision within the defined local centres is relatively small-scale and primarily orientated towards top-up shopping. The floorspace threshold therefore proposed would consequently enable the Council to make a balanced planning assessment of the likely trading impacts of new provision on existing local centres.

10.28 With respect to comparison retail, the city centre has a historic core with a conservation area designation covering the majority of the existing primary shopping area. Existing retail units within the city centre are relatively small and in some instance have constrained layouts. On this basis and having regard to current vacant units within the city centre, it is our view that a larger locally set floorspace threshold would potentially undermine the re-occupation of existing units and enable high street style comparison retailers to open small format units outside of the city centre.

FASCIA POLICIES

10.29 Fascia policies should be maintained and enhanced through the emerging Local Plan as appropriate. The secondary area around Botchergate should be effectively managed given the existing concentration of evening leisure uses (particularly bars and takeaways).



Carlisle Retail Study
Catchment Plan

CARLISLE RETAIL STUDY

APPENDIX 2 - CONVENIENCE CAPACITY ASSESSMENT

TABLE 1 - SURVEY AREA POPULATION FORECASTS

SURVEY ZONE	POPULATION PROJECTIONS							POPULATION GROWTH (%)			
	2010	2011	2012	2014	2018	2021	2030	2011 - 2012	2012-2014	2012-2018	2012-2030
Zone 1 - Carlisle	75,760	76,164	76,921	77,970	80,097	81,660	86,184	1.0%	1.4%	4.1%	12.0%
Zone 2 - Carlisle West	28,490	28,633	28,581	28,646	28,793	28,929	29,290	-0.2%	0.2%	0.7%	2.5%
Zone 3 - Rural North	23,597	23,738	23,755	23,858	24,271	24,478	25,120	0.1%	0.4%	2.2%	5.7%
Zone 4 - Rural South	8,879	8,943	8,919	8,960	9,021	9,124	9,260	-0.3%	0.5%	1.1%	3.8%
Zone 5 - Keswick	31,061	31,165	31,187	31,172	31,422	31,692	32,459	0.1%	0.0%	0.8%	4.1%
Zone 6 - Yorkshire Dales	26,531	26,693	26,694	26,856	27,178	27,439	28,018	0.0%	0.6%	1.8%	5.0%
Zone 7 - Allerdale	64,763	64,664	64,890	65,277	66,068	66,772	68,406	0.3%	0.6%	1.8%	5.4%
Zone 8 - Copeland	56,093	56,285	56,551	57,030	57,903	58,661	60,173	0.5%	0.8%	2.4%	6.4%
Zone 9 - Annan / Gretna	15,802	15,780	15,748	15,771	15,872	15,917	15,888	-0.2%	0.1%	0.8%	0.9%
Zone 10 - Langholm	4,195	4,191	4,177	4,147	4,146	4,116	4,042	-0.3%	-0.7%	-0.7%	-3.2%
Zone 11 - Lockerbie	16,928	16,963	16,927	16,917	16,910	16,894	16,710	-0.2%	-0.1%	-0.1%	-1.3%
Zone 12 - Dumfries	48,597	48,559	48,741	49,264	49,799	50,100	50,290	0.4%	1.1%	2.2%	3.2%
TOTAL	400,696	401,778	403,091	405,868	411,480	415,782	425,840				

Source: Experian Retail Planner Report (Summary Demographics - 2010 Base)

TABLE 2 - CONVENIENCE EXPENDITURE PER CAPITA FORECASTS, 2010 - 2030

SURVEY ZONE	2010	2010	2011	2011	2012	2012	2014	2014	2018	2018	2021	2021	2030	2030
	(£)	Minus SfT (£)	(£)	Minus SfT (£)	(£)	Minus SfT (£)	(£)	Minus SfT (£)	(£)	Minus SfT (£)	(£)	Minus SfT (£)	(£)	Minus SfT (£)
Zone 1 - Carlisle	£2,026	£1,951	£2,020	£1,935	£2,012	£1,919	£2,032	£1,922	£2,073	£1,949	£2,110	£1,978	£2,227	£2,071
Zone 2 - Carlisle West	£2,172	£2,092	£2,165	£2,075	£2,157	£2,058	£2,178	£2,061	£2,222	£2,089	£2,263	£2,120	£2,388	£2,221
Zone 3 - Rural North	£2,093	£2,016	£2,087	£1,999	£2,078	£1,983	£2,099	£1,986	£2,142	£2,013	£2,180	£2,043	£2,301	£2,140
Zone 4 - Rural South	£2,378	£2,290	£2,371	£2,271	£2,361	£2,253	£2,385	£2,256	£2,433	£2,287	£2,477	£2,321	£2,614	£2,431
Zone 5 - Keswick	£2,112	£2,034	£2,106	£2,017	£2,097	£2,001	£2,118	£2,004	£2,161	£2,031	£2,200	£2,061	£2,322	£2,159
Zone 6 - Yorkshire Dales	£2,273	£2,189	£2,266	£2,171	£2,257	£2,153	£2,280	£2,157	£2,326	£2,186	£2,368	£2,219	£2,499	£2,324
Zone 7 - Allerdale	£2,804	£2,700	£2,796	£2,678	£2,784	£2,656	£2,812	£2,660	£2,869	£2,697	£2,921	£2,737	£3,083	£2,867
Zone 8 - Copeland	£2,076	£1,999	£2,070	£1,983	£2,061	£1,967	£2,082	£1,970	£2,124	£1,997	£2,163	£2,026	£2,282	£2,122
Zone 9 - Annan / Gretna	£2,181	£2,100	£2,174	£2,083	£2,166	£2,066	£2,187	£2,069	£2,232	£2,098	£2,272	£2,129	£2,398	£2,230
Zone 10 - Langholm	£2,242	£2,159	£2,235	£2,141	£2,226	£2,124	£2,249	£2,127	£2,294	£2,156	£2,336	£2,188	£2,465	£2,292
Zone 11 - Lockerbie	£2,113	£2,035	£2,107	£2,018	£2,098	£2,002	£2,119	£2,005	£2,162	£2,032	£2,201	£2,062	£2,323	£2,160
Zone 12 - Dumfries	£2,112	£2,034	£2,106	£2,017	£2,097	£2,001	£2,118	£2,004	£2,161	£2,031	£2,200	£2,061	£2,322	£2,159

Notes

1. Expenditure per Capita Forecasts derived from Experian Retail Planner (Fine Expenditure) Report; All Expenditure Figures given in 2010 Prices

2. Growth in per capita retail expenditure for Convenience Goods (Source: - Experian Retail Planner Briefing Note 9 (September 2011)

	2011	2012	2012-18	2019-30
Growth	-0.3%	-0.4%	0.5%	0.6%

3. Deductions for Special Forms of Trading (SfT) (Source: - Experian Retail Planner Briefing Note 9 (September 2011)

	2010	2011	2012	2014	2018	2021	2030
SFT	3.7%	4.2%	4.6%	5.4%	6.0%	6.3%	7.0%

TABLE 3 - Convenience Expenditure Growth, 2010 - 2030

SURVEY ZONE	2010 (£)	2011 (£)	2012 (£)	2014 (£)	2018 (£)	2021 (£)	2030 (£)	EXPENDITURE GROWTH (£) 2011-2012	2012-2018	2012-2021	2012-2030
Zone 1 - Carlisle	£147,810,639	£147,383,835	£147,634,288	£149,880,361	£156,075,384	£161,485,383	£178,515,394	£250,453	£8,441,096	£13,851,095	£30,881,106
Zone 2 - Carlisle West	£59,590,710	£59,400,123	£58,808,501	£59,033,912	£60,148,591	£61,330,661	£65,041,235	-£591,621	£1,340,090	£2,522,159	£6,232,733
Zone 3 - Rural North	£47,561,146	£47,454,131	£47,100,675	£47,378,469	£48,857,993	£50,006,857	£53,752,473	-£353,455	£1,757,317	£2,906,182	£6,651,797
Zone 4 - Rural South	£20,333,034	£20,312,143	£20,092,357	£20,216,111	£20,632,186	£21,177,833	£22,512,951	-£219,786	£539,829	£1,085,476	£2,420,594
Zone 5 - Keswick	£63,173,601	£62,866,852	£62,397,959	£62,464,942	£63,827,298	£65,332,302	£70,087,188	-£468,893	£1,429,339	£2,934,343	£7,689,229
Zone 6 - Yorkshire Dales	£58,073,679	£57,950,540	£57,479,895	£57,918,662	£59,414,938	£60,876,842	£65,109,768	-£470,646	£1,935,044	£3,396,947	£7,629,874
Zone 7 - Allerdale	£174,876,420	£173,181,399	£172,368,799	£173,666,460	£178,175,461	£182,749,751	£196,101,895	-£812,600	£5,806,662	£10,380,952	£23,733,096
Zone 8 - Copeland	£112,140,452	£111,604,238	£111,216,829	£112,333,290	£115,613,124	£118,866,975	£127,714,027	-£387,409	£4,396,294	£7,650,146	£16,497,197
Zone 9 - Annan / Gretna	£33,188,988	£32,871,788	£32,537,482	£32,635,679	£33,294,005	£33,884,516	£35,427,008	-£334,306	£756,523	£1,347,033	£2,889,526
Zone 10 - Langholm	£9,057,198	£8,974,576	£8,871,620	£8,821,601	£8,940,126	£9,007,315	£9,264,916	-£102,955	£68,505	£135,695	£393,296
Zone 11 - Lockerbie	£34,445,416	£34,234,408	£33,883,040	£33,915,686	£34,365,433	£34,843,068	£36,098,199	-£351,369	£482,394	£960,028	£2,215,159
Zone 12 - Dumfries	£98,839,300	£97,954,483	£97,519,445	£98,719,135	£101,156,375	£103,279,955	£108,588,825	-£435,038	£3,636,930	£5,760,510	£11,069,380
TOTAL	£859,090,584	£854,188,515	£849,910,891	£856,984,308	£880,500,914	£902,841,458	£968,213,878	-£4,277,625	£30,590,023	£52,930,568	£118,302,988

Notes

1. Expenditure Growth derived from Population Projections (Table 1) * Expenditure per Capita figures (less SfT deduction) (Table 2)

TABLE 4a - MAIN FOOD SHOPPING EXPENDITURE (75%)

SURVEY ZONE	2010 (£)	2011 (£)	2012 (£)	2014 (£)	2018 (£)	2021 (£)	2030 (£)
Zone 1 - Carlisle	£110,857,979	£110,537,876	£110,725,716	£112,410,271	£117,056,538	£121,114,037	£133,886,545
Zone 2 - Carlisle West	£44,693,032	£44,550,092	£44,106,376	£44,275,434	£45,111,443	£45,997,995	£48,780,926
Zone 3 - Rural North	£35,670,859	£35,590,598	£35,325,507	£35,533,851	£36,643,494	£37,505,143	£40,314,355
Zone 4 - Rural South	£15,249,776	£15,234,107	£15,069,268	£15,162,083	£15,474,140	£15,883,375	£16,884,713
Zone 5 - Keswick	£47,380,201	£47,150,139	£46,798,469	£46,848,706	£47,870,473	£48,999,227	£52,565,391
Zone 6 - Yorkshire Dales	£43,555,260	£43,462,905	£43,109,921	£43,438,997	£44,561,204	£45,657,632	£48,832,326
Zone 7 - Allerdale	£131,157,315	£129,886,049	£129,276,599	£130,249,845	£133,631,595	£137,062,313	£147,076,421
Zone 8 - Copeland	£84,105,339	£83,703,179	£83,412,622	£84,249,967	£86,709,843	£89,150,231	£95,785,520
Zone 9 - Annan / Gretna	£24,891,741	£24,653,841	£24,403,112	£24,476,759	£24,970,504	£25,413,387	£26,570,256
Zone 10 - Langholm	£6,792,898	£6,730,932	£6,653,715	£6,616,201	£6,705,094	£6,755,487	£6,948,687
Zone 11 - Lockerbie	£25,834,062	£25,675,806	£25,412,280	£25,436,764	£25,774,075	£26,132,301	£27,073,649
Zone 12 - Dumfries	£74,129,475	£73,465,862	£73,139,584	£74,039,351	£75,867,281	£77,459,966	£81,441,619
TOTAL	£644,317,938	£640,641,387	£637,433,168	£642,738,231	£660,375,685	£677,131,094	£726,160,409

TABLE 4B - TOP-UP FOOD SHOPPING EXPENDITURE (25%)

SURVEY ZONE	2010 (£)	2011 (£)	2012 (£)	2014 (£)	2018 (£)	2021 (£)	2030 (£)
Zone 1 - Carlisle	£36,952,660	£36,845,959	£36,908,572	£37,470,090	£39,018,846	£40,371,346	£44,628,848
Zone 2 - Carlisle West	£14,897,677	£14,850,031	£14,702,125	£14,758,478	£15,037,148	£15,332,665	£16,260,309
Zone 3 - Rural North	£11,890,286	£11,863,533	£11,775,169	£11,844,617	£12,214,498	£12,501,714	£13,438,118
Zone 4 - Rural South	£5,083,259	£5,078,036	£5,023,089	£5,054,028	£5,158,047	£5,294,458	£5,628,238
Zone 5 - Keswick	£15,793,400	£15,716,713	£15,599,490	£15,616,235	£15,956,824	£16,333,076	£17,521,797
Zone 6 - Yorkshire Dales	£14,518,420	£14,487,635	£14,369,974	£14,479,666	£14,853,735	£15,219,211	£16,277,442
Zone 7 - Allerdale	£43,719,105	£43,295,350	£43,092,200	£43,416,615	£44,543,865	£45,687,438	£49,025,474
Zone 8 - Copeland	£28,035,113	£27,901,060	£27,804,207	£28,083,322	£28,903,281	£29,716,744	£31,928,507
Zone 9 - Annan / Gretna	£8,297,247	£8,217,947	£8,134,371	£8,158,920	£8,323,501	£8,471,129	£8,856,752
Zone 10 - Langholm	£2,264,299	£2,243,644	£2,217,905	£2,205,400	£2,235,031	£2,251,829	£2,316,229
Zone 11 - Lockerbie	£8,611,354	£8,558,602	£8,470,760	£8,478,921	£8,591,358	£8,710,767	£9,024,550
Zone 12 - Dumfries	£24,709,825	£24,488,621	£24,379,861	£24,679,784	£25,289,094	£25,819,989	£27,147,206
TOTAL	£214,772,646	£213,547,129	£212,477,723	£214,246,077	£220,125,228	£225,710,365	£242,053,470

Table 5a - Main Food Market Share Analysis (2012)

Destinations		Zone 1 - Carlisle	Zone 2 - Carlisle West	Zone 3 - Rural North	Zone 4 - Rural South	Zone 5 - Keswick	Zone 6 - Yorkshire Dales	Zone 7 - Allerdale	Zone 8 - Copeland	Zone 9 - Gretna	Zone 10 - Langholm	Zone 11 - Lockerbie	Zone 12 - Dumfries	SURVEY TURNOVER
Carlisle City Centre														
Tesco Metro (Blackfriar Street)	%	4.1%	0.0%	0.0%	1.0%	0.0%	1.4%	0.0%	0.0%	0.0%	1.4%	0.0%	0.0%	
	£	£4,539,754	£0	£0	£150,693	£0	£603,539	£0	£0	£0	£93,152	£0	£0	£5,387,138
M&S (English Street)	%	2.6%	1.1%	2.1%	5.0%	0.0%	0.0%	0.0%	0.0%	3.1%	1.4%	0.0%	0.0%	
	£	£2,878,869	£485,170	£741,836	£753,463	£0	£0	£0	£0	£756,496	£93,152	£0	£0	£5,708,986
Iceland (Lowther Street)	%	0.5%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£553,629	£0	£0	£150,693	£0	£0	£0	£0	£0	£0	£0	£0	£704,321
Local Shops (City Centre)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
CITY CENTRE TOTAL	%	7.2%	1.1%	2.1%	7.0%	0.0%	1.4%	0.0%	0.0%	3.1%	2.8%	0.0%	0.0%	
	£	£7,972,252	£485,170	£741,836	£1,054,849	£0	£603,539	£0	£0	£756,496	£186,304	£0	£0	£11,800,445
Carlisle - Main Foodstores														
Tesco (Warwick Road)	%	30.6%	12.9%	18.9%	63.0%	1.4%	1.4%	0.0%	0.0%	4.1%	8.6%	0.0%	0.0%	
	£	£33,882,069	£5,689,723	£6,676,521	£9,493,639	£655,179	£603,539	£0	£0	£1,000,528	£572,220	£0	£0	£58,573,416
Morrison's (Kingstown Road)	%	32.1%	16.1%	33.7%	10.0%	0.0%	1.4%	1.4%	0.0%	11.2%	24.3%	2.9%	0.0%	
	£	£35,542,955	£7,101,127	£11,904,696	£1,506,927	£0	£603,539	£1,809,872	£0	£2,733,149	£1,616,853	£736,956	£0	£63,556,073
Asda (Kingstown Retail Park)	%	15.8%	15.1%	25.3%	4.0%	4.3%	4.1%	0.0%	1.4%	20.4%	38.6%	5.7%	2.7%	
	£	£17,494,663	£6,660,063	£8,937,353	£602,771	£2,012,334	£1,767,507	£0	£1,167,777	£4,978,235	£2,568,334	£1,448,500	£1,974,769	£49,612,305
Asda (St Nicholas Gate RP)	%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£1,660,886	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£1,660,886
Aldi (Kingstown Road)	%	1.5%	1.1%	4.2%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	5.7%	1.4%	0.0%	
	£	£1,660,886	£485,170	£1,483,671	£0	£0	£0	£0	£0	£244,031	£379,262	£355,772	£0	£4,608,792
Co-Op (Wigton Road, Morton)	%	2.6%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£2,878,869	£970,340	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£3,849,209
Aldi (London Road)	%	3.6%	2.2%	0.0%	5.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%	0.0%	
	£	£3,986,126	£970,340	£0	£753,463	£0	£0	£0	£0	£0	£93,152	£0	£0	£5,803,081
Sainsbury's Local (Scotland Rd, Knowefield)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Lidl (Charlotte Street)	%	3.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£3,432,497	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£3,432,497
CARLISLE - MAIN FOODSTORES	%	90.8%	49.6%	82.1%	82.0%	5.7%	6.9%	1.4%	1.4%	36.7%	78.6%	10.0%	2.7%	
	£	£100,538,950	£21,876,763	£29,002,241	£12,356,800	£2,667,513	£2,974,585	£1,809,872	£1,167,777	£8,955,942	£5,229,820	£2,541,228	£1,974,769	£191,096,258
Carlisle - Local Centres														
Wigton Road (Caldewgate)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Shady Grove Road (Raffles)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Orton Road / Wigton Road (Morton)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Stonegarth (Morton)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Newlaithes Avenue (Morton)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Holmbrook Road (Whernside)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Denton Street	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Boundary Road / Upperby Road (Upperby)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Blackwell Road (Currock)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Central Drive / Pennine Way (Harraby)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Petteril Bank Road (Upperby Bridge)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Victoria Road (Botcherby)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Warwick Road	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Scotland Road (Knowefield)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Cumwhinton Road (Harraby)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
CARLISLE - LOCAL CENTRES	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
CARLISLE CITY TOTAL	%	98.0%	50.7%	84.2%	89.0%	5.7%	8.3%	1.4%	1.4%	39.8%	81.4%	10.0%	2.7%	
	£	£108,511,202	£22,361,933	£29,744,077	£13,411,648	£2,667,513	£3,578,123	£1,809,872	£1,167,777	£9,712,438	£5,416,124	£2,541,228	£1,974,769	£200,921,935
Longtown														
Spar (Longtown)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Local Shops (Longtown)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
LONGTOWN TOTAL	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Brampton														
Spar (Brampton)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Local Shops (Brampton)	%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£150,693	£0	£0	£0	£0	£0	£0	£0	£0	£150,693
BRAMPTON TOTAL	%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£150,693	£0	£0	£0	£0	£0	£0	£0	£0	£150,693
Dalston														
Co-Op (Dalston)	%	0.0%	1.1%	0.0%	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£485,170	£0	£0	£0	£603,539	£0	£0	£0	£0	£0	£0	£1,088,709
Local Shops (Dalston)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
DALSTON TOTAL	%	0.0%	1.1%	0.0%	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£485,170	£0	£0	£0	£603,539	£0	£0	£0	£0	£0	£0	£1,088,709
Other														
OTHER	%	2.0%	48.2%	15.8%	10.0%	94.3%	90.3%	98.6%	98.6%	60.2%	18.6%	90.0%	97.3%	
	£	£2,214,514	£21,259,273	£5,581,430	£1,506,927	£44,130,957	£38,928,259	£127,466,727	£82,244,845	£14,690,673	£1,237,591	£22,871,052	£71,164,815	£433,297,062
OTHER TOTAL	%	2.0%	48.2%	15.8%	10.0%	94.3%	90.3%	98.6%	98.6%	60.2%	18.6%	90.0%	97.3%	
	£	£2,214,514	£21,259,273	£5,581,430	£1,506,927	£44,130,957	£38,928,259	£127,466,727	£82,244,845	£14,690,673	£1,237,591	£22,871,052	£71,164,815	£433,297,062
OVERALL TOTAL	%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
	£	£110,725,716	£44,106,376	£35,325,507	£15,069,268	£46,798,469	£43,109,921	£129,276,599	£83,412,622	£24,403,112	£6,653,715	£25,412,280	£73,139,584	£637,433,168

Table 5b - TOP-UP Food Market Share Analysis (2012)

Destinations		Zone 1 - Carlisle	Zone 2 - Carlisle West	Zone 3 - Rural North	Zone 4 - Rural South	Zone 5 - Keswick	Zone 6 - Yorkshire Dales	Zone 7 - Allerdale	Zone 8 - Copeland	Zone 9 - Gretna	Zone 10 - Langholm	Zone 11 - Lockerbie	Zone 12 - Dumfries	SURVEY TURNOVER
Carlisle City Centre														
Tesco Metro (Blackfriar Street)	%	5.9%	1.1%	1.1%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%	0.0%	0.0%	
	£	£2,177,606	£161,723	£129,527	£65,300	£0	£0	£0	£0	£0	£35,486	£0	£0	£2,569,643
M&S (English Street)	%	3.6%	2.3%	0.0%	6.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£1,328,709	£338,149	£0	£316,455	£0	£0	£0	£0	£0	£0	£0	£0	£1,983,312
Iceland (Lowther Street)	%	1.2%	1.1%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£442,903	£161,723	£0	£65,300	£0	£0	£0	£0	£0	£0	£0	£0	£669,926
Local Shops (City Centre)	%	5.3%	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£1,956,154	£0	£0	£0	£0	£0	£732,567	£0	£0	£0	£0	£0	£2,688,722
CITY CENTRE TOTAL	%	16.0%	4.5%	1.1%	8.9%	0.0%	0.0%	1.7%	0.0%	0.0%	1.6%	0.0%	0.0%	
	£	£5,905,372	£661,596	£129,527	£447,055	£0	£0	£732,567	£0	£0	£35,486	£0	£0	£7,911,603
Carlisle - Main Foodstores														
Tesco (Warwick Road)	%	10.1%	0.0%	0.0%	21.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£3,727,766	£0	£0	£1,079,964	£0	£0	£0	£0	£0	£0	£0	£0	£4,807,730
Morrison's (Kingstown Road)	%	7.1%	2.3%	2.2%	2.5%	0.0%	0.0%	0.0%	0.0%	2.7%	3.2%	0.0%	0.0%	
	£	£2,620,509	£338,149	£259,054	£125,577	£0	£0	£0	£0	£219,628	£70,973	£0	£0	£3,633,889
Asda (Kingstown Retail Park)	%	1.2%	2.3%	11.2%	1.3%	0.0%	0.0%	0.0%	0.0%	4.0%	3.2%	1.4%	0.0%	
	£	£442,903	£338,149	£1,318,819	£65,300	£0	£0	£0	£0	£325,375	£70,973	£118,591	£0	£2,680,109
Asda (St Nicholas Gate RP)	%	5.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£1,956,154	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£1,956,154
Aldi (Kingstown Road)	%	3.6%	1.1%	6.7%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%	1.6%	0.0%	0.0%	
	£	£1,328,709	£161,723	£788,936	£0	£233,992	£0	£0	£0	£0	£35,486	£0	£0	£2,548,847
Co-Op (Wigton Road, Morton)	%	13.0%	4.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£4,798,114	£661,596	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£5,459,710
Aldi (London Road)	%	4.7%	0.0%	0.0%	6.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£1,734,703	£0	£0	£316,455	£0	£0	£0	£0	£0	£0	£0	£0	£2,051,158
Sainsbury's Local (Scotland Rd, Knowefield)	%	4.7%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£1,734,703	£161,723	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£1,896,426
Lidl (Charlotte Street)	%	1.2%	2.3%	0.0%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%	
	£	£442,903	£338,149	£0	£125,577	£0	£0	£0	£0	£0	£0	£118,591	£0	£1,025,220
CARLISLE - MAIN FOODSTORES	%	50.9%	13.6%	20.1%	34.1%	1.5%	0.0%	0.0%	0.0%	6.7%	8.0%	2.8%	0.0%	
	£	£18,786,463	£1,999,489	£2,366,809	£1,712,873	£233,992	£0	£0	£0	£545,003	£177,432	£237,181	£0	£26,059,243
Carlisle - Local Centres														
Wigton Road (Caldewgate)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Shady Grove Road (Raffles)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Orton Road / Wigton Road (Morton)	%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£664,354	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£664,354
Stonegarth (Morton)	%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£442,903	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£442,903
Newlaithes Avenue (Morton)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Holmbrook Road (Whernside)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Denton Street	%	3.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	
	£	£1,328,709	£0	£0	£0	£0	£0	£0	£0	£105,747	£0	£0	£0	£1,434,455
Boundary Road / Upperby Road (Upperby)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Blackwell Road (Currock)	%	6.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£2,399,057	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£2,399,057
Central Drive / Pennine Way (Harraby)	%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£442,903	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£442,903
Petteril Bank Road (Upperby Bridge)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Victoria Road (Botcherby)	%	0.6%	0.0%	0.0%	0.0%	3.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£221,451	£0	£0	£0	£467,985	£0	£0	£0	£0	£0	£0	£0	£689,436
Warwick Road	%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£65,300	£0	£0	£0	£0	£0	£0	£0	£0	£65,300
Scotland Road (Knowefield)	%	2.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£885,806	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£885,806
Cumwhinton Road (Harraby)	%	1.2%	0.0%	0.0%	6.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£442,903	£0	£0	£316,455	£0	£0	£0	£0	£0	£0	£0	£0	£759,357
CARLISLE - LOCAL CENTRES	%	18.5%	0.0%	0.0%	7.6%	3.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	
	£	£6,828,086	£0	£0	£381,755	£467,985	£0	£0	£0	£105,747	£0	£0	£0	£7,783,572
CARLISLE CITY TOTAL	%	85.4%	18.1%	21.2%	50.6%	4.5%	0.0%	1.7%	0.0%	8.0%	9.6%	2.8%	0.0%	
	£	£31,519,920	£2,661,085	£2,496,336	£2,541,683	£701,977	£0	£732,567	£0	£650,750	£212,919	£237,181	£0	£41,754,418
Longtown														
Spar (Longtown)	%	0.0%	0.0%	12.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.3%	0.0%	0.0%	
	£	£0	£0	£1,460,121	£0	£0	£0	£0	£0	£0	£139,728	£0	£0	£1,599,849
Local Shops (Longtown)	%	0.0%	0.0%	4.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£529,883	£0	£0	£0	£0	£0	£0	£0	£0	£0	£529,883
LONGTOWN TOTAL	%	0.0%	0.0%	16.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.3%	0.0%	0.0%	
	£	£0	£0	£1,990,004	£0	£0	£0	£0	£0	£0	£139,728	£0	£0	£2,129,732
Brampton														
Spar (Brampton)	%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£65,300	£0	£0	£0	£0	£0	£0	£0	£0	£65,300
Local Shops (Brampton)	%	0.6%	0.0%	29.2%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£221,451	£0	£3,438,349	£65,300	£0	£0	£0	£0	£0	£0	£0	£0	£3,725,101
BRAMPTON TOTAL	%	0.6%	0.0%	29.2%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£221,451	£0	£3,438,349	£130,600	£0	£0	£0	£0	£0	£0	£0	£0	£3,790,401
Dalston														
Co-Op (Dalston)	%	1.2%	9.1%	0.0%	1.3%	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£442,903	£1,337,893	£0	£65,300	£0	£229,920	£0	£0	£0	£0	£0	£0	£2,076,016
Local Shops (Dalston)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
DALSTON TOTAL	%	1.2%	9.1%	0.0%	1.3%	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£442,903	£1,337,893	£0	£65,300	£0	£229,920	£0	£0	£0	£0	£0	£0	£2,076,016
Other														
OTHER	%	12.8%	72.8%	32.7%	45.5%	95.5%	98.4%	98.3%	100.0%	92.0%	84.1%	97.2%	100.0%	
	£	£4,724,297	£10,703,147	£3,850,480	£2,285,506	£14,897,513	£14,140,054	£42,359,632	£27,804,207	£7,483,621	£1,865,258	£8,233,579	£24,379,861	£162,727,156
OTHER TOTAL	%	12.8%	72.8%	32.7%	45.5%	95.5%	98.4%	98.3%	100.0%	92.0%	84.1%	97.2%	100.0%	
	£	£4,724,297	£10,703,147	£3,850,480	£2,285,506	£14,897,513	£14,140,054	£42,359,632	£27,804,207	£7,483,621	£1,865,258	£8,233,579	£24,379,861	£162,727,156
OVERALL TOTAL	%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
	£	£36,908,572	£14,702,125	£11,775,169	£5,023,089	£15,599,490	£14,369,974	£43,092,200	£27,804,207	£8,134,371	£2,217,905	£8,470,760	£24,379,861	£212,477,723

Table 5c - OVERALL MARKET SHARE (2012)

Destinations		Zone 1 - Carlisle	Zone 2 - Carlisle West	Zone 3 - Rural North	Zone 4 - Rural South	Zone 5 - Keswick	Zone 6 - Yorkshire Dales	Zone 7 - Allerdale	Zone 8 - Copeland	Zone 9 - Gretna	Zone 10 - Langholm	Zone 11 - Lockerbie	Zone 12 - Dumfries	SURVEY TURNOVER
Carlisle City Centre														
Tesco Metro (Blackfriar Street)	%	4.6%	0.3%	0.3%	1.1%	0.0%	1.1%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	
	£	£6,717,360	£161,723	£129,527	£215,993	£0	£603,539	£0	£0	£0	£128,638	£0	£0	£7,956,781
M&S (English Street)	%	2.9%	1.4%	1.6%	5.3%	0.0%	0.0%	0.0%	0.0%	2.3%	1.1%	0.0%	0.0%	
	£	£4,207,577	£823,319	£741,836	£1,069,918	£0	£0	£0	£0	£756,496	£93,152	£0	£0	£7,692,298
Iceland (Lowther Street)	%	0.7%	0.3%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£996,531	£161,723	£0	£215,993	£0	£0	£0	£0	£0	£0	£0	£0	£1,374,248
Local Shops (City Centre)	%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£1,956,154	£0	£0	£0	£0	£0	£732,567	£0	£0	£0	£0	£0	£2,688,722
CITY CENTRE TOTAL	%	9.4%	2.0%	1.9%	7.5%	0.0%	1.1%	0.4%	0.0%	2.3%	2.5%	0.0%	0.0%	
	£	£13,877,623	£1,146,766	£871,362	£1,501,904	£0	£603,539	£732,567	£0	£756,496	£221,791	£0	£0	£19,712,048
Carlisle - Main Foodstores														
Tesco (Warwick Road)	%	25.5%	9.7%	14.2%	52.6%	1.1%	1.1%	0.0%	0.0%	3.1%	6.5%	0.0%	0.0%	
	£	£37,609,835	£5,689,723	£6,676,521	£10,573,603	£655,179	£603,539	£0	£0	£1,000,528	£572,220	£0	£0	£63,381,146
Morrison's (Kingstown Road)	%	25.9%	12.7%	25.8%	8.1%	0.0%	1.1%	1.1%	0.0%	9.1%	19.0%	2.2%	0.0%	
	£	£38,163,463	£7,439,275	£12,163,749	£1,632,504	£0	£603,539	£1,809,872	£0	£2,952,777	£1,687,826	£736,956	£0	£67,189,962
Asda (Kingstown Retail Park)	%	12.2%	11.9%	21.8%	3.3%	3.2%	3.1%	0.0%	1.1%	16.3%	29.8%	4.6%	2.0%	
	£	£17,937,566	£6,998,212	£10,256,172	£668,071	£2,012,334	£1,767,507	£0	£1,167,777	£5,303,610	£2,639,307	£1,567,091	£1,974,769	£52,292,414
Asda (St Nicholas Gate RP)	%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£3,617,040	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£3,617,040
Aldi (Kingstown Road)	%	2.0%	1.1%	4.8%	0.0%	0.4%	0.0%	0.0%	0.0%	0.8%	4.7%	1.1%	0.0%	
	£	£2,989,594	£646,894	£2,272,608	£0	£233,992	£0	£0	£0	£244,031	£414,748	£355,772	£0	£7,157,639
Co-Op (Wigton Road, Morton)	%	5.2%	2.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£7,676,983	£1,631,936	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£9,308,919
Aldi (London Road)	%	3.9%	1.7%	0.0%	5.3%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	
	£	£5,720,829	£970,340	£0	£1,069,918	£0	£0	£0	£0	£0	£93,152	£0	£0	£7,854,239
Sainsbury's Local (Scotland Rd, Knowefield)	%	1.2%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£1,734,703	£161,723	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£1,896,426
Lidl (Charlotte Street)	%	2.6%	0.6%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	
	£	£3,875,400	£338,149	£0	£125,577	£0	£0	£0	£0	£0	£0	£118,591	£0	£4,457,717
CARLISLE - MAIN FOODSTORES	%	80.8%	40.6%	66.6%	70.0%	4.7%	5.2%	1.1%	1.1%	29.2%	61.0%	8.2%	2.0%	
	£	£119,325,413	£23,876,252	£31,369,050	£14,069,673	£2,901,505	£2,974,585	£1,809,872	£1,167,777	£9,500,945	£5,407,253	£2,778,409	£1,974,769	£217,155,502
Carlisle - Local Centres														
Wigton Road (Caldewgate)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Shady Grove Road (Raffles)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Orton Road / Wigton Road (Morton)	%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£664,354	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£664,354
Stonegarth (Morton)	%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£442,903	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£442,903
Newlaithes Avenue (Morton)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Holmbrook Road (Whernside)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Denton Street	%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	
	£	£1,328,709	£0	£0	£0	£0	£0	£0	£0	£105,747	£0	£0	£0	£1,434,455
Boundary Road / Upperby Road (Upperby)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Blackwell Road (Currock)	%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£2,399,057	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£2,399,057
Central Drive / Pennine Way (Harraby)	%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£442,903	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£442,903
Petteril Bank Road (Upperby Bridge)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Victoria Road (Botcherby)	%	0.2%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£221,451	£0	£0	£0	£467,985	£0	£0	£0	£0	£0	£0	£0	£689,436
Warwick Road	%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£65,300	£0	£0	£0	£0	£0	£0	£0	£0	£65,300
Scotland Road (Knowefield)	%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£885,806	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£885,806
Cumwhinton Road (Harraby)	%	0.3%	0.0%	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£442,903	£0	£0	£316,455	£0	£0	£0	£0	£0	£0	£0	£0	£759,357
CARLISLE - LOCAL CENTRES	%	4.6%	0.0%	0.0%	1.9%	0.8%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	
	£	£6,828,086	£0	£0	£381,755	£467,985	£0	£0	£0	£105,747	£0	£0	£0	£7,783,572
CARLISLE CITY TOTAL	%	94.9%	42.6%	68.5%	79.4%	5.4%	6.2%	1.5%	1.1%	31.9%	63.5%	8.2%	2.0%	
	£	£140,031,122	£25,023,017	£32,240,412	£15,953,331	£3,369,490	£3,578,123	£2,542,440	£1,167,777	£10,363,188	£5,629,043	£2,778,409	£1,974,769	£242,676,354
Longtown														
Spar (Longtown)	%	0.0%	0.0%	3.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%	0.0%	0.0%	
	£	£0	£0	£1,460,121	£0	£0	£0	£0	£0	£0	£139,728	£0	£0	£1,599,849
Local Shops (Longtown)	%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£529,883	£0	£0	£0	£0	£0	£0	£0	£0	£0	£529,883
LONGTOWN TOTAL	%	0.0%	0.0%	4.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%	0.0%	0.0%	
	£	£0	£0	£1,990,004	£0	£0	£0	£0	£0	£0	£139,728	£0	£0	£2,129,732
Brampton														
Spar (Brampton)	%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£65,300	£0	£0	£0	£0	£0	£0	£0	£0	£65,300
Local Shops (Brampton)	%	0.2%	0.0%	7.3%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£221,451	£0	£3,438,349	£215,993	£0	£0	£0	£0	£0	£0	£0	£0	£3,875,794
BRAMPTON TOTAL	%	0.2%	0.0%	7.3%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£221,451	£0	£3,438,349	£281,293	£0	£0	£0	£0	£0	£0	£0	£0	£3,941,094
Dalston														
Co-Op (Dalston)	%	0.3%	3.1%	0.0%	0.3%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£442,903	£1,823,064	£0	£65,300	£0	£833,458	£0	£0	£0	£0	£0	£0	£3,164,725
Local Shops (Dalston)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
DALSTON TOTAL	%	0.3%	3.1%	0.0%	0.3%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£442,903	£1,823,064	£0	£65,300	£0	£833,458	£0	£0	£0	£0	£0	£0	£3,164,725
Other														
OTHER	%	4.7%	54.4%	20.0%	18.9%	94.6%	92.3%	98.5%	99.0%	68.2%	35.0%	91.8%	98.0%	
	£	£6,938,812	£31,962,420	£9,431,910	£3,792,432	£59,028,469	£53,068,313	£169,826,359	£110,049,053	£22,174,294	£3,102,849	£31,104,630	£95,544,676	£596,024,218
OTHER TOTAL	%	4.7%	54.4%	20.0%	18.9%	94.6%	92.3%	98.5%	99.0%	68.2%	35.0%	91.8%	98.0%	
	£	£6,938,812	£31,962,420	£9,431,910	£3,792,432	£59,028,469	£53,068,313	£169,826,359	£110,049,053	£22,174,294	£3,102,849	£31,104,630	£95,544,676	£596,024,218
OVERALL TOTAL	%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
	£	£147,634,288	£58,808,501	£47,100,675	£20,092,357	£62,397,959	£57,479,895	£172,368,799	£111,216,829	£32,537,482	£8,871,620	£33,883,040	£97,519,445	£849,910,891

Table 6a - Carlisle City Centre Floorspace

Carlisle LPA AREA - City Centre							
STORE	Net Floorspace	Net Convenience Ratio	Net Convenience Floorspace	Company Average Sales Density (£/sqm)	Company Average Turnover	Survey-Derived Turnover	Trading Performance
Tesco Metro (Blackfriar Street)	1,648	100.0%	1,648	£12,842	£21,163,616	£7,956,781	-£13,206,835
M&S (English Street)	1,000	100.0%	1,000	£10,833	£10,833,000	£7,692,298	-£3,140,702
City Centre - Other Convenience Shops	2,240	100.0%	2,240	-	-	£4,062,969	-
TOTAL	4,888		4,888		-	£19,712,048	-

Notes

1. City Centre floorspace derived from Experian GOAD (GVA on-site update)
2. Gross to Net 70%
3. City Centre Floorspace excludes Market but includes Iceland and Farmfoods

Table 6b - Carlisle Main Foodstore Performance

Carlisle LPA AREA - Main Foodstores							
STORE	Net Floorspace	Net Convenience Ratio	Net Convenience Floorspace	Company Average Sales Density (£/sqm)	Company Average Turnover	Survey-Derived Turnover	Trading Performance
Tesco (Warwick Road)	4,118	64.0%	2,636	£12,842	£33,845,348	£63,381,146	£29,535,798
Morrison's (Kingstown Road)	4,191	77.0%	3,227	£11,988	£38,686,115	£67,189,962	£28,503,847
Asda (Kingstown Retail Park)	5,312	56.0%	2,975	£14,933	£44,421,494	£52,292,414	£7,870,921
Asda (St Nicholas Gate RP)	820	100.0%	820	£14,933	£12,245,060	£3,617,040	-£8,628,020
Aldi (Kingstown Road)	743	71.0%	528	£4,750	£2,505,768	£7,157,639	£4,651,872
Co-Op (Wigton Road, Morton)	1,119	100.0%	1,119	£7,530	£8,426,070	£9,308,919	£882,849
Aldi (London Road)	1,286	71.0%	913	£4,750	£4,337,035	£7,854,239	£3,517,204
Sainsbury's Local (Scotland Rd, Knowefield)	217	90.0%	195	£12,526	£2,446,328	£1,896,426	-£549,902
Lidl (Charlotte Street)	1,286	78.0%	1,003	£2,987	£2,996,200	£4,457,717	£1,461,517
SUB TOTAL	19,092	-	13,415	£11,175	£149,909,417	£217,155,502	£67,246,085

Notes

1. Floorspace data sourced from IGD / Experian GOAD
2. Company Average Sales Density based on Mintel (Verdict) 2010
3. Aldi and Lidl Sales Density based on GVA Professional Judgement
4. Co-Op Wigton Road floorspace derived from Pro-Map Measurement (1,599 sqm gross); Gross to Net 70%
5. Sainsbury's Local (Scotland Road) based on Applicant's RIA

Table 6c - Carlisle Local Centres Floorspace

Carlisle LPA AREA - Local Centres							
STORE	Net Floorspace	Net Convenience Ratio	Net Convenience Floorspace	Company Average Sales Density (£/sqm)	Company Average Turnover	Survey-Derived Turnover	Trading Performance
Local Centres	2,901	100.0%	2,901	-	-	£7,783,572	-
TOTAL	2,901		2,901		-	£7,783,572	-

Notes

1. Floorspace data sourced from GVA on-site surveys (Promap measurements)
2. Gross to Net 70%

Table 7 - Carlisle Commitments

Store	Zone	Gross Floorspace (sqm)	Net Floorspace (sqm)	Net Convenience (%)	Net Convenience (sqm)	Company Average Sales Density (£/sqm)	Company Average Turnover (£)
99/0842 - Tesco (Upper Viaduct Estate)	**Zone 1 - Carlisle**	3,715	2,415	80%	1,932	£12,842	**£24,810,744**
09/0512 - Sainsbury's (Bridge Street)	**Zone 1 - Carlisle**	8,886	5,514	68%	3,750	£12,526	**£46,966,488**
09/1082 - Tesco (Wigton Road)	**Zone 1 - Carlisle**	404	283	100%	283	£12,842	**£3,631,718**
10/0917 - Morton District Centre	**Zone 1 - Carlisle**	8,175	5,574	60%	3,344	£12,000	**£40,132,800**
10/0504 - St Nicholas Gate RP (Units 4 - 6)	**Zone 1 - Carlisle**	4,300	2,975	63%	1,874	£12,000	**£22,491,000**
TOTAL		**25,480**	**16,761**		**11,183**		**£138,032,749**

Notes

1. Floorspace figures derived from Planning Decision Notices / Applicant's RIA
2. Average Sales Density for Morton and St Nicholas Gate Commitments based on GVA Judgement
3. Tesco Wigton Road Commitment based on 70% Gross to Net Ratio

Table 8a - CITY-WIDE CONVENIENCE CAPACITY (BASELINE + GROWTH)

CONVENIENCE GOODS					
	2012	**2014**	**2018**	**2021**	**2030**
Survey Derived Catchment Expenditure (£)	£244,651,122	£247,103,750	£252,083,014	£256,647,788	£273,276,798
Existing (Net) Convenience Floorspace (sq m)	21,204	21,204	21,204	21,204	21,204
Sales per sq m net (£)	£11,538	£11,630	£11,818	£11,889	£12,104
Sales from Existing Floorspace (£)	£244,651,122	£246,612,246	£250,581,780	£252,088,279	£256,662,339
RESIDUAL CAPACITY (£)	**£0**	**£491,504**	**£1,501,234**	**£4,559,508**	**£16,614,459**
Sales per sq m net in new shops (Large Retailer) (£)	£12,000	£12,096	£12,291	£12,365	£12,589
Capacity for new floorspace (sq m net)	**0**	**41**	**122**	**369**	**1,320**
Capacity for new floorspace (sq m gross)	**0**	**58**	**174**	**527**	**1,885**

Notes

1. Expenditure Growth; 0.5% per annum (2012-2018); 0.6% per annum (2019-2030)
2. Sales Efficiency Growth; 0% per annum (2011-2012); 0.4% per annum (2012-2018); 0.2% per annum (2019-2028)
3. Gross to Net ratio for new floorspace capacity is 70%
4. Sales Density for Large Retailer based on Verdict and GVA Research (Goods-Based Turnover).

Table 8b - CITY-WIDE CONVENIENCE CAPACITY (BASELINE + GROWTH) - COMMITMENTS

CONVENIENCE GOODS					
	2012	**2014**	**2018**	**2021**	**2030**
Survey Derived Catchment Expenditure (£)	£244,651,122	£247,103,750	£252,083,014	£256,647,788	£273,276,798
Existing (Net) Convenience Floorspace (sq m)	21,204	21,204	21,204	21,204	21,204
Sales per sq m net (£)	£11,538	£11,630	£11,818	£11,889	£12,104
Sales from Existing Floorspace (£)	£244,651,122	£246,612,246	£250,581,780	£252,088,279	£256,662,339
RESIDUAL CAPACITY (£)	**£0**	**£491,504**	**£1,501,234**	**£4,559,508**	**£16,614,459**
COMMITMENTS	**£138,032,749**	**£139,416,527**	**£142,225,840**	**£144,513,421**	**£152,507,081**
RESIDUAL CAPACITY	**-£138,032,749**	**-£138,925,023**	**-£140,724,606**	**-£139,953,913**	**-£135,892,622**
Sales per sq m net in new shops (Large Retailer) (£)	£12,000	£12,096	£12,291	£12,365	£12,589
Capacity for new floorspace (sq m net)	**-11,503**	**-11,485**	**-11,449**	**-11,319**	**-10,794**
Capacity for new floorspace (sq m gross)	**-16,432**	**-16,407**	**-16,356**	**-16,170**	**-15,421**

Notes

1. Commitments Turnover derived from Table 7

CARLISLE RETAIL STUDY

APPENDIX 3 - COMPARISON CAPACITY ASSESSMENT

TABLE 1 - SURVEY AREA POPULATION FORECASTS

SURVEY ZONE	POPULATION PROJECTIONS							POPULATION GROWTH (%)			
	2010	2011	2012	2014	2018	2021	2030	2010 - 2012	2012-2014	2012-2018	2012-2030
Zone 1 - Carlisle	75,760	76,164	76,921	77,970	80,097	81,660	86,184	1.5%	0.6%	4.1%	12.0%
Zone 2 - Carlisle West	28,490	28,633	28,581	28,646	28,793	28,929	29,290	0.3%	0.1%	0.7%	2.5%
Zone 3 - Rural North	23,597	23,738	23,755	23,858	24,271	24,478	25,120	0.7%	0.5%	2.2%	5.7%
Zone 4 - Rural South	8,879	8,943	8,919	8,960	9,021	9,124	9,260	0.5%	0.3%	1.1%	3.8%
Zone 5 - Keswick	31,061	31,165	31,187	31,172	31,422	31,692	32,459	0.4%	0.0%	0.8%	4.1%
Zone 6 - Yorkshire Dales	26,531	26,693	26,694	26,856	27,178	27,439	28,018	0.6%	0.4%	1.8%	5.0%
Zone 7 - Allerdale	64,763	64,664	64,890	65,277	66,068	66,772	68,406	0.2%	0.3%	1.8%	5.4%
Zone 8 - Copeland	56,093	56,285	56,551	57,030	57,903	58,661	60,173	0.8%	0.3%	2.4%	6.4%
Zone 9 - Gretna	15,802	15,780	15,748	15,771	15,872	15,917	15,888	-0.3%	0.5%	0.8%	0.9%
Zone 10 - Langholm	4,195	4,191	4,177	4,147	4,146	4,116	4,042	-0.4%	0.1%	-0.7%	-3.2%
Zone 11 - Lockerbie	16,928	16,963	16,927	16,917	16,910	16,894	16,710	0.0%	0.2%	-0.1%	-1.3%
Zone 12 - Dumfries	48,597	48,559	48,741	49,264	49,799	50,100	50,290	0.3%	0.3%	2.2%	3.2%
TOTAL	400,696	401,778	403,091	405,868	411,480	415,782	425,840				

Source: Experian Retail Planner Report (Summary Demographics - 2010 Base)

TABLE 2 - EXPENDITURE BREAKDOWN

Comparison Goods by Sector		CLOTHING / FASHION GOODS	FURNITURE, FLOORING & HOUSEHOLD TEXTILES	DIY, DECORATING, GARDEN AND PETS	MAJOR HOUSEHOLD APPLIANCES	LARGE ELECTRICAL APPLIANCES	SMALL ELECTRICAL APPLIANCES	PERSONAL GOODS	BOOKS, CDs & DVDs	RECREATIONAL GOODS	Total Comparison Spend (£)
ZONE 1	Expenditure (£)	£770	£317	£253	£63	£259	£328	£251	£185	£338	£2,764
	Weighting	27.9%	11.5%	9.2%	2.3%	9.4%	11.9%	9.1%	6.7%	12.2%	
ZONE 2	Expenditure (£)	£793	£355	£346	£54	£272	£360	£284	£240	£363	£3,067
	Weighting	25.9%	11.6%	11.3%	1.8%	8.9%	11.7%	9.3%	7.8%	11.8%	
ZONE 3	Expenditure (£)	£775	£368	£336	£44	£272	£348	£254	£240	£368	£3,005
	Weighting	25.8%	12.2%	11.2%	1.5%	9.1%	11.6%	8.5%	8.0%	12.2%	
ZONE 4	Expenditure (£)	£885	£426	£407	£57	£284	£413	£335	£274	£390	£3,471
	Weighting	25.5%	12.3%	11.7%	1.6%	8.2%	11.9%	9.7%	7.9%	11.2%	
ZONE 5	Expenditure (£)	£778	£349	£314	£52	£264	£349	£276	£226	£351	£2,959
	Weighting	26.3%	11.8%	10.6%	1.8%	8.9%	11.8%	9.3%	7.6%	11.9%	
ZONE 6	Expenditure (£)	£810	£362	£375	£46	£288	£350	£269	£270	£364	£3,134
	Weighting	25.8%	11.6%	12.0%	1.5%	9.2%	11.2%	8.6%	8.6%	11.6%	
ZONE 7	Expenditure (£)	£748	£328	£279	£66	£257	£330	£248	£191	£357	£2,804
	Weighting	26.7%	11.7%	10.0%	2.4%	9.2%	11.8%	8.8%	6.8%	12.7%	
ZONE 8	Expenditure (£)	£778	£326	£275	£63	£262	£340	£247	£193	£366	£2,850
	Weighting	27.3%	11.4%	9.6%	2.2%	9.2%	11.9%	8.7%	6.8%	12.8%	
ZONE 9	Expenditure (£)	£755	£358	£299	£66	£237	£346	£244	£207	£410	£2,922
	Weighting	25.8%	12.3%	10.2%	2.3%	8.1%	11.8%	8.4%	7.1%	14.0%	
ZONE 10	Expenditure (£)	£782	£373	£335	£58	£264	£330	£235	£235	£395	£3,007
	Weighting	26.0%	12.4%	11.1%	1.9%	8.8%	11.0%	7.8%	7.8%	13.1%	
ZONE 11	Expenditure (£)	£735	£356	£329	£53	£217	£329	£229	£225	£383	£2,856
	Weighting	25.7%	12.5%	11.5%	1.9%	7.6%	11.5%	8.0%	7.9%	13.4%	
ZONE 12	Expenditure (£)	£779	£371	£299	£63	£232	£350	£256	£220	£403	£2,973
	Weighting	25.7%	12.5%	11.5%	1.9%	7.6%	11.5%	8.0%	7.9%	13.4%	
TOTAL	Expenditure Average	£782	£357	£321	£57	£259	£348	£261	£226	£374	£2,984

Notes

1. Expenditure Weighting derived from Experian Retail Planner Report (Fine Expenditure)

TABLE 3 - COMPARISON EXPENDITURE FORECASTS

SURVEY AREA	2010 (£)	2010 Minus SfT (£)	2011 (£)	2011 Minus SfT (£)	2012 (£)	2012 Minus SfT (£)	2014 (£)	2014 Minus SfT (£)	2018 (£)	2018 Minus SfT (£)	2021 (£)	2021 Minus SfT (£)	2030 (£)	2030 Minus SfT (£)
Zone 1 - Carlisle	£2,764	£2,750	£2,778	£2,500	£2,822	£2,515	£2,968	£2,603	£3,340	£2,916	£3,650	£3,329	£4,763	£4,286
Zone 2 - Carlisle West	£3,067	£3,052	£3,082	£2,774	£3,132	£2,790	£3,293	£2,888	£3,707	£3,236	£4,050	£3,694	£5,285	£4,756
Zone 3 - Rural North	£3,005	£2,990	£3,020	£2,718	£3,068	£2,734	£3,227	£2,830	£3,632	£3,171	£3,969	£3,619	£5,178	£4,660
Zone 4 - Rural South	£3,471	£3,454	£3,488	£3,140	£3,544	£3,158	£3,727	£3,269	£4,195	£3,662	£4,584	£4,181	£5,981	£5,383
Zone 5 - Keswick	£2,959	£2,944	£2,974	£2,676	£3,021	£2,692	£3,177	£2,787	£3,576	£3,122	£3,908	£3,564	£5,099	£4,589
Zone 6 - Yorkshire Dales	£3,134	£3,118	£3,150	£2,835	£3,200	£2,851	£3,365	£2,951	£3,788	£3,307	£4,139	£3,775	£5,400	£4,860
Zone 7 - Allerdale	£2,804	£2,790	£2,818	£2,536	£2,863	£2,551	£3,011	£2,641	£3,389	£2,958	£3,703	£3,377	£4,832	£4,348
Zone 8 - Copeland	£2,850	£2,836	£2,864	£2,578	£2,910	£2,593	£3,060	£2,684	£3,444	£3,007	£3,764	£3,433	£4,911	£4,420
Zone 9 - Annan/Gretna	£2,922	£2,907	£2,937	£2,643	£2,984	£2,658	£3,138	£2,752	£3,531	£3,083	£3,859	£3,519	£5,035	£4,531
Zone 10 - Langholm	£3,007	£2,992	£3,022	£2,720	£3,070	£2,736	£3,229	£2,832	£3,634	£3,173	£3,971	£3,622	£5,181	£4,663
Zone 11 - Lockerbie	£2,856	£2,842	£2,870	£2,583	£2,916	£2,598	£3,067	£2,690	£3,452	£3,013	£3,772	£3,440	£4,921	£4,429
Zone 12 - Dumfries	£2,973	£2,958	£2,988	£2,689	£3,036	£2,705	£3,192	£2,800	£3,593	£3,137	£3,926	£3,581	£5,123	£4,611

Notes

1. Expenditure per Capita Forecasts derived from Experian Retail Planner (Fine Expenditure) Report; All Expenditure Figures given in 2010 Prices
2. Growth in per capita retail expenditure for Comparison Goods: (Source: - Experian Retail Planner Briefing Note 9 / GVA)

	2011	2012	2013	2014-2030
Expend. Growth (p.a.)	0.5%	1.6%	2.1%	3.0%

3. Deductions for Special Forms of Trading (SfT) (Source: - Experian Retail Planner Briefing Note 9 / GVA)

	2010	2011	2012	2014	2018	2021	2030
Comparison Goods	8.8%	10.0%	10.90%	12.3%	12.7%	12.4%	12.0%

TABLE 4 - TOTAL COMPARISON SPEND (2012 - 2030)

COMPARISON GOODS	2011	2012	2014	2018	2021	2030
Zone 1 - Carlisle	£190,412,894	£193,428,487	£201,460,593	£233,582,428	£268,352,168	£369,424,358
Zone 2 - Carlisle West	£79,430,848	£79,749,629	£82,621,531	£93,172,248	£106,504,190	£139,313,752
Zone 3 - Rural North	£64,520,418	£64,943,694	£67,551,877	£76,951,666	£88,147,654	£117,064,429
Zone 4 - Rural South	£28,076,723	£28,164,902	£29,251,723	£33,036,587	£37,842,281	£49,845,556
Zone 5 - Keswick	£83,410,489	£83,956,831	£86,915,372	£98,099,020	£112,376,275	£148,950,149
Zone 6 - Yorkshire Dales	£75,666,727	£76,111,472	£79,113,999	£89,867,439	£102,814,024	£136,174,868
Zone 7 - Allerdale	£164,002,001	£165,536,305	£171,886,314	£195,458,719	£224,046,504	£297,463,064
Zone 8 - Copeland	£145,092,880	£146,629,928	£152,290,155	£174,113,243	£199,633,063	£265,954,514
Zone 9 - Annan/Gretna	£41,705,735	£41,864,228	£43,545,799	£48,932,538	£56,108,467	£71,996,318
Zone 10 - Langholm	£11,398,814	£11,427,083	£11,845,233	£13,153,720	£14,990,185	£18,849,098
Zone 11 - Lockerbie	£43,819,704	£43,982,071	£45,636,380	£50,955,104	£58,153,682	£74,010,867
Zone 12 - Dumfries	£130,578,963	£131,833,814	£136,898,741	£156,207,330	£178,840,170	£231,866,169
TOTAL COMPARISON SPEND	**£1,058,116,196**	**£1,067,628,445**	**£1,109,017,717**	**£1,263,530,042**	**£1,447,808,662**	**£1,920,913,142**

TABLE 5A - TOTAL COMPARISON SPEND (2012)

COMPARISON GOODS	CLOTHING / FASHION GOODS	FURNITURE & FLOORING	DIY GOODS	MAJOR HOUSEHOLD APPS	LARGE ELECTRICAL APPS	SMALL ELECTRICAL APPS	PERSONAL GOODS	BOOKS, CDs & DVDs	RECREATIONAL GOODS	ZONE TOTAL
Zone 1 - Carlisle	£53,885,649	£22,184,092	£17,705,285	£4,408,826	£18,125,173	£22,953,887	£17,565,322	£12,946,552	£23,653,701	£193,428,487
Zone 2 - Carlisle West	£20,619,972	£9,230,883	£8,996,861	£1,404,134	£7,072,677	£9,360,895	£7,384,706	£6,240,597	£9,438,903	£79,749,629
Zone 3 - Rural North	£16,749,205	£7,953,171	£7,261,591	£950,923	£5,878,431	£7,520,934	£5,489,417	£5,186,851	£7,953,171	£64,943,694
Zone 4 - Rural South	£7,181,198	£3,456,712	£3,302,540	£462,518	£2,304,475	£3,351,226	£2,718,307	£2,223,331	£3,164,596	£28,164,902
Zone 5 - Keswick	£22,074,490	£9,902,310	£8,909,241	£1,475,416	£7,490,572	£9,902,310	£7,831,053	£6,412,384	£9,959,056	£83,956,831
Zone 6 - Yorkshire Dales	£19,671,440	£8,791,434	£9,107,148	£1,117,143	£6,994,290	£8,500,005	£6,532,861	£6,557,147	£8,840,005	£76,111,472
Zone 7 - Allerdale	£44,158,758	£19,363,733	£16,470,980	£3,896,361	£15,172,193	£19,481,805	£14,640,871	£11,275,832	£21,075,771	£165,536,305
Zone 8 - Copeland	£40,027,398	£16,772,406	£14,148,502	£3,241,293	£13,479,664	£17,492,693	£12,707,927	£9,929,676	£18,830,370	£146,629,928
Zone 9 - Annan/Gretna	£10,817,075	£5,129,156	£4,283,848	£945,599	£3,395,559	£4,957,229	£3,495,849	£2,965,741	£5,874,173	£41,864,228
Zone 10 - Langholm	£2,971,726	£1,417,460	£1,273,054	£220,409	£1,003,242	£1,254,053	£893,038	£893,038	£1,501,063	£11,427,083
Zone 11 - Lockerbie	£11,318,915	£5,482,359	£5,066,562	£816,194	£3,341,775	£5,066,562	£3,526,574	£3,464,974	£5,898,156	£43,982,071
Zone 12 - Dumfries	£33,927,820	£16,433,067	£15,186,738	£2,446,496	£10,016,785	£15,186,738	£10,570,709	£10,386,067	£17,679,395	£131,833,814
TOTAL COMPARISON SPEND	£283,403,646	£126,116,782	£111,712,350	£21,385,312	£94,274,835	£125,028,337	£93,356,634	£78,482,190	£133,868,359	£1,067,628,445

TABLE 5B - TOTAL COMPARISON SPEND (2018)

COMPARISON GOODS	CLOTHING / FASHION GOODS	FURNITURE & FLOORING	DIY GOODS	MAJOR HOUSEHOLD APPS	LARGE ELECTRICAL APPS	SMALL ELECTRICAL APPS	PERSONAL GOODS	BOOKS, CDs & DVDs	RECREATIONAL GOODS	ZONE TOTAL
Zone 1 - Carlisle	£65,071,805	£26,789,302	£21,380,736	£5,324,057	£21,887,789	£27,718,899	£21,211,718	£15,634,135	£28,563,987	£233,582,428
Zone 2 - Carlisle West	£24,090,509	£10,784,528	£10,511,118	£1,640,463	£8,263,075	£10,936,423	£8,627,623	£7,290,949	£11,027,560	£93,172,248
Zone 3 - Rural North	£19,846,103	£9,423,698	£8,604,246	£1,126,747	£6,965,342	£8,911,541	£6,504,400	£6,145,890	£9,423,698	£76,951,666
Zone 4 - Rural South	£8,423,330	£4,054,620	£3,873,780	£542,520	£2,703,080	£3,930,887	£3,188,492	£2,607,901	£3,711,976	£33,036,587
Zone 5 - Keswick	£25,792,848	£11,570,314	£10,409,967	£1,723,944	£8,752,329	£11,570,314	£9,150,162	£7,492,524	£11,636,619	£98,099,020
Zone 6 - Yorkshire Dales	£23,226,747	£10,380,349	£10,753,124	£1,319,050	£8,258,399	£10,036,249	£7,713,574	£7,742,249	£10,437,699	£89,867,439
Zone 7 - Allerdale	£52,140,914	£22,863,930	£19,448,282	£4,600,669	£17,914,726	£23,003,344	£17,287,362	£13,314,057	£24,885,436	£195,458,719
Zone 8 - Copeland	£47,529,861	£19,916,111	£16,800,401	£3,848,819	£16,006,200	£20,771,404	£15,089,814	£11,790,827	£22,359,806	£174,113,243
Zone 9 - Annan/Gretna	£12,643,418	£5,995,157	£5,007,128	£1,105,252	£3,968,861	£5,794,202	£4,086,085	£3,466,473	£6,865,962	£48,932,538
Zone 10 - Langholm	£3,420,755	£1,631,639	£1,465,413	£253,713	£1,154,833	£1,443,541	£1,027,976	£1,027,976	£1,727,875	£13,153,720
Zone 11 - Lockerbie	£13,113,446	£6,351,547	£5,869,828	£945,595	£3,871,589	£5,869,828	£4,085,686	£4,014,320	£6,833,265	£50,955,104
Zone 12 - Dumfries	£40,200,416	£19,471,222	£17,994,472	£2,898,805	£11,868,694	£17,994,472	£12,525,028	£12,306,250	£20,947,972	£156,207,330
TOTAL COMPARISON SPEND	£335,500,152	£149,232,416	£132,118,494	£25,329,634	£111,614,916	£147,981,104	£110,497,920	£92,833,551	£158,421,855	£1,263,530,042

TABLE 5C - TOTAL COMPARISON SPEND (2030)

COMPARISON GOODS	CLOTHING / FASHION GOODS	FURNITURE & FLOORING	DIY GOODS	MAJOR HOUSEHOLD APPS	LARGE ELECTRICAL APPS	SMALL ELECTRICAL APPS	PERSONAL GOODS	BOOKS, CDs & DVDs	RECREATIONAL GOODS	ZONE TOTAL
Zone 1 - Carlisle	£102,914,890	£42,368,857	£33,814,892	£8,420,309	£34,616,827	£43,839,070	£33,547,581	£24,726,305	£45,175,627	£369,424,358
Zone 2 - Carlisle West	£36,020,804	£16,125,328	£15,716,517	£2,452,867	£12,355,181	£16,352,446	£12,900,263	£10,901,630	£16,488,716	£139,313,752
Zone 3 - Rural North	£30,191,325	£14,336,010	£13,089,400	£1,714,088	£10,596,181	£13,556,879	£9,894,963	£9,349,572	£14,336,010	£117,064,429
Zone 4 - Rural South	£12,709,109	£6,117,605	£5,844,754	£818,553	£4,078,403	£5,930,917	£4,810,793	£3,934,798	£5,600,624	£49,845,556
Zone 5 - Keswick	£39,162,966	£17,567,963	£15,806,133	£2,617,576	£13,289,233	£17,567,963	£13,893,289	£11,376,389	£17,668,639	£148,950,149
Zone 6 - Yorkshire Dales	£35,195,164	£15,729,197	£16,294,057	£1,998,738	£12,513,836	£15,207,787	£11,688,270	£11,731,721	£15,816,098	£136,174,868
Zone 7 - Allerdale	£79,351,773	£34,795,965	£29,597,787	£7,001,627	£27,263,911	£35,008,135	£26,309,144	£20,262,284	£37,872,437	£297,463,064
Zone 8 - Copeland	£72,600,916	£30,421,464	£25,662,278	£5,878,995	£24,449,152	£31,727,907	£23,049,391	£18,010,253	£34,154,159	£265,954,514
Zone 9 - Annan/Gretna	£18,602,745	£8,820,904	£7,367,180	£1,626,200	£5,839,537	£8,525,231	£6,012,013	£5,100,355	£10,102,153	£71,996,318
Zone 10 - Langholm	£4,901,894	£2,338,116	£2,099,916	£363,568	£1,654,859	£2,068,574	£1,473,076	£1,473,076	£2,476,021	£18,849,098
Zone 11 - Lockerbie	£19,046,914	£9,225,444	£8,525,762	£1,373,451	£5,623,375	£8,525,762	£5,934,345	£5,830,688	£9,925,127	£74,010,867
Zone 12 - Dumfries	£59,671,440	£28,902,085	£26,710,073	£4,302,839	£17,617,282	£26,710,073	£18,591,510	£18,266,767	£31,094,098	£231,866,169
TOTAL COMPARISON SPEND	£510,369,940	£226,748,938	£200,528,750	£38,568,810	£169,897,778	£225,020,744	£168,104,637	£140,963,838	£240,709,708	£1,920,913,142

TABLE 6 - Clothing

DESTINATIONS	M/S	Zone 1 - Carlisle	Zone 2 - Carlisle West	Zone 3 - Rural North	Zone 4 - Rural South	Zone 5 - Keswick	Zone 6 - Yorkshire Dales	Zone 7 - Allerdale	Zone 8 - Copeland	Zone 9 - Gretna	Zone 10 - Longholm	Zone 11 - Lockerbie	Zone 12 - Dumfries	SURVEY TURNOVER
Centres														
Carlisle City Centre	%	86.2%	80.6%	65.9%	81.5%	68.7%	67.7%	40.6%	16.9%	74.4%	76.5%	44.1%	26.1%	
	£	£46,449,430	£16,619,698	£11,037,726	£5,852,676	£15,165,174	£13,317,565	£17,928,456	£6,764,630	£8,047,904	£2,273,370	£4,991,642	£8,855,161	£157,303,432
Longtown	%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£184,241	£0	£0	£0	£0	£0	£0	£0	£0	£0	£184,241
Dalston	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Brampton	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
CENTRES TOTAL	%	86.2%	80.6%	67.0%	81.5%	68.7%	67.7%	40.6%	16.9%	74.4%	76.5%	44.1%	26.1%	
	£	£46,449,430	£16,619,698	£11,221,968	£5,852,676	£15,165,174	£13,317,565	£17,928,456	£6,764,630	£8,047,904	£2,273,370	£4,991,642	£8,855,161	£157,487,673
Retail Parks / Out-of-Centre Provision														
Asda, Kingstown RP, Carlisle	%	2.8%	2.2%	3.3%	0.0%	0.0%	1.5%	0.0%	0.0%	4.4%	1.5%	0.0%	1.5%	
	£	£1,508,798	£453,639	£552,724	£0	£0	£295,072	£0	£0	£475,951	£44,576	£0	£508,917	£3,839,677
Kingstown Retail Park, Carlisle	%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£226,820	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£226,820
Tesco, Warwick Road, Carlisle	%	0.6%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£323,314	£0	£0	£78,993	£0	£0	£0	£0	£0	£0	£0	£0	£402,307
Matalan, Station Retail Park	%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£592,742	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£592,742
London Road RP, Carlisle	%	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£78,993	£0	£0	£0	£0	£0	£0	£0	£0	£78,993
Currock Road, Carlisle	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
St Nicholas Gate Retail Park, Carlisle	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Madford Retail Park, Carlisle	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Hardwicke Circus, Carlisle	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
RETAIL PARKS TOTAL	%	4.5%	3.3%	3.3%	2.2%	0.0%	1.5%	0.0%	0.0%	4.4%	1.5%	0.0%	1.5%	
	£	£2,424,854	£680,459	£552,724	£157,986	£0	£295,072	£0	£0	£475,951	£44,576	£0	£508,917	£5,140,540
Other														
Gretna Gateway Outlet Village	%	3.3%	2.2%	6.6%	4.3%	1.5%	0.0%	1.5%	1.5%	11.1%	10.3%	8.8%	2.9%	
	£	£1,778,226	£453,639	£1,105,448	£308,792	£331,117	£0	£662,381	£600,411	£1,200,695	£306,088	£996,065	£983,907	£8,726,769
Dumfries	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.7%	4.4%	32.4%	40.6%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£724,744	£130,756	£3,667,329	£13,774,695	£18,297,523
Whitehaven	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	23.1%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£9,246,329	£0	£0	£0	£0	£9,246,329
Workington	%	0.6%	5.4%	0.0%	0.0%	4.5%	0.0%	52.2%	47.7%	0.0%	0.0%	0.0%	0.0%	
	£	£323,314	£1,113,479	£0	£0	£993,352	£0	£23,050,871	£19,093,069	£0	£0	£0	£0	£44,574,085
Keswick	%	0.0%	1.1%	0.0%	0.0%	3.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£226,820	£0	£0	£662,235	£0	£0	£0	£0	£0	£0	£0	£889,054
Wigton	%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£453,639	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£453,639
Darlington	%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£295,072	£0	£0	£0	£0	£0	£0	£295,072
Kendal	%	0.0%	0.0%	0.0%	0.0%	0.0%	16.9%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£3,324,473	£662,381	£0	£0	£0	£0	£0	£3,986,855
Hexham	%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£184,241	£0	£0	£0	£0	£0	£0	£0	£0	£0	£184,241
Penrith	%	0.6%	0.0%	1.1%	1.1%	16.4%	4.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£323,314	£0	£184,241	£78,993	£3,620,216	£904,886	£0	£0	£0	£0	£0	£0	£5,111,651
Metro Centre, Gateshead	%	2.2%	1.1%	6.6%	0.0%	1.5%	3.1%	0.0%	1.5%	0.0%	1.5%	0.0%	0.0%	
	£	£1,185,484	£226,820	£1,105,448	£0	£331,117	£609,815	£0	£600,411	£0	£44,576	£0	£0	£4,103,670
The Peel Centre, Dumfries	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.2%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£2,442,803	£2,442,803
Trafford Centre, Manchester	%	0.0%	0.0%	0.0%	1.1%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£78,993	£0	£295,072	£0	£0	£0	£0	£0	£0	£374,065
Newcastle-upon-Tyne	%	1.1%	0.0%	7.7%	4.3%	3.0%	1.5%	0.0%	3.1%	0.0%	0.0%	0.0%	0.0%	
	£	£592,742	£0	£1,289,689	£308,792	£662,235	£295,072	£0	£1,240,849	£0	£0	£0	£0	£4,389,378
Glasgow	%	0.0%	0.0%	2.2%	1.1%	0.0%	0.0%	0.0%	1.5%	0.0%	1.5%	5.9%	8.7%	
	£	£0	£0	£368,483	£78,993	£0	£0	£0	£600,411	£0	£44,576	£667,816	£2,951,720	£4,711,999
Manchester	%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£184,241	£0	£0	£0	£0	£600,411	£0	£0	£0	£0	£784,652
Edinburgh	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£169,784	£0	£169,784
OTHER	%	1.5%	4.1%	3.3%	4.4%	1.4%	1.7%	4.2%	3.2%	3.4%	4.3%	7.3%	13.0%	
	£	£808,285	£845,419	£552,724	£315,973	£309,043	£334,414	£1,854,668	£1,280,877	£367,781	£127,784	£826,281	£4,410,617	£12,033,864
OTHER TOTAL	%	9.3%	16.1%	29.7%	16.3%	31.3%	30.8%	59.4%	83.1%	21.2%	22.0%	55.9%	72.4%	
	£	£5,011,365	£3,319,816	£4,974,514	£1,170,535	£6,909,315	£6,058,803	£26,230,302	£33,262,768	£2,293,220	£653,780	£6,327,274	£24,563,742	£120,775,433
CATCHMENT TOTAL	%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
	£	£53,885,649	£20,619,972	£16,749,205	£7,181,198	£22,074,490	£19,671,440	£44,158,758	£40,027,398	£10,817,075	£2,971,726	£11,318,915	£33,927,820	£283,403,646

TABLE 7 - FURNITURE

DESTINATIONS	M/S	Zone 1 - Carlisle	Zone 2 - Carlisle West	Zone 3 - Rural North	Zone 4 - Rural South	Zone 5 - Keswick	Zone 6 - Yorkshire Dales	Zone 7 - Allerdale	Zone 8 - Copeland	Zone 9 - Gretna	Zone 10 - Longholm	Zone 11 - Lockerbie	Zone 12 - Dumfries	SURVEY TURNOVER
Centres														
Carlisle City Centre	%	73.1%	59.5%	56.4%	74.1%	40.0%	57.4%	13.6%	24.6%	50.0%	41.3%	20.7%	7.8%	
	£	£16,216,571	£5,492,375	£4,485,589	£2,561,424	£3,960,924	£5,046,283	£2,633,468	£4,126,012	£2,564,578	£585,411	£1,134,848	£1,281,779	£50,089,262
Longtown	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Dalston	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Brampton	%	0.0%	5.1%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£470,775	£95,438	£0	£0	£0	£0	£0	£0	£0	£0	£0	£566,213
CENTRES TOTAL	%	73.1%	64.6%	57.6%	74.1%	40.0%	57.4%	13.6%	24.6%	50.0%	41.3%	20.7%	7.8%	
	£	£16,216,571	£5,963,150	£4,581,027	£2,561,424	£3,960,924	£5,046,283	£2,633,468	£4,126,012	£2,564,578	£585,411	£1,134,848	£1,281,779	£50,655,475
Retail Parks / Out-of-Centre Provision														
Asda, Kingstown RP, Carlisle	%	1.2%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%	0.0%	
	£	£266,209	£0	£103,391	£0	£0	£0	£0	£0	£0	£0	£93,200	£0	£462,800
Kingstown Retail Park, Carlisle	%	2.4%	1.4%	7.7%	1.2%	0.0%	1.9%	0.0%	0.0%	5.0%	4.8%	0.0%	0.0%	
	£	£532,418	£129,232	£612,394	£41,481	£0	£167,037	£0	£0	£256,458	£68,038	£0	£0	£1,807,058
Tesco, Warwick Road, Carlisle	%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£133,105	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£133,105
Matalan, Station Retail Park	%	0.6%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£133,105	£0	£0	£41,481	£0	£0	£0	£0	£0	£0	£0	£0	£174,585
London Road RP, Carlisle	%	3.6%	2.7%	5.1%	3.7%	1.7%	1.9%	0.0%	0.0%	0.0%	3.2%	0.0%	0.0%	
	£	£798,627	£249,234	£405,612	£127,898	£168,339	£167,037	£0	£0	£0	£45,359	£0	£0	£1,962,106
Currock Road, Carlisle	%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£133,105	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£133,105
St Nicholas Gate Retail Park, Carlisle	%	3.0%	1.4%	7.7%	0.0%	0.0%	0.0%	3.4%	0.0%	0.0%	1.6%	3.4%	0.0%	
	£	£665,523	£129,232	£612,394	£0	£0	£0	£658,367	£0	£0	£22,679	£186,400	£0	£2,274,596
Madford Retail Park, Carlisle	%	1.2%	1.4%	0.0%	3.7%	0.0%	0.0%	0.0%	1.8%	1.3%	3.2%	0.0%	0.0%	
	£	£266,209	£129,232	£0	£127,898	£0	£0	£0	£301,903	£66,679	£45,359	£0	£0	£937,281
Hardwicke Circus, Carlisle	%	1.2%	0.0%	1.3%	0.0%	0.0%	0.0%	1.7%	1.8%	2.5%	0.0%	0.0%	0.0%	
	£	£266,209	£0	£103,391	£0	£0	£0	£329,183	£301,903	£128,229	£0	£0	£0	£1,128,916
RETAIL PARKS TOTAL	%	14.4%	6.9%	23.1%	9.8%	1.7%	3.8%	5.1%	3.6%	8.8%	12.8%	5.1%	0.0%	
	£	£3,194,509	£636,931	£1,837,183	£338,758	£168,339	£334,074	£987,550	£603,807	£451,366	£181,435	£279,600	£0	£9,013,552
Other														
Gretna Gateway Outlet Village	%	0.6%	0.0%	1.3%	1.2%	0.0%	0.0%	0.0%	0.0%	3.8%	0.0%	3.4%	1.6%	
	£	£133,105	£0	£103,391	£41,481	£0	£0	£0	£0	£194,908	£0	£186,400	£262,929	£922,214
Dumfries	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£262,929	£262,929
Whitehaven	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%	26.3%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£329,183	£4,411,143	£0	£0	£0	£0	£4,740,326
Workington	%	0.0%	2.7%	0.0%	0.0%	0.0%	0.0%	37.3%	29.8%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£249,234	£0	£0	£0	£0	£7,222,673	£4,998,177	£0	£0	£0	£0	£12,470,083
Keswick	%	0.0%	0.0%	0.0%	0.0%	0.0%	10.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£879,143	£0	£0	£0	£0	£0	£0	£879,143
Wigton	%	0.0%	5.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£498,468	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£498,468
Darlington	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Kendal	%	0.0%	0.0%	0.0%	0.0%	0.0%	5.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£492,320	£0	£0	£0	£0	£0	£0	£492,320
Hexham	%	0.0%	0.0%	1.3%	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£103,391	£0	£0	£167,037	£0	£0	£0	£0	£0	£0	£270,428
Penrith	%	0.0%	1.4%	0.0%	2.5%	36.7%	13.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£129,232	£0	£86,418	£3,634,148	£1,142,886	£0	£0	£0	£0	£0	£0	£4,992,684
Metro Centre, Gateshead	%	1.2%	1.4%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	1.6%	0.0%	0.0%	
	£	£266,209	£129,232	£206,782	£0	£0	£0	£0	£0	£66,679	£22,679	£0	£0	£691,582
The Peel Centre, Dumfries	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.3%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£1,035,283	£1,035,283
Trafford Centre, Manchester	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Newcastle-upon-Tyne	%	2.4%	0.0%	5.1%	4.9%	3.3%	0.0%	0.0%	1.8%	0.0%	0.0%	0.0%	0.0%	
	£	£532,418	£0	£405,612	£169,379	£326,776	£0	£0	£301,903	£0	£0	£0	£0	£1,736,088
Glasgow	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	1.7%	0.0%	1.6%	
	£	£0	£0	£0	£0	£0	£0	£0	£218,041	£0	£24,097	£0	£262,929	£505,067
Manchester	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Edinburgh	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£93,200	£0	£93,200
OTHER	%	8.3%	17.6%	9.0%	7.5%	18.3%	8.3%	42.3%	12.6%	36.1%	42.6%	69.1%	81.1%	
	£	£1,841,280	£1,624,635	£715,785	£259,253	£1,812,123	£729,689	£8,190,859	£2,113,323	£1,851,625	£603,838	£3,788,310	£13,327,217	£36,857,938
OTHER TOTAL	%	12.5%	28.5%	19.3%	16.1%	58.3%	38.8%	81.3%	71.8%	41.2%	45.9%	74.2%	92.2%	
	£	£2,773,011	£2,630,802	£1,534,962	£556,531	£5,773,047	£3,411,076	£15,742,715	£12,042,587	£2,113,212	£650,614	£4,067,910	£15,151,287	£66,447,755
CATCHMENT TOTAL	%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
	£	£22,184,092	£9,230,883	£7,953,171	£3,456,712	£9,902,310	£8,791,434	£19,363,733	£16,772,406	£5,129,156	£1,417,460	£5,482,359	£16,433,067	£126,116,782

TABLE 8 - DIY GOODS

DESTINATIONS	M/S	Zone 1 - Carlisle	Zone 2 - Carlisle West	Zone 3 - Rural North	Zone 4 - Rural South	Zone 5 - Keswick	Zone 6 - Yorkshire Dales	Zone 7 - Allerdale	Zone 8 - Copeland	Zone 9 - Gretna	Zone 10 - Longholm	Zone 11 - Lockerbie	Zone 12 - Dumfries	SURVEY TURNOVER
Centres														
Carlisle City Centre	%	41.5%	23.6%	12.2%	19.8%	1.5%	10.0%	1.5%	1.5%	24.7%	30.4%	5.8%	1.4%	
	£	£7,347,693	£2,123,259	£885,914	£653,903	£133,639	£910,715	£247,065	£212,228	£1,058,110	£387,008	£293,861	£212,614	£14,466,009
Longtown	%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	1.5%	0.0%	0.0%	
	£	£0	£0	£72,616	£0	£0	£0	£0	£0	£51,406	£19,096	£0	£0	£143,118
Dalston	%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£98,965	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£98,965
Brampton	%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.9%	0.0%	0.0%	
	£	£0	£0	£72,616	£0	£0	£0	£0	£0	£0	£36,919	£0	£0	£109,534
CENTRES TOTAL	%	41.5%	24.7%	14.2%	19.8%	1.5%	10.0%	1.5%	1.5%	25.9%	34.8%	5.8%	1.4%	
	£	£7,347,693	£2,222,225	£1,031,146	£653,903	£133,639	£910,715	£247,065	£212,228	£1,109,517	£443,023	£293,861	£212,614	£14,817,627
Retail Parks / Out-of-Centre Provision														
Asda, Kingstown RP, Carlisle	%	0.5%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	
	£	£88,526	£98,965	£0	£0	£0	£0	£0	£0	£0	£19,096	£0	£0	£206,588
Kingstown Retail Park, Carlisle	%	14.8%	11.2%	35.7%	13.5%	2.9%	1.4%	0.0%	0.0%	34.1%	27.5%	5.8%	0.0%	
	£	£2,620,382	£1,007,648	£2,592,388	£445,843	£258,368	£127,500	£0	£0	£1,460,792	£350,090	£293,861	£0	£9,156,872
Tesco, Warwick Road, Carlisle	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Matalan, Station Retail Park	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
London Road RP, Carlisle	%	38.3%	36.0%	41.8%	50.0%	7.2%	5.7%	0.0%	1.5%	16.5%	20.3%	7.2%	0.0%	
	£	£6,781,124	£3,238,870	£3,035,345	£1,651,270	£641,465	£519,107	£0	£212,228	£706,835	£258,430	£364,792	£0	£17,409,466
Currock Road, Carlisle	%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£88,526	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£88,526
St Nicholas Gate Retail Park, Carlisle	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Madford Retail Park, Carlisle	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Hardwicke Circus, Carlisle	%	3.3%	1.1%	2.0%	2.1%	0.0%	0.0%	0.0%	0.0%	2.4%	2.9%	1.4%	0.0%	
	£	£584,274	£98,965	£145,232	£69,353	£0	£0	£0	£0	£102,812	£36,919	£70,932	£0	£1,108,488
RETAIL PARKS TOTAL	%	57.4%	49.4%	79.5%	65.6%	10.1%	7.1%	0.0%	1.5%	53.0%	52.2%	14.4%	0.0%	
	£	£10,162,833	£4,444,449	£5,772,965	£2,166,466	£899,833	£646,608	£0	£212,228	£2,270,440	£664,534	£729,585	£0	£27,969,940
Other														
Gretna Gateway Outlet Village	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Dumfries	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	8.2%	0.0%	29.0%	33.3%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£351,276	£0	£1,469,303	£5,057,184	£6,877,762
Whitehaven	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	23.5%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£3,324,898	£0	£0	£0	£0	£3,324,898
Workington	%	0.0%	4.5%	0.0%	0.0%	4.3%	0.0%	39.1%	39.7%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£404,859	£0	£0	£383,097	£0	£6,440,153	£5,616,955	£0	£0	£0	£0	£12,845,065
Keswick	%	0.0%	0.0%	0.0%	0.0%	4.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£383,097	£0	£0	£0	£0	£0	£0	£0	£383,097
Wigton	%	0.0%	5.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£503,824	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£503,824
Darlington	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Kendal	%	0.0%	0.0%	0.0%	0.0%	0.0%	10.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	.
	£	£0	£0	£0	£0	£0	£910,715	£0	£0	£0	£0	£0	£0	£910,715
Hexham	%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£72,616	£0	£0	£0	£0	£0	£0	£0	£0	£0	£72,616
Penrith	%	0.0%	0.0%	1.0%	1.0%	21.7%	30.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£72,616	£33,025	£1,933,305	£2,732,144	£0	£0	£0	£0	£0	£0	£4,771,091
Metro Centre, Gateshead	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
The Peel Centre, Dumfries	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Trafford Centre, Manchester	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Newcastle-upon-Tyne	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Glasgow	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Manchester	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Edinburgh	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
OTHER	%	1.1%	15.8%	4.3%	13.6%	58.1%	42.9%	59.4%	33.8%	12.9%	13.0%	50.8%	65.3%	
	£	£194,758	£1,421,504	£312,248	£449,145	£5,176,269	£3,906,967	£9,783,762	£4,782,194	£552,616	£165,497	£2,573,814	£9,916,940	£39,235,715
OTHER TOTAL	%	1.1%	25.9%	6.3%	14.6%	88.4%	82.9%	98.5%	97.0%	21.1%	13.0%	79.8%	98.6%	
	£	£194,758	£2,330,187	£457,480	£482,171	£7,875,769	£7,549,826	£16,223,916	£13,724,047	£903,892	£165,497	£4,043,117	£14,974,124	£68,924,783
CATCHMENT TOTAL	%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
	£	£17,705,285	£8,996,861	£7,261,591	£3,302,540	£8,909,241	£9,107,148	£16,470,980	£14,148,502	£4,283,848	£1,273,054	£5,066,562	£15,186,738	£111,712,350

TABLE 9 - MAJOR HOUSEHOLD APPLIANCES

DESTINATIONS	M/S	Zone 1 - Carlisle	Zone 2 - Carlisle West	Zone 3 - Rural North	Zone 4 - Rural South	Zone 5 - Keswick	Zone 6 - Yorkshire Dales	Zone 7 - Allerdale	Zone 8 - Copeland	Zone 9 - Gretna	Zone 10 - Longholm	Zone 11 - Lockerbie	Zone 12 - Dumfries	SURVEY TURNOVER
Centres														
Carlisle City Centre	%	58.3%	31.1%	38.6%	59.0%	20.0%	17.0%	1.6%	3.4%	28.6%	38.5%	5.6%	0.0%	
	£	£2,570,345	£436,686	£367,056	£272,886	£295,083	£189,914	£62,342	£110,204	£270,441	£84,858	£45,707	£0	£4,705,522
Longtown	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£12,482	£0	£0	£0	£12,482
Dalston	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Brampton	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
CENTRES TOTAL	%	58.3%	31.1%	38.6%	59.0%	20.0%	17.0%	1.6%	3.4%	29.9%	38.5%	5.6%	0.0%	
	£	£2,570,345	£436,686	£367,056	£272,886	£295,083	£189,914	£62,342	£110,204	£282,923	£84,858	£45,707	£0	£4,718,004
Retail Parks / Out-of-Centre Provision														
Asda, Kingstown RP, Carlisle	%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£19,658	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£19,658
Kingstown Retail Park, Carlisle	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Tesco, Warwick Road, Carlisle	%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£19,658	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£19,658
Matalan, Station Retail Park	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
London Road RP, Carlisle	%	2.5%	1.4%	1.2%	5.1%	0.0%	1.9%	0.0%	0.0%	2.6%	1.5%	0.0%	0.0%	
	£	£110,221	£19,658	£11,411	£23,588	£0	£21,226	£0	£0	£24,586	£3,306	£0	£0	£213,995
Currock Road, Carlisle	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
St Nicholas Gate Retail Park, Carlisle	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Madford Retail Park, Carlisle	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Hardwicke Circus, Carlisle	%	0.0%	0.0%	2.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£22,822	£0	£0	£0	£0	£0	£0	£0	£0	£0	£22,822
RETAIL PARKS TOTAL	%	2.5%	4.2%	3.6%	5.1%	0.0%	1.9%	0.0%	0.0%	2.6%	1.5%	0.0%	0.0%	
	£	£110,221	£58,974	£34,233	£23,588	£0	£21,226	£0	£0	£24,586	£3,306	£0	£0	£276,133
Other														
Gretna Gateway Outlet Village	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Dumfries	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	13.0%	1.5%	27.8%	46.4%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£122,928	£3,306	£226,902	£1,135,174	£1,488,310
Whitehaven	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%	27.6%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£62,342	£894,597	£0	£0	£0	£0	£956,939
Workington	%	0.0%	2.7%	0.0%	0.0%	1.7%	0.0%	35.5%	36.2%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£37,912	£0	£0	£25,082	£0	£1,383,208	£1,173,348	£0	£0	£0	£0	£2,619,550
Keswick	%	0.0%	0.0%	0.0%	0.0%	10.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£147,542	£0	£0	£0	£0	£0	£0	£0	£147,542
Wigton	%	0.0%	2.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£37,912	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£37,912
Darlington	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Kendal	%	0.0%	0.0%	0.0%	0.0%	0.0%	15.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£168,689	£0	£0	£0	£0	£0	£0	£168,689
Hexham	%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£11,411	£0	£0	£0	£0	£0	£0	£0	£0	£0	£11,411
Penrith	%	0.0%	0.0%	0.0%	2.6%	36.7%	26.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£12,025	£541,478	£294,926	£0	£0	£0	£0	£0	£0	£848,429
Metro Centre, Gateshead	%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£6,013	£0	£0	£0	£0	£0	£0	£0	£0	£6,013
The Peel Centre, Dumfries	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£44,037	£44,037
Trafford Centre, Manchester	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Newcastle-upon-Tyne	%	0.0%	0.0%	3.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£34,233	£0	£0	£0	£0	£0	£0	£0	£0	£0	£34,233
Glasgow	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Manchester	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Edinburgh	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.9%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£15,508	£0	£15,508
OTHER	%	39.2%	59.3%	53.0%	32.0%	31.6%	39.6%	61.3%	32.8%	54.5%	58.5%	64.7%	51.8%	
	£	£1,728,260	£832,652	£503,989	£148,006	£466,231	£442,389	£2,388,469	£1,063,144	£515,351	£128,939	£528,077	£1,267,285	£10,012,793
OTHER TOTAL	%	39.2%	64.7%	57.8%	35.9%	80.0%	81.1%	98.4%	96.6%	67.5%	60.0%	94.4%	100.0%	
	£	£1,728,260	£908,475	£549,633	£166,044	£1,180,333	£906,003	£3,834,019	£3,131,089	£638,279	£132,246	£770,487	£2,446,496	£16,391,364
CATCHMENT TOTAL	%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
	£	£4,408,826	£1,404,134	£950,923	£462,518	£1,475,416	£1,117,143	£3,896,361	£3,241,293	£945,788	£220,409	£816,194	£2,446,496	£21,385,501

TABLE 10 - AUDIO-VISUAL

DESTINATIONS	M/S	Zone 1 - Carlisle	Zone 2 - Carlisle West	Zone 3 - Rural North	Zone 4 - Rural South	Zone 5 - Keswick	Zone 6 - Yorkshire Dales	Zone 7 - Allerdale	Zone 8 - Copeland	Zone 9 - Gretna	Zone 10 - Longholm	Zone 11 - Lockerbie	Zone 12 - Dumfries	SURVEY TURNOVER
Centres														
Carlisle City Centre	%	47.6%	27.3%	25.3%	53.0%	15.5%	25.0%	6.5%	1.9%	36.8%	22.9%	12.3%	0.0%	
	£	£8,627,582	£1,930,841	£1,487,243	£1,221,372	£1,161,039	£1,748,572	£986,193	£256,114	£1,249,566	£229,743	£411,038	£0	£19,309,301
Longtown	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Dalston	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Brampton	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
CENTRES TOTAL	%	47.6%	27.3%	25.3%	53.0%	15.5%	25.0%	6.5%	1.9%	36.8%	22.9%	12.3%	0.0%	
	£	£8,627,582	£1,930,841	£1,487,243	£1,221,372	£1,161,039	£1,748,572	£986,193	£256,114	£1,249,566	£229,743	£411,038	£0	£19,309,301
Retail Parks / Out-of-Centre Provision														
Asda, Kingstown RP, Carlisle	%	1.2%	0.0%	3.6%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	
	£	£217,502	£0	£211,624	£0	£0	£0	£0	£0	£44,142	£0	£0	£0	£473,268
Kingstown Retail Park, Carlisle	%	48.8%	41.6%	53.0%	28.9%	31.0%	17.9%	3.2%	1.9%	35.5%	60.0%	15.8%	0.0%	
	£	£8,845,084	£2,942,233	£3,115,568	£665,993	£2,322,077	£1,251,978	£485,510	£256,114	£1,205,423	£601,945	£528,000	£0	£22,219,928
Tesco, Warwick Road, Carlisle	%	1.2%	1.3%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	
	£	£217,502	£91,945	£70,541	£0	£0	£0	£0	£0	£44,142	£0	£0	£0	£424,130
Matalan, Station Retail Park	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
London Road RP, Carlisle	%	0.0%	0.0%	1.2%	4.8%	0.0%	1.8%	0.0%	0.0%	2.6%	0.0%	0.0%	0.0%	
	£	£0	£0	£70,541	£110,615	£0	£125,897	£0	£0	£88,285	£0	£0	£0	£395,338
Currock Road, Carlisle	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
St Nicholas Gate Retail Park, Carlisle	%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£108,751	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£108,751
Madford Retail Park, Carlisle	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Hardwicke Circus, Carlisle	%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£70,541	£0	£0	£0	£0	£0	£0	£0	£0	£0	£70,541
RETAIL PARKS TOTAL	%	51.8%	42.9%	60.2%	33.7%	31.0%	19.7%	3.2%	1.9%	40.7%	60.0%	15.8%	0.0%	
	£	£9,388,840	£3,034,178	£3,538,815	£776,608	£2,322,077	£1,377,875	£485,510	£256,114	£1,381,992	£601,945	£528,000	£0	£23,691,956
Other														
Gretna Gateway Outlet Village	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Dumfries	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	10.5%	1.5%	28.1%	46.3%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£356,534	£15,049	£939,039	£4,637,771	£5,948,392
Whitehaven	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.2%	23.1%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£485,510	£3,113,802	£0	£0	£0	£0	£3,599,312
Workington	%	0.0%	5.2%	0.0%	0.0%	1.7%	0.0%	41.9%	38.5%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£367,779	£0	£0	£127,340	£0	£6,357,149	£5,189,670	£0	£0	£0	£0	£12,041,938
Keswick	%	0.0%	0.0%	0.0%	0.0%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£127,340	£0	£0	£0	£0	£0	£0	£0	£127,340
Wigton	%	0.0%	9.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£643,614	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£643,614
Darlington	%	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£125,897	£0	£0	£0	£0	£0	£0	£125,897
Kendal	%	0.0%	0.0%	0.0%	0.0%	0.0%	14.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£1,000,183	£0	£0	£0	£0	£0	£0	£1,000,183
Hexham	%	0.0%	0.0%	2.4%	0.0%	0.0%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£141,082	£0	£0	£125,897	£0	£0	£0	£0	£0	£0	£266,980
Penrith	%	0.0%	1.3%	0.0%	6.0%	39.7%	25.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£91,945	£0	£138,268	£2,973,757	£1,748,572	£0	£0	£0	£0	£0	£0	£4,952,543
Metro Centre, Gateshead	%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£27,654	£0	£0	£0	£0	£0	£0	£0	£0	£27,654
The Peel Centre, Dumfries	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.9%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£190,319	£190,319
Trafford Centre, Manchester	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Newcastle-upon-Tyne	%	0.0%	1.3%	6.0%	2.4%	1.7%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£91,945	£352,706	£55,307	£127,340	£125,897	£0	£0	£0	£0	£0	£0	£753,195
Glasgow	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.7%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£370,621	£370,621
Manchester	%	0.0%	0.0%	0.0%	0.0%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£127,340	£0	£0	£0	£0	£0	£0	£0	£127,340
Edinburgh	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.5%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£116,962	£0	£116,962
OTHER	%	0.6%	12.9%	6.1%	3.7%	7.0%	10.6%	45.2%	34.6%	12.0%	15.6%	40.3%	48.1%	
	£	£108,751	£912,375	£358,584	£85,266	£524,340	£741,395	£6,857,831	£4,663,964	£407,467	£156,506	£1,346,735	£4,818,074	£20,981,288
OTHER TOTAL	%	0.6%	29.8%	14.5%	13.3%	53.5%	55.3%	90.3%	96.2%	22.5%	17.1%	71.9%	100.0%	
	£	£108,751	£2,107,658	£852,372	£306,495	£4,007,456	£3,867,842	£13,700,491	£12,967,436	£764,001	£171,554	£2,402,736	£10,016,785	£51,273,578
CATCHMENT TOTAL	%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
	£	£18,125,173	£7,072,677	£5,878,431	£2,304,475	£7,490,572	£6,994,290	£15,172,193	£13,479,664	£3,395,559	£1,003,242	£3,341,775	£10,016,785	£94,274,835

TABLE 11 - DOMESTIC GOODS

DESTINATIONS	M/S	Zone 1 - Carlisle	Zone 2 - Carlisle West	Zone 3 - Rural North	Zone 4 - Rural South	Zone 5 - Keswick	Zone 6 - Yorkshire Dales	Zone 7 - Allerdale	Zone 8 - Copeland	Zone 9 - Gretna	Zone 10 - Longholm	Zone 11 - Lockerbie	Zone 12 - Dumfries	SURVEY TURNOVER
Centres														
Carlisle City Centre	%	48.1%	29.1%	24.4%	34.5%	6.2%	17.7%	3.0%	1.6%	24.7%	24.6%	4.7%	1.6%	
	£	£11,040,820	£2,724,021	£1,835,108	£1,156,173	£613,943	£1,504,501	£584,454	£279,883	£1,224,436	£308,497	£238,128	£242,988	£21,752,951
Longtown	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Dalston	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Brampton	%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£82,730	£0	£0	£0	£0	£0	£0	£0	£0	£0	£82,730
CENTRES TOTAL	%	48.1%	29.1%	25.5%	34.5%	6.2%	17.7%	3.0%	1.6%	24.7%	24.6%	4.7%	1.6%	
	£	£11,040,820	£2,724,021	£1,917,838	£1,156,173	£613,943	£1,504,501	£584,454	£279,883	£1,224,436	£308,497	£238,128	£242,988	£21,835,681
Retail Parks / Out-of-Centre Provision														
Asda, Kingstown RP, Carlisle	%	5.5%	5.1%	11.1%	1.1%	4.6%	1.6%	0.0%	0.0%	9.4%	12.3%	1.6%	1.6%	
	£	£1,262,464	£477,406	£834,824	£36,863	£455,506	£136,000	£0	£0	£465,980	£154,249	£81,065	£242,988	£4,147,344
Kingstown Retail Park, Carlisle	%	25.7%	26.6%	36.7%	34.5%	6.2%	6.5%	0.0%	0.0%	17.6%	36.9%	7.8%	0.0%	
	£	£5,899,149	£2,489,998	£2,760,183	£1,156,173	£613,943	£552,500	£0	£0	£872,472	£462,746	£395,192	£0	£15,202,356
Tesco, Warwick Road, Carlisle	%	12.6%	7.6%	8.9%	16.1%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	
	£	£2,892,190	£711,428	£669,363	£539,547	£0	£0	£0	£0	£0	£18,811	£0	£0	£4,831,339
Matalan, Station Retail Park	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
London Road RP, Carlisle	%	1.1%	0.0%	1.1%	1.1%	0.0%	0.0%	0.0%	0.0%	2.4%	0.0%	1.6%	0.0%	
	£	£252,493	£0	£82,730	£36,863	£0	£0	£0	£0	£118,973	£0	£81,065	£0	£572,125
Currock Road, Carlisle	%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£114,769	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£114,769
St Nicholas Gate Retail Park, Carlisle	%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£114,769	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£114,769
Madford Retail Park, Carlisle	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Hardwicke Circus, Carlisle	%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£82,730	£0	£0	£0	£0	£0	£0	£0	£0	£0	£82,730
RETAIL PARKS TOTAL	%	45.9%	39.3%	58.9%	52.8%	10.8%	8.1%	0.0%	0.0%	29.4%	50.7%	11.0%	1.6%	
	£	£10,535,834	£3,678,832	£4,429,830	£1,769,447	£1,069,449	£688,500	£0	£0	£1,457,425	£635,805	£557,322	£242,988	£25,065,433
Other														
Gretna Gateway Outlet Village	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Dumfries	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	10.6%	0.0%	26.6%	39.1%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£525,466	£0	£1,347,706	£5,938,015	£7,811,187
Whitehaven	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	55.6%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£9,725,937	£0	£0	£0	£0	£9,725,937
Workington	%	0.0%	3.8%	0.0%	0.0%	3.1%	0.0%	47.0%	17.5%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£355,714	£0	£0	£306,972	£0	£9,156,448	£3,061,221	£0	£0	£0	£0	£12,880,355
Keswick	%	0.0%	0.0%	0.0%	0.0%	9.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£911,012	£0	£0	£0	£0	£0	£0	£0	£911,012
Wigton	%	0.0%	16.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£1,544,548	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£1,544,548
Darlington	%	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£136,000	£0	£0	£0	£0	£0	£0	£136,000
Kendal	%	0.0%	0.0%	0.0%	0.0%	0.0%	11.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£960,501	£0	£0	£0	£0	£0	£0	£960,501
Hexham	%	0.0%	0.0%	3.3%	0.0%	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£248,191	£0	£0	£136,000	£0	£0	£0	£0	£0	£0	£384,191
Penrith	%	0.0%	0.0%	0.0%	1.1%	61.5%	30.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£37,534	£6,089,920	£2,601,001	£0	£0	£0	£0	£0	£0	£8,728,456
Metro Centre, Gateshead	%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£114,769	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£114,769
The Peel Centre, Dumfries	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Trafford Centre, Manchester	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Newcastle-upon-Tyne	%	0.0%	0.0%	3.3%	3.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£248,191	£117,293	£0	£0	£0	£0	£0	£0	£0	£0	£365,484
Glasgow	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Manchester	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Edinburgh	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0
	£	£0	£0	£0	£0	£0	£0	£0	£0	£59,487	£0	£0	£0	£59,487
OTHER	%	5.5%	11.3%	9.0%	8.1%	9.2%	29.1%	50.0%	25.3%	34.1%	24.7%	57.7%	57.7%	
	£	£1,262,464	£1,057,781	£676,884	£271,449	£911,012	£2,473,501	£9,740,902	£4,425,651	£1,690,415	£309,751	£2,923,406	£8,762,748	£34,505,967
OTHER TOTAL	%	6.0%	31.6%	15.6%	12.7%	83.0%	74.2%	97.0%	98.4%	45.9%	24.7%	84.3%	96.8%	
	£	£1,377,233	£2,958,043	£1,173,266	£426,276	£8,218,917	£6,307,004	£18,897,351	£17,212,810	£2,275,368	£309,751	£4,271,112	£14,700,763	£78,127,893
CATCHMENT TOTAL	%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
	£	£22,953,887	£9,360,895	£7,520,934	£3,351,896	£9,902,310	£8,500,005	£19,481,805	£17,492,693	£4,957,229	£1,254,053	£5,066,562	£15,186,738	£125,029,007

Notes

1. Market Share derived from Household Telephone Survey Results

TABLE 12 - PERSONAL GOODS

DESTINATIONS	M/S	Zone 1 - Carlisle	Zone 2 - Carlisle West	Zone 3 - Rural North	Zone 4 - Rural South	Zone 5 - Keswick	Zone 6 - Yorkshire Dales	Zone 7 - Allerdale	Zone 8 - Copeland	Zone 9 - Gretna	Zone 10 - Longholm	Zone 11 - Lockerbie	Zone 12 - Dumfries	SURVEY TURNOVER
Centres														
Carlisle City Centre	%	85.1%	60.0%	61.0%	76.8%	17.0%	27.3%	13.6%	6.9%	48.6%	62.1%	12.7%	3.1%	
	£	£14,948,089	£4,430,824	£3,348,544	£2,087,659	£1,331,279	£1,783,471	£1,991,159	£876,847	£1,698,983	£554,576	£447,875	£327,692	£33,826,998
Longtown	%	0.0%	0.0%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%	0.0%	0.0%	
	£	£0	£0	£142,725	£0	£0	£0	£0	£0	£0	£15,182	£0	£0	£157,906
Dalston	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Brampton	%	0.0%	0.0%	7.8%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£428,175	£38,056	£0	£0	£0	£0	£0	£0	£0	£0	£466,231
CENTRES TOTAL	%	85.1%	60.0%	71.4%	78.2%	17.0%	27.3%	13.6%	6.9%	48.6%	63.8%	12.7%	3.1%	
	£	£14,948,089	£4,430,824	£3,919,444	£2,125,716	£1,331,279	£1,783,471	£1,991,159	£876,847	£1,698,983	£569,758	£447,875	£327,692	£34,451,136
Retail Parks / Out-of-Centre Provision														
Asda, Kingstown RP, Carlisle	%	2.5%	2.7%	5.2%	0.0%	0.0%	0.0%	0.0%	0.0%	2.9%	5.2%	1.6%	0.0%	
	£	£439,133	£199,387	£285,450	£0	£0	£0	£0	£0	£101,380	£46,438	£56,425	£0	£1,128,213
Kingstown Retail Park, Carlisle	%	0.6%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	1.7%	0.0%	0.0%	
	£	£105,392	£0	£71,362	£0	£0	£0	£0	£0	£48,942	£15,182	£0	£0	£240,878
Tesco, Warwick Road, Carlisle	%	3.7%	0.0%	3.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£649,917	£0	£214,087	£0	£0	£0	£0	£0	£0	£0	£0	£0	£864,004
Matalan, Station Retail Park	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
London Road RP, Carlisle	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Currock Road, Carlisle	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
St Nicholas Gate Retail Park, Carlisle	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Madford Retail Park, Carlisle	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Hardwicke Circus, Carlisle	%	0.0%	0.0%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£142,725	£0	£0	£0	£0	£0	£0	£0	£0	£0	£142,725
RETAIL PARKS TOTAL	%	6.8%	2.7%	13.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.3%	6.9%	1.6%	0.0%	
	£	£1,194,442	£199,387	£713,624	£0	£0	£0	£0	£0	£150,322	£61,620	£56,425	£0	£2,375,819
Other														
Gretna Gateway Outlet Village	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Dumfries	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	10.0%	0.0%	34.9%	82.8%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£349,585	£0	£1,230,774	£8,752,547	£10,332,906
Whitehaven	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	56.9%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£7,230,811	£0	£0	£0	£0	£7,230,811
Workington	%	0.0%	1.3%	0.0%	0.0%	3.8%	0.0%	51.5%	12.1%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£96,001	£0	£0	£297,580	£0	£7,540,049	£1,537,659	£0	£0	£0	£0	£9,471,289
Keswick	%	0.6%	0.0%	0.0%	1.4%	13.2%	0.0%	1.5%	0.0%	1.4%	0.0%	0.0%	0.0%	
	£	£105,392	£0	£0	£38,056	£1,033,699	£0	£219,613	£0	£48,942	£0	£0	£0	£1,445,702
Wigton	%	0.0%	18.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£1,380,940	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£1,380,940
Darlington	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Kendal	%	0.0%	0.0%	0.0%	0.0%	0.0%	20.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£1,306,572	£0	£0	£0	£0	£0	£0	£1,306,572
Hexham	%	0.0%	0.0%	1.3%	4.0%	0.0%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£71,362	£108,732	£0	£117,591	£0	£0	£0	£0	£0	£0	£297,686
Penrith	%	0.0%	0.0%	1.3%	2.9%	54.7%	29.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£71,362	£78,831	£4,283,586	£1,901,063	£0	£0	£0	£0	£0	£0	£6,334,842
Metro Centre, Gateshead	%	0.6%	0.0%	1.3%	0.0%	1.9%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£105,392	£0	£71,362	£0	£148,790	£117,591	£0	£0	£0	£0	£0	£0	£443,136
The Peel Centre, Dumfries	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Trafford Centre, Manchester	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Newcastle-upon-Tyne	%	0.6%	0.0%	1.3%	1.4%	0.0%	0.0%	3.0%	1.7%	0.0%	0.0%	0.0%	0.0%	
	£	£105,392	£0	£71,362	£38,056	£0	£0	£439,226	£216,035	£0	£0	£0	£0	£870,072
Glasgow	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Manchester	%	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%	4.5%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£117,591	£658,839	£0	£0	£0	£0	£0	£776,431
Edinburgh	%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	1.7%	0.0%	0.0%	
	£	£105,392	£0	£0	£0	£0	£0	£0	£0	£48,942	£15,182	£0	£0	£169,515
OTHER	%	5.7%	17.3%	10.4%	12.1%	9.4%	18.2%	25.9%	22.4%	34.3%	27.6%	50.8%	14.1%	
	£	£1,001,223	£1,277,554	£570,899	£328,915	£736,119	£1,188,981	£3,791,986	£2,846,576	£1,199,076	£246,478	£1,791,499	£1,490,470	£16,469,777
OTHER TOTAL	%	8.1%	37.3%	15.6%	21.8%	83.0%	72.7%	86.4%	93.1%	47.1%	29.3%	85.7%	96.9%	
	£	£1,422,791	£2,754,495	£856,349	£592,591	£6,499,774	£4,749,390	£12,649,713	£11,831,080	£1,646,545	£261,660	£3,022,274	£10,243,017	£56,529,679
CATCHMENT TOTAL	%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
	£	£17,565,322	£7,384,706	£5,489,417	£2,718,307	£7,831,053	£6,532,861	£14,640,871	£12,707,927	£3,495,849	£893,038	£3,526,574	£10,570,709	£93,356,634

TABLE 13 - BOOKS, CDs & DVDs

DESTINATIONS	M/S	Zone 1 - Carlisle	Zone 2 - Carlisle West	Zone 3 - Rural North	Zone 4 - Rural South	Zone 5 - Keswick	Zone 6 - Yorkshire Dales	Zone 7 - Allerdale	Zone 8 - Copeland	Zone 9 - Gretna	Zone 10 - Longholm	Zone 11 - Lockerbie	Zone 12 - Dumfries	SURVEY TURNOVER
Centres														
Carlisle City Centre	%	86.1%	80.4%	58.0%	80.4%	21.2%	48.3%	10.3%	8.3%	55.1%	70.6%	16.7%	2.8%	
	£	£11,146,981	£5,017,440	£3,008,373	£1,787,558	£1,359,425	£3,167,102	£1,161,411	£824,163	£1,634,123	£630,485	£578,651	£290,810	£30,606,523
Longtown	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Dalston	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Brampton	%	0.0%	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£44,467	£0	£0	£0	£0	£0	£0	£0	£0	£44,467
CENTRES TOTAL	%	86.1%	80.4%	58.0%	82.4%	21.2%	48.3%	10.3%	8.3%	55.1%	70.6%	16.7%	2.8%	
	£	£11,146,981	£5,017,440	£3,008,373	£1,832,025	£1,359,425	£3,167,102	£1,161,411	£824,163	£1,634,123	£630,485	£578,651	£290,810	£30,650,989
Retail Parks / Out-of-Centre Provision														
Asda, Kingstown RP, Carlisle	%	5.0%	2.2%	16.0%	2.0%	0.0%	0.0%	0.0%	0.0%	8.2%	11.8%	0.0%	0.0%	
	£	£647,328	£137,293	£829,896	£44,467	£0	£0	£0	£0	£243,191	£105,378	£0	£0	£2,007,553
Kingstown Retail Park, Carlisle	%	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£103,737	£0	£0	£0	£0	£0	£0	£0	£0	£0	£103,737
Tesco, Warwick Road, Carlisle	%	4.0%	2.2%	6.0%	9.8%	0.0%	0.0%	0.0%	0.0%	2.0%	5.9%	0.0%	0.0%	
	£	£517,862	£137,293	£311,211	£217,886	£0	£0	£0	£0	£59,315	£52,689	£0	£0	£1,296,257
Matalan, Station Retail Park	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
London Road RP, Carlisle	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Currock Road, Carlisle	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
St Nicholas Gate Retail Park, Carlisle	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Madford Retail Park, Carlisle	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Hardwicke Circus, Carlisle	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
RETAIL PARKS TOTAL	%	9.0%	4.4%	24.0%	11.8%	0.0%	0.0%	0.0%	0.0%	10.2%	17.7%	0.0%	0.0%	
	£	£1,165,190	£274,586	£1,244,844	£262,353	£0	£0	£0	£0	£302,506	£158,068	£0	£0	£3,407,547
Other														
Gretna Gateway Outlet Village	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Dumfries	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	10.2%	0.0%	50.0%	86.1%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£302,506	£0	£1,732,487	£8,942,404	£10,977,397
Whitehaven	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	29.2%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£2,899,465	£0	£0	£0	£0	£2,899,465
Workington	%	0.0%	2.2%	0.0%	0.0%	3.0%	0.0%	51.3%	29.2%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£137,293	£0	£0	£192,372	£0	£5,784,502	£2,899,465	£0	£0	£0	£0	£9,013,632
Keswick	%	0.0%	0.0%	0.0%	0.0%	12.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£775,898	£0	£0	£0	£0	£0	£0	£0	£775,898
Wigton	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Darlington	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Kendal	%	0.0%	0.0%	0.0%	0.0%	0.0%	13.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£904,886	£0	£0	£0	£0	£0	£0	£904,886
Hexham	%	0.0%	0.0%	2.0%	0.0%	0.0%	3.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£103,737	£0	£0	£222,943	£0	£0	£0	£0	£0	£0	£326,680
Penrith	%	0.0%	0.0%	2.0%	2.0%	57.6%	20.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£103,737	£44,467	£3,693,533	£1,357,329	£0	£0	£0	£0	£0	£0	£5,199,066
Metro Centre, Gateshead	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
The Peel Centre, Dumfries	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	4.2%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£59,315	£0	£145,529	£0	£204,844
Trafford Centre, Manchester	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Newcastle-upon-Tyne	%	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£103,737	£0	£0	£0	£293,172	£0	£0	£0	£0	£0	£396,909
Glasgow	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.2%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£145,529	£0	£145,529
Manchester	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Edinburgh	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
OTHER	%	4.9%	13.0%	12.0%	3.8%	6.1%	13.8%	35.8%	33.3%	22.5%	11.7%	24.9%	11.1%	
	£	£634,381	£811,278	£622,422	£84,487	£391,155	£904,886	£4,036,748	£3,306,582	£667,292	£104,485	£862,779	£1,152,853	£13,579,348
OTHER TOTAL	%	4.9%	15.2%	18.0%	5.8%	78.8%	51.7%	89.7%	91.7%	34.7%	11.7%	83.3%	97.2%	
	£	£634,381	£948,571	£933,633	£128,953	£5,052,958	£3,390,045	£10,114,422	£9,105,513	£1,029,112	£104,485	£2,886,323	£10,095,257	£44,423,654
CATCHMENT TOTAL	%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
	£	£12,946,552	£6,240,597	£5,186,851	£2,223,331	£6,412,384	£6,557,147	£11,275,832	£9,929,676	£2,965,741	£893,038	£3,464,974	£10,386,067	£78,482,190

TABLE 14 - RECREATIONAL GOODS

DESTINATIONS	M/S	Zone 1 - Carlisle	Zone 2 - Carlisle West	Zone 3 - Rural North	Zone 4 - Rural South	Zone 5 - Keswick	Zone 6 - Yorkshire Dales	Zone 7 - Allerdale	Zone 8 - Copeland	Zone 9 - Gretna	Zone 10 - Longholm	Zone 11 - Lockerbie	Zone 12 - Dumfries	SURVEY TURNOVER
Centres														
Carlisle City Centre	%	74.2%	63.6%	46.0%	87.2%	20.7%	35.7%	2.6%	2.9%	56.1%	70.4%	14.7%	0.0%	
	£	£17,551,046	£6,003,142	£3,658,459	£2,759,528	£2,061,525	£3,155,882	£547,970	£546,081	£3,295,411	£1,056,749	£867,029	£0	£41,502,820
Longtown	%	0.0%	2.3%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.7%	0.0%	0.0%	
	£	£0	£217,095	£159,063	£0	£0	£0	£0	£0	£0	£55,539	£0	£0	£431,698
Dalston	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Brampton	%	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%	0.0%	2.9%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£159,063	£0	£0	£0	£0	£546,081	£0	£0	£0	£0	£705,144
CENTRES TOTAL	%	74.2%	65.9%	50.0%	87.2%	20.7%	35.7%	2.6%	5.8%	56.1%	74.1%	14.7%	0.0%	
	£	£17,551,046	£6,220,237	£3,976,586	£2,759,528	£2,061,525	£3,155,882	£547,970	£1,092,161	£3,295,411	£1,112,288	£867,029	£0	£42,639,662
Retail Parks / Out-of-Centre Provision														
Asda, Kingstown RP, Carlisle	%	2.1%	2.3%	0.0%	0.0%	3.4%	0.0%	0.0%	0.0%	0.0%	3.7%	0.0%	0.0%	
	£	£496,728	£217,095	£0	£0	£338,608	£0	£0	£0	£0	£55,539	£0	£0	£1,107,970
Kingstown Retail Park, Carlisle	%	4.1%	4.5%	10.0%	2.1%	0.0%	0.0%	0.0%	0.0%	4.9%	11.1%	2.9%	0.0%	
	£	£969,802	£424,751	£795,317	£66,457	£0	£0	£0	£0	£287,834	£166,618	£171,047	£0	£2,881,825
Tesco, Warwick Road, Carlisle	%	0.0%	2.3%	6.0%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£217,095	£477,190	£66,457	£0	£0	£0	£0	£0	£0	£0	£0	£760,742
Matalan, Station Retail Park	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
London Road RP, Carlisle	%	9.3%	4.5%	10.0%	4.3%	0.0%	2.4%	2.6%	0.0%	2.4%	0.0%	0.0%	0.0%	
	£	£2,199,794	£424,751	£795,317	£136,078	£0	£212,160	£547,970	£0	£140,980	£0	£0	£0	£4,457,050
Currock Road, Carlisle	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£530,382	£530,382
St Nicholas Gate Retail Park, Carlisle	%	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.7%	0.0%	0.0%	
	£	£0	£0	£159,063	£0	£0	£0	£0	£0	£0	£55,539	£0	£0	£214,603
Madford Retail Park, Carlisle	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.6%	0.0%	0.0%	0.0%	0.0%	3.0%	
	£	£0	£0	£0	£0	£0	£0	£547,970	£0	£0	£0	£0	£530,382	£1,078,352
Hardwicke Circus, Carlisle	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
RETAIL PARKS TOTAL	%	15.5%	13.6%	28.0%	8.5%	3.4%	2.4%	5.2%	0.0%	7.3%	18.5%	2.9%	6.0%	
	£	£3,666,324	£1,283,691	£2,226,888	£268,991	£338,608	£212,160	£1,095,940	£0	£428,815	£277,697	£171,047	£1,060,764	£11,030,923
Other														
Gretna Gateway Outlet Village	%	1.0%	2.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%	3.7%	0.0%	3.0%	
	£	£236,537	£217,095	£0	£0	£0	£0	£0	£0	£140,980	£55,539	£0	£530,382	£1,180,533
Dumfries	%	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.3%	0.0%	35.3%	54.5%	
	£	£0	£0	£159,063	£0	£0	£0	£0	£0	£428,815	£0	£2,082,049	£9,635,270	£12,305,197
Whitehaven	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	40.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£7,532,148	£0	£0	£0	£0	£7,532,148
Workington	%	0.0%	2.3%	0.0%	0.0%	6.9%	0.0%	53.8%	31.4%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£217,095	£0	£0	£687,175	£0	£11,338,765	£5,912,736	£0	£0	£0	£0	£18,155,770
Keswick	%	0.0%	4.5%	0.0%	0.0%	13.8%	2.4%	2.6%	2.9%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£424,751	£0	£0	£1,374,350	£212,160	£547,970	£546,081	£0	£0	£0	£0	£3,105,311
Wigton	%	1.0%	2.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£236,537	£217,095	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£453,632
Darlington	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Kendal	%	0.0%	0.0%	0.0%	0.0%	0.0%	9.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£839,800	£0	£0	£0	£0	£0	£0	£839,800
Hexham	%	0.0%	0.0%	2.0%	0.0%	0.0%	2.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£159,063	£0	£0	£212,160	£0	£0	£0	£0	£0	£0	£371,224
Penrith	%	0.0%	0.0%	6.0%	0.0%	55.2%	38.1%	0.0%	2.9%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£477,190	£0	£5,497,399	£3,368,042	£0	£546,081	£0	£0	£0	£0	£9,888,712
Metro Centre, Gateshead	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
The Peel Centre, Dumfries	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Trafford Centre, Manchester	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Newcastle-upon-Tyne	%	0.0%	0.0%	4.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%	0.0%	0.0%	0.0%	
	£	£0	£0	£318,127	£0	£0	£0	£0	£0	£140,980	£0	£0	£0	£459,107
Glasgow	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Manchester	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Edinburgh	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.9%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£171,047	£0	£171,047
OTHER	%	8.3%	9.1%	8.0%	4.3%	0.0%	9.5%	35.8%	17.0%	24.5%	3.7%	44.2%	36.5%	
	£	£1,963,257	£858,940	£636,254	£136,078	£0	£839,800	£7,545,126	£3,201,163	£1,439,172	£55,539	£2,606,985	£6,452,979	£25,735,294
OTHER TOTAL	%	10.3%	20.5%	22.0%	4.3%	75.9%	61.9%	92.2%	94.2%	36.6%	7.4%	82.4%	94.0%	
	£	£2,436,331	£1,934,975	£1,749,698	£136,078	£7,558,924	£5,471,963	£19,431,861	£17,738,208	£2,149,947	£111,079	£4,860,080	£16,618,631	£80,197,775
CATCHMENT TOTAL	%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
	£	£23,653,701	£9,438,903	£7,953,171	£3,164,596	£9,959,056	£8,840,005	£21,075,771	£18,830,370	£5,874,173	£1,501,063	£5,898,156	£17,679,395	£133,868,359

TABLE 15 - OVERALL MARKET SHARE

DESTINATIONS	M/S	Zone 1 - Carlisle	Zone 2 - Carlisle West	Zone 3 - Rural North	Zone 4 - Rural South	Zone 5 - Keswick	Zone 6 - Yorkshire Dales	Zone 7 - Allerdale	Zone 8 - Copeland	Zone 9 - Gretna	Zone 10 - Longholm	Zone 11 - Lockerbie	Zone 12 - Dumfries	SURVEY TURNOVER
Centres														
Carlisle City Centre	%	70.3%	56.1%	46.4%	65.2%	31.1%	40.5%	15.8%	9.5%	50.3%	53.5%	20.5%	8.5%	35.0%
	£	£135,898,558	£44,778,285	£30,114,013	£18,353,179	£26,082,031	£30,824,005	£26,142,516	£13,996,161	£21,043,552	£6,110,696	£9,008,779	£11,211,044	£373,562,818
Longtown	%	0.0%	0.3%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.8%	0.0%	0.0%	
	£	£0	£217,095	£558,645	£0	£0	£0	£0	£0	£63,888	£89,817	£0	£0	£929,445
Dalston	%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£98,965	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£98,965
Brampton	%	0.0%	0.6%	1.3%	0.3%	0.0%	0.0%	0.0%	0.4%	0.0%	0.3%	0.0%	0.0%	
	£	£0	£470,775	£838,022	£82,523	£0	£0	£0	£546,081	£0	£36,919	£0	£0	£1,974,319
CENTRES TOTAL	%	70.3%	57.1%	48.5%	65.5%	31.1%	40.5%	15.8%	9.9%	50.4%	54.6%	20.5%	8.5%	35.3%
	£	£135,898,558	£45,565,121	£31,510,680	£18,435,702	£26,082,031	£30,824,005	£26,142,516	£14,542,242	£21,107,440	£6,237,432	£9,008,779	£11,211,044	£376,565,548
Retail Parks / Out-of-Centre Provision														
Asda, Kingstown RP, Carlisle	%	2.5%	2.0%	4.3%	0.3%	0.9%	0.6%	0.0%	0.0%	3.2%	3.7%	0.5%	0.6%	
	£	£4,926,688	£1,603,443	£2,817,908	£81,330	£794,114	£431,072	£0	£0	£1,330,643	£425,276	£230,690	£751,905	£13,393,070
Kingstown Retail Park, Carlisle	%	9.8%	9.1%	15.5%	8.4%	3.8%	2.8%	0.3%	0.2%	9.9%	14.6%	3.2%	0.0%	
	£	£18,972,227	£7,220,683	£10,050,950	£2,375,946	£3,194,389	£2,099,015	£485,510	£256,114	£4,131,922	£1,664,619	£1,388,099	£0	£51,839,474
Tesco, Warwick Road, Carlisle	%	2.4%	1.5%	2.7%	3.2%	0.0%	0.0%	0.0%	0.0%	0.2%	0.6%	0.0%	0.0%	
	£	£4,733,889	£1,177,419	£1,742,393	£902,884	£0	£0	£0	£0	£103,457	£71,500	£0	£0	£8,731,541
Matalan, Station Retail Park	%	0.4%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£725,847	£0	£0	£41,481	£0	£0	£0	£0	£0	£0	£0	£0	£767,327
London Road RP, Carlisle	%	5.2%	4.9%	6.8%	7.7%	1.0%	1.4%	0.3%	0.1%	2.6%	2.7%	1.0%	0.0%	
	£	£10,142,259	£3,932,512	£4,400,956	£2,165,306	£809,805	£1,045,428	£547,970	£212,228	£1,079,659	£307,095	£445,857	£0	£25,089,074
Currock Road, Carlisle	%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	
	£	£336,400	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£530,382	£866,782
St Nicholas Gate Retail Park, Carlisle	%	0.5%	0.2%	1.2%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.7%	0.4%	0.0%	
	£	£889,043	£129,232	£771,458	£0	£0	£0	£658,367	£0	£0	£78,219	£186,400	£0	£2,712,719
Madford Retail Park, Carlisle	%	0.1%	0.2%	0.0%	0.5%	0.0%	0.0%	0.3%	0.2%	0.2%	0.4%	0.0%	0.4%	
	£	£266,209	£129,232	£0	£127,898	£0	£0	£547,970	£301,903	£66,679	£45,359	£0	£530,382	£2,015,633
Hardwicke Circus, Carlisle	%	0.4%	0.1%	0.9%	0.2%	0.0%	0.0%	0.2%	0.2%	0.6%	0.3%	0.2%	0.0%	
	£	£850,484	£98,965	£567,441	£69,353	£0	£0	£329,183	£301,903	£231,041	£36,919	£70,932	£0	£2,556,222
RETAIL PARKS TOTAL	%	21.6%	17.9%	31.3%	20.5%	5.7%	4.7%	1.6%	0.7%	16.6%	23.0%	5.3%	1.4%	10.1%
	£	£41,843,046	£14,291,487	£20,351,106	£5,764,198	£4,798,307	£3,575,515	£2,569,001	£1,072,148	£6,943,401	£2,628,985	£2,321,979	£1,812,669	£107,971,843
Other														
Gretna Gateway Outlet Village	%	1.1%	0.8%	1.9%	1.2%	0.4%	0.0%	0.4%	0.4%	3.7%	3.2%	2.7%	1.3%	
	£	£2,147,868	£670,734	£1,208,839	£350,272	£331,117	£0	£662,381	£600,411	£1,536,583	£361,627	£1,182,465	£1,777,218	£10,829,516
Dumfries	%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	7.6%	1.3%	28.9%	44.1%	
	£	£0	£0	£159,063	£0	£0	£0	£0	£0	£3,161,852	£149,111	£12,695,588	£58,135,989	£74,301,603
Whitehaven	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	33.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£877,035	£48,379,130	£0	£0	£0	£0	£49,256,165
Workington	%	0.2%	3.7%	0.0%	0.0%	3.6%	0.0%	47.3%	33.7%	0.0%	0.0%	0.0%	0.0%	
	£	£323,314	£2,979,365	£0	£0	£3,012,969	£0	£78,273,818	£49,482,302	£0	£0	£0	£0	£134,071,768
Keswick	%	0.1%	0.8%	0.0%	0.1%	6.4%	1.4%	0.5%	0.4%	0.1%	0.0%	0.0%	0.0%	
	£	£105,392	£651,570	£0	£38,056	£5,415,173	£1,091,303	£767,583	£546,081	£48,942	£0	£0	£0	£8,664,101
Wigton	%	0.1%	6.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£236,537	£5,280,039	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£5,516,576
Darlington	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£556,969	£0	£0	£0	£0	£0	£0	£556,969
Kendal	%	0.0%	0.0%	0.0%	0.0%	0.0%	13.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£9,908,140	£662,381	£0	£0	£0	£0	£0	£10,570,521
Hexham	%	0.0%	0.0%	1.7%	0.4%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£1,095,095	£108,732	£0	£981,629	£0	£0	£0	£0	£0	£0	£2,185,457
Penrith	%	0.2%	0.3%	1.4%	1.8%	38.4%	21.1%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	
	£	£323,314	£221,177	£909,147	£509,562	£32,267,343	£16,050,851	£0	£546,081	£0	£0	£0	£0	£50,827,473
Metro Centre, Gateshead	%	0.9%	0.4%	2.1%	0.1%	0.6%	1.0%	0.0%	0.4%	0.2%	0.6%	0.0%	0.0%	
	£	£1,671,855	£356,052	£1,383,592	£33,666	£479,907	£727,406	£0	£600,411	£66,679	£67,255	£0	£0	£5,386,824
The Peel Centre, Dumfries	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.3%	2.8%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£59,315	£0	£145,529	£3,712,442	£3,917,286
Trafford Centre, Manchester	%	0.0%	0.0%	0.0%	0.3%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£78,993	£0	£295,072	£0	£0	£0	£0	£0	£0	£374,065
Newcastle-upon-Tyne	%	0.6%	0.1%	4.3%	2.4%	1.3%	0.6%	0.4%	1.2%	0.3%	0.0%	0.0%	0.0%	
	£	£1,230,552	£91,945	£2,823,657	£688,827	£1,116,351	£420,969	£732,398	£1,758,787	£140,980	£0	£0	£0	£9,004,466
Glasgow	%	0.0%	0.0%	0.6%	0.3%	0.0%	0.0%	0.0%	0.6%	0.0%	0.6%	1.8%	2.7%	
	£	£0	£0	£368,483	£78,993	£0	£0	£0	£818,452	£0	£68,673	£813,345	£3,585,270	£5,733,216
Manchester	%	0.0%	0.0%	0.3%	0.0%	0.2%	0.2%	0.4%	0.4%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£184,241	£0	£127,340	£117,591	£658,839	£600,411	£0	£0	£0	£0	£1,688,423
Edinburgh	%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.1%	1.3%	0.0%	
	£	£105,392	£0	£0	£0	£0	£0	£0	£0	£108,429	£15,182	£566,500	£0	£795,502
OTHER	%	4.9%	12.1%	7.6%	7.4%	12.3%	15.2%	32.7%	18.9%	20.8%	16.6%	39.2%	39.1%	
	£	£9,542,659	£9,642,138	£4,949,790	£2,078,571	£10,326,293	£11,562,022	£54,190,352	£27,683,473	£8,690,796	£1,898,819	£17,247,886	£51,599,183	£209,411,983
OTHER TOTAL	%	8.1%	24.9%	20.1%	14.1%	63.2%	54.8%	82.7%	89.4%	33.0%	22.4%	74.2%	90.1%	
	£	£15,686,882	£19,893,021	£13,081,908	£3,965,673	£53,076,493	£41,711,952	£136,824,789	£131,015,539	£13,813,576	£2,560,666	£32,651,313	£118,810,102	£583,091,914
CATCHMENT TOTAL	%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
	£	£193,428,487	£79,749,629	£64,943,694	£28,165,573	£83,956,831	£76,111,472	£165,536,305	£146,629,928	£41,864,418	£11,427,083	£43,982,071	£131,833,814	£1,067,629,304

Table 16a - Carlisle City Centre Comparison Floorspace

Carlisle LPA AREA - City Centre			
STORE / LOCATION	Gross Floorspace	Net Comparison Ratio	Net Comparison Floorspace
Carlisle City Centre	100,780	100.0%	70,546
SUB TOTAL		100.0%	70,546

Notes

1. Floorspace derived from Experian Goad (updated by GVA fieldwork)

2. Upper Sales Floors accounted for and included in overall Gross Floorspace figure

3. Gross to Net assumed 70%

Table 16b - Carlisle Foodstores Comparison Floorspace

Carlisle LPA AREA - Main Foodstores			
STORE / LOCATION	Net Floorspace	Net Comparison Ratio	Net Comparison Floorspace
Tesco (Warwick Road)	4,118	36.0%	1,482
Morrison's (Kingstown Road)	4,191	23.0%	964
Asda (Kingstown Retail Park)	5,312	44.0%	2,337
Asda (St Nicholas Gate RP)	820	0.0%	0
Aldi (Kingstown Road)	743	29.0%	215
Co-Op (Wigton Road, Morton)	1,119	0.0%	0
Aldi (London Road)	1,286	29.0%	373
Sainsbury's Local (Scotland Rd, Knowefield)	217	10.0%	22
Lidl (Charlotte Street)	1,286	22.0%	283
SUB TOTAL	19,092	-	5,677

Table 16c - Carlisle Out-of-Centre Retail Comparison Floorspace

Carlisle LPA AREA - Out-of-Centre			
STORE / LOCATION	Net Floorspace	Net Comparison Ratio	Net Comparison Floorspace
St Nicholas Gate Retail Park			
Halford's	703	100.0%	703
Carpetright	949	100.0%	949
Toys R Us	2,225	100.0%	2,225
Brantano	938	100.0%	938
Computers for Africa	3,246	100.0%	3,246
Hein Gericke	345	100.0%	345
SUB TOTAL	8,406	-	8,406
Madford Retail Park			
Dunelm Mill	1,977	100%	1,977
Ponden Mill	228	100%	228
Story Carpets	670	100%	670
SUB TOTAL	2,875	-	2,875
London Road Retail Park			
B&Q Warehouse	8,608	100%	8,608
Pets @ Home	673	100.0%	673
Laura Ashley	632	100.0%	632
Maplin	751	100.0%	751
SUB TOTAL	10,664	-	10,664
Kingstown Retail Park			
Comet	1,429	100.0%	1,429
Argos	930	100.0%	930
Homebase	4,890	100.0%	4,890
PC World / Currys	1,875	100.0%	1,875
SUB TOTAL	9,124	-	9,124
Hardwicke Circus			
DFS	1,447	100.0%	1,447
Wickes	2,029	100.0%	2,029
SUB TOTAL	3,476	-	3,476
Station Retail Park			
Staples	1,893	100.0%	1,893
Matalan	2,418	100.0%	2,418
SUB TOTAL	4,311	-	4,311
Currock Road Retail Park			
Harveys	926	100.0%	926
The Range	3,450	100.0%	3,450
Bathstore	378	100.0%	378
Topps Tiles	378	100.0%	378
SUB TOTAL	5,132	-	5,132
OUT-OF-CENTRE TOTAL	43,988	-	43,988

OVERALL CITY WIDE TOTAL	-	-	120,211

Notes

1. Floorspace derived from Carlisle CC or Trevor Wood Retail Warehouse Database (January 2012)

2. Gross to Net 70%

Table 17 - Carlisle Commitments

Store	Zone	Gross Floorspace (sqm)	Net Floorspace (sqm)	Net Comparison (%)	Net Comparison (sqm)	Company Average Sales Density (£/sqm)	Company Average Turnover (£)
99/0842 - Tesco (Upper Viaduct Estate)	**Zone 1 - Carlisle**	3,715	2,415	20%	483	£7,152	**£3,454,416**
09/0512 - Sainsbury's (Bridge Street)	**Zone 1 - Carlisle**	8,886	5,514	32%	1,764	£5,249	**£9,261,756**
10/0917 - Morton District Centre	**Zone 1 - Carlisle**	8,175	5,574	40%	2,230	£7,000	**£15,607,200**
10/0504 - St Nicholas Gate RP (Units 4 - 6)	**Zone 1 - Carlisle**	4,300	2,975	37%	1,101	£7,000	**£7,705,250**
TOTAL		**25,076**	**16,478**		**5,578**		**£36,028,622**

Notes

1. Floorspace figures derived from Planning Decision Notices / Applicant's RIA
2. Average Sales Density for Morton and St Nicholas Gate Commitments based on GVA Judgement
3. Tesco Wigton Road Commitment based on 70% Gross to Net Ratio

Table 18A - CARLISLE CITY CENTRE (BASELINE + GROWTH) COMPARISON CAPACITY

COMPARISON GOODS					
	2012	2014	2018	2021	2030
Survey Derived Catchment Expenditure (£)	£373,562,818	£392,849,866	£442,155,985	£483,155,783	£630,408,709
Existing (NET) Comparison Floorspace (m^2)	70,546	70,546	70,546	70,546	70,546
Sales per m^2 net (£)	£5,295	£5,455	£5,836	£6,139	£7,144
Sales from Existing Floorspace (£)	£373,562,818	£384,853,754	£411,698,741	£433,054,342	£504,000,507
RESIDUAL CAPACITY (£)	£0	£7,996,112	£30,457,244	£50,101,441	£126,408,202
Sales per m^2 net in new shops (£)	£5,000	£5,166	£5,527	£5,813	£6,766
Capacity for new floorspace (m^2 net)	0	1,548	5,511	8,618	18,683
Capacity for new floorspace (m^2 gross)	0	2,211	7,873	12,312	26,691

Notes

1. Comparison Goods Expend. Growth; 1.6% p.a. (2012-2013); 2.1% p.a. (2013-2014); and 3% p.a. (2014-); Source Experian Retail Planner Note 9
2. Sales Efficiency Growth; 1.8% p.a. (2012-2013); 1.5% p.a. (2013-2014); and 1.7% p.a. (2014-); Source Experian Retail Planner Note 9 (September 2011)
3. Gross to Net ratio for new floorspace is 70%
4. New Shop Sales Density based on GVA judgement having regard to existing city centre
5. Survey Turnover based on Carlisle CC Turnover

Table 18B - CARLISLE CITY CENTRE (BASELINE + GROWTH) COMPARISON CAPACITY - COMMITMENTS

COMPARISON GOODS					
	2012	2014	2018	2021	2030
Survey Derived Catchment Expenditure (£)	£373,562,818	£392,849,866	£442,155,985	£483,155,783	£630,408,709
Existing (NET) Comparison Floorspace (m^2)	70,546	70,546	70,546	70,546	70,546
Sales per m^2 net (£)	£5,295	£5,455	£5,836	£6,139	£7,144
Sales from Existing Floorspace (£)	£373,562,818	£384,853,754	£411,698,741	£433,054,342	£504,000,507
CURRENT RESIDUAL	£0	£7,996,112	£30,457,244	£50,101,441	£126,408,202
COMMITMENTS	£36,028,622	£37,227,294	£39,824,037	£41,889,786	£48,752,480
RESIDUAL CAPACITY	-£36,028,622	-£29,231,182	-£9,366,792	£8,211,656	£77,655,722
Sales per m^2 net in new shops (£)	£5,000	£5,166	£5,527	£5,813	£6,766
Capacity for new floorspace (m^2 net)	-7,206	-5,658	-1,695	1,413	11,478
Capacity for new floorspace (m^2 gross)	-10,294	-8,083	-2,421	2,018	16,397

Notes

1. Commitments Turnover (Table 18)

Table 19A - CARLISLE CITY CENTRE MARKET SHARE INCREASE - SCENARIO 1

	Current MS	MS Increase	Difference
Carlisle City Centre - SCENARIO 1 [LOW MARKET SHARE INCREASE]	35.0%	37.5%	2.5%
	£373,562,818	£400,360,667	£26,797,849

Notes

1. Current Market Share relates to overall turnover of Carlisle City Centre derived from Study Area (Zones 1 - 12)

Table 19B - CARLISLE CITY CENTRE MARKET SHARE INCREASE - SCENARIO 1 [CAPACITY]

COMPARISON GOODS						
	2012	2012	2014	2018	2021	2030
	EXISTING MS	MS INCREASE				
Survey Derived Catchment Expenditure (£)	£373,562,818	£400,360,667	£421,031,288	£473,874,424	£517,815,378	£675,631,619
Existing (NET) Comparison Floorspace (m^2)	70,546	70,546	70,546	70,546	70,546	70,546
Sales per m^2 net (£)	£5,295	£5,295	£5,455	£5,836	£6,139	£7,144
Sales from Existing Floorspace (£)	£373,562,818	£373,562,818	£384,853,754	£411,698,741	£433,054,342	£504,000,507
RESIDUAL CAPACITY (£)	£0	£26,797,849	£36,177,534	£62,175,683	£84,761,036	£171,631,112
Sales per m^2 net in new shops (£)	£5,000	£5,000	£5,166	£5,527	£5,813	£6,766
Capacity for new floorspace (m^2 net)	0	5,360	7,003	11,250	14,580	25,367
Capacity for new floorspace (m^2 gross)	0	7,657	10,004	16,071	20,829	36,239

Notes

1. Comparison Goods Expend. Growth; 1.6% p.a. (2012-2013); 2.1% p.a. (2013-2014); and 3% p.a. (2014-); Source Experian Retail Planner Note 9 (September 2011)
2. Sales Efficiency Growth; 1.8% p.a. (2012-2013); 1.5% p.a. (2013-2014); and 1.7% p.a. (2014-); Source Experian Retail Planner Note 9 (September 2011)
3. Gross to Net ratio for new floorspace is 70%
4. New Shop Sales Density based on GVA judgement having regard to existing city centre
5. Survey Turnover based on Carlisle CC Turnover

Table 19C - CARLISLE CITY CENTRE MARKET SHARE INCREASE - SCENARIO 1 [CAPACITY WITH COMMITMENTS]

COMPARISON GOODS						
	2012	2012	2014	2018	2021	2030
	EXISTING MS	MS INCREASE				
Survey Derived Catchment Expenditure (£)	£373,562,818	£400,360,667	£421,031,288	£473,874,424	£517,815,378	£675,631,619
Existing (NET) Comparison Floorspace (m^2)	70,546	70,546	70,546	70,546	70,546	70,546
Sales per m^2 net (£)	£5,295	£5,295	£5,455	£5,836	£6,139	£7,144
Sales from Existing Floorspace (£)	£373,562,818	£373,562,818	£384,853,754	£411,698,741	£433,054,342	£504,000,507
CURRENT RESIDUAL	£0	£26,797,849	£36,177,534	£62,175,683	£84,761,036	£171,631,112
COMMITMENTS	£36,028,622	£36,028,622	£37,227,294	£39,824,037	£41,889,786	£48,752,480
RESIDUAL CAPACITY	-£36,028,622	-£9,230,772	-£1,049,759	£22,351,647	£42,871,250	£122,878,632
Sales per m^2 net in new shops (£)	£5,000	£5,000	£5,166	£5,527	£5,813	£6,766
Capacity for new floorspace (m^2 net)	-7,206	-1,846	-203	4,044	7,375	18,162
Capacity for new floorspace (m^2 gross)	-10,294	-2,637	-290	5,778	10,535	25,945

Notes

1. Commitments Turnover (Table 18)

Table 20A - CARLISLE CITY (BASELINE + GROWTH) COMPARISON CAPACITY

COMPARISON GOODS					
	2012	2014	2018	2021	2030
Survey Derived Catchment Expenditure (£)	£481,534,660	£506,396,295	£569,953,491	£622,803,568	£812,617,395
Existing (NET) Comparison Floorspace (m^2)	120,211	120,211	120,211	120,211	120,211
Sales per m^2 net (£)	£4,006	£4,127	£4,415	£4,644	£5,404
Sales from Existing Floorspace (£)	£481,534,660	£496,089,045	£530,693,109	£558,221,176	£649,673,098
RESIDUAL CAPACITY (£)	£0	£10,307,249	£39,260,382	£64,582,392	£162,944,297
Sales per m^2 net in new shops (£)	£5,000	£5,166	£5,527	£5,813	£6,766
Capacity for new floorspace (m^2 net)	0	1,995	7,104	11,109	24,084
Capacity for new floorspace (m^2 gross)	0	2,850	10,148	15,870	34,405

Notes

1. Comparison Goods Expend. Growth; 1.6% p.a. (2012-2013); 2.1% p.a. (2013-2014); and 3% p.a. (2014-); Source Experian Retail Planner Note 9
2. Sales Efficiency Growth; 1.8% p.a. (2012-2013); 1.5% p.a. (2013-2014); and 1.7% p.a. (2014-); Source Experian Retail Planner Note 9 (September 2011)
3. Gross to Net ratio for new floorspace is 70%
4. New Shop Sales Density based on GVA judgement having regard to existing city centre
5. Survey Turnover based on Carlisle CC and Carlisle Retail Parks (including Foodstores) Turnover

Table 20B - CARLISLE CITY (BASELINE + GROWTH) COMPARISON CAPACITY - COMMITMENTS

COMPARISON GOODS					
	2012	2014	2018	2021	2030
Survey Derived Catchment Expenditure (£)	£481,534,660	£506,396,295	£569,953,491	£622,803,568	£812,617,395
Existing (NET) Comparison Floorspace (m^2)	120,211	120,211	120,211	120,211	120,211
Sales per m^2 net (£)	£4,006	£4,127	£4,415	£4,644	£5,404
Sales from Existing Floorspace (£)	£481,534,660	£496,089,045	£530,693,109	£558,221,176	£649,673,098
CURRENT RESIDUAL	£0	£10,307,249	£39,260,382	£64,582,392	£162,944,297
COMMITMENTS	£36,028,622	£37,227,294	£39,824,037	£41,889,786	£48,752,480
RESIDUAL CAPACITY	-£36,028,622	-£26,920,044	-£563,655	£22,692,607	£114,191,817
Sales per m^2 net in new shops (£)	£5,000	£5,166	£5,527	£5,813	£6,766
Capacity for new floorspace (m^2 net)	-7,206	-5,211	-102	3,903	16,878
Capacity for new floorspace (m^2 gross)	-10,294	-7,444	-146	5,576	24,111

Notes

1. Commitments Turnover (Table 18)

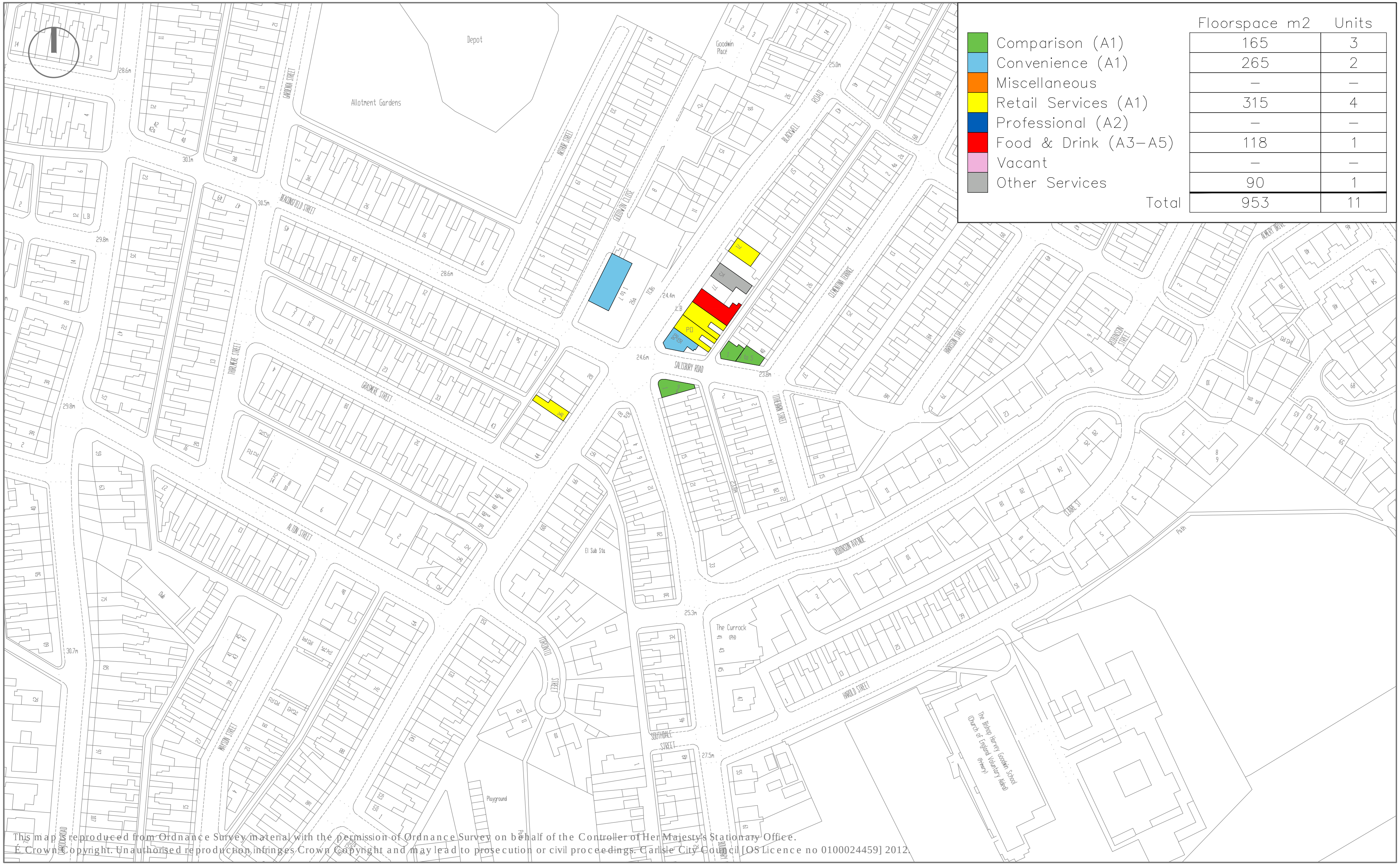
	Floorspace m2	Units
Comparison (A1)	102	1
Convenience (A1)	2,041	5
Miscellaneous	–	–
Retail Services (A1)	–	–
Professional (A2)	–	–
Food & Drink (A3–A5)	195	2
Vacant	–	–
Other Services	–	–
Total	2,338	8

Carlisle Retail Study
Petteril Bank Road, Upperby Bridge

GVA

	Floorspace m2	Units
Comparison (A1)	262	2
Convenience (A1)	861	6
Miscellaneous	–	–
Retail Services (A1)	84	1
Professional (A2)	–	–
Food & Drink (A3–A5)	132	1
Vacant	126	1
Other Services	151	1
Total	1,621	12

Carlisle Retail Study
Central Drive/Pennine Way, Harraby



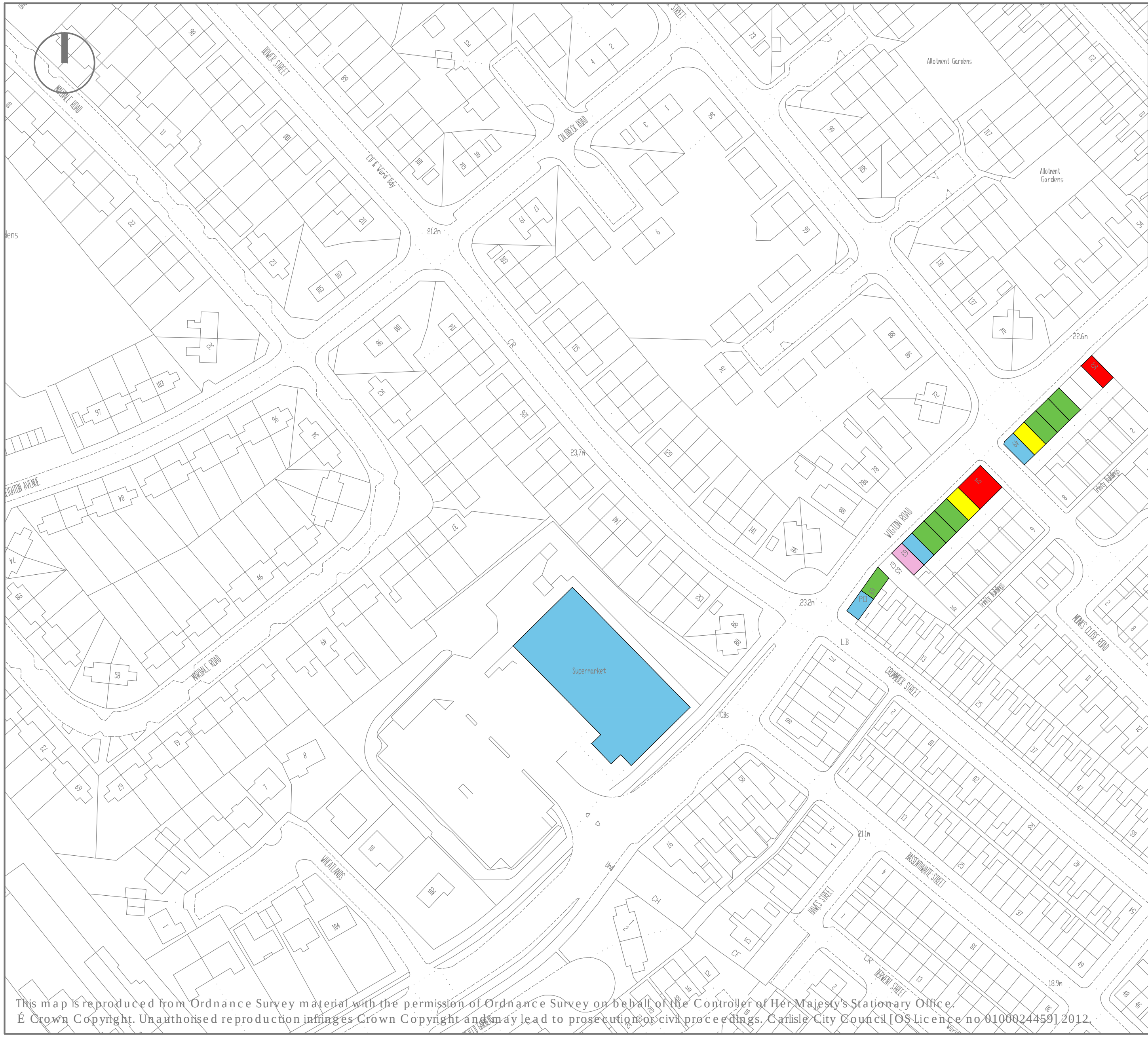
	Floorspace m2	Units
Comparison (A1)	165	3
Convenience (A1)	265	2
Miscellaneous	–	–
Retail Services (A1)	315	4
Professional (A2)	–	–
Food & Drink (A3–A5)	118	1
Vacant	–	–
Other Services	90	1
Total	953	11

Carlisle Retail Study
Blackwell Road, Currock

	Floorspace m2	Units
Comparison (A1)	84	1
Convenience (A1)	215	2
Miscellaneous	–	–
Retail Services (A1)	–	–
Professional (A2)	–	–
Food & Drink (A3–A5)	93	1
Vacant	89	1
Other Services	–	–
Total	481	5

Carlisle Retail Study
Boundary Road/Upperby Road, Upperby

GVA



	Floorspace m2	Units
Comparison (A1)	385	7
Convenience (A1)	1,739	4
Miscellaneous	–	–
Retail Services (A1)	109	2
Professional (A2)	–	–
Food & Drink (A3–A5)	159	2
Vacant	50	1
Other Services	–	–
Total	2,442	16

Carlisle Retail Study
Wigton Road, Caldewgate

	Floorspace m2	Units
Comparison (A1)	371	2
Convenience (A1)	591	4
Miscellaneous	–	–
Retail Services (A1)	–	–
Professional (A2)	–	–
Food & Drink (A3–A5)	489	1
Vacant	–	–
Other Services	–	–
Total	1,451	7

Carlisle Retail Study
Stonegarth, Morton

	Floorspace m2	Units
Comparison (A1)	–	–
Convenience (A1)	257	2
Miscellaneous	–	–
Retail Services (A1)	237	2
Professional (A2)	–	–
Food & Drink (A3–A5)	95	1
Vacant	–	–
Other Services	131	1
Total	720	6

Carlisle Retail Study
Newlaithes Avenue, Morton

GVA

	Floorspace m2	Units
Comparison (A1)	–	–
Convenience (A1)	518	4
Miscellaneous	–	–
Retail Services (A1)	–	–
Professional (A2)	–	–
Food & Drink (A3–A5)	693	2
Vacant	–	–
Other Services	–	–
Total	1,211	6

Carlisle Retail Study
Holmbrook Road, Whernside

	Floorspace m2	Units
Comparison (A1)	210	2
Convenience (A1)	–	–
Miscellaneous	–	–
Retail Services (A1)	88	1
Professional (A2)	–	–
Food & Drink (A3–A5)	–	–
Vacant	–	–
Other Services	–	–
Total	298	3

Carlisle Retail Study
Shady Grove Road, Raffles

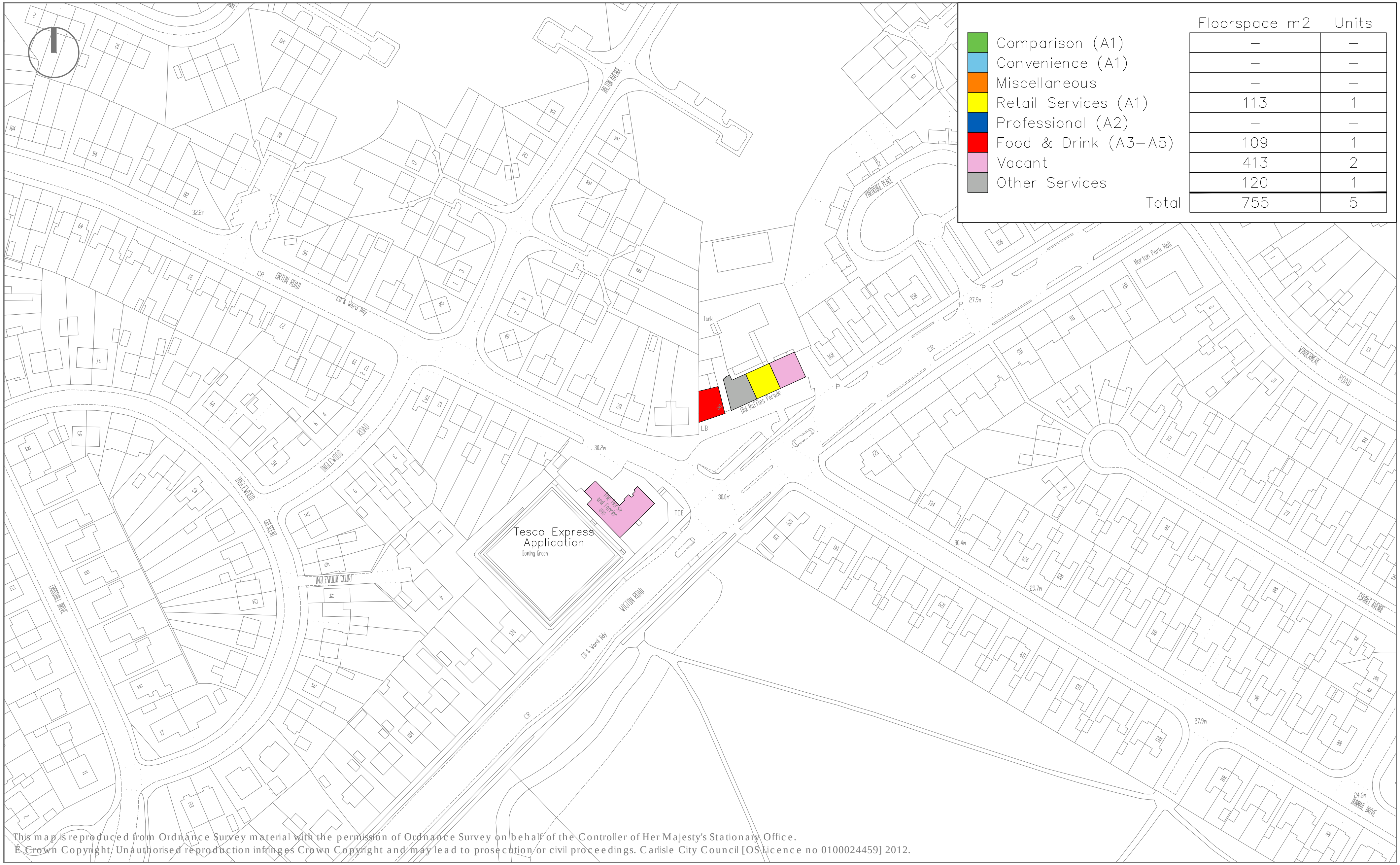
	Floorspace m2	Units
Comparison (A1)	297	2
Convenience (A1)	214	2
Miscellaneous	–	–
Retail Services (A1)	101	1
Professional (A2)	–	–
Food & Drink (A3–A5)	–	–
Vacant	119	1
Other Services	–	–
Total	731	6

Carlisle Retail Study
Warwick Road

GVA

	Floorspace m2	Units
Comparison (A1)	632	9
Convenience (A1)	541	7
Miscellaneous	–	–
Retail Services (A1)	113	3
Professional (A2)	150	2
Food & Drink (A3–A5)	608	7
Vacant	208	4
Other Services	412	8
Total	2,664	40

Carlisle Retail Study
Denton Street



Use	Floorspace m2	Units
Comparison (A1)	–	–
Convenience (A1)	–	–
Miscellaneous	–	–
Retail Services (A1)	113	1
Professional (A2)	–	–
Food & Drink (A3–A5)	109	1
Vacant	413	2
Other Services	120	1
Total	755	5

Carlisle Retail Study
Orton Road/Wigton Road, Morton

	Floorspace m2	Units
Comparison (A1)	978	13
Convenience (A1)	1,244	11
Miscellaneous	–	–
Retail Services (A1)	459	6
Professional (A2)	340	4
Food & Drink (A3–A5)	1,146	12
Vacant	290	4
Other Services	163	2
Total	4,620	52

Carlisle Retail Study
Main Street, Brampton

	Floorspace m2	Units
Comparison (A1)	906	10
Convenience (A1)	530	5
Miscellaneous	–	–
Retail Services (A1)	284	6
Professional (A2)	190	1
Food & Drink (A3–A5)	600	5
Vacant	144	2
Other Services	–	–
Total	2,654	29

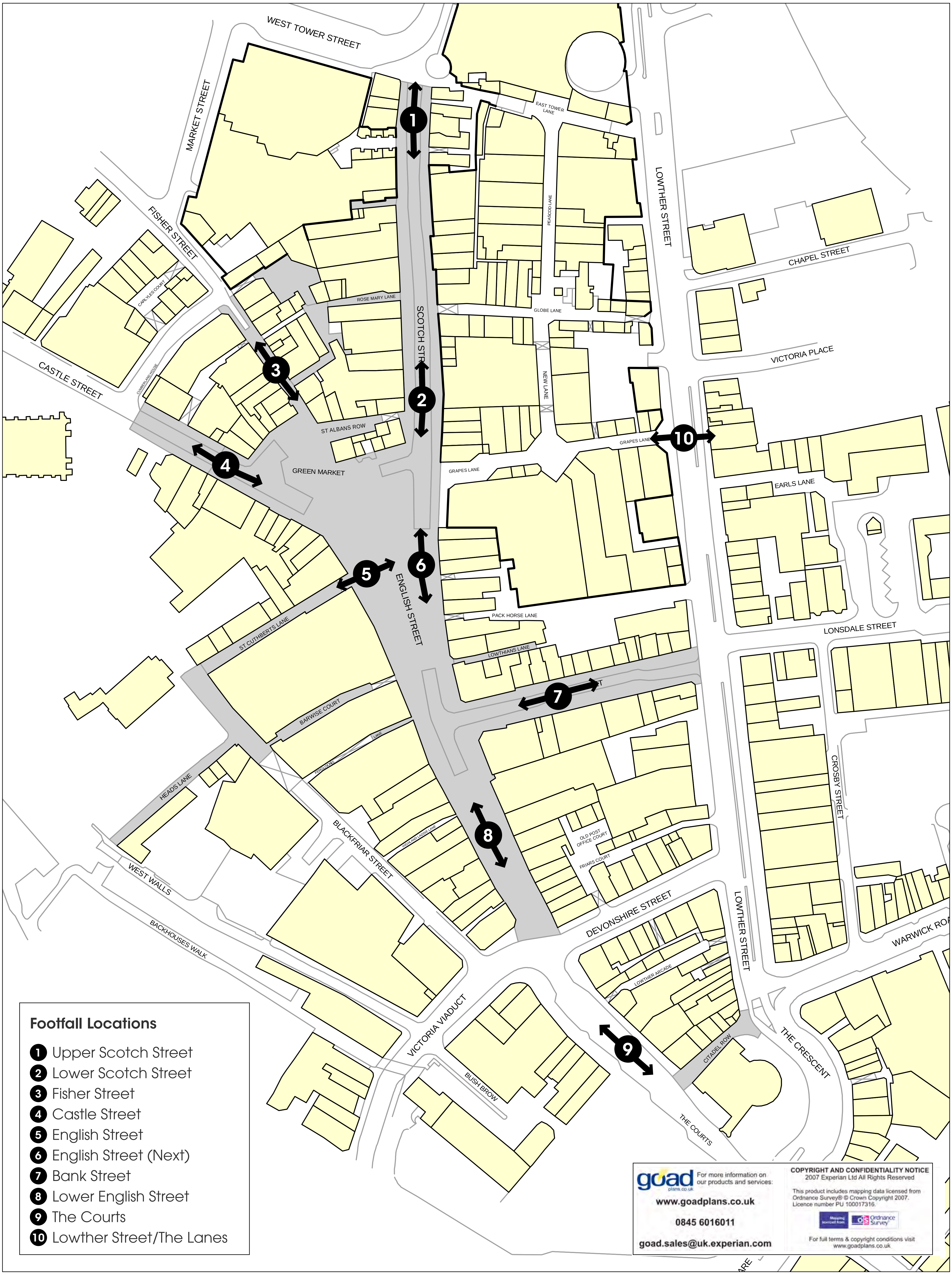
Carlisle Retail Study
Longtown

	Floorspace m2	Units
Comparison (A1)	293	5
Convenience (A1)	851	4
Miscellaneous	–	–
Retail Services (A1)	74	2
Professional (A2)	–	–
Food & Drink (A3–A5)	758	7
Vacant	–	–
Other Services	–	–
Total	1976	18

Carlisle Retail Study
Scotland Road, Stanwix

	Floorspace m2	Units
Comparison (A1)	–	–
Convenience (A1)	206	2
Miscellaneous	–	–
Retail Services (A1)	–	–
Professional (A2)	–	–
Food & Drink (A3–A5)	292	2
Vacant	–	–
Other Services	–	–
Total	498	4

Carlisle Retail Study
Victoria Road, Botcherby



Carlisle Retail Study

Pedestrian Footfall Survey Locations