

WYG PLANNING
ROSSENDALE RETAIL CAPACITY STUDY

TABLE 1: POPULATION AND PER CAPITA EXPENDITURE WITHIN EACH ZONE OF STUDY AREA

| ZONE | POPULATION | | | | | PER CAPITA EXPENDITURE CONVENIENCE (£) | | | | | |
|--------------|---------------|---------------|----------------|----------------|----------------|---|-------|-------|-------|-------|-------|
| | 2017 | 2019 | 2024 | 2029 | 2034 | <i>2017 with SFT</i> | 2017 | 2019 | 2024 | 2029 | 2034 |
| 1 | 21,920 | 22,176 | 23,073 | 23,929 | 24,793 | <i>2,056</i> | 1,991 | 1,965 | 1,950 | 1,950 | 1,953 |
| 2 | 28,525 | 28,837 | 29,609 | 30,382 | 31,155 | <i>2,133</i> | 2,065 | 2,038 | 2,023 | 2,022 | 2,026 |
| 3 | 23,955 | 24,224 | 24,842 | 25,460 | 26,078 | <i>2,086</i> | 2,019 | 1,992 | 1,978 | 1,977 | 1,981 |
| 4 | 23,009 | 23,387 | 24,680 | 25,907 | 27,070 | <i>2,302</i> | 2,228 | 2,199 | 2,183 | 2,182 | 2,186 |
| TOTAL | 97,409 | 98,624 | 102,204 | 105,679 | 109,097 | | | | | | |

Notes:

a. Zones based on the following post code sectors

1 - BB5 2, BB4 5, BB4 4

2 - BB4 8, BB4 9, BB4 6, BB4 7

3 - OL13 8, OL13 0, OL13 9, OL12 8

4 - BL8 4, BLO 9, BLO 0

b. Per capita expenditure derived from Experian MMG3 data (December 2016 report)

c. Population derived from Experian MMG3 data (December 2016 report)

d. Per capita expenditure projected forward using forecast growth rates taken from Table 1a of Experian Retail Planner Briefing Note 14 (November 2016)

e. Expenditure excludes Special Forms of Trading in line with 'adjusted' allowance derived from Appendix 3 of Experian Retail Planner Briefing Note 14 (November 2016)

2015 Prices

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TABLE 2A: TOTAL CONVENIENCE GOODS EXPENDITURE

| ZONE | EXPENDITURE (£m) | | | | | GROWTH | | | |
|--------------|------------------|--------------|--------------|--------------|--------------|-------------|------------|-------------|-------------|
| | CONVENIENCE | | | | | CONVENIENCE | | | |
| | 2017 | 2019 | 2024 | 2029 | 2034 | 2017-19 | 2017-24 | 2017-29 | 2017-34 |
| 1 | 43.6 | 43.6 | 45.0 | 46.7 | 48.4 | -0.1 | 1.4 | 3.0 | 4.8 |
| 2 | 58.9 | 58.8 | 59.9 | 61.4 | 63.1 | -0.1 | 1.0 | 2.5 | 4.2 |
| 3 | 48.4 | 48.3 | 49.1 | 50.3 | 51.7 | -0.1 | 0.8 | 2.0 | 3.3 |
| 4 | 51.3 | 51.4 | 53.9 | 56.5 | 59.2 | 0.2 | 2.6 | 5.3 | 7.9 |
| TOTAL | 202.2 | 202.0 | 207.9 | 215.0 | 222.4 | -0.1 | 5.7 | 12.8 | 20.2 |

TABLE 2B: CONVENIENCE GOODS EXPENDITURE SPLIT BETWEEN MAIN FOOD SHOPPING AND TOP-UP FOOD SHOPPING SPEND WITHIN AREA OF ANALYSIS

| ZONE | EXPENDITURE (£m) | | |
|--------------|--------------------|-------------|--------------|
| | CONVENIENCE - 2017 | | |
| | MAIN | TOP-UP | TOTAL |
| 1 | 34.8 | 8.9 | 43.6 |
| 2 | 45.3 | 13.6 | 58.9 |
| 3 | 39.1 | 9.3 | 48.4 |
| 4 | 39.9 | 11.3 | 51.3 |
| TOTAL | 159.0 | 43.1 | 202.2 |

Notes:

- a. Zones based on the following post code sectors
 - 1 - BB5 2, BB4 5, BB4 4
 - 2 - BB4 8, BB4 9, BB4 6, BB4 7
 - 3 - OL13 8, OL13 0, OL13 9, OL12 8
 - 4 - BL8 4, BLO 9, BLO 0
- b. Per capita expenditure derived from Experian MMG3 data (December 2016 report)
- c. Population derived from Experian MMG3 data (December 2016 report)
- d. Per capita expenditure projected forward using forecast growth rates taken from Table 1a of Experian Retail Planner Briefing Note 14 (November 2016)
- e. Expenditure excludes Special Forms of Trading in line with 'adjusted' allowance derived from Appendix 3 of Experian Retail Planner Briefing Note 14 (November 2016)
- f. Figures derived from multiplying per capita expenditure with population within each zone using data provided at Table 1

2015 Prices

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TABLE 4: CONVENIENCE GOODS SHOPPING PATTERNS (£m)

| DESTINATION | TOTAL | | 1 | | 2 | | 3 | | 4 | |
|--|----------------|-------------|----------------|-------------|----------------|-------------|----------------|-------------|----------------|-------------|
| | MAIN FOOD (£m) | TOP UP (£m) | MAIN FOOD (£m) | TOP UP (£m) | MAIN FOOD (£m) | TOP UP (£m) | MAIN FOOD (£m) | TOP UP (£m) | MAIN FOOD (£m) | TOP UP (£m) |
| STUDY AREA | | | | | | | | | | |
| Zone 1 | | | | | | | | | | |
| In centre | | | | | | | | | | |
| Haslingden District Centre, Local Shops | 0.5 | 1.4 | 0.5 | 0.9 | 0.0 | 0.5 | 0.0 | 0.1 | 0.0 | 0.0 |
| Helmshore Neighbourhood Centre, Local Shops | 0.0 | 0.9 | 0.0 | 0.6 | 0.0 | 0.2 | 0.0 | 0.0 | 0.0 | 0.0 |
| Premier Store, Broadway Crescent, Helmshore | 0.0 | 0.1 | 0.0 | 0.1 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| Edge of Centre | | | | | | | | | | |
| Co-op, John Street, Haslingden District Centre | 0.8 | 1.3 | 0.8 | 1.0 | 0.0 | 0.3 | 0.0 | 0.0 | 0.0 | 0.0 |
| Nisa, Deardengate, Haslingden District Centre | 0.2 | 0.4 | 0.2 | 0.4 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| Out of Centre | | | | | | | | | | |
| Tesco Superstore, Syke Street, Haslingden | 16.2 | 2.0 | 10.8 | 1.6 | 2.9 | 0.3 | 0.3 | 0.0 | 2.2 | 0.1 |
| Sub Total (Zone 1) | 17.7 | 6.0 | 12.3 | 4.5 | 2.9 | 1.2 | 0.3 | 0.1 | 2.2 | 0.1 |
| Zone 2 | | | | | | | | | | |
| In Centre | | | | | | | | | | |
| Rawtenstall Town Centre, Local Shops | 0.3 | 2.3 | 0.0 | 0.2 | 0.2 | 2.0 | 0.1 | 0.1 | 0.0 | 0.0 |
| Waterfoot Local Centre, Local Shops | 0.3 | 0.8 | 0.0 | 0.0 | 0.3 | 0.8 | 0.0 | 0.0 | 0.0 | 0.0 |
| Co-op, Bacup Road, Waterfoot Local Centre | 0.1 | 0.3 | 0.0 | 0.0 | 0.1 | 0.2 | 0.0 | 0.1 | 0.0 | 0.0 |
| Edge of Centre | | | | | | | | | | |
| Asda, Hollymount Way, Rawtenstall | 35.9 | 2.7 | 6.4 | 0.2 | 19.9 | 2.2 | 8.3 | 0.2 | 1.3 | 0.1 |
| Lidl, Bacup Road, Rawtenstall | 5.5 | 1.4 | 0.5 | 0.3 | 2.9 | 0.8 | 1.7 | 0.3 | 0.3 | 0.0 |
| Out of Centre | | | | | | | | | | |
| Tesco Superstore, Bocholt Way, Rawtenstall | 15.2 | 3.2 | 0.6 | 0.0 | 10.3 | 2.4 | 3.7 | 0.7 | 0.6 | 0.0 |
| Spar, Holmefield Garage, Burnley Road, Rawtenstall | 0.3 | 0.6 | 0.0 | 0.0 | 0.3 | 0.6 | 0.0 | 0.0 | 0.0 | 0.0 |
| Other Within Zone 2 | 0.0 | 0.7 | 0.0 | 0.1 | 0.0 | 0.5 | 0.0 | 0.0 | 0.0 | 0.0 |
| Sub Total (Zone 2) | 57.6 | 12.0 | 7.4 | 0.8 | 34.0 | 9.6 | 13.9 | 1.4 | 2.3 | 0.1 |
| Zone 3 | | | | | | | | | | |
| In Centre | | | | | | | | | | |
| Bacup District Centre, Local Shops | 0.4 | 0.6 | 0.0 | 0.0 | 0.0 | 0.0 | 0.4 | 0.6 | 0.0 | 0.0 |
| Whitworth Local Centre, Local Shops | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| Co-op, Thorneylea Road, Whitworth Local Centre | 0.5 | 0.9 | 0.0 | 0.0 | 0.0 | 0.0 | 0.5 | 0.9 | 0.0 | 0.0 |
| Tesco Express, Market Street, Whitworth Local Centre | 0.2 | 0.6 | 0.0 | 0.0 | 0.0 | 0.0 | 0.2 | 0.6 | 0.0 | 0.0 |
| Edge of Centre | | | | | | | | | | |
| Morrisons, Lee Street, Bacup District Centre | 9.3 | 3.5 | 0.0 | 0.0 | 0.8 | 0.3 | 8.5 | 3.3 | 0.0 | 0.0 |
| Co-op, Irwell Street, Bacup District Centre | 0.7 | 1.3 | 0.0 | 0.0 | 0.0 | 0.0 | 0.7 | 1.3 | 0.0 | 0.0 |
| One Stop, King Street, Bacup District Centre | 0.0 | 0.3 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.3 | 0.0 | 0.0 |
| Out of Centre | | | | | | | | | | |
| Spar, Market Street Service Station, Bacup | 0.0 | 0.1 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.1 | 0.0 | 0.0 |
| Sub Total (Zone 3) | 11.0 | 7.3 | 0.0 | 0.0 | 0.8 | 0.3 | 10.3 | 7.0 | 0.0 | 0.0 |
| Zone 4 | | | | | | | | | | |
| In Centre | | | | | | | | | | |
| Edenfield Neighbourhood Centre, Local Shops | 0.0 | 0.2 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.2 |
| Ramsbottom Town Centre, Local Shops | 0.6 | 0.8 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.6 | 0.8 |
| Morrisons, King Street, Ramsbottom Town Centre | 5.8 | 2.3 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 5.8 | 2.3 |
| Tesco Metro, Irwell Street, Ramsbottom Town Centre | 2.8 | 1.7 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 2.8 | 1.7 |
| Aldi, Railway Street, Ramsbottom | 15.2 | 1.7 | 0.5 | 0.0 | 1.8 | 0.3 | 1.0 | 0.1 | 12.0 | 1.4 |
| Co-op, Longsight Road, Holcombe Brook | 0.0 | 1.2 | 0.0 | 0.2 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 1.0 |
| Sub Total (Zone 4) | 24.4 | 7.8 | 0.5 | 0.2 | 1.8 | 0.3 | 1.0 | 0.1 | 21.3 | 7.3 |
| SUB-TOTAL ROSSENDALE ADMINISTRATIVE AREA | 86.4 | 25.5 | 19.8 | 5.4 | 37.6 | 11.1 | 24.5 | 8.5 | 4.5 | 0.4 |
| SUB-TOTAL STUDY AREA | 110.8 | 33.1 | 20.2 | 5.6 | 39.4 | 11.4 | 25.4 | 8.6 | 25.8 | 7.6 |
| OUTSIDE STUDY AREA | | | | | | | | | | |
| Accrington | | | | | | | | | | |
| Accrington Town Centre | 1.9 | 1.8 | 1.7 | 1.1 | 0.0 | 0.7 | 0.1 | 0.0 | 0.2 | 0.0 |
| Iceland, The Arndale Centre, Accrington | 0.7 | 0.3 | 0.6 | 0.3 | 0.1 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| Tesco Extra, Eagle Street, Accrington | 5.9 | 0.5 | 4.3 | 0.5 | 1.5 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| Asda, Hyndburn Road, Accrington | 2.9 | 0.3 | 2.3 | 0.3 | 0.0 | 0.0 | 0.0 | 0.0 | 0.6 | 0.0 |
| Aldi, Argyle Street, Accrington | 3.0 | 0.4 | 2.6 | 0.4 | 0.4 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| Lidl, Hyndburn Road, Accrington | 0.5 | 0.3 | 0.5 | 0.3 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| Sub Total (Accrington) | 14.7 | 3.5 | 11.8 | 2.8 | 2.0 | 0.7 | 0.1 | 0.0 | 0.8 | 0.0 |
| Bury | | | | | | | | | | |
| Bury Town Centre | 0.1 | 0.7 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.1 | 0.7 |
| Marks & Spencer, Bury Town Centre | 1.0 | 0.3 | 0.1 | 0.0 | 0.0 | 0.1 | 0.0 | 0.0 | 0.9 | 0.3 |
| Tesco, Woodfield Retail Park, Peel Way, Bury | 6.5 | 0.1 | 0.0 | 0.0 | 0.3 | 0.0 | 0.0 | 0.0 | 6.2 | 0.1 |
| Asda, Pilsworth Road, Bury | 2.0 | 0.1 | 0.3 | 0.0 | 0.0 | 0.0 | 0.5 | 0.0 | 1.2 | 0.1 |
| Aldi, Crostons Retail Park, Wood Street, Bury | 1.3 | 0.1 | 0.0 | 0.0 | 0.2 | 0.0 | 0.0 | 0.0 | 1.1 | 0.1 |
| Aldi, Bell Lane, Bury | 0.7 | 0.1 | 0.0 | 0.0 | 0.7 | 0.0 | 0.0 | 0.0 | 0.0 | 0.1 |
| Other Foodstores Bury | 1.3 | 1.5 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 1.3 | 1.5 |
| Sub Total (Bury) | 12.9 | 3.0 | 0.4 | 0.0 | 1.1 | 0.1 | 0.5 | 0.0 | 10.9 | 2.9 |
| Burnley | | | | | | | | | | |
| Burnley Town Centre | 0.3 | 0.6 | 0.0 | 0.0 | 0.3 | 0.5 | 0.0 | 0.1 | 0.0 | 0.0 |
| Marks & Spencer, Burnley Town Centre | 1.2 | 0.2 | 0.1 | 0.0 | 0.8 | 0.2 | 0.2 | 0.0 | 0.0 | 0.0 |
| Farmfoods, Burnley Town Centre | 0.4 | 0.1 | 0.4 | 0.0 | 0.0 | 0.1 | 0.0 | 0.0 | 0.0 | 0.0 |
| Tesco Extra, Centenary Way, Finsley Gate, Burnley | 1.0 | 0.3 | 0.1 | 0.0 | 0.2 | 0.3 | 0.8 | 0.0 | 0.0 | 0.0 |
| Aldi, Active Way, Burnley | 1.3 | 0.3 | 0.0 | 0.0 | 0.0 | 0.1 | 1.3 | 0.2 | 0.0 | 0.0 |
| Sainsbury's, Active Way, Burnley | 1.4 | 0.1 | 0.0 | 0.0 | 0.3 | 0.1 | 1.1 | 0.0 | 0.0 | 0.0 |
| Sub Total (Burnley) | 5.5 | 1.7 | 0.6 | 0.0 | 1.6 | 1.3 | 3.3 | 0.3 | 0.0 | 0.0 |
| Rochdale | | | | | | | | | | |
| Asda, The Old Cricket Ground, Rochdale | 2.3 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 2.3 | 0.0 | 0.0 | 0.0 |
| Aldi, Mellor Street, Rochdale | 1.6 | 0.1 | 0.0 | 0.0 | 0.0 | 0.0 | 1.6 | 0.1 | 0.0 | 0.0 |
| Aldi, Entwisle Road, Rochdale | 2.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 2.0 | 0.0 | 0.0 | 0.0 |
| Other Foodstores Rochdale | 1.9 | 0.2 | 0.0 | 0.0 | 0.1 | 0.0 | 1.8 | 0.2 | 0.0 | 0.0 |
| Sub Total (Rochdale) | 7.8 | 0.3 | 0.0 | 0.0 | 0.1 | 0.0 | 7.7 | 0.3 | 0.0 | 0.0 |
| Elsewhere | | | | | | | | | | |
| Blackburn Foodstores | 1.2 | 0.1 | 0.5 | 0.1 | 0.3 | 0.0 | 0.0 | 0.0 | 0.4 | 0.0 |
| Bolton Foodstores | 0.0 | 0.4 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.4 |
| Other Outside Catchment | 6.0 | 1.1 | 1.3 | 0.3 | 0.7 | 0.2 | 1.9 | 0.1 | 2.1 | 0.5 |
| Sub Total (Elsewhere) | 7.3 | 1.6 | 1.8 | 0.4 | 1.1 | 0.2 | 1.9 | 0.1 | 2.5 | 0.9 |
| SUB-TOTAL OUTSIDE STUDY AREA | 48.3 | 10.0 | 14.6 | 3.3 | 5.9 | 2.2 | 13.6 | 0.7 | 14.2 | 3.8 |
| TOTAL | 159.0 | 43.1 | 34.8 | 8.9 | 45.3 | 13.6 | 39.1 | 9.3 | 39.9 | 11.3 |

Notes:

- a. Zones based on post code sectors
- b. Market shares for 'main' and 'top-up' shopping derived directly from NEMS Household Survey
- c. Excludes 'don't know/varies', markets and internet sales
- d. Rossendale administrative area comprises Zones 1 to 3 and parts of Zones 4

2015 Prices

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TABLE 3: CONVENIENCE GOODS SHOPPING PATTERNS (%)

| DESTINATION | TOTAL | | 1 | | 2 | | 3 | | 4 | |
|--|---------------|--------------|---------------|--------------|---------------|--------------|---------------|--------------|---------------|--------------|
| | MAIN FOOD (%) | TOP UP (%) | MAIN FOOD (%) | TOP UP (%) | MAIN FOOD (%) | TOP UP (%) | MAIN FOOD (%) | TOP UP (%) | MAIN FOOD (%) | TOP UP (%) |
| STUDY AREA | | | | | | | | | | |
| Zone 1 | | | | | | | | | | |
| In centre | | | | | | | | | | |
| Haslingden District Centre, Local Shops | 0.3 | 3.2 | 1.4 | 9.6 | 0.0 | 3.4 | 0.0 | 0.7 | 0.0 | 0.0 |
| Helmshore Neighbourhood Centre, Local Shops | 0.0 | 2.0 | 0.0 | 7.1 | 0.0 | 1.6 | 0.0 | 0.0 | 0.0 | 0.0 |
| Premier Store, Broadway Crescent, Helmshore | 0.0 | 0.1 | 0.0 | 0.7 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| Edge of Centre | | | | | | | | | | |
| Co-op, John Street, Haslingden District Centre | 0.5 | 2.9 | 2.4 | 11.5 | 0.0 | 1.9 | 0.0 | 0.0 | 0.0 | 0.0 |
| Nisa, Deardengate, Haslingden District Centre | 0.1 | 0.9 | 0.5 | 4.2 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| Out of Centre | | | | | | | | | | |
| Tesco Superstore, Syke Street, Haslingden | 10.2 | 4.7 | 31.1 | 18.3 | 6.3 | 2.0 | 0.8 | 0.0 | 5.6 | 1.1 |
| Sub Total (Zone 1) | 11.2 | 13.8 | 35.4 | 51.4 | 6.3 | 8.9 | 0.8 | 0.7 | 5.6 | 1.1 |
| Zone 2 | | | | | | | | | | |
| In Centre | | | | | | | | | | |
| Rawtenstall Town Centre, Local Shops | 0.2 | 5.4 | 0.0 | 2.6 | 0.5 | 14.5 | 0.2 | 1.4 | 0.0 | 0.0 |
| Waterfoot Local Centre, Local Shops | 0.2 | 1.8 | 0.0 | 0.0 | 0.6 | 5.6 | 0.0 | 0.0 | 0.0 | 0.0 |
| Co-op, Bacup Road, Waterfoot Local Centre | 0.1 | 0.7 | 0.0 | 0.0 | 0.2 | 1.8 | 0.0 | 0.7 | 0.0 | 0.0 |
| Edge of Centre | | | | | | | | | | |
| Asda, Hollymount Way, Rawtenstall | 22.6 | 6.2 | 18.5 | 2.1 | 43.9 | 16.0 | 21.3 | 2.5 | 3.2 | 0.7 |
| Lidl, Bacup Road, Rawtenstall | 3.4 | 3.2 | 1.3 | 3.0 | 6.4 | 6.2 | 4.5 | 2.9 | 0.9 | 0.0 |
| Out of Centre | | | | | | | | | | |
| Tesco Superstore, Bocholt Way, Rawtenstall | 9.6 | 7.3 | 1.6 | 0.4 | 22.7 | 17.9 | 9.6 | 7.5 | 1.6 | 0.0 |
| Spar, Holmefield Garage, Burnley Road, Rawtenstall | 0.2 | 1.5 | 0.0 | 0.0 | 0.7 | 4.7 | 0.0 | 0.0 | 0.0 | 0.0 |
| Other Within Zone 2 | 0.0 | 1.6 | 0.0 | 1.4 | 0.0 | 4.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| Sub Total (Zone 2) | 36.2 | 27.7 | 21.4 | 9.5 | 75.1 | 70.7 | 35.6 | 15.1 | 5.6 | 0.7 |
| Zone 3 | | | | | | | | | | |
| In Centre | | | | | | | | | | |
| Bacup District Centre, Local Shops | 0.2 | 1.4 | 0.0 | 0.0 | 0.0 | 0.0 | 1.0 | 6.6 | 0.0 | 0.0 |
| Whitworth Local Centre, Local Shops | 0.0 | 0.1 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.4 | 0.0 | 0.0 |
| Co-op, Thorneyale Road, Whitworth Local Centre | 0.3 | 2.0 | 0.0 | 0.0 | 0.0 | 0.0 | 1.2 | 9.3 | 0.0 | 0.0 |
| Tesco Express, Market Street, Whitworth Local Centre | 0.1 | 1.4 | 0.0 | 0.0 | 0.0 | 0.0 | 0.5 | 6.7 | 0.0 | 0.0 |
| Edge of Centre | | | | | | | | | | |
| Morrisons, Lee Street, Bacup District Centre | 5.8 | 8.2 | 0.0 | 0.0 | 1.7 | 2.1 | 21.8 | 35.0 | 0.0 | 0.0 |
| Co-op, Irwell Street, Bacup District Centre | 0.4 | 2.9 | 0.0 | 0.0 | 0.0 | 0.0 | 1.7 | 13.5 | 0.0 | 0.0 |
| One Stop, King Street, Bacup District Centre | 0.0 | 0.6 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 3.0 | 0.0 | 0.0 |
| Out of Centre | | | | | | | | | | |
| Spar, Market Street Service Station, Bacup | 0.0 | 0.3 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 1.3 | 0.0 | 0.0 |
| Sub Total (Zone 3) | 6.9 | 17.0 | 0.0 | 0.0 | 1.7 | 2.1 | 26.3 | 75.8 | 0.0 | 0.0 |
| Zone 4 | | | | | | | | | | |
| In Centre | | | | | | | | | | |
| Edenfield Neighbourhood Centre, Local Shops | 0.0 | 0.5 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 1.8 |
| Ramsbottom Town Centre, Local Shops | 0.4 | 1.8 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 1.4 | 6.9 |
| Morrisons, King Street, Ramsbottom Town Centre | 3.7 | 5.4 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 14.6 | 20.4 |
| Tesco Metro, Irwell Street, Ramsbottom Town Centre | 1.8 | 3.9 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 7.1 | 15.0 |
| Aldi, Railway Street, Ramsbottom | 9.6 | 3.9 | 1.3 | 0.0 | 3.9 | 1.9 | 2.4 | 0.7 | 30.1 | 12.0 |
| Co-op, Longsight Road, Holcombe Brook | 0.0 | 2.7 | 0.0 | 1.8 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 8.7 |
| Sub Total (Zone 4) | 15.4 | 18.2 | 1.3 | 1.8 | 3.9 | 1.9 | 2.4 | 0.7 | 53.3 | 64.8 |
| SUB-TOTAL ROSSENDALE ADMINISTRATIVE AREA | 54.3 | 59.0 | 56.8 | 60.9 | 83.1 | 81.7 | 62.7 | 91.6 | 11.3 | 3.6 |
| SUB-TOTAL STUDY AREA | 69.7 | 76.7 | 58.1 | 62.7 | 87.0 | 83.6 | 65.1 | 92.3 | 64.5 | 66.7 |
| OUTSIDE STUDY AREA | | | | | | | | | | |
| Accrington | | | | | | | | | | |
| Accrington Town Centre | 1.2 | 4.1 | 4.8 | 12.0 | 0.0 | 5.1 | 0.3 | 0.0 | 0.4 | 0.0 |
| Iceland, The Arndale Centre, Accrington | 0.4 | 0.7 | 1.6 | 3.2 | 0.2 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| Tesco Extra, Eagle Street, Accrington | 3.7 | 1.2 | 12.4 | 5.7 | 3.4 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| Asda, Hyndburn Road, Accrington | 1.8 | 0.7 | 6.5 | 3.6 | 0.0 | 0.0 | 0.0 | 0.0 | 1.5 | 0.0 |
| Aldi, Argyle Street, Accrington | 1.9 | 0.9 | 7.4 | 4.2 | 0.8 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| Lidl, Hyndburn Road, Accrington | 0.3 | 0.6 | 1.3 | 3.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| Sub Total (Accrington) | 9.3 | 8.1 | 34.0 | 31.6 | 4.5 | 5.1 | 0.3 | 0.0 | 1.9 | 0.0 |
| Bury | | | | | | | | | | |
| Bury Town Centre | 0.1 | 1.7 | 0.0 | 0.5 | 0.0 | 0.0 | 0.0 | 0.0 | 0.3 | 6.0 |
| Marks & Spencer, Bury Town Centre | 0.6 | 0.8 | 0.2 | 0.0 | 0.0 | 0.5 | 0.0 | 0.0 | 2.3 | 2.4 |
| Tesco, Woodfield Retail Park, Peel Way, Bury | 4.1 | 0.3 | 0.0 | 0.0 | 0.6 | 0.0 | 0.0 | 0.0 | 15.6 | 1.0 |
| Asda, Pilsforth Road, Bury | 1.3 | 0.2 | 0.9 | 0.0 | 0.0 | 0.0 | 1.3 | 0.0 | 3.0 | 0.9 |
| Aldi, Crostons Retail Park, Wood Street, Bury | 0.8 | 0.2 | 0.0 | 0.0 | 0.3 | 0.0 | 0.0 | 0.0 | 2.9 | 0.7 |
| Aldi, Bell Lane, Bury | 0.4 | 0.3 | 0.0 | 0.0 | 1.5 | 0.0 | 0.0 | 0.0 | 0.0 | 1.0 |
| Other Foodstores Bury | 0.8 | 3.5 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 3.3 | 13.3 |
| Sub Total (Bury) | 8.1 | 6.9 | 1.1 | 0.5 | 2.4 | 0.5 | 1.3 | 0.0 | 27.2 | 25.3 |
| Burnley | | | | | | | | | | |
| Burnley Town Centre | 0.2 | 1.3 | 0.0 | 0.0 | 0.6 | 3.4 | 0.0 | 1.3 | 0.0 | 0.0 |
| Marks & Spencer, Burnley Town Centre | 0.7 | 0.5 | 0.4 | 0.0 | 1.8 | 1.7 | 0.5 | 0.0 | 0.0 | 0.0 |
| Farmfoods, Burnley Town Centre | 0.2 | 0.3 | 1.0 | 0.0 | 0.0 | 0.5 | 0.0 | 0.4 | 0.0 | 0.0 |
| Tesco Extra, Centenary Way, Finsley Gate, Burnley | 0.6 | 0.8 | 0.2 | 0.4 | 0.4 | 2.2 | 1.9 | 0.0 | 0.0 | 0.0 |
| Aldi, Active Way, Burnley | 0.8 | 0.6 | 0.0 | 0.0 | 0.0 | 0.8 | 3.4 | 1.7 | 0.0 | 0.0 |
| Sainsbury's, Active Way, Burnley | 0.9 | 0.3 | 0.0 | 0.0 | 0.7 | 1.0 | 2.7 | 0.0 | 0.0 | 0.0 |
| Sub Total (Burnley) | 3.5 | 3.9 | 1.6 | 0.4 | 3.5 | 9.7 | 8.6 | 3.5 | 0.0 | 0.0 |
| Rochdale | | | | | | | | | | |
| Asda, The Old Cricket Ground, Rochdale | 1.5 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 5.9 | 0.0 | 0.0 | 0.0 |
| Aldi, Mellor Street, Rochdale | 1.0 | 0.1 | 0.0 | 0.0 | 0.0 | 0.0 | 4.1 | 0.7 | 0.0 | 0.0 |
| Aldi, Entwisle Road, Rochdale | 1.3 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 5.2 | 0.0 | 0.0 | 0.0 |
| Other Foodstores Rochdale | 1.2 | 0.5 | 0.0 | 0.0 | 0.2 | 0.0 | 4.6 | 2.2 | 0.0 | 0.0 |
| Sub Total (Rochdale) | 4.9 | 0.6 | 0.0 | 0.0 | 0.2 | 0.0 | 19.8 | 2.9 | 0.0 | 0.0 |
| Elsewhere | | | | | | | | | | |
| Blackburn Foodstores | 0.8 | 0.2 | 1.5 | 1.1 | 0.7 | 0.0 | 0.0 | 0.0 | 1.0 | 0.0 |
| Bolton Foodstores | 0.0 | 0.9 | 0.0 | 0.4 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 3.3 |
| Other Outside Catchment | 3.8 | 2.6 | 3.7 | 3.4 | 1.6 | 1.2 | 4.8 | 1.3 | 5.4 | 4.7 |
| Sub Total (Elsewhere) | 4.6 | 3.8 | 5.1 | 4.9 | 2.4 | 1.2 | 4.8 | 1.3 | 6.3 | 8.0 |
| SUB-TOTAL OUTSIDE STUDY AREA | 30.3 | 23.3 | 41.9 | 37.3 | 13.0 | 16.4 | 34.9 | 7.7 | 35.5 | 33.3 |
| TOTAL | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |

Notes:

- a. Zones based on post code sectors
- b. Market shares for 'main' and 'top-up' shopping derived directly from NEMS Household Survey (February 2016)
- c. Excludes 'don't know/varies', markets and internet sales
- d. Rossendale administrative area comprises Zones 1 to 3 and parts of Zone 4

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ROSSENDALE RETAIL CAPACITY STUDY

TABLE 5: SURVEY-DERIVED PERFORMANCE OF CONVENIENCE FLOORSPACE COMPARED TO EXPECTED BENCHMARK PERFORMANCE AT 2017

| STUDY AREA | GROSS FLOORSPACE (sq.m) | NET SALES (sq.m) | NET CONVENIENCE SALES AREA (sq.m) (A) | SALES DENSITY (£ per sq.m) (B) | BENCHMARK TURNOVER (£m) (AxB) | SURVEY TURNOVER (£m) | INFLOW ALLOWANCE (%) | ESTIMATED SURVEY T/O WITH INFLOW (£m) | OVERTRADING (£m) |
|--|-------------------------|------------------|---------------------------------------|--------------------------------|-------------------------------|----------------------|----------------------|---------------------------------------|------------------|
| Zone 1 | | | | | | | | | |
| In centre | | | | | | | | | |
| Haslingden District Centre, Local Shops | - | - | - | - | 1.9 | 1.9 | 0.0 | 1.9 | 0.0 |
| Helmshore Neighbourhood Centre, Local Shops | - | - | - | - | 0.9 | 0.9 | 0.0 | 0.9 | 0.0 |
| Premier Store, Broadway Crescent, Helmshore | 142 | 114 | 108 | 6,541 | 0.7 | 0.1 | 0.0 | 0.1 | -0.6 |
| Edge of Centre | | | | | | | | | |
| Co-op, John Street, Haslingden District Centre | 348 | 232 | 204 | 8,491 | 1.7 | 2.1 | 0.0 | 2.1 | 0.4 |
| Nisa, Deardengate, Haslingden District Centre | 438 | 307 | 292 | 6,228 | 1.8 | 0.5 | 0.0 | 0.5 | -1.3 |
| Out of Centre | | | | | | | | | |
| Tesco Superstore, Syke Street, Haslingden | 8,191 | 4,710 | 3,080 | 13,413 | 41.3 | 18.3 | 15.0 | 21.0 | -20.3 |
| Sub Total (Zone 1) | 9,120 | 5,362 | 3,683 | - | 48.3 | 23.7 | - | 26.4 | -21.9 |
| Zone 2 | | | | | | | | | |
| In Centre | | | | | | | | | |
| Rawtenstall Town Centre, Local Shops | - | - | - | - | 2.6 | 2.6 | 10.0 | 2.9 | 0.3 |
| Waterfoot Local Centre, Local Shops | - | - | - | - | 1.0 | 1.0 | 0.0 | 1.0 | 0.0 |
| Co-op, Bacup Road, Waterfoot Local Centre | 548 | 334 | 293 | 8,491 | 2.5 | 0.4 | 0.0 | 0.4 | -2.1 |
| Edge of Centre | | | | | | | | | |
| Asda, Hollymount Way, Rawtenstall | 10,655 | 5,570 | 2,991 | 13,863 | 41.5 | 38.6 | 10.0 | 42.5 | 1.0 |
| Lidl, Bacup Road, Rawtenstall | 1,117 | 801 | 641 | 4,228 | 2.7 | 6.9 | 10.0 | 7.5 | 4.8 |
| Out of Centre | | | | | | | | | |
| Tesco Superstore, Bocholt Way, Rawtenstall | 6,604 | 4,093 | 2,677 | 13,413 | 35.9 | 18.4 | 10.0 | 20.2 | -15.7 |
| Spar, Holmefield Garage, Burnley Road, Rawtenstall | 438 | 219 | 208 | 6,920 | 1.4 | 1.0 | 0.0 | 1.0 | -0.5 |
| Other Within Zone 2 | - | - | - | - | 0.7 | 0.7 | 0.0 | 0.7 | 0.0 |
| Sub Total (Zone 2) | 19,363 | 11,018 | 6,810 | - | 88.3 | 69.5 | - | 76.2 | -12.2 |
| Zone 3 | | | | | | | | | |
| In Centre | | | | | | | | | |
| Bacup District Centre, Local Shops | - | - | - | - | 1.0 | 1.0 | 0.0 | 1.0 | 0.0 |
| Whitworth Local Centre, Local Shops | - | - | - | - | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| Co-op, Thorneylea Road, Whitworth Local Centre | 529 | 392 | 344 | 8,491 | 2.9 | 1.3 | 0.0 | 1.3 | -1.6 |
| Tesco Express, Market Street, Whitworth Local Centre | 278 | 213 | 202 | 13,413 | 2.7 | 0.8 | 0.0 | 0.8 | -1.9 |
| Edge of Centre | | | | | | | | | |
| Morrisons, Lee Street, Bacup District Centre | 2,231 | 1,105 | 824 | 12,064 | 9.9 | 12.8 | 0.0 | 12.8 | 2.9 |
| Co-op, Irwell Street, Bacup District Centre | 851 | 566 | 497 | 8,491 | 4.2 | 1.9 | 0.0 | 1.9 | -2.3 |
| One Stop, King Street, Bacup District Centre | 230 | 188 | 179 | 8,445 | 1.5 | 0.3 | 0.0 | 0.3 | -1.2 |
| Out of Centre | | | | | | | | | |
| Spar, Market Street Service Station, Bacup | 145 | 116 | 110 | 6,920 | 0.8 | 0.1 | 0.0 | 0.1 | -0.6 |
| Sub Total (Zone 3) | 4,264 | 2,580 | 2,157 | - | 23.1 | 18.4 | - | 18.4 | -4.8 |
| Zone 4 | | | | | | | | | |
| In Centre | | | | | | | | | |
| Ederfield Neighbourhood Centre, Local Shops | - | - | - | - | 0.2 | 0.2 | 0.0 | 0.2 | 0.0 |
| Sub Total (Zone 4) | 0 | 0 | 0 | - | 0.2 | 0.2 | - | 0.2 | 0.0 |
| TOTAL STUDY AREA | 32,746 | 18,960 | 12,651 | - | 160.0 | 111.8 | - | 121.2 | -38.8 |

Notes:

- Gross floorspace derived from VOA data, IGD Database, Storepoint Database or WYG assessment
- Net floorspace derived from Storepoint or IGD data where available or based on WYG professional judgement
- Proportion of net floorspace derived from typical company split between convenience and comparison floorspace as identified by Verdict UK Food & Grocery Retailers 2015
- Sales densities relate to the monetary turnover of each square metre of net sales area and are derived from Verdict UK Food & Grocery Retailers 2015 or Mintel Retail Rankings 2016
- It has been assumed that all unnamed convenience stores within a centre are 'trading at equilibrium' (i.e. their 'benchmark' turnover equates to that identified by the survey)
- Survey derived performance of stores calculated by adding together 'main' and 'top up' turnover as set out in Table 4

2015 Prices

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ROSSENDALE RETAIL CAPACITY STUDY

TABLE 6: ESTIMATED (BASELINE) CAPACITY FOR NEW CONVENIENCE GOODS PROVISION WITHIN ROSSENDALE STUDY AREA

Table 6a: Estimated 'Capacity' for Convenience Goods Facilities in Rossendale

| Year | Turnover - £m ¹ | Expenditure Available £m ² | SA Inflow - £m | Surplus Expenditure - £m |
|-------------------------|----------------------------|--|----------------|-----------------------------|
| 2017 | 160.0 | 111.8 | 9.4 | -38.8 |
| 2019 | 159.2 | 111.7 | 9.4 | -38.0 |
| 2024 | 158.7 | 115.0 | 9.7 | -34.0 |
| 2029 | 159.5 | 118.9 | 10.0 | -30.6 |
| 2034 | 160.3 | 123.0 | 10.3 | -26.9 |
| Market Share (%) | | 55.3 | | |

1. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 14 (Nov 2016)

2. Assumes constant market share claimed by Rossendale facilities at 55.3% from Study Area

2015 prices

Table 6b: Quantitative Need for Additional Convenience Goods Floorspace in Rossendale

| Year | Convenience Goods | | |
|------|-------------------|------------------------|------------------|
| | £m | Floorspace Requirement | |
| | | Min ¹ | Max ² |
| 2017 | -38.8 | -3,000 | -4,600 |
| 2019 | -38.0 | -2,900 | -4,500 |
| 2024 | -34.0 | -2,600 | -4,000 |
| 2029 | -30.6 | -2,400 | -3,600 |
| 2034 | -26.9 | -2,100 | -3,200 |

1. Average sales density assumed to be £13,035 per sq.m based on the average sales density of the leading four supermarkets as identified by Verdict 2015

2. Average sales density assumed to be £8,511 per sq.m which is based on WYG's knowledge of discount operators

3. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 14 (Nov 2016)

2015 prices

Table 6c: Net Quantitative Need for Additional Convenience Goods Floorspace in Rossendale

| Year | Convenience Goods | | | | |
|------|-------------------|--------------|----------------|------------------------|------------------|
| | £m Surplus | £m Extant | £m Residual | Floorspace Requirement | |
| | | | | Min ¹ | Max ² |
| 2017 | -38.8 | 15.2 | -54.0 | -4,200 | -6,300 |
| 2019 | -38.0 | 15.2 | -53.2 | -4,100 | -6,300 |
| 2024 | -34.0 | 15.1 | -49.2 | -3,800 | -5,800 |
| 2029 | -30.6 | 15.2 | -45.8 | -3,500 | -5,400 |
| 2034 | -26.9 | 15.3 | -42.2 | -3,200 | -5,000 |

1. Average sales density assumed to be £13,035 per sq.m based on the average sales density of the leading four supermarkets as identified by Verdict 2015

2. Average sales density assumed to be £8,511 per sq.m which is based on WYG's knowledge of discount operators

3. Residual calculated by subtracting turnover of commitments (sourced from Table 6d) from surplus expenditure (sourced from Table 6a)

4. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 14 (Nov 2016)

2015 prices

Table 6d: Extant Convenience Goods Commitments in Rossendale

| Destination | Reference | Proposal | Gross Retail Floorspace (sq.m) | Net Convenience Floorspace (sq.m) | Estimated Sales Density (£/sq.m) | Estimated Convenience Turnover (£m) | Turnover Diverted from Rossendale Facilities (£m) | Status |
|------------------------|-----------|-------------------|-----------------------------------|--------------------------------------|-------------------------------------|---|---|-------------------|
| Zone 2 | | | | | | | | |
| New Hall Hey, Phase II | 2016/0129 | Aldi Foodstore | 1,718 | 1,003 | 12,794 | 12.8 | 6.4 | Extant permission |
| New Hall Hey, Phase II | 2016/0129 | Frozen Food Store | 929 | 706 | 7,366 | 5.2 | 3.9 | Extant permission |
| New Hall Hey, Phase I | 2014/0384 | M&S Simply Food | 1,162 | 883 | 11,173 | 9.9 | 4.9 | Extant permission |
| TOTAL | | | 3,809 | 2,592 | - | 27.9 | 15.2 | |

1. The gross and net floorspace of the New Hall Hey Phase I scheme has been sourced from the Retail Impact Assessment which supported application ref. 2014/0384

2. The gross and net floorspace of the New Hall Hey Phase II scheme has been sourced from the Retail Impact Assessment which supported application ref. 2016/0129

3. Convenience goods sales densities for all retailers referenced is derived from Mintel Retail Rankings (2016) and Verdict Food and Grocery Retailing (2015)

4. Convenience goods turnover of 'frozen foodstore' is based on an average of Iceland, Farmfoods and Heron Foods (derived from Mintel Retail Rankings 2016)

5. Turnovers projected using Experian Forecast sales densities from Figure 4a (Page 14) of Experian Retail Planner Briefing Note 14 (Nov 2016)

6. Turnover derived from Rossendale WYG assumption based on the findings of the retail impact assessments which supported planning applications ref. 2016/0129 and ref. 2014/0384

2015 prices

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TABLE 6(I): ESTIMATED (BASELINE) CAPACITY FOR NEW CONVENIENCE GOODS PROVISION WITHIN RAWTENSTALL

Table 6(I)a: Estimated 'Capacity' for Convenience Goods Facilities in Rawtenstall

| Year | Turnover - £m ¹ | Expenditure Available - £m ² | SA Inflow - £m | Surplus Expenditure - £m |
|-------------------------|----------------------------|---|----------------|--------------------------|
| 2017 | 82.7 | 66.5 | 6.6 | -9.6 |
| 2019 | 82.3 | 66.4 | 6.6 | -9.3 |
| 2024 | 82.1 | 68.3 | 6.8 | -6.9 |
| 2029 | 82.5 | 70.7 | 7.1 | -4.7 |
| 2034 | 82.9 | 73.1 | 7.3 | -2.5 |
| Market Share (%) | | 32.9 | | |

1. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 14 (Nov 2016)

2. Assumes constant market share claimed by Rossendale facilities at 32.9% from Study Area

2015 prices

Table 6(I)b: Quantitative Need for Additional Convenience Goods Floorspace in Rawtenstall

| Year | £m | Convenience Goods Floorspace Requirement | |
|------|------|--|------------------|
| | | Min ¹ | Max ² |
| | | 2017 | -700 |
| 2019 | -700 | -1,100 | |
| 2024 | -500 | -800 | |
| 2029 | -400 | -600 | |
| 2034 | -200 | -300 | |

1. Average sales density assumed to be £13,035 per sq.m based on the average sales density of the leading four supermarkets as identified by Verdict 2015

2. Average sales density assumed to be £8,511 per sq.m which is based on WYG's knowledge of discount operators

3. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 14 (Nov 2016)

2015 prices

Table 6(I)c: Net Quantitative Need for Additional Convenience Goods Floorspace in Rawtenstall

| Year | Convenience Goods Floorspace Requirement | | | | |
|------|--|-----------|-------------|------------------|------------------|
| | £m Surplus | £m Extant | £m Residual | Min ¹ | Max ² |
| | 2017 | -9.6 | 9.3 | -18.9 | -1,500 |
| 2019 | -9.3 | 9.2 | -18.5 | -1,400 | -2,200 |
| 2024 | -6.9 | 9.2 | -16.1 | -1,200 | -1,900 |
| 2029 | -4.7 | 9.3 | -14.0 | -1,100 | -1,600 |
| 2034 | -2.5 | 9.3 | -11.8 | -900 | -1,400 |

1. Average sales density assumed to be £13,035 per sq.m based on the average sales density of the leading four supermarkets as identified by Verdict 2015

2. Average sales density assumed to be £8,511 per sq.m which is based on WYG's knowledge of discount operators

3. Residual calculated by subtracting turnover of commitments (sourced from Table 6(I)d) from surplus expenditure (sourced from Table 6(I)a)

4. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 14 (Nov 2016)

2015 prices

Table 6(I)d: Extant Convenience Goods Commitments in Rawtenstall

| Destination | Reference | Proposal | Gross Retail Floorspace (sq.m) | Net Convenience Floorspace (sq.m) | Estimated Sales Density (£/sq.m) | Estimated Convenience Turnover (£m) | Turnover Diverted from Rawtenstall Facilities (£m) | Status |
|------------------------|-----------|-------------------|--------------------------------|-----------------------------------|----------------------------------|-------------------------------------|--|-------------------|
| Zone 2 | | | | | | | | |
| New Hall Hey, Phase II | 2016/0129 | Aldi Foodstore | 1,718 | 1,003 | 12,794 | 12.8 | 4.7 | Extant permission |
| New Hall Hey, Phase II | 2016/0129 | Frozen Food Store | 929 | 706 | 7,366 | 5.2 | 2.3 | Extant permission |
| New Hall Hey, Phase I | 2014/0384 | M&S Simply Food | 1,162 | 883 | 11,173 | 9.9 | 2.3 | Extant permission |
| TOTAL | | | 3,809 | 2,592 | - | 27.9 | 9.3 | |

1. The gross and net floorspace of the New Hall Hey Phase I scheme has been sourced from the Retail Impact Assessment which supported application ref. 2014/0384

2. The gross and net floorspace of the New Hall Hey Phase II scheme has been sourced from the Retail Impact Assessment which supported application ref. 2016/0129

3. Convenience goods sales densities for all retailers referenced is derived from Mintel Retail Rankings (2016) and Verdict Food and Grocery Retailing (2015)

4. Convenience goods turnover of 'frozen foodstore' is based on an average of Iceland, Farmfoods and Heron Foods (derived from Mintel Retail Rankings 2016)

5. Turnovers projected using Experian Forecast sales densities from Figure 4a (Page 14) of Experian Retail Planner Briefing Note 14 (Nov 2016)

6. 'Turnover derived from Rawtenstall' WYG assumption based on the findings of the retail impact assessments which supported planning applications ref. 2016/0129 and ref. 2014/0384

2015 prices

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TABLE 6(ii): ESTIMATED (BASELINE) CAPACITY FOR NEW CONVENIENCE GOODS PROVISION WITHIN HASLINGDEN

Table 6(ii)a: Estimated 'Capacity' for Convenience Goods Facilities in Haslingden

| Year | Turnover - £m ¹ | Expenditure Available £m ² | SA Inflow - £m | Surplus Expenditure - £m |
|-------------------------|----------------------------|--|----------------|-----------------------------|
| 2017 | 5.4 | 4.5 | 0.0 | -0.9 |
| 2019 | 5.4 | 4.5 | 0.0 | -0.9 |
| 2024 | 5.4 | 4.6 | 0.0 | -0.7 |
| 2029 | 5.4 | 4.8 | 0.0 | -0.6 |
| 2034 | 5.4 | 5.0 | 0.0 | -0.5 |
| Market Share (%) | | 2.2 | | |

1. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 14 (Nov 2016)

2. Assumes constant market share claimed by Rosendale facilities at 2.2% from Study Area

2015 prices

Table 6(ii)b: Quantitative Need for Additional Convenience Goods Floorspace in Haslingden

| Year | £m | Convenience Goods Floorspace Requirement | |
|------|------|---|------------------|
| | | Min ¹ | Max ² |
| | | | |
| 2017 | -0.9 | -100 | -100 |
| 2019 | -0.9 | -100 | -100 |
| 2024 | -0.7 | -100 | -100 |
| 2029 | -0.6 | 0 | -100 |
| 2034 | -0.5 | 0 | -100 |

1. Average sales density assumed to be £13,035 per sq,m based on the average sales density of the leading four supermarkets as identified by Verdict 2015

2. Average sales density assumed to be £8,511 per sq,m which is based on WYG's knowledge of discount operators

3. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 14 (Nov 2016)

2015 prices

Table 6(ii)c: Net Quantitative Need for Additional Convenience Goods Floorspace in Haslingden

| Year | Convenience Goods Floorspace Requirement | | | | |
|------|---|--------|----------|------------------|------------------|
| | £m | £m | £m | Min ¹ | Max ² |
| | Surplus | Extant | Residual | | |
| 2017 | -0.9 | 0.9 | -1.8 | -100 | -200 |
| 2019 | -0.9 | 0.9 | -1.8 | -100 | -200 |
| 2024 | -0.7 | 0.9 | -1.6 | -100 | -200 |
| 2029 | -0.6 | 0.9 | -1.5 | -100 | -200 |
| 2034 | -0.5 | 0.9 | -1.4 | -100 | -200 |

1. Average sales density assumed to be £13,035 per sq,m based on the average sales density of the leading four supermarkets as identified by Verdict 2015

2. Average sales density assumed to be £8,511 per sq,m which is based on WYG's knowledge of discount operators

3. Residual calculated by subtracting turnover of commitments (sourced from Table 6(i)d) from surplus expenditure (sourced from Table 6(i)a)

4. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 14 (Nov 2016)

2015 prices

Table 6(ii)d: Extant Convenience Goods Commitments in Haslingden

| Destination | Reference | Proposal | Gross Retail Floorspace (sq,m) | Net Convenience Floorspace (sq,m) | Estimated Sales Density (£/sq,m) | Estimated Convenience Turnover (£m) | Turnover Diverted from Haslingden Facilities (£m) | Status |
|------------------------|-----------|-------------------|-----------------------------------|--------------------------------------|-------------------------------------|---|---|-------------------|
| Zone 2 | | | | | | | | |
| New Hall Hey, Phase II | 2016/0129 | Aldi Foodstore | 1,718 | 1,003 | 12,794 | 12.8 | £0.32 | Extant permission |
| New Hall Hey, Phase II | 2016/0129 | Frozen Food Store | 929 | 706 | 7,366 | 5.2 | £0.20 | Extant permission |
| New Hall Hey, Phase I | 2014/0384 | M&S Simply Food | 1,162 | 883 | 11,173 | 9.9 | £0.37 | Extant permission |
| TOTAL | | | 3,809 | 2,592 | - | 27.9 | 0.9 | |

1. The gross and net floorspace of the New Hall Hey Phase I scheme has been sourced from the Retail Impact Assessment which supported application ref. 2014/0384

2. The gross and net floorspace of the New Hall Hey Phase II scheme has been sourced from the Retail Impact Assessment which supported application ref. 2016/0129

3. Convenience goods sales densities for all retailers referenced is derived from Mintel Retail Rankings (2016) and Verdict Food and Grocery Retailing (2015)

4. Convenience goods turnover of 'frozen foodstore' is based on an average of Iceland, Farmfoods and Heron Foods (derived from Mintel Retail Rankings 2016)

5. Turnovers projected using Experian Forecast sales densities from Figure 4a (Page 14) of Experian Retail Planner Briefing Note 14 (Nov 2016)

6. Turnover derived from Haslingden WYG assumption based on the findings of the the retail impact assessments which supported planning applications ref. 2016/0129 and ref. 2014/0384

2015 prices

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TABLE 6(iii): ESTIMATED (BASELINE) CAPACITY FOR NEW CONVENIENCE GOODS PROVISION WITHIN BACUP

Table 6(iii)a: Estimated 'Capacity' for Convenience Goods Facilities in Bacup

| Year | Turnover - £m ¹ | Expenditure Available - £m ² | SA Inflow - £m | Surplus Expenditure - £m |
|-------------------------|----------------------------|---|----------------|--------------------------|
| 2017 | 16.7 | 16.0 | 0.0 | -0.6 |
| 2019 | 16.6 | 16.0 | 0.0 | -0.6 |
| 2024 | 16.5 | 16.5 | 0.0 | -0.1 |
| 2029 | 16.6 | 17.1 | 0.0 | 0.4 |
| 2034 | 16.7 | 17.6 | 0.0 | 0.9 |
| Market Share (%) | | 7.9 | | |

1. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 14 (Nov 2016)

2. Assumes constant market share claimed by Rossendale facilities at 7.9% from Study Area

2015 prices

Table 6(iii)b: Quantitative Need for Additional Convenience Goods Floorspace in Bacup

| Year | £m | Convenience Goods Floorspace Requirement | |
|------|------|--|------------------|
| | | Min ¹ | Max ² |
| | | 2017 | -0.6 |
| 2019 | -0.6 | 0 | |
| 2024 | -0.1 | 0 | |
| 2029 | 0.4 | 0 | |
| 2034 | 0.9 | 100 | 100 |

1. Average sales density assumed to be £13,035 per sq.m based on the average sales density of the leading four supermarkets as identified by Verdict 2015

2. Average sales density assumed to be £8,511 per sq.m which is based on WYG's knowledge of discount operators

3. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 14 (Nov 2016)

2015 prices

Table 6(iii)c: Net Quantitative Need for Additional Convenience Goods Floorspace in Bacup

| Year | Convenience Goods Floorspace Requirement | | | | |
|------|--|-----------|-------------|------------------|------------------|
| | £m Surplus | £m Extant | £m Residual | Min ¹ | Max ² |
| | 2017 | -0.6 | 1.5 | -2.2 | -200 |
| 2019 | -0.6 | 1.5 | -2.1 | -200 | -200 |
| 2024 | -0.1 | 1.5 | -1.6 | -100 | -200 |
| 2029 | 0.4 | 1.5 | -1.1 | -100 | -100 |
| 2034 | 0.9 | 1.5 | -0.6 | 0 | -100 |

1. Average sales density assumed to be £13,035 per sq.m based on the average sales density of the leading four supermarkets as identified by Verdict 2015

2. Average sales density assumed to be £8,511 per sq.m which is based on WYG's knowledge of discount operators

3. Residual calculated by subtracting turnover of commitments (sourced from Table 6(iii)d) from surplus expenditure (sourced from Table 6(iii)a)

4. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 14 (Nov 2016)

2015 prices

Table 6(iii)d: Extant Convenience Goods Commitments in Bacup

| Destination | Reference | Proposal | Gross Retail Floorspace (sq.m) | Net Convenience Floorspace (sq.m) | Estimated Sales Density (£/sq.m) | Estimated Convenience Turnover (£m) | Turnover Diverted from Bacup Facilities (£m) | Status |
|------------------------|-----------|-------------------|--------------------------------|-----------------------------------|----------------------------------|-------------------------------------|--|-------------------|
| Zone 2 | | | | | | | | |
| New Hall Hey, Phase II | 2016/0129 | Aldi Foodstore | 1,718 | 1,003 | 12,794 | 12.8 | £0.37 | Extant permission |
| New Hall Hey, Phase II | 2016/0129 | Frozen Food Store | 929 | 706 | 7,366 | 5.2 | £0.39 | Extant permission |
| New Hall Hey, Phase I | 2014/0384 | M&S Simply Food | 1,162 | 883 | 11,173 | 9.9 | £0.76 | Extant permission |
| TOTAL | | | 3,809 | 2,592 | - | 27.9 | 1.5 | |

1. The gross and net floorspace of the New Hall Hey Phase I scheme has been sourced from the Retail Impact Assessment which supported application ref. 2014/0384

2. The gross and net floorspace of the New Hall Hey Phase II scheme has been sourced from the Retail Impact Assessment which supported application ref. 2016/0129

3. Convenience goods sales densities for all retailers referenced is derived from Mintel Retail Rankings (2016) and Verdict Food and Grocery Retailing (2015)

4. Convenience goods turnover of 'frozen foodstore' is based on an average of Iceland, Farmfoods and Heron Foods (derived from Mintel Retail Rankings 2016)

5. Turnovers projected using Experian Forecast sales densities from Figure 4a (Page 14) of Experian Retail Planner Briefing Note 14 (Nov 2016)

6. 'Turnover derived from Bacup' WYG assumption based on the findings of the retail impact assessments which supported planning applications ref. 2016/0129 and ref. 2014/0384

2015 prices