Blackpool Town Centre

Potential Foodstore Allocation - Assessment of Impact on Blackpool Town Centre

on behalf of Blackpool Borough Council

February 2020

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1.0 Introduction

Instruction and Scope

1.1 Nexus Planning has been commissioned by Blackpool Borough Council ('the Council') to undertake an assessment of the potential implications of allocating a site in the northern part of Blackpool town centre, adjacent to the Talbot Gateway Central Business District, for the development of a discount foodstore. The commission follows the recommendations made in the Blackpool Retail, Leisure and Hotel Study 2018 (the '2018 Study'), identifying the potential to provide an additional foodstore towards the northern periphery of Blackpool town centre should a site within or on the edge of the centre become available.

1.2 The purpose of this assessment is to provide the Council with the evidence to understand the implications on Blackpool town centre, should the preferred approach be to allocate a site for Class A1 convenience uses within the town centre boundary.

1.3 We will seek to establish the potential quantitative and qualitative impact considerations, based on our knowledge of the performance, offer and nature of the town centre, and on our overall knowledge of the commercial market and how convenience operators trade in practice.

Structure of Report

1.4 Accordingly, our report is structured as follows:

- **Section 2.0** – sets out the background to the commission, and a summary in respect of the commercial market;
- **Section 3.0** – provides a summary of the relevant planning policy and findings from the 2018 Retail Study;
- **Section 4.0** – provides an update to the baseline position, including an update of the healthcheck of Blackpool town centre and an update of the quantitative capacity model from the 2018 Study, incorporating the latest available Experian data;

- **Section 5.0** – summarises the methodology adopted in respect of the impact assessment, and the key findings;
- **Section 6.0** – provides our overall summary and conclusions.

2.0 Background to the Project

Background to the Commission

2.1 The Blackpool Retail, Leisure and Hotel Study 2018 (the '2018 Study') was published by the Council in 2018. The 2018 Study drew on empirical evidence in the form of a telephone household survey also undertaken in 2018, and sought to provide an analysis of the current shopping and leisure patterns of residents across the Borough, along with an assessment of the vitality and viability (the health) of the Borough's defined centres.

2.2 The Study also looked at whether there is a quantitative and qualitative need for additional retail and leisure facilities within the Borough, having regard to the level of expenditure available, whether some of this expenditure is being spent at destinations outside of Blackpool (known as 'leakage') and whether there is a 'gap' in provision when reviewing the presence of the larger foodstores (i.e. those which measure over 1,500 sq.m gross).

2.3 In undertaking the review of convenience provision in the Borough, it was also important that a consideration of the demographics of the local population of Blackpool was included to establish whether a particular type of convenience operator was under-represented in Blackpool.

2.4 In particular, turning to the conclusions of the 2018 Study, paragraph 10.5.6 stated:

'Based on the findings above, we are of the view that there could be the potential to provide an additional foodstore towards the northern periphery of Blackpool town centre should a site within or on the edge of the centre become available. We envisage that the scale of foodstore appropriate would fit within the 1,500 to 2,500 sq.m (gross) bracket, ensuring that the turnover of which would not untenably impact on the existing Sainsbury's foodstore at Talbot Gateway. Any additional floorspace would need to ensure that it complements, rather than competes with the substantial investment made at Talbot Gateway in the delivery of the Sainsbury's, whilst seeking to attract shoppers and residents of Zone 1 back into the town centre, instead of travelling to other foodstores in Zone 5 to meet their shopping needs. As such, in order to claw the expenditure back into the town centre, any retailer would need to provide an offer different to that which is already provided, and which seeks to meet the current deficiency in terms of providing lower priced goods. It is important to note that providing another large foodstore or 'superstore' (i.e. over 2,500

sq.m) would not meet this same objective and would instead compete directly with the existing Sainsbury's.'

2.5 It is clear from the recommendations that there was a qualitative requirement for an additional foodstore within Blackpool town centre, but that should this be pursued further, a full consideration of the potential impact on existing provision in the centre would need to be explored.

2.6 As such, what is key to the consideration of the potential for a new allocation within the town centre is the requirement to ensure that the existing offer in the centre is protected, through the application of the relevant planning policy tests of both the sequential and impact assessments. Indeed, paragraph 10.5.8 of the 2018 Study stated:

'Taking this one step further, it is important that any potential development site would ideally be located within the town centre boundary, and whilst it would need to meet both the sequential and impact tests, it would be necessary to consider the wider benefits a new foodstore could provide to the town centre in terms of choice, increased turnover and encouraging linked-trips with the existing uses. For example, a store of between 1,500 sq.m and 2,500 sq.m would require a site of approximately 0.6ha to provide the required floorspace and associated car parking (dependent on its location), demonstrating its relatively small scale.'

2.7 It is on the above basis that this appraisal has been undertaken, having regard in particular to the requirements of the adopted development plan policies and paragraphs 86, 87 and 89 of the NPPF.

2.8 In addition to the above, a consideration of the potential positive benefits of a discount foodstore in the town centre must also be included, and an exercise of weighing the impacts and positive benefits must then be undertaken not only by us, but also the decision makers at the Council.

2.9 Exploring the full extent of this impact and providing the associated advice as to the wider implications is the principal purpose of this commission. Indeed, if the impact is considered to be at a level which could potentially cause an existing store to close, then this would need to be explored very carefully, particularly given the current state and uncertainty of the commercial market. Furthermore, the town centre is experiencing a positive period of change, with more developments and improvements to come, and this future for Blackpool needs to be protected very carefully.

2.10 We firstly set out a brief commercial context to the assessment below, which summarises the key economic factors which may have an influence on the future delivery and performance of convenience operators on the market.

The Impact of Brexit and the Current State of the UK Economy

2.11 Subsequent to the referendum result in June 2016, which secured a majority vote for the UK to leave the European Union, it is generally accepted that the immediate future is still likely to be one of economic uncertainty with a consequential impact on consumer confidence and spending.

2.12 In the aftermath of Brexit, Experian published its Economic & Retail Update in February 2020, forecasting the following trends:

- The UK economy slowed over 2019, with growth sliding to a 7 year low by the end of the year.
- The period was dominated by heightened Brexit uncertainty and a weaker global economy.
- Business investment declined for the second year in a row and exports remained sluggish. Consumer spending also lost momentum, reflecting low confidence and lacklustre incomes growth.
- The outcome of the December general election has removed near-term political uncertainty and the risk of a no-deal Brexit, empowering the government to push forward with spending pledges and EU withdrawal plans.
- Latest indicators point to a pick up in business confidence and investment intentions.
- Housing market surveys suggest activity is rebounding and consumer sentiment has also improved.

Convenience Goods

2.13 Recent socio-economic conditions have led to significant shifts in convenience goods retailing, which have resulted in the 'big four' supermarket operators' market share being cut. Mintel[1] finds that the decline of the food superstore is well established and that this can be attributed to two issues.

2.14 Firstly, people are undertaking food shopping in different ways. More people are living in town and city centres and more people are having difficulties financing the purchase of their own home. Mintel

[1] 'UK Retail Rankings', Mintel, April 2016

indicates that such people are more likely to undertake food shopping on a 'as needs' basis and are more likely to eat out or use takeaways. As such, they are less likely to have need to undertake a 'main food shop'.

2.15 Secondly, the current uncertainty in the economy has made hard discounters (namely Aldi and Lidl) a more attractive proposition. Discounters have also made efforts to try to compete more directly with the 'big four' supermarket operators, with larger stores, greater ranges, fresh foods and premium products becoming increasingly prevalent. When analysing the performance of Aldi, Retail Economics[2] notes that it has **'attacked the heartland of UK grocery'** by undercutting the 'big four' with highly competitive prices and investing in more high quality premium produce. In a similar way, Lidl has also adopted an aggressive growth programme relating to its pricing, produce offer and store openings since 2013.

2.16 The move towards the middle ground has allowed discounters to secure market share from both superstores and smaller convenience stores. In addition, we note that discount retailers are often happy to trade alongside more upmarket convenience goods retailers (such as Marks & Spencer Foodhall) as, collectively, the two stores can meet many food shopping needs.

2.17 The shifts in the sector are illustrated with reference to changes in retailers' market share in recent years. The 'big four' grocers have closed some of their loss-making stores and larger stores have accommodated further concessions in order to take floorspace which is no longer required for the operators' main product range. By way of example, Sainsbury's is progressing with plans[3] to open around 250 Argos concessions within Sainsbury's foodstores. Other food superstores have welcomed additional concessions (including day to day services, such as dry cleaning and key cutting).

2.18 In April 2018, a proposed merger between Asda and Sainsbury's was announced, which had the potential to be one of the most significant structural changes affecting large format food retailing in recent times. However, the merger was considered by the Competition and Markets Authority ('CMA'), and a report published in April 2019 confirmed that the CMA found that UK shoppers and motorists would be worse off if the merger took place, due to expected price rises, reductions in the quality and

[2] 'UK Food and Grocery', Retail Economics, September 2015

[3] Article headlined 'Sainsbury's pushes ahead with Argos rollout in supermarkets', BBC News online, 13 April 2017

range of products available, or a poorer overall shopping experience. This final decision to block the deal follows the publication of the CMA's provisional findings and a subsequent consultation period, during which the CMA reviewed responses from a variety of interested parties, including Sainsbury's and Asda themselves.

2.19 Tesco has tried to take on the discounter market with its own operation, called Jack's, which launched in September 2018. It appears that the initial stores trading under the Jack's fascia will occupy former and proposed Tesco stores, which may allow the new operation to grow relatively quickly. Reports suggested that the initial plan was for around 60 Jack's stores to open across the UK, but the actual number was under ten by the end of 2019 with staff redundancies already taking place.

2.20 Discount operators continue to be generally optimistic in respect of their future growth. Aldi announced ambitious expansion plans in September 2019, with an aspiration to trade from around 1,300 stores by 2022[4]; a significant increase given it currently trades from around 959 stores in 2018. New figures from data, insights and consulting company Kantar show that the grocer saw a 10.6% year-on-year rush in sales to May 2019, seeing it attain a new record high market share of 8%, an increase from 7.3% during the same period last year.

2.21 Similarly, Lidl announced last year that its intention is to open at least one shop a week in forthcoming years[5]. Both operators are also seeking to significant expand within the M25, exploring new smaller formats to better meet the London market requirements and in turn generating thousands of new employment opportunities.

[4] Article headlined 'Aldi plans to open up to eight stores in some UK towns', The Guardian, 12 May 2017
[5] Article headlined 'Lidl to add 60 new shops a year in ambitious £1.5bn UK expansion plan, The Telegraph, 8 July 2017

3.0 Relevant Planning Policy and Background

Planning Policy Review

3.1 In order to shape the direction of this piece of work, it is helpful to understand relevant retail and town centre planning policy at a national and local level. As such, we first summarise national planning policy of relevance before briefly considering relevant development plan policy as set out in the Trafford Local Plan: Core Strategy. We also provide a summary of other relevant material policy consideration and a summary of emerging planning policy within Blackpool.

The Revised National Planning Policy Framework

3.2 The revised NPPF was published in February 2019. It sets out the Government's overarching policy objectives and, at paragraph 6, identifies that the purpose of the planning system is to contribute to the achievement of sustainable development.

3.3 Paragraph 8 indicates that there are three dimensions to sustainable development: economic, social and environmental. It goes on to identify that:

'These dimensions give rise to the need for the planning system to perform a number of roles:

- **an economic objective – to help build a strong, responsive and competitive economy, by ensuring that sufficient land of the right types is available in the right places and at the right time to support growth, innovation and improved productivity; and by identifying and coordinating the provision of infrastructure;**
- **a social objective – to support strong, vibrant and healthy communities, by ensuring that a sufficient number and range of homes can be provided to meet the needs of present and future generations; and by fostering a well-designed and safe built environment, with accessible services and open spaces that reflect current and future needs and support communities' health, social and cultural well-being; and**
- **an environmental objective – to contribute to protecting and enhancing our natural, built and historic environment; including making effective use of land, helping to improve biodiversity, using natural resources prudently, minimising waste and pollution, and mitigating and adapting to climate change, including moving to a low carbon economy.'**

3.4 Paragraph 11 sets out a presumption in favour of sustainable development. It indicates that:

'For decision-taking this means:

- **approving development proposals that accord with an up-to-date development plan without delay; or**
- **where there are no relevant development plan policies, or the policies which are most important for determining the application are out-of-date, granting permission unless:**
  - **the application of policies in this Framework that protect areas or assets of particular importance provides a clear reason for refusing the development proposed; or**
  - **any adverse impacts of doing so would significantly and demonstrably outweigh the benefits, when assessed against the policies in this Framework taken as a whole.'**

3.5 The Government's policies for delivering sustainable development are set out at Section 1 to 13 of the NPPF.

Section 7: Ensuring the Vitality of Town Centres

3.6 Paragraph 86 sets out the sequential approach to development that is to be applied to proposals for main town centre uses (including retail and food and drink uses) which are not in an existing centre and not in accordance with an up-to-date development plan. In terms of local planning authorities' consideration of such planning applications, paragraph 24 states that:

'They should require applications for main town centre uses to be located in town centres, then in edge of centre locations and only if suitable sites are not available should out of centre sites be considered. When considering edge of centre and out of centre proposals, preference should be given to accessible sites that are well connected to the town centre. Applicants and local planning authorities should demonstrate flexibility on issues such as format and scale.'

3.7 Paragraph 89 sets out a streamlined impact test which focuses on two particular issues. It states that:

'When assessing applications for retail, leisure and office development outside of town centres, which are not in accordance with an up-to-date Local Plan, local planning authorities should require an impact assessment if the development is over a proportionate, locally set floorspace threshold (if there is no locally set threshold, the default threshold is 2,500 sq.m). This should include assessment of:

- **the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and**
- **the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area, up to five years from the time the application is made. For major schemes where the full impact will not be realised in five years, the impact should also be assessed up to ten years from the time the application is made.'**

3.8 Paragraph 90 suggests that, where an application fails to satisfy the sequential test or is likely to have significant adverse impact, it should be refused.

3.9 A reading of paragraph 90 in isolation may give rise to the suggestion that it could act to set out two 'gateway' tests (a sequential test and an impact test), which have to be 'passed' before other considerations could be weighed in the balance. However, such an interpretation is contradictory both to the remainder of the NPPF – which gives primacy to the development plan where it is up to date – and to the key principle established by Section 38(6) of the Planning and Compulsory Purchase Act 2004 which requires both the positives and negatives of any application proposal to be considered before reaching a balanced decision. Notwithstanding this, it is accepted that whether a proposal complies with the requirements of the NPPF's sequential and impact tests will clearly be a material consideration to be afforded appropriate weight in the decision making process.

Town Centres and Retail Planning Practice Guidance

3.10 The now updated Town Centres Planning Practice Guidance ('the Town Centres PPG') was published in July 2019 and remains in place to provide additional direction in respect of how retail and town centre planning policy should be applied in respect of plan-making and decision taking.

3.11 Paragraph 006 of the Town Centres PPG identifies a series of key indicators of relevance in assessing the health of a centre over time. Paragraph 006 also states that not all successful town centre regeneration projects have been retail led or have involved significant new development. Improvements to the public realm, transport (including parking) and accessibility can also play important roles. Any strategy should identify relevant sites, actions and timescales through the development plan, and should be the subject of regular review.

3.12 Paragraph 009 indicates that the sequential test is of direct relevance to plan-making. It requires local planning authorities to consider the suitability, viability and availability of sites when considering sequentially preferable opportunities to accommodate additional development for main town centre uses.

Blackpool Local Plan Part 1: Core Strategy

3.13 Policy CS1 (Strategic Location of Development) of the Core Strategy sets out the overarching spatial focus for Blackpool as regeneration and supporting growth. It identifies three locations within the inner area of Blackpool as the focus for growth, development and investment, namely Blackpool town centre, the resort core and neighbourhoods within the inner areas. The three strategic sites within the town centre of Central Business District, Winter Gardens and Leisure Quarter are specifically identified. The policy further supports growth in South Blackpool.

3.14 Policy CS4 (Retail and Other Town Centre Uses) of the Core Strategy sets out the Council's retail strategy. The policy states:

In order to strengthen Blackpool Town Centre's role as the sub-regional centre for retail on the Fylde Coast, its vitality and viability will be safeguarded and improved by:

- **a. Focusing new major retail development in the town centre to strengthen the offer and improve the quality of the shopping experience; and**
- **b. The preparation and implementation of a Town Centre Strategy and Action Plan, working with stakeholders to arrest decline and restore confidence in the town centre.**

3.15 Policy CS19 relates to the Central Business District (Talbot Gateway) which the potential site allocation is likely to be located within or adjacent to. The Policy states:

1. **Comprehensive redevelopment of the Central Business District will be promoted and encouraged for mixed-use development which will become an important anchor for the north of the town centre; providing a welcoming arrival experience, connecting with the wider town centre and complementing its retail offer.**
2. **The following uses will be supported:**

a. **A public transport interchange around a re-modelled railway station and enhanced pedestrian environment**

b. **Retail development that supports the existing major foodstore, including cafes and restaurants**

c. **Offices**

d. **Police Headquarters**

e. **Law Courts**

f. **Improved public car park provision for the wider town centre**

g. **Hotels**

h. **Residential**

3. **In addition to new development, proposals to improve the appearance of existing buildings will be supported.**

Blackpool Town Centre Strategy

3.16 The Blackpool Town Centre Strategy was published in March 2013 and outlines a long-term vision for Blackpool town centre over the next 15-year period. The document establishes the town centre's strengths and weaknesses and identifies opportunities for change, priorities for improvement, as well as setting out a five-year action plan with delivery mechanisms.

3.17 The strategy aims to improve business confidence and encourage quality investment from both the private and public sectors, inform future decision making and co-ordinate town centre initiatives to achieve complementary improvements and assist with town centre promotion and marketing.

Relevant Findings of the Blackpool Retail, Leisure and Hotels Study 2018

3.18 The Blackpool Retail, Leisure and Hotels Study was published in June 2018. The Study draws on new empirical research in the form of a telephone survey of 1,150 households across the defined Study Area, which comprises 10 separate zones covering Blackpool Borough, and the adjacent local authority areas of Fylde and Wyre, to assess shopping and leisure patterns within the sub-region. The Study draws on the recommendations and strategy as set out in the previous evidence base documents, along with the policies and guidance as set out in the Core Strategy and the 2013 Town Centre Strategy.

3.19 The household survey, undertaken in October 2017, identified that Blackpool Borough claims a market share of 39.1% of available convenience goods expenditure, and 54.1% of available comparison goods expenditure which originates within the Study Area. The town centre however, claims a market share of 5.6% of available convenience goods expenditure and 30.2% of available comparison goods expenditure. This emphasises the strong level of draw of the destinations which lie within the Borough but which are located outside of the town centre.

3.20 The role of Blackpool town centre as a convenience retail destination for Study Area residents has remained broadly static since 2010, when Blackpool town centre achieved a market share of 5.6% (compared to 5.7% at 2017). However, we would have expected the new Sainsbury's supermarket that opened in the town centre at Talbot Road in 2014 to have increased the attraction and market share of Blackpool town centre for convenience retail shopping amongst the Study Area residents. This was a key prediction made by RTP in preparing the 2011 FCRS.

3.21 However, new foodstores that have also opened elsewhere in the Borough since 2010 (namely, the Aldi at Park Road), appears to have acted to cancel out any potential positive shift in spending to Blackpool town centre, along with an increase in popularity of discounters such as Aldi and Lidl given the reduction in available convenience expenditure. In short, whilst the new Sainsbury's has diverted trade to the town centre as evidenced by the shopping patterns in certain zones, the Aldi stores have also diverted trade from the town centre. In particular, the second most popular store for residents in Zone 1 is the Aldi at Park Road which attracts 11% of all main food shopping trips. These shopping trips demonstrate the attraction of certain operators (or 'brand loyalty') but also the desire of shoppers to meet their convenience shopping needs at the lowest priced stores.

3.22 In terms of Blackpool town centre, Houndshill Shopping Centre is functioning effectively and accommodates a range of modern retailers. However, following the shopping centre's extension in 2008, a number of retailers relocated from elsewhere within the Principal Retail Core which resulted in a number of vacancies, most notably along Bank Hey Street.

3.23 Bank Hey Street now comprises a number of discount and value stores such as Poundland, B&M

Bargains, Heron Foods and the Liquidation Stock Clearance. There are also a number of charity shops throughout the town centre. In terms of leisure services, Blackpool has a significant and in some respects unique offer reflecting its role as the UK's premier seaside resort, with this service sector playing a significant role in the composition of the town centre.

3.24 There are significant issues with vacancies and poor-quality retail stock in other parts of the Principal Retail Core. This is also true in more peripheral locations of the town centre, including at Bickerstaffe Square, where many retail and service units remain vacant since being developed in 2014. However, it is hoped that the second phase of the scheme will help to generate market interest in this location. Although significant investment is taking place within the town centre there are still clear areas of high vacancy rates and poor overall environmental quality, and it is this lack of consistency across the centre in terms of overall aesthetics and offer which needs to be addressed.

Recent Developments in Blackpool Town Centre

3.25 Blackpool's leisure facilities and tourism attractions continue to appear to be attracting considerable investment as 'traditional' retail continues to decline. Indeed, a number of new hotels are planned for the town and there are new attractions in the pipeline to support them, including the Blackpool Central Development and Blackpool Museum.

3.26 The Talbot Gateway scheme will see Wilko relocating to the three-storey extension to the Houndshill shopping centre, incorporating a new IMAX 'style' cinema and restaurant. The scheme in place of the existing Wilko store will be completed in 2022 and will include a Tramway terminus as art of an extended tramway to Blackpool North Railway Station along Talbot Road. These improvements to the strategic transport infrastructure, in addition to works on High Street to create a safer modern entrance to the station, will create a more accessible town centre and in particular around Talbot Gateway. In addition, the new Conference and Exhibition Centre is under construction and planned to open towards the end of 2020.

3.27 Up to four new hotels to suit a range of budgets are scheduled to open in the town centre over the next couple of years. A 150 room Premier Inn on the former Yates Wine Lodge in Talbot Square is now set to open in early 2020. Secondly, a 144 room 4 star Holiday Inn was approved on the site of the current Wilko on Talbot Road in 2017 and went out to tender in June 2019. The budget chain Easyhotel are planning to open their first site in the town on a vacant site on the Promenade, having gained planning permission in April 2019. It is expected that the hotel will open for business during the 2020/2021 financial year which would provide a significantly improved frontage to the Promenade. The first five star hotel in Blackpool, Sands Venue Resort, is expected to open in Summer 2020. Furthermore, a vacant site fronting Adelaide Street and Leopold Grove with outline planning permission for a five-storey 203 bedroom hotel is on the market currently.

3.28 Key leisure sites are also being progressed. Developer Nikal, Blackpool Council and Media Invest Entertainment are working together on Blackpool Central, a £300 million mixed use development on the Golden Mile incorporating leisure uses, a food hall, hotels and apartments set around a public square designed to stage events.[6] Its key tenant is anticipated to be the Chariot of The Gods Entertainment Park, a leisure concept based on the book of the same name. Alongside other attractions, Blackpool could soon be home to the world's first immersive flying theatre. A planning application is intended to submit to the Council in 2020.

3.29 A state of the art conference centre is scheduled to be completed towards the end of this year, adjacent to the Winter Gardens. Its floorspace will be 2,400sqm and when used in conjunction with the other venues in the complex, total capacity will be 7,000. The investment into the Winter Gardens and its expansion is expected to support a wide range of economic benefits for the town centre and wider Blackpool Borough. In particular, the increased capacity and wider offer of facilities is expected to generate a significant volume of increased visitors and associated expenditure, increased commercial activity and further private sector investment within the town centre. The message to the market is very much that 'Blackpool is open for business'. The conference centre will seek to attract professionals and businesses from across the UK and overseas, where the recent investment in the town centre's physical environment and visitor offer is expected to help re-establish positive perceptions of the town as a place to invest and do business.

3.30 Lastly, a new immersive, family-oriented museum - in partnership with the Victoria & Albert Museum in London - celebrating Blackpool's role as the UK's most popular seaside destination, is in the works.

[6] https://www.blackpool.gov.uk/Your-Council/Creating-a-better-Blackpool/Blackpool-Central/Blackpool-Central.aspx

In January 2020, the Council was awarded £75,000 from the Wolfson Foundation to be allocated to the museum and in June 2019 was allocated £4 million from the National Lottery Heritage Fund for the development of the Blackpool Museum Project. [7]

3.31 In addition to the above, further schemes to increase the office provision through the opportunity for a civil service hub have the potential to draw in an additional new office workers .

[7] https://www.liveblackpool.info/about/history/blackpool-museum/

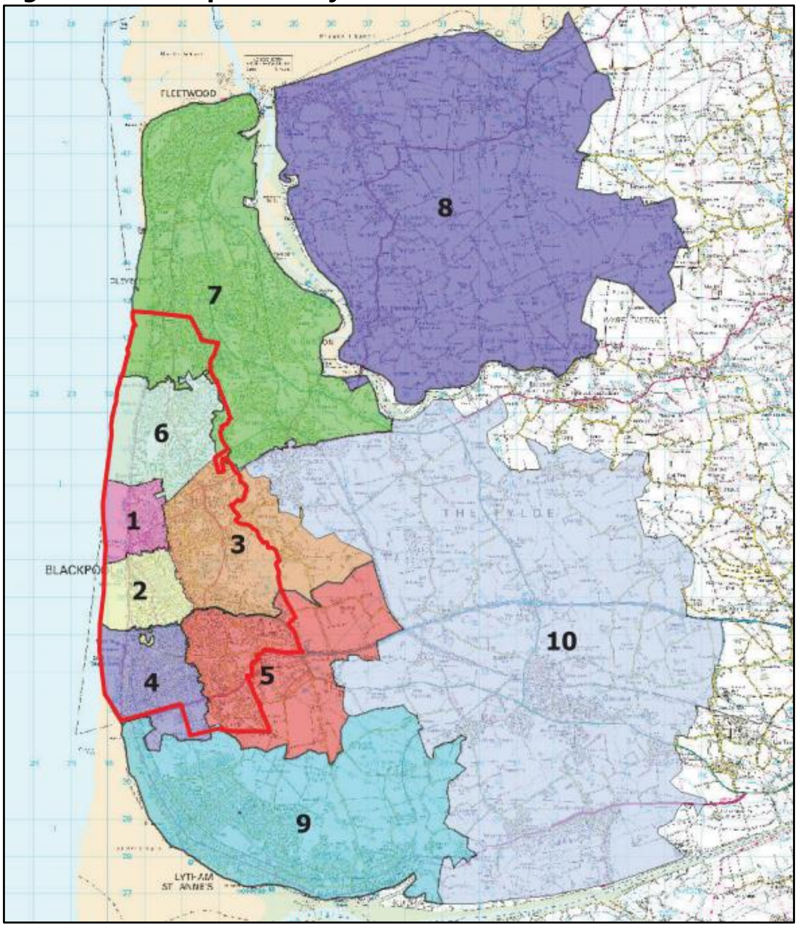
4.0 Update to the Baseline Position

Introduction

4.1 Nexus Planning has undertaken an update to the capacity assessment which formed the basis of the 2018 Study. The purpose of updating the assessment is to provide the most up-to-date position upon which the assessment of impact of the potential foodstore can be based on, through the calculation of turnovers of existing destinations within the Study Area, including the destinations within Blackpool town centre.

4.2 The updated assessment has utilised the household survey which was undertaken in October 2017, which surveyed a total of 1,150 households across ten zones.

Figure 4.1: Blackpool Study Area Plan



4.3 The defined Study Area (as shown in figure 4.1 above) has been broken down into ten different survey zones in accordance with postcode sectors in order to gain a comprehensive understanding of respondents' behaviour. The zones are representative of geographic areas that may accommodate broadly similar patterns of shopping behaviour.

4.4 Further details in relation to shopping patterns across the Borough and the market shares achieved by individual facilities are set out in the 2018 Retail, Leisure and Hotels Study.

Study Area Population

4.5 The population within each postcode sector and each zone at 2019 has been calculated using Experian Micromarketer G3 data (2017 estimate, which was issued in December 2018). Experian also models projected future increases in population, utilising Government population projections. Experian is a widely accepted source of population and expenditure data, and was the data source used in the 2018 Study.

4.6 Experian's data provides 2017 base year population estimates which accord with the findings of the 2011 Census release. Its methodology in calculating projected changes in population is based on a 'demographic component model', which takes into consideration birth and death rates, and net migration.

4.7 Population growth (and available expenditure) has been calculated at five year reporting intervals in order to appropriately assess the impact in accordance with guidance contained in the NPPF and the NPPG.

4.8 The first of these relates to the appropriate design year for 'impact testing' (for a future planning application for retail uses), with paragraph 017 of the Ensuring the Vitality of Town Centres Planning Practice Guidance ('the Town Centres PPG') indicating that this will typically comprise the second calendar year of trading of the subject proposal. In our experience, given the need to secure planning permission, discharge conditions and erect the proposal, this period often equates to around five years (i.e. 2024).

4.9 The second relates to the timeframe over which a local planning authority is now obliged to meet anticipated retail needs, which is identified by paragraph 85 of the revised NPPF as being **'…at least ten years ahead'** (i.e. 2029).

4.10 As a consequence, our assessment uses the reporting years 2024, 2029 and 2034. We set out Experian's population projections across each zone and each reporting period over the page at Table 4.1.

4.11 The table indicates that the Study Area population is projected to increase from 309,441 at 2019 to 317,632 at 2034, equating to an increase in population of 8,191 persons. Across Zones 1 to 6, which broadly accords with the Blackpool Borough Boundary, the population equates to 132,759 at 2019, increasing to 133,582 at 2034.

Table 4.1: Study Area Population by Survey Zone

	1	2	3	4	5	6	7	8	9	10	Total
2019	12,653	20,116	32,335	25,983	18,142	23,530	85,435	13,136	44,554	33,557	309,441
2024	12,625	20,026	32,514	25,956	18,172	23,376	86,519	13,365	45,325	34,463	312,341
2029	12,637	20,026	32,733	26,012	18,201	23,306	87,470	13,559	45,845	35,276	315,065
2034	12,792	20,121	33,059	26,075	18,301	23,234	88,214	13,645	46,247	35,944	317,632

Source: Table 1 of Appendix 1
Population derived from Experian MMG3 2018 data. See 2018 Blackpool Retail, Leisure and Hotels Study for full details

Retail Expenditure

4.12 In order to calculate per capita convenience and comparison goods expenditure, we again utilise Experian Micromarketer G3 data, which provides detailed information on local consumer expenditure that takes into consideration the socio-economic characteristics of the local population.

4.13 The base year for the Experian expenditure data is 2017. Our methodology takes account of the fact that at least some special forms of trading expenditure[8] will not available to support retail floorspace, and then allows for increases in per capita expenditure growth on an annual basis.

4.14 Figure 5 of Appendix 3 of ERPBN16 provides forecasts in respect of the proportion of convenience and comparison goods expenditure that will be committed through special forms of trading both now and

[8] Identified as comprising sales via the internet, mail order, stalls and markets, door-to-door and telephone sales (i.e. all expenditure not available to traditional retail floorspace)

in the future. We have 'stripped out' any survey responses which relate to expenditure committed via special forms of trading and have instead made an allowance derived from Experian's recommendation (which we consider to be the most appropriate means by which to account for such expenditure).

4.15 In considering special forms of trading, it should be noted that many products which are ordered online are actually sourced from a store's shelves or stockroom (particularly in the case of convenience goods). As such, expenditure committed in this manner acts to sustain shops and can be considered 'available' to support floorspace within the Study Area.

4.16 Accordingly, in order not to overstate the influence of special forms of trading on retailers, our methodology utilises Experian's 'adjusted' allowance for special forms of trading (which is provided at Figure 5 of ERPBN16). This allowance indicates that 3.4% of convenience goods expenditure and 15.5% of comparison goods expenditure is 'lost' to shops at base year 2017 through special forms of trading purchases.

4.17 The Office for National Statistics (ONS) collects data for SFT, comprising sales via the internet, mail order, stalls and markets, door-to-door and telephone sales. On-line sales by supermarkets, department stores and catalogue companies are all included. The ONS figure of internet sales plus their estimate of mail order and market/stalls sales is therefore a comprehensive estimate of SFT in retailing.

4.18 Having made allowance for special forms of trading, we then take account of projected changes in expenditure in accordance with the recommendations provided by Figure 6 of Appendix 3 of ERPBN16. Experian provides overall growth rates and 'adjusted' rates, which account for any additional increases in expenditure lost to special forms of trading.

4.19 By applying Experian's recommendations in respect of special forms of trading and expenditure growth, we are able to produce expenditure estimates for each survey zone and the Study Area as a whole at 2019, 2024, 2029 and 2034.

Convenience Goods Expenditure

4.20 Taking into account the Study Area resident population and the available per capita convenience goods expenditure, we estimate that £705.88m[9] of convenience goods expenditure originates within the Study Area at 2019. The below Table 4.2 indicates that available Study Area convenience goods expenditure is forecast to then increase to £725.21 at 2034.

4.21 Table 4.3 indicates that this represents a modest expenditure increase of £19.33m (or 2.7%) across the Study Area between 2019 and 2034. Given the static growth in per capita expenditure, this increase can be attributed to growth in the Study Area's population.

Table 4.2: Total Available Study Area Convenience Goods Expenditure

2019 (£m)	2024 (£m)	2029 (£m)	2034 (£m)
705.88	711.39	718.54	725.21

Source: Table 2a of Appendix 1
In 2017 prices

Table 4.3: Growth in Available Study Area Convenience Goods Expenditure

Growth 2019-24 (£m)	Growth 2019-29 (£m)	Growth 2019-34 (£m)
5.51	12.66	19.33

Source: Table 2a of Appendix 1
In 2017 prices

4.22 We note that the 2018 Study assumed that 78.9% of this expenditure would take the form of main food shopping and that 21.1% would take the form of 'top up' shopping (which relates to smaller purchases, often including staple items such as milk and bread). We believe that this ratio probably slightly overstates the proportion of the convenience goods shopping that is spent during main food shopping trips; as such, we instead assume that 75.0% of available convenience goods expenditure is committed through main food shopping trips and the remaining 25.0% as top up shopping.

4.23 By applying these assumptions, we estimate that main food shopping trips account for £529.41m of Study Area convenience goods expenditure at 2019, and top up shopping trips account for £176.47m.

[9] In 2017 prices, as is every subsequent monetary reference

General Approach to Estimating Need

4.24 Retail capacity modelling follows the basic principle that: *Available Expenditure* minus *Expected Turnover of Existing and Committed Floorspace* equals *Expenditure Surplus or Deficit*. We summarise the key considerations relating to each component of the equation below.

Available Expenditure

4.25 As we set out above, available expenditure within a zone is calculated by multiplying the population at a given reporting year by the estimated per capita expenditure. The available expenditure takes into consideration:

- estimated population growth;
- forecast increases in per capita expenditure; and
- forecast increases in special forms of trading.

Turnover

4.26 The turnover relates to the expenditure required by existing retailers (and by retail commitments benefitting from an extant planning permission) in order to ensure that they trade viably. For convenience goods retailers, the expected 'benchmark' turnover of existing convenience goods facilities in calculated with reference to GlobalData Convenience and Comparison Goods Sales Densities of Major Grocers 2018 and Mintel Retail Rankings 2018 data[10].

Surplus/Deficit

4.27 The expenditure surplus (or deficit) is calculated by subtracting the turnover of existing and committed floorspace from the available expenditure in the Blackpool authority area. A surplus figure effectively represents an under-provision of retail facilities within the Borough (which may indicate that additional floorspace could be supported), whereas a deficit would suggest a quantitative over-provision of retail floorspace.

[10] These datasets provide independent analysis of key grocery retailers' declared turnover and the overall floorspace in their portfolio in order to calculate national average sales densities

4.28 Although a surplus is presented as a monetary figure, it can be converted to a floorspace requirement through the application of an appropriate sales density. In this regard, the floorspace requirement will vary according to operator and the likely sales density they could achieve.

4.29 The turnover of destinations is generally considered with reference to retailers' net sales areas and all of the following floorspace figures relate to net sales areas.

Capacity for Future Convenience Goods Floorspace

4.30 In order to identify the likely need for additional convenience goods floorspace in Blackpool Borough, it is first necessary to consider the performance of the current provision. In this respect, the built up areas of Blackpool already accommodate a variety of foodstore operators. As such, we believe that many of the food shopping trips which originate within the Study Area, but are directed to facilities outside of Blackpool Borough, occur principally because the trip is convenient (i.e. close to home or work), rather than due to any significant deficiencies in Blackpool's offer. Consideration of convenience goods shopping patterns on a zone-by-zone basis does not suggest that there is a significant problem with shoppers driving significant distances outside the Borough to access convenience goods shopping facilities.

4.31 Based on the existing market share, we estimate that £284.6m of convenience goods expenditure which originates within the Study Area will be claimed by retailers in Blackpool at 2019. For each convenience goods retail destination, consideration has been given as to whether any of its turnover is likely to be derived as 'inflow' from outside the Study Area.

4.32 In this regard, we believe that the inflow assumptions adopted in the 2018 Study remain robust and continue to apply them for the purpose of this Update.

4.33 In total, assumed inflow accounts for £55.2m of convenience goods expenditure, which equates to 16.2% of the overall turnover of Blackpool's convenience goods floorspace. This takes the total turnover of such facilities to £339.7m at 2019.

4.34 For each convenience goods retail destination, the identified survey derived turnover is compared its expected benchmark performance (which is estimated with reference to company average sales densities and the estimated net sales areas of individual shops). Our assessment assumes a 'goods based' approach, which disaggregates expenditure by sector, as it is important to recognise that major foodstore operators generally also sell some comparison goods, such as clothing, household goods, books and CDs.

4.35 To account for this, the typical split between convenience and comparison goods provision for each operator has been identified[11] and this multiplier has been applied to the estimated net floorspace of each foodstore. This provides an indication of the likely floorspace dedicated to the sale of convenience goods at each store and provides for an accurate estimation of convenience goods benchmark turnover. The calculation of the estimated benchmark turnover of individual stores allows an assessment to be made in respect of individual retailers' trading performance and whether (on an aggregated basis) surplus expenditure exists to support additional floorspace. For smaller shops (where it is more difficult to collate accurate floorspace and sales density data), we assume that stores are trading 'in equilibrium' (i.e. the survey-derived turnover equates to the anticipated benchmark turnover).

4.36 As the below Table 4.6 demonstrates, the expenditure that is claimed by convenience goods commitments and implemented development acts to extinguish the majority of the identified Borough-wide capacity to support additional convenience goods floorspace in the period to 2034.

Table 4.6: Quantitative Need for Convenience Goods Floorspace in Blackpool Borough After Commitments

Year	Surplus (£m)	Commitments (£m)	Residual (£m)	Floorspace Requirement	
				Minimum (sq.m)	Maximum (sq.m)
2019	19.5	19.7	-0.3	0	0
2024	18.3	20.0	-1.7	-100	-200
2029	21.1	20.0	1.0	100	100
2034	24.3	20.0	4.3	300	600

Source: Table 6a of Appendix 1

Notes: Assumes constant market share (40.3%) of Study Area expenditure claimed by facilities in Borough; allows for changes in benchmark turnover sales efficiency in accordance with Table 4a of Experian Retail Planner Briefing Note 16; minimum floorspace requirement based on an assumed sales density of £12,580 per sq.m at 2019 (which equates to the average sales density of the 'big four' foodstore operators); maximum floorspace requirement based on an assumed sales density of £7,207 per sq.m at 2019 (which equates to the mid-point between the sales densities of Aldi and Lidl) In 2017 prices

[11] Generally sourced from GlobalData Convenience and Comparison Goods Sales Densities of Major Grocers 2018, except where we believe that this data is not likely representative of how a store trades in practice. Detailed notes in respect of our approach in calculating net convenience goods sales areas are provided at Table 5 of Appendix 4

5.0 The Impact Assessment

Application of the Impact Test

5.1 Paragraph 89 of the NPPF requires consideration of:

- the impact of the proposal on existing committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and
- the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and wider retail catchment (as applicable to the scale and nature of the scheme).

5.2 In considering the impact test, it is relevant to reflect on the direction provided at paragraph 017 of the NPPG, which identifies that a judgement as to whether likely adverse impacts are significant can only be reached in light of local circumstances.

The Health of Blackpool Town Centre

5.3 Whilst the 2018 Study is relatively recent, we have revisited the current state of the town centre, given the importance of this assessment. Our update on the health of the centre has taken account of recent developments, wider town centre improvements and the latest diversity of use figures provided by the Council's Policy and GIS team. Usefully, the GIS team has broken down the diversity figures within the town centre to the defined Principal Retail Area, Periphery Areas and overall town centre. This is particularly important given that the test of impact is to be considered in respect of the primary shopping area (and in the case of Blackpool, the Principal Retail Core) and that the extent of Blackpool town centre is substantial, so having a grasp of the health of the 'heart' of the centre is very important.

5.4 The Sainsbury's foodstore at Talbot Gateway is situated within the defined Town Centre Boundary but outside of the defined Principal Retail Core and as such is situated in an edge-of-centre location in terms of the NPPF definition. However, given its prominence, size and overall offer, it is an important destination which does function as part of the wider town centre offer.

5.5 As such, a consideration of the potential impact on edge of centre stores (particularly Sainsbury's in this case) is also an important part of the assessment given that a reduction in trade on an edge of centre store could also have implications on the overall proportion of footfall and associated linked-trips from the edge of centre store to the operators in the primary shopping area.

5.6 The 2018 Study concluded that Blackpool town centre - whilst being the principal retail, commercial and administrative centre in Blackpool Borough - is also a regional and national tourist destination. Key attractions such as the Blackpool Tower, Madame Tussauds and the Pleasure Beach (located to the south of the town) help to attract visitors to the town centre and wider Resort Core. There is the potential for this to be substantially expanded upon through the delivery of the Blackpool Central Site.

5.7 The Venuescore retail rankings place Blackpool as the seventh highest ranked retail destination in the North-West region and second in the Lancashire sub-region behind Preston. Blackpool's overall ranking in the national context has also increased in the 16/17 period against the 15/16 period by six places which appears to reflect positively on the town centre. However, we have established that this is simply attributed to other competing centres suffering from greater levels of decline in the context of the Venuescore methodology. Nevertheless, this still provides a helpful indication of Blackpool's position within a national hierarchy of town centres and the increase in the rankings does reflect positively on Blackpool in the context of Venuescore methodology.

5.8 Blackpool was found to contain a relatively high proportion of top national multiple retailers (as defined by Goad), all of which are located in the Principal Retail Core, two of which are of course M&S and Next (which are also key national multiples in other centres).

5.9 We have however found that the Houndshill Shopping Centre dominates the Principal Retail Core, with a number of retailers relocating to within it from elsewhere in recent years.

5.10 Indeed, peripheral parts of the town centre were found to have a considerably greater proportion of vacant units and poorer environmental quality, although it is not unusual for such areas to have benefitted from lower levels of investment than the primary shopping area. However, there are parts of the Principal Retail Core that also require investment to uplift environmental quality, in particular, Bank Hey Street and Church Street.

5.11 There remain a number of issues through the town centre, most notably a high, and above UK average vacancy rate and an overall mix of retail stock. The vacant unit plan at Appendix 3 shows clearly that the proportion of vacant units outside of the Principal Retail Core is high.

5.12 Although the vacancy rate within the Principal Retail Core is lower than the vacancy rate across the centre as a whole, this level is still substantially above what would be expected in a centre of Blackpool's size and above the UK average. Furthermore, some of the vacant units within the Principal Retail Core are large, and significantly detracts from the vitality and viability of the centre. It is important to note that the vacancy rate has also increased over the last three months, with the rate in the principal retail core in particular increasing by just under 2 percentage points since November 2019. This demonstrates the difficult times faced by Blackpool.

Table 5.1: Breakdown of Units within Blackpool Town Centre – Council Data

Area	Total Units [1]	Total Vacant Units	Vacancy Rate
Principal Retail Core - (Local Plan boundary based around Houndshill, Victoria Street, Bank Hey Street, Church Street, Corporation Street and Adelaide Street West)	161	24	14.9%
Town Centre Boundary – this relates to the Core Strategy found in the Local Plan but it excludes the Central Station site and Coral Island (as above but also including the Promenade, Springfield Road, Dickson Road, King Street, Cookson Street, Caunce Street and the new Talbot Gateway area)	638	153	24.0%

[1] Excluding the properties to the south of the Palatine Buildings; development sites (old Yates's site, Tower Street site, 35 Cookson Street site); internal units within Blackpool North Station & Sainsbury's; community sites (e.g. churches, libraries, schools etc.) and civic sites (e.g. Town Hall).
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5.13 As noted above, leisure services continue to play a significant role in Blackpool than they would in comparably-sized town centres across the country, however this is a result of the centre's tourism industry. As such encouraging increased leisure service uses within the centre could help to reduce the vacancy rate and increase footfall and the length of stay of residents and visitors, however efforts should also be made to maintain a strong, representative convenience and comparison retail offer in order for Blackpool to continue to attract shoppers.

5.14 In summary, it is anticipated that leisure will continue to be of significant importance to the town centre. Accordingly there should be careful efforts to ensure that a suitably diverse range of retailers and operators maintain a presence within the town centre to guarantee Blackpool remains vital and viable.

Impact of the Proposal on Public and Private Investment

5.15 The first part of the impact test requires an assessment of the potential impact of a proposal on planned and committed investment within defined centres. For a town centre scheme to be realistically considered as 'investment' for the purposes of the impact test, it must be suitably progressed.

5.16 Given that we are considering a potential opportunity site for discount foodstore which is likely to sit within the defined town centre boundary but outside of the defined primary shopping area, a consideration of the potential implications on the impact on investment principally within the primary shopping area will be of relevance.

5.17 There are a number of planned investments within Blackpool town centre, all of which are progressed to a stage which needs to be considered as part of the impact on investment test.

5.18 Most notably, are the schemes for the 142-bedroom hotel associated with the second phase of the Talbot Gateway Scheme (Ref. 17/0276), the extension to the Houndshill Shopping centre to provide a cinema, restaurant and additional retail unit to accommodate Wilkos (Ref. 17/0453), the development of a new conference centre at the Winter Gardens (Ref. 16/0363) and also the reconfiguration of the former Royal Mail Sorting Office to create retail, leisure and office space (Ref. 17/0504) which will potentially create modern purpose built retail/leisure units that are suitable to accommodate national multiple retailers. Indeed, there is unlikely to be a position where town centre schemes are more progressed and likely to come forward than in Blackpool's situation.

5.19 The Talbot Gateway Central Business District, within which the Sainsbury's is located and the area proposed for the foodstore, is now set to accommodate additional substantial office space, as part of the Council's strategy to increase footfall in the town centre and bring jobs back. The proposed development of a foodstore is likely to assist in increasing the footfall in the area and provide additional consumer choice for the local population.

5.20 Given the nature of the scheme being considered and the types of goods that the proposal will sell, we are of the view that it will provide a qualitatively different offer to the developments proposed in Blackpool town centre. As such, we do not consider that a foodstore could have a significant adverse impact on the planned and committed investment. Indeed, the proposal could assist in regenerating the remaining stages of Talbot Gateway, helping in continuing to regenerate this part of Blackpool town centre.

Impact of the Proposal on Town Centre Vitality and Viability

Assessment of Impact

5.21 In order to inform judgements in respect of the likely impact of proposals on established centres, it is necessary to consider the likely diversion of expenditure that may occur when the proposed development is implemented and trading patterns have been established. Whilst the NPPF sets out the second part of the impact test, paragraph 017 of the Town Centres PPG establishes a checklist for its application in practice.

5.22 The checklist identifies the following steps:

- establish the state of existing centres and the nature of current shopping patterns at base year;
- determine the appropriate time frame for assessing impact, focusing on impact in the first five years, as this is when most of the impact will occur;
- examine the 'no development' scenario;
- assess the proposal's turnover and trade draw;
- consider a range of plausible scenarios in assessing the impact of the proposal on existing centres and facilities;
- set out the likely impact of that proposal clearly, along with any associated assumptions or reasoning, including in respect of quantitative and qualitative issues; and
- any conclusions should be proportionate; for example, it may be sufficient to give a broad indication of the proportion of the proposal's trade derived from different centres and facilities in the catchment area and the likely consequences to the viability and vitality of existing centres.

5.23 Using the above checklist as a guide, we set out below our methodology and conclusions in respect of the retail impacts arising from the proposal. Detailed tables providing our step-by-step retail impact assessment comprise Appendix B of this Statement. In order to assist with the interpretation of our assessment, we provide a brief summary of the retail impact tables (and associated inputs) below at Table 5.1.

Table 5.1: Summary of Appendix B Retail Impact Tables

Table Reference	Summary of Information	Data Sources Utilised
Tables 1, 2 and 3	Study Area population and convenience and comparison goods expenditure by zone	Experian MMG3 2018 data report; allowances made to account for future growth of trading in accordance with recommendations of Experian Retail Planner Briefing Note 16.
Table 4	Convenience goods turnover and market share of relevant existing retail venues at 2019	Derived directly from the Blackpool Retail, Leisure and Hotels Study 2018 and updated using the latest Experian data report
Table 5	Estimated convenience and comparison goods turnover of discount foodstore (there are no commitments of relevance to the assessment)	Floorspace of proposal derived from submitted plans and application forms. Convenience goods sales densities derived from Mintel Retail Rankings 2018 and Verdict GlobalData Major Grocers Sales Densities 2018. The sales density is an average of Lidl and Aldi
Table 6	Assessment of trade draw and trade diversion on a zonal basis	We have undertaken the assessment of trade diversion on a zonal basis, adopting Zones 1 to 7 of the Blackpool Retail and Leisure Study 2018. The trade draw assumptions are based on existing stores' shopping patterns and Nexus' judgement based on the urban areas of the Borough, existing stores and where the store is likely to draw its trade from. Using the trade draw assumptions (as shown at Table 6a), we then apportion these to the existing shopping patterns within the Study Area. The existing shopping patterns have been weighted to reflect those stores from which we consider the development would divert trade from, based on a like-for-like assessment (i.e. the store is more likely to divert trade from other comparable larger format stores, given the similarities in the overall offer in these stores).
Table 7	Assessment of convenience goods trade diversion	Turnover of stores based on Table 4, with assumptions in respect of trade diversion taken from Table 6.

Establish the State of Existing Centres and the Nature of Current Shopping at Base Year

5.24 Our assessment estimates the turnover of existing centres at base year with reference to the quantitative need assessment provided in the 2018 Study.

5.25 In order to adopt an approach that is consistent with the 2018 Study, we have sourced up to date Experian MMG3 population and expenditure data[12] for those Study Area zones that surround or are proximate to Blackpool town centre; these being Zones 1 to 7, which form our extended catchment for

[12] Derived from a 2018 Experian MMG report

the proposal. We are of the view that the majority of the resident's trade will be drawn from these zones.

5.26 Table 1 of Appendix B of this Statement identifies the estimated population of each relevant zone at base year 2019 and design year 2024. Tables 2a and 2b of Appendix B identify the average per capita convenience and comparison goods expenditure which is available on a zonal basis at 2019 and 2024 (after an allowance has been made to account for increases in growth and expenditure committed through special forms of trading in accordance with the recommendations of Experian Retail Planner Briefing Note 16).

5.27 Having estimated the zonal population and the zonal per capita convenience and comparison goods expenditure, it is a straightforward exercise to calculate the overall pot of expenditure that exists to sustain retail facilities in the area. We set out this calculation at Tables 3a and 3b of Appendix B and provide a summary in Table 5.2 below.

Table 5.2: Estimated Catchment Area Convenience Goods Expenditure at 2019

Zone	1	2	3	4	5	6	7	Total
Per Capita Expenditure at 2019(£)	1,985	2,102	2,202	2,237	2,280	2,247	2,222	-
Population at 2019	12,653	20,116	32,335	25,983	18,142	23,530	85,435	**218,194**
Total Expenditure at 2019 (£m)	25.1	42.3	71.2	58.1	41.4	52.9	189.8	**480.8**

Note: Extract from Tables 1, 2a and 3a of Appendix B; 2017 prices

5.28 Table 5.2 identifies that a total of £480.8m[13] of convenience goods expenditure originates within the catchment area at 2019.

5.29 The zonal market shares secured by convenience goods retailers are used to apportion to the available expenditure and estimate the turnover of existing retail destinations. The turnover of convenience goods provision in the catchment area at 2019 is set out at Table 4 of Appendix B. It is important to note that the inflow of tourism expenditure is not included at Table 4 but is then included at Table 7 as part of the overall impact assessment.

[13] At 2017 prices, as is every subsequent monetary reference unless specified

5.30 In calculating the proportion of tourism expenditure directed to each of the convenience destinations within the Borough, we have taken account of the proportion of expenditure attracted by residents and applied this on a broad pro-rata basis. Whilst we consider this may slightly over-estimate the level of expenditure attracted to the larger foodstores in out of centre locations, it is clear that visitors to the Borough will stay at various visitor accommodation across area and will therefore use not only the town centre facilities but also the wider offer in the Borough

5.31 We summarise the estimated turnover of retail facilities in and around Blackpool town centre (i.e. those in Zone 1) on this basis below at Table 5.3.

Table 5.3: Turnover of Existing Destinations at 2024 – Zone 1

Destination	Estimated Convenience Turnover Derived from Catchment (£m)	Convenience Goods Inflow (£m)	Total (£m)
Zone 1			
Blackpool Town Centre	8.4	1.6	10.1
Sainsbury's, Talbot Road, Blackpool	22.2	4.3	26.5
Iceland, Topping Street, Blackpool	5.4	1.1	6.5
Marks & Spencer, Church Street, Blackpool	3.7	0.7	4.4
Co-op, Abingdon Street, Blackpool	0.8	0.2	1.0
Co-op, Warley Road, Blackpool	1.9	0.4	2.2
Local shops, Zone 1	0.5	0.1	0.5
Sub Total Zone 1	**42.9**	**8.3**	**51.2**

Note: Extract from Table 6 of Appendix B; 2017 prices

5.32 As such, we estimate that convenience operators within Zone 1 have a combined convenience turnover of £51.2m, based on up to date expenditure and population data, and the our methodology as outlined above. It is important to note that the Table above does not include the increase in turnover in Zone 1 which would be generated by the potential foodstore allocation.

5.33 Looking beyond Zone 1, principal convenience destinations which meet 'main food' shopping requirements include foodstores located in Zones 4 and 5, principally comprising the three Aldi stores at Blackpool Retail Park, Waterloo Road and Park Road, the Morrisons at Blackpool Retail Park, the Asda at Cherry Tree Road and the Tesco Extra at Clifton Road Retail Park, along with the Sainsbury's at

Red Bank Road in Zone 6 and the Aldi and Lidl at Cleveleys in Zone 7.

5.34 In assessing the potential impact a store may have on these existing destinations in the Borough, it is important to understand the current shopping patterns of those who may divert their trips to a new store should it come forward in the town centre. We set out in Table 5.4 below the principal convenience destinations for Zone 1 residents, of which we consider a considerable proportion of the turnover of the new foodstore would be drawn from.

5.35 In this regard, we can see from Table 5.4 that the principal destination for Zone 1 residents is the Sainsbury's on Talbot Road in Talbot Gateway which attracts 28% of the available expenditure in Zone 1, followed by the Lidl on Devonshire Road which attracts 11.1%. In total, 36.6% of the available expenditure generated by residents in Zone 1 is retained in Zone 1 (i.e. the retention rate).

Table 5.4: Principal Destinations Based on Existing Convenience Shopping Patterns for Zone 1 Residents (Total Expenditure)

Destination	Total Convenience Expenditure Attracted to Destination (£m)	Total Convenience Expenditure (% of available expenditure in Zone 1)
Sainsbury's Talbot Road, Blackpool	£7.0m	28.0%
Lidl, Devonshire Road, Blackpool	£2.8m	11.1%
Sainsbury's, Red Bank Road District Centre	£2.4m	9.7%
Aldi, Park Road, Blackpool	£2.2m	8.8%
Asda, Cherry Tree Road, Blackpool	£2.1m	8.4%
Tesco Extra, Clifton Retail Park	£1.5m	6.0%

Note: Extract from Table 6 of Appendix B; 2017 prices

Determine the Appropriate Time Frame for Assessing Impact

5.36 Paragraph 017 of the Town Centres PPG indicates that the design year for the testing of impact should equate to the year when the proposal has achieved a 'mature' trading pattern and that this is conventionally taken as the full second year of trading after the opening of a new retail development.

5.37 Given that this piece of work will be used to advise the Council in respect of the forthcoming Allocations DPD, the actual construction date of any potential foodstore cannot be determined at this stage.

5.38 However, given that there is a live requirement for new foodstores in Blackpool, and the Council's commitment to bring forward a scheme of this nature, we have assumed that a foodstore could likely commence trading at some point in 2022. In this regard, we believe that 2024 could represent the second complete year of trading and should therefore acts as the appropriate design year for the testing of impact.

Proposal Turnover and Trade Draw

5.39 In considering the impacts arising from the development, it is important to note that no specific retailer is formally associated with the proposed allocation and, as such, the unit could theoretically be occupied by a range of convenience operators. However, given the size of the proposed allocation site, the format of the store would be suited to a discount retailer (i.e. Aldi or Lidl).

5.40 We provide our estimate of the turnover of the potential store below at Table 5.5. It is assumed that the foodstore would have a net sales area of approximately 1,268 sq.m and that approximately 80% of the sales area would be dedicated to convenience goods sales (equating to 1,015 sq.m). The net floorspace is based on the company's typical business model operation across the country but there is the chance that given the town centre location of the potential store, it may be smaller than the average, and therefore any impacts assessed below may be less in practice. Furthermore, given the format of the foodstore, we have estimated its turnover based on the mid-point between the Aldi and Lidl company average sales densities as identified by Verdict GlobalData 2018.

5.41 On this basis, we estimate that the potential foodstore subject to the allocation would likely have a convenience goods turnover of up to £11.6m at 2024.

Table 5.5: Estimated Convenience Goods Turnover of Application Proposal at 2019 and 2024

Floorspace	Gross Internal Area (sq.m)	Net Convenience Goods Floorspace (sq.m)	Sales Density (£ per sq.m)	2019 Turnover (£m)	2024 Turnover (£m)
Convenience	1,951	1,015	11,500	11.7	11.6
Comparison		253	7,000	1.8	1.9

Note: Extract from Table 5 of Appendix B; 2017 prices

5.42 Given the limited turnover of the comparison goods floorspace proposed as part of the foodstore (which would equate to approximately £1.9m at 2024), we have not undertaken a full impact assessment of this element of the development. Any trade dive]rsion as a result of the proposed comparison floorspace would be spread over a number of destinations and would be of no material consequence and certainly would be unlikely to have a significant adverse impact on any individual destination or defined centres.

5.43 We have assessed the likely patterns of convenience goods trade diversion to the proposal having regard to existing trading patterns throughout the catchment and the principle identified at paragraph 017 of the Town Centres Planning Practice Guidance that **'Retail uses tend to compete with their most comparable competitive facilities'** (often referred to as 'like competes with like').

5.44 The zonal trade draw and trade diversion calculations are provided at Table 6a and 6b of Appendix B. These have been calculated by adopting assumed trade draw levels on a zonal basis, having regard to existing shopping patterns and where we consider the store will draw its trade from (i.e. where people will travel from to purchase goods from the store).

5.45 We have also applied a 'weighting' system to the market share of existing destinations, to ensure that the trade diversion assumptions reflect the fact that the proposal is more likely to divert trade from existing stores with a comparable offer.

Assessing the Impact of the Proposed Allocation

5.46 It is widely accepted that competing facilities with a similar offer, which are located close to the application proposal, are likely to be the subject of greater trade diversion impacts. In this regard, we believe that the greatest monetary diversion would be from the Sainsbury's in Zone 1 in Blackpool town centre, which attracts approximately 28.0% of main food trips from Retail & Leisure Study Zone 1 (within which the application site is situated). However, a substantial proportion of shopping trips in the area are also attracted to destinations outside of Zone 1, and in fact only 36.6% of the available expenditure in Zone 1 is retained in the zone. As such, whilst a proportion of the turnover will likely be diverted from the existing Sainsbury's, there are also a number of other stores across the catchment, principally located in out of centre locations, which will also likely be impacted upon as a result of the potential foodstore at Talbot Gateway.

5.47 Of particular importance when analysing the shopping patterns and locations from which trade may be diverted, is the absence of a discounter within Zone 1. Shoppers are willing to travel to ensure that they get a good deal on main food shopping and, as such, the proposal has the potential to 'claw back' trade which is being spent at existing discounters elsewhere within the catchment area. Indeed, as the summary of convenience commercial trends above sets out, the discount foodstores (Aldi and Lidl in particular) are trading exceptionally well despite the current commercial market. It is on this basis that the assessment and assumptions of trade diversion have been applied.

The Identified Likely Impact

5.48 Our detailed convenience goods trade diversion assessment is set out at Tables 6 and 7 of Appendix B; we provide a summary table below.

5.49 The greatest monetary diversion on stores within the town centre is expected to arise at the Sainsbury's at Talbot Gateway, from which we estimate that 20.2% or £2.4m of the proposal's turnover will be diverted. However, the highest level of impact is expected to be felt on the Lidl at Devonshire Road at -10.2%, which is an out of centre foodstore in policy terms and therefore does not afford any policy protection.

Table 5.6: Estimated Convenience Goods Impact Summary Table at 2024 – Zone 1

Destination	Estimated Convenience Goods Turnover (£m)	Trade Diversion to Proposal Foodstore (£m)	Post-Impact Turnover (£m)	Solus Impact of Proposal (%)
Zone 1				
Blackpool Town Centre	10.1	0.12	10.0	-1.2%
Sainsbury's, Talbot Road, Blackpool	26.5	2.36	24.1	-8.9%
Iceland, Topping Street, Blackpool	6.5	0.15	6.3	-2.3%
Marks & Spencer, Church Street, Blackpool	4.4	0.07	4.3	-1.5%
Co-op, Abingdon Street, Blackpool	1.0	0.01	1.0	-1.3%
Co-op, Warley Road, Blackpool	2.2	0.05	2.2	-2.1%
Local shops, Zone 1	0.5	0.04	0.5	-6.6%
Potential Foodstore Allocation	*11.6*	-	*11.6*	-
Sub Total Zone 1	**62.9**	**2.79**	**60.1**	**-4.4%**

Note: Extract from Table 8 of Appendix B; 2017 prices

5.50 Overall we estimate that 23.9% of the proposal's turnover will be diverted from existing destinations within Blackpool town centre, equating to £2.8m of the turnover of the store. However, when taking account of the increase in turnover associated with the potential store which will in effect add to the total convenience turnover of the town centre, the resulting impact on the total convenience turnover of the town centre would be -4.4%.

5.51 Based on existing shopping patterns within the catchment area and the likelihood that the proposal will divert trade from other similar discount operators elsewhere in the catchment, we believe that the proposal will also divert trade from the Lidl on Bloomfield Road, the Lidl on Devonshire Road and the three Aldi stores on Blackpool Retail Park, Parkinson Way Retail Park and Park Road.

5.52 Table 5.7 below provides the estimated levels of trade diversion from other key destinations within the wider Study Area. The Table indicates that the highest impact is expected to be felt on the existing Lidl store on Devonshire Road, Blackpool at -10.2%, which as we state above is an out-of-centre store in planning policy terms.

Table 5.7: Estimated Convenience Goods Impact Summary Table at 2024 - all other zones

Destination	Zone	Estimated Convenience Goods Turnover (£m)	Trade Diversion to Proposal Foodstore (£m)	Post-Impact Turnover (£m)	Solus Impact of Proposal (%)
Lidl, Bloomfield Road, Blackpool	2	8.2	0.36	7.8	-4.4%
Lidl, Devonshire Road, Blackpool	3	8.8	0.89	7.9	-10.2%
Aldi, Parkinson Way Retail Park, Waterloo Road, Blackpool	4	15.8	0.50	15.3	-3.1%
Aldi, Park Road, Blackpool	5	18.7	1.01	17.7	-5.4%
Asda, Cherry Tree Road, Blackpool	5	53.6	0.89	52.7	-1.7%
Tesco Extra, Clifton Road Retail Park, Sandhams Way, Blackpool	5	73.6	1.00	72.6	-1.4%
Sainsbury's, Red Bank Road District Centre, Blackpool	6	30.3	1.08	29.2	-3.6%
Aldi, Crescent West, Thornton-Cleveleys	7	36.1	0.42	35.6	-1.2%
Lidl, Anchorsholme Lane West, Thornton-Cleveleys	7	9.4	0.13	9.3	-1.4%

Note: Extract from Table 8 of Appendix B; 2017 prices

Overall Considerations in Respect of Trade Diversion Impact

5.53 The findings of the impact assessment have demonstrated that the highest impact is expected to be felt on the Lidl located on Devonshire Road in Zone 3 at -10.2%, followed by the Sainsbury's at Talbot Gateway in Zone 1 at -8.9%. These figures are based on assumptions made in respect of existing shopping patterns from the primary catchment area but also made on an assumption that expenditure will be diverted from stores of a similar nature to the proposal. In this regard, both stores are meeting resident's main food shopping needs within the Borough, and will therefore undoubtedly feel a substantial proportion of the trade diversion impacts. Other key stores include the Aldi foodstores on Parkinson Way and Park Road, which are estimated to feel an impact of approximately -3.1% and -5.4% respectively.

5.54 Looking in particular at the existing foodstores in the town centre, we do not consider that the impact on the existing Sainsbury's would be at a level which would be considered to be significant adverse. This is particularly the case given that the assessment of impact on the store is based on the convenience turnover only, and a relatively substantial proportion of turnover is also generated from the comparison floorspace in the store. When taken together, the overall impact on the store will reduce, given that a proposed discount foodstore will have a relatively low comparison turnover, particularly when compared to the Sainsbury's which also includes an Argos and Timpsons.

5.55 Furthermore, the proposal will ensure (in accordance with the aspirations of paragraph 89 of the NPPF) that there is greater consumer choice within the area by providing an alternative destination for residents to meet their main food shopping needs. Indeed, it is a common occurrence for one of the 'top four' convenience operators (Sainsbury's, Tesco, Asda and Morrisons) to be situated in proximity to a discounter (Aldi or Lidl) and trade very successfully. This is principally due to the relatively limited range and variety of goods in discounters (i.e. you can purchase one type of baked beans), and therefore, the requirement for shoppers to meet their needs in a range of shops. As such, given the cross-visitation between the two, such operators often trade well because of this proximity, and there are a number of examples across the country of this taking place[14].

[14] Examples include the Tesco and Lidl on Chester Road, Trafford, the Aldi and Sainsbury's in Eden Square Urmston and the Aldi and Sainsbury's at Bamber Bridge in Preston

5.56 By providing an additional store in the town centre through the allocation within the development plan, the Council is welcoming in a range of positive material benefits, which all need to be taken account of when weighing the balance of the proposal. In this regard, a new foodstore would:

- Deliver the successful redevelopment of a key town centre site, sending out the message that Blackpool is 'open for business' and seeking to diversify its offer to meet everyone's needs;
- Increase the level of available expenditure within the town centre and create additional opportunities to encourage linked-trips with existing operators in the centre;
- Diversify the overall convenience offer in Blackpool town centre, providing an alternative fascia to specifically meet the needs of the local demographic population; and
- Add to the overall range of operators available within walking distance of the range of business operations within the town centre, increasing choice.

5.57 The level of impact arising at other in-centre destinations is not considered to be such that it would materially impact upon any centre's role and general trading performance.

Conclusion in Respect of the Impact Test

5.58 The first part of the NPPF impact test relates to the impact of a proposal on existing, committed and planned public and private investment in centres. We are unaware of any investment in any centre which could be impacted or prejudiced by the application proposal. Indeed, the proposal will add to the Council's overall regeneration aspirations for the Talbot Gateway Central Business District.

5.59 The second part of the impact test relates to the vitality and viability of existing centres. We are of the view that no significant adverse impact would result from the proposal and that the application thereby accords with the provision of paragraph 89 and 90 of the NPPF. In addition, we note that NPPF paragraph 89 supports development which provides (as this development clearly would) for increased consumer choice.

6.0 Summary and Conclusions

6.1 Nexus Planning has been commissioned by Blackpool Borough Council ('the Council') to undertake an assessment of the potential implications of allocating a site in Blackpool town centre for the development of a discount foodstore. The commission follows the recommendations made in the Blackpool Retail, Leisure and Hotel Study 2018 (the '2018 Study'), which acknowledged the qualitative deficiency in respect of the convenience offer within Zones 1 and 2 of the Study Area (the detail of which we cover later in this report).

6.2 The purpose of this assessment was to provide the Council with the evidence to understand the implications on Blackpool town centre, should the preferred approach be to allocate a site for Class A1 convenience uses within the town centre boundary.

6.3 Our assessment has taken account of the existing provision of convenience operators in Blackpool town centre and the wider Borough, and provides a detailed analysis of existing shopping patterns from those residents who we consider would visit a new store should it be located in the town centre.

6.4 There is no doubt that a new convenience operator in Blackpool town centre would have implications on the turnovers of existing stores, in fact all retail proposals will have some impact on town centres given that they need to divert their trade from somewhere.

6.5 However, in assessing the merits of the proposal, or allocation in this case, the wider positive benefits need to be considered. In particular, a convenience store could deliver:

- The successful redevelopment of a key town centre site, sending out the message that Blackpool is 'open for business' and seeking to diversify its offer to meet everyone's needs;
- An increase the level of available expenditure within the town centre and create additional opportunities to encourage linked-trips with existing operators in the centre;
- A diversification of the overall convenience offer in Blackpool town centre, providing an alternative fascia to specifically meet the needs of the local demographic population; and

- An addition to the overall range of operators available within walking distance of the range of business operations within the town centre, increasing choice.

6.6 Furthermore, it is important to acknowledge that some additional expenditure is likely to be made available within the local area as a direct result of an additional workforce within the town centre following the construction of Talbot Gateway Phase 3, and the wider substantial tourism and commercial developments which will come forward in the short and medium term. As such, the impact assumptions may in fact be over-stated and the store will instead go someway to meet a local identified need for the additional footfall within the town centre.

6.7 Taking the above into account, the first part of the NPPF impact test relates to the impact of a proposal on existing, committed and planned public and private investment in centres. We are unaware of any investment in any centre which could be impacted or prejudiced by the application proposal.

6.8 The second part of the impact test relates to the vitality and viability of existing centres. We are of the view that no significant adverse impact would result from the proposal and that the application thereby accords with the provision of paragraph 89 and 90 of the NPPF. In addition, we note that NPPF paragraph 89 supports development which provides (as this development clearly would) for increased consumer choice.

Appendix A: Updated Quantitative Capacity Tables

NEXUS PLANNING
BLACKPOOL RETAIL STUDY - 2019 UPDATED TABLES

TABLE 1a: POPULATION WITHIN EACH ZONE OF STUDY AREA

Year	Population										
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Study Area
	Persons	Persons	Persons	Persons	Persons	Persons	Persons	Persons	Persons	Persons	Persons
2019	12,653	20,116	32,335	25,983	18,142	23,530	85,435	13,136	44,554	33,557	**309,441**
2024	12,625	20,026	32,514	25,956	18,172	23,376	86,519	13,365	45,325	34,463	**312,341**
2029	12,637	20,026	32,733	26,012	18,201	23,306	87,470	13,559	45,845	35,276	**315,065**
2034	12,792	20,121	33,059	26,075	18,301	23,234	88,214	13,645	46,247	35,944	**317,632**

TABLE 1b: PER CAPITA CONVENIENCE EXPENDITURE WITHIN EACH ZONE OF STUDY AREA

SFT	Year	Per Capita Convenience Expenditure									
		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10
		£ per Person	£ per Person	£ per Person	£ per Person	£ per Person	£ per Person	£ per Person	£ per Person	£ per Person	£ per Person
Including SFT	***2017***	*2,039*	*2,159*	*2,261*	*2,297*	*2,341*	*2,308*	*2,282*	*2,544*	*2,492*	*2,584*
Excluding SFT	***2017***	*1,970*	*2,086*	*2,184*	*2,219*	*2,261*	*2,230*	*2,204*	*2,458*	*2,407*	*2,496*
	2019	1,985	2,102	2,202	2,237	2,280	2,247	2,222	2,477	2,427	2,516
	2024	1,981	2,098	2,197	2,232	2,275	2,243	2,218	2,472	2,422	2,511
	2029	1,983	2,100	2,199	2,234	2,277	2,245	2,220	2,475	2,424	2,514
	2034	1,985	2,102	2,202	2,237	2,280	2,247	2,222	2,477	2,427	2,516

Notes:
a. Zones based on the following post code sectors
1 - FY1 1, FY1 2, FY1 3
2 - FY1 4, FY1 5, FY1 6
3 - FY3 0, FY3 7, FY3 8, FY3 9
4 - FY4 1, FY4 2, FY4 3
5 - FY4 4, FY4 5
6 - FY2 0, FY2 9
7 - FY5 1, FY5 2, FY5 3, FY5 4, FY5 5, FY6 7, FY7 6, FY7 7, FY7 8
8 - FY6 0, FY6 9, PR3 6
9 - FY8 1, FY8 2, FY8 3, FY8 4, FY8 5
10 - FY6 8, PR4 1, PR4 2, PR4 3
b. Per capita expenditure derived from Experian MMG3 2018 data
c. Population derived from Experian MMG3 2018 data
d. Per capita expenditure projected forward from 2016 using forecast growth rates taken from Figure 6 of Experian Retail Planner Briefing Note 16, December 2018
e. Expenditure excludes Special Forms of Trading in line with 'adjusted' allowance derived from Figure 5 of Experian Retail Planner Briefing Note 16
2017 Prices

TABLE 2a: TOTAL CONVENIENCE GOODS EXPENDITURE FOR EACH ZONE

	Year	CONVENIENCE GOODS EXPENDITURE										
		Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Zone 6 £m	Zone 7 £m	Zone 8 £m	Zone 9 £m	Zone 10 £m	Study Area £m
Total	**2019**	25.12	42.29	71.19	58.12	41.35	52.88	189.84	32.54	108.11	84.43	**705.88**
	2024	25.02	42.02	71.44	57.94	41.34	52.43	191.87	33.04	109.76	86.54	**711.39**
	2029	25.06	42.06	71.99	58.12	41.45	52.32	194.17	33.55	111.13	88.67	**718.54**
	2034	25.40	42.30	72.78	58.32	41.72	52.22	196.02	33.80	112.22	90.44	**725.21**
Growth	**2019-2024**	-0.11	-0.27	0.25	-0.18	-0.01	-0.45	2.02	0.50	1.65	2.11	**5.51**
	2019-2029	-0.06	-0.23	0.80	0.01	0.09	-0.56	4.33	1.01	3.02	4.24	**12.66**
	2019-2034	0.28	0.01	1.59	0.21	0.36	-0.67	6.17	1.26	4.11	6.01	**19.33**

TABLE 2b: CONVENIENCE GOODS EXPENDITURE SPLIT BETWEEN MAIN FOOD SHOPPING AND TOP-UP FOOD SHOPPING SPEND

		CONVENIENCE GOODS EXPENDITURE										
		Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Zone 6 £m	Zone 7 £m	Zone 8 £m	Zone 9 £m	Zone 10 £m	Study Area £m
2019	**Main Food**	18.84	31.72	53.39	43.59	31.02	39.66	142.38	24.41	81.08	63.33	**529.41**
	Top-up	6.28	10.57	17.80	14.53	10.34	13.22	47.46	8.14	27.03	21.11	**176.47**
	Total	**25.12**	**42.29**	**71.19**	**58.12**	**41.35**	**52.88**	**189.84**	**32.54**	**108.11**	**84.43**	**705.88**

Notes:

a. Total convenience goods expenditure derived by multiplying population within each zone (Table 1a) by per capita expenditure within each zone (Table 1b)

b. Convenience goods expenditure split between main food shopping and top-up food shopping derived from NEMS 2017 Household Survey (residents' typical weekly spend on main and top-up food shopping (Q18 and Q25A))

TABLE 3: STUDY AREA RESIDENTS' TRIPS (%) - CONVENIENCE GOODS 2019

Destination	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
	Main Food %	Top-up %	Main Food %	Top-up %	Main Food %	Top-up %	Main Food %	Top-up %	Main Food %	Top-up %	Main Food %	Top-up %	Main Food %	Top-up %	Main Food %	Top-up %	Main Food %	Top-up %	Main Food %	Top-up %
INSIDE STUDY AREA																				
Zone 1																				
Blackpool Town Centre	0.0	8.8	0.7	5.1	2.4	25.7	0.0	1.7	0.0	2.1	0.0	4.4	0.0	0.0	0.0	0.9	0.0	0.7	0.0	0.0
Sainsbury's, Talbot Road, Blackpool	28.1	27.7	9.6	2.6	6.9	2.6	0.0	0.0	0.7	0.0	7.7	3.1	1.2	1.7	4.8	0.5	0.0	0.0	0.4	0.0
Iceland, Topping Street, Blackpool	4.5	0.0	2.5	0.7	2.9	2.6	0.4	0.0	0.0	0.0	1.8	0.0	0.0	0.0	0.0	0.0	1.0	0.0	0.0	0.0
Marks & Spencer, Church Street, Blackpool	1.0	0.0	1.6	2.0	2.0	2.8	0.3	0.0	0.3	2.7	0.6	0.0	0.0	0.0	1.0	0.0	0.0	0.0	0.0	0.8
Co-op, Abingdon Street, Blackpool	0.3	0.0	0.0	2.9	0.0	0.0	0.0	1.2	0.0	2.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Co-op, Warley Road, Blackpool	0.7	0.9	0.0	0.0	0.0	1.0	0.0	0.0	0.0	0.0	0.0	11.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Local shops, Zone 1	0.0	5.1	0.0	1.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub Total Zone 1	**34.6**	**42.5**	**14.4**	**14.6**	**14.2**	**34.8**	**0.6**	**2.9**	**1.0**	**7.5**	**10.1**	**19.0**	**1.2**	**1.7**	**5.8**	**1.4**	**1.0**	**0.7**	**0.4**	**0.8**
Zone 2																				
Lidl, Bloomfield Road, Blackpool	0.8	0.0	10.8	9.3	0.7	2.4	1.2	1.5	2.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Tesco Express, Ansdell Road, Blackpool	0.0	0.0	0.3	12.8	0.0	0.0	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Tesco Express, Central Drive, Blackpool	0.0	0.0	0.8	5.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Local shops, Zone 2	0.0	0.0	0.0	13.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub Total Zone 2	**0.8**	**0.0**	**11.9**	**40.6**	**0.7**	**2.4**	**1.2**	**2.1**	**2.5**	**0.0**	**0.0**	**0.0**	**0.2**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**
Zone 3																				
Co-op, Layton Road, Blackpool	0.0	0.0	0.0	0.0	0.8	15.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Co-op, Normoss Road, Blackpool	0.0	0.0	0.0	0.0	0.0	13.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Layton District Centre	0.0	0.0	0.0	0.0	0.3	3.3	0.0	0.0	0.0	0.0	0.0	0.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Lidl, Devonshire Road, Blackpool	10.0	14.3	0.7	3.7	5.0	2.3	0.0	0.0	0.0	0.0	0.9	3.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Marks & Spencer, Blackpool Victoria Hospital, Whinney Heys Road, Blackpool	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sainsbury's Local, Whitegate Drive, Blackpool	0.0	1.8	0.3	2.0	0.4	1.8	0.4	12.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Tesco Express, Westcliffe Drive, Blackpool	0.3	4.2	0.0	0.0	0.7	0.7	0.0	0.0	0.0	0.0	0.0	0.8	0.0	0.0	0.0	0.0	0.0	0.0	4.2	0.0
Tesco Express, Whitegate Drive, Blackpool	0.0	2.1	0.7	5.8	0.6	0.5	0.0	0.0	0.0	0.0	0.0	3.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0
Whitegate Drive District Centre	0.0	0.0	0.0	1.3	0.8	2.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Local shops, Zone 3 (Blackpool)	0.0	3.2	0.0	0.0	0.0	1.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Local shops, Zone 3 (Fylde)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub Total Zone 3	**11.0**	**25.6**	**1.6**	**12.8**	**8.6**	**41.4**	**0.4**	**12.4**	**0.0**	**0.0**	**0.9**	**8.4**	**0.0**	**5.0**	**0.0**	**0.0**	**0.0**	**0.0**	**4.6**	**0.0**
Zone 4																				
Aldi, Blackpool Retail Park, Blackpool	0.0	0.0	0.0	0.0	0.0	0.0	16.8	12.0	2.6	18.8	0.0	0.0	0.3	0.0	0.0	0.0	0.6	0.3	0.0	0.0
Aldi, Parkinson Way Retail Park, Waterloo Road, Blackpool	1.2	0.0	12.1	6.3	6.8	0.0	3.8	0.6	7.4	2.0	0.0	0.0	0.3	0.0	0.0	0.0	0.3	0.0	0.0	0.0
Co-op, Harrowside, Blackpool	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Highfield Road District 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	0.0	0.0
Tesco Express, Highfield Road, Blackpool	0.0	0.0	0.0	0.0	0.0	0.0	0.6	11.4	0.0	2.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Waterloo Road/South Shore District 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	0.0	0.0
Iceland, Waterloo Road, Blackpool	0.0	0.0	1.6	0.0	0.0	0.0	3.0	1.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Tesco Express, Lytham Road, Blackpool	0.0	0.0	0.4	2.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Tesco Express, Marton Drive, Blackpool	0.0	0.0	0.0	3.1	0.3	0.0	0.5	15.3	0.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.3	0.0
Local shops, Zone 4 (Blackpool)	0.0	0.0	0.0	1.3	0.0	0.0	0.0	3.1	0.0	7.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.7	0.0	0.0
Morrisons, Squires Gate Lane, Blackpool	1.7	0.0	10.4	0.0	3.6	0.0	34.0	15.2	7.4	0.7	2.2	1.1	0.3	0.0	1.8	0.0	13.4	0.0	1.0	0.8
Sub Total Zone 4	**2.9**	**0.0**	**24.6**	**12.7**	**10.7**	**0.0**	**58.8**	**61.8**	**18.4**	**30.7**	**2.2**	**1.1**	**0.9**	**0.0**	**1.8**	**0.0**	**14.7**	**1.0**	**1.4**	**0.8**
Zone 5																				
Aldi, Park Road, Blackpool	11.2	1.6	8.4	9.3	10.8	0.7	2.4	6.6	3.3	3.4	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.6	0.0
Asda, Cherry Tree Road, Blackpool	9.8	4.2	11.5	2.6	18.2	7.9	11.7	2.5	47.5	14.4	3.0	1.6	0.5	0.3	0.0	0.0	1.1	2.1	3.6	0.0
Asda, Wellbeck Avenue, Blackpool	0.3	0.0	2.9	4.7	0.0	0.0	2.7	0.0	2.1	8.7	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0
Iceland, Vicarage Lane, Blackpool	0.8	0.0	0.0	1.3	0.0	0.0	2.1	1.5	1.5	5.5	1.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Tesco Extra, Clifton Road Retail Park, Sandhams Way, Blackpool	8.0	0.0	22.4	0.7	20.3	4.3	10.2	0.0	19.3	7.7	13.0	0.0	3.1	0.0	15.6	0.0	11.4	0.9	11.0	0.0
Vicarage Lane Commercial Area, Blackpool	0.0	0.0	0.0	0.0	0.0	0.7	0.0	0.0	0.0	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Local shops, Zone 5 (Blackpool)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	17.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub Total Zone 5	**30.1**	**5.8**	**45.2**	**18.6**	**49.3**	**13.5**	**29.1**	**10.5**	**73.6**	**57.8**	**18.1**	**1.6**	**3.6**	**0.3**	**15.6**	**0.0**	**12.7**	**3.0**	**15.2**	**0.0**
Zone 6																				
Bispham District Centre	0.0	3.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.1	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0
Co-op, Red Bank Road, Blackpool	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Devonshire Road, Blackpool	0.0	6.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Red Bank Road District 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	0.0	0.0
Sainsbury's, Red Bank Road District Centre, Blackpool	9.5	10.1	1.6	0.0	2.0	0.5	0.0	0.0	0.8	0.0	27.6	36.9	3.3	1.4	0.0	0.0	0.0	0.0	0.0	0.0
Tesco Express, All Hallows Road, Blackpool	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	11.2	0.3	1.8	0.0	0.0	0.0	0.0	0.3	0.0
Local shops, Zone 6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	4.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub Total Zone 6	**9.5**	**20.6**	**1.6**	**0.0**	**2.0**	**0.5**	**0.0**	**0.0**	**0.8**	**0.0**	**28.5**	**62.3**	**3.6**	**3.5**	**0.0**	**0.0**	**0.0**	**0.0**	**0.3**	**0.0**

Destination	Zone 1 Main Food %	Zone 1 Top-up %	Zone 2 Main Food %	Zone 2 Top-up %	Zone 3 Main Food %	Zone 3 Top-up %	Zone 4 Main Food %	Zone 4 Top-up %	Zone 5 Main Food %	Zone 5 Top-up %	Zone 6 Main Food %	Zone 6 Top-up %	Zone 7 Main Food %	Zone 7 Top-up %	Zone 8 Main Food %	Zone 8 Top-up %	Zone 9 Main Food %	Zone 9 Top-up %	Zone 10 Main Food %	Zone 10 Top-up %
Zone 7																				
Aldi, Crescent West, Thornton-Cleveleys	2.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	18.5	1.1	13.2	6.3	1.1	0.0	0.0	0.0	0.0	0.0
Aldi, Poulton Road, Fleetwood	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	8.7	3.1	2.3	0.6	0.0	0.0	0.0	0.0
Aldi, Tithebarn Street, Poulton-le-Fylde	0.8	0.0	0.3	0.0	0.6	0.0	0.0	0.0	0.0	0.0	2.9	0.0	5.0	0.6	20.9	0.6	0.0	0.0	2.9	5.3
Asda, Cop Lane, Fleetwood	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0	18.0	5.7	11.5	3.6	0.0	0.0	1.1	0.0
Booths, Teanlowe Centre, Blackpool Old Road, Poulton-le-Fylde	0.7	0.0	0.0	0.0	3.1	2.1	0.0	0.0	0.0	0.0	0.0	0.0	3.7	3.3	0.9	2.8	0.0	0.0	2.7	4.7
Cleveleys Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	1.1	0.4	3.7	0.0	0.0	0.0	0.0	0.0	0.0
Co-op, Fleetwood Road North, Thornton-Cleveleys	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	7.5	0.0	0.6	0.0	0.0	0.7	0.0
Co-op, Larkholme Parade, Fleetwood	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	7.2	0.0	0.0	0.0	0.0	0.0	2.3
Co-op, Thornton Centre, Victoria Road East, Thornton-Cleveleys	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.7	5.6	0.0	0.0	0.0	0.0	0.0	0.0
Fleetwood Town 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	2.6	0.0	0.0	0.0	0.0	0.0	0.0
Iceland, Lord Street, Fleetwood	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.6	1.1	1.3	0.0	0.0	0.0	0.0	0.0
Lidl, Anchorsholme Lane West, Thornton-Cleveleys	0.3	1.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.8	0.6	2.5	3.6	0.0	0.0	0.0	0.0	0.0	0.0
M&S Simply Food, Victoria Road West, Thornton-Cleveleys	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.1	0.9	2.8	0.6	1.3	0.0	0.0	0.7	0.0
Morrisons, Amounderness Way, Thornton-Cleveleys	2.1	2.1	0.0	0.0	1.9	1.2	0.4	0.0	0.0	0.0	6.7	1.0	22.2	5.6	13.5	1.4	0.0	0.0	0.3	0.0
Poulton-le-Fylde Town 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	4.8	0.0	5.3	0.0	0.0	0.0	2.8
Sainsbury's Local, Victoria Road West, Thornton-Cleveleys	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	2.3	0.0	0.0	0.0	0.0	0.0	0.0
Tesco Express, Garstang Road East, Poulton-le-Fylde	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.4	0.0	0.6	0.0	0.0	0.0	1.1
Tesco Express, Lighthouse Ford, Hatfield Avenue, Fleetwood	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	1.2	0.0	0.0	0.0	0.0	0.0	0.0
Tesco Express, Marsh Mill Village, Fleetwood Road North, Thornton-Cleveleys	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	1.8	0.6	0.0	0.0	0.0	0.0	0.0
Tesco Metro, Victoria Road West, Thornton-Cleveleys	0.0	0.0	0.0	0.7	3.1	0.0	0.0	0.0	0.0	0.0	0.4	0.0	1.6	1.7	0.0	0.0	0.0	0.0	0.0	0.0
Local shops, Zone 7 (Wyre)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	12.5	0.0	0.0	0.0	0.0	0.0	0.0
Sub Total Zone 7	**7.4**	**3.9**	**0.3**	**0.7**	**8.7**	**3.3**	**0.4**	**0.0**	**0.0**	**0.0**	**35.0**	**5.0**	**78.1**	**85.3**	**52.7**	**16.9**	**0.0**	**0.0**	**8.3**	**16.2**
Zone 8																				
Co-op, Lancaster Road, Poulton-le-Fylde	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.1	11.7	0.0	0.0	0.0	0.0
Co-op, Sandy Lane, Poulton-le-Fylde	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.9	15.4	0.0	0.0	0.0	0.0
Hambleton	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	10.4	0.0	0.0	0.0	0.0
Knott End-on-Sea	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.8	0.0	0.0	0.0	0.0
Pilling	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	11.6	0.0	0.0	0.0	0.0
Spar, Hambleton Service Station, Shard Lane, Hambleton	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.9	0.0	0.0	0.0	0.0
Spar, Lancaster Road, Knott End-on-Sea	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.4	0.9	0.0	0.0	0.0	0.0
Stalmine	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	11.3	0.0	0.0	0.0	0.0
Local shops, Zone 8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.6	3.3	0.0	0.0	0.0	0.0
Sub Total Zone 8	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**6.2**	**78.5**	**0.0**	**0.0**	**0.0**	**0.0**
Zone 9																				
Aldi, Clifton Drive North, Lytham St Annes	0.0	0.0	0.0	0.0	0.0	0.0	2.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	19.9	5.8	0.3	0.0
Booths, Haven Road, Lytham St Annes	0.0	0.0	0.0	0.0	0.0	0.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	10.2	1.9	0.3	1.6
Booths, Main Drive, Heyhouses Lane, Lytham St Annes	0.3	1.8	0.0	0.0	0.0	0.0	0.5	1.2	0.7	1.6	0.0	0.0	0.0	0.0	0.0	0.0	7.7	5.6	1.9	2.8
Co-op, Headroomgate Road, Lytham St Annes	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5	7.3	0.0	0.0
Co-op, Woodlands Road, Lytham St Annes	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	0.0	0.9	11.1	0.0	0.0
Lidl, Preston Road, Lytham St Annes	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.9	4.9	1.2	0.8
Local shops, Lytham St Annes	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.9	0.0	0.0
Lytham Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.1	0.0	1.6
Lytham/St Annes Town Centre	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	0.0	0.0	0.0	5.1	0.0	0.0
M&S Simply Food, Clifton Drive South, Lytham St Annes	0.0	0.0	0.0	0.0	0.5	0.0	0.5	3.3	0.5	0.9	0.0	0.0	0.0	0.0	0.0	0.0	4.1	3.2	0.3	0.0
Sainsbury's Local, Clifton Street, Lytham St Annes	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.4	24.5	0.0	0.8
Sainsbury's, St Andrews Road North, Lytham St Annes	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	12.2	5.5	0.0	0.0
Spar, Whalley Place, Lytham St. Annes	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.4	0.0	0.0
Tesco Express, Clifton Street, Lytham St Annes	0.6	0.0	0.0	0.0	1.2	1.3	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.6	4.4	0.3	1.1
Tesco Express, Kilnhouse Lane, Lytham St Annes	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0
Tesco Express, St Annes Road West, Lytham St Annes	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	0.0	0.8
Tesco Express, St Davids Road North, Lytham St Annes	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.5	0.0	0.0
Sub Total Zone 9	**1.0**	**1.8**	**0.0**	**0.0**	**1.7**	**2.2**	**3.8**	**8.7**	**1.1**	**4.1**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**67.4**	**94.4**	**4.4**	**9.7**
Zone 10																				
Aldi, Mill Farm Sports Village, Coronation Way, Wesham	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	0.0	0.0	0.0	0.0	0.0	0.0	0.5	18.4	1.1
Co-op, Lytham Road, Freckleton	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.7	3.1
Co-op, Market Square, Kirkham	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.1
Co-op, Weeton Road, Wesham	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.7	5.5
Freckleton	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.7
Kirkham Town 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	0.0	5.9
Lidl, Clarke Street, Poulton-le-Fylde	1.6	0.0	0.0	0.0	2.6	1.2	0.4	0.0	0.0	0.0	3.8	1.6	11.2	4.2	2.0	0.5	0.0	0.0	4.3	5.2
Morrisons, Mill Street, Kirkham	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.6	0.0	19.5	22.3
Sainsbury's Local, Euro Garages, Coronation Way, Wesham	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0
Local shops, Zone 10	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.6
Sub Total Zone 10	**1.6**	**0.0**	**0.0**	**0.0**	**2.6**	**1.2**	**0.7**	**0.0**	**0.0**	**0.0**	**4.7**	**1.6**	**11.2**	**4.2**	**2.3**	**0.5**	**0.6**	**0.5**	**43.9**	**52.6**
SUB-TOTAL BLACKPOOL BOROUGH	**87.6**	**96.1**	**88.9**	**99.3**	**81.9**	**92.6**	**56.0**	**74.4**	**88.8**	**95.2**	**63.5**	**91.8**	**11.7**	**9.1**	**21.3**	**1.4**	**15.0**	**4.7**	**20.9**	**0.8**
SUB TOTAL INSIDE STUDY AREA	**99.0**	**100.0**	**99.7**	**100.0**	**98.5**	**99.3**	**94.9**	**98.3**	**97.4**	**100.0**	**99.6**	**98.9**	**98.8**	**100.0**	**84.2**	**97.3**	**96.4**	**99.5**	**78.5**	**80.1**
																	3.6		9.9	

	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Destination	**Main Food %**	**Top-up %**	**Main Food %**	**Top-up %**	**Main Food %**	**Top-up %**	**Main Food %**	**Top-up %**	**Main Food %**	**Top-up %**	**Main Food %**	**Top-up %**	**Main Food %**	**Top-up %**	**Main Food %**	**Top-up %**	**Main Food %**	**Top-up %**	**Main Food %**	**Top-up %**
OUTSIDE STUDY AREA																				
Outside Study Area - Lancaster District																				
Lancaster 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	0.5	0.0	0.0	0.0	0.0
Morrisons, Central Drive Retail Park, Central Drive, Morecambe	0.3	0.0	0.0	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	0.0	0.0	0.0	0.0
Sainsbury's, Cable Street, Lancaster	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.3	0.0	0.0	0.0	0.0	0.0
Sub Total Outside Study Area - Lancaster District	**0.3**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**1.1**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**1.3**	**0.5**	**0.0**	**0.0**	**0.0**	**0.0**
Outside Study Area - Manchester																				
Greater Manchester	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub Total Outside Study Area - Manchester	**0.3**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**
Outside Study Area - Preston District																				
Aldi, Corporation Street Retail Park, Corporation Street, Preston	0.0	0.0	0.0	0.0	0.0	0.0	0.4	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
Aldi, Deepdale Retail Park, Blackpool Road, Preston	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.5	0.0
Asda, Pittman Way, Preston	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	1.1
Co-op, Norbreck Drive, Preston	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Iceland, Market Street, Preston	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.0	0.0
Lidl, New Hall Lane, Preston	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	0.0	0.0	0.0	0.0	0.4	0.0
Lidl, West Strand, Preston	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0
Marks & Spencer, Fishergate, Preston	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.0	0.0	0.0
Morrisons, Blackpool Road, Preston	0.3	0.0	0.0	0.0	0.0	0.0	2.3	0.0	0.7	0.0	0.0	0.0	0.4	0.0	0.0	0.0	2.0	0.0	6.8	0.8
Morrisons, Riverside Retail Park, Mariners Way, Preston	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.3	0.0	0.3	0.0	4.2	5.0
Preston 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	1.3	0.0	0.0	0.0	0.0
Sainsbury's, Flintoff Way, Preston	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0
Tesco Express, Blackpool Road, Preston	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	0.0	0.0	0.0	0.0	0.3	0.0
Tesco Express, Church Street, Preston	0.0	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	0.0	0.0	0.0	0.0	0.0
Tesco Express, Longsands Lane, Preston	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0
Sub Total Outside Study Area - Preston District	**0.3**	**0.0**	**0.3**	**0.0**	**0.0**	**0.0**	**3.8**	**1.7**	**2.3**	**0.0**	**0.4**	**0.0**	**0.4**	**0.0**	**0.8**	**1.3**	**3.1**	**0.5**	**18.1**	**7.0**
Outside Study Area - South Ribble District																				
Aldi, Cuerden Way, Preston	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.8	0.0	0.0	0.0	0.0	0.0
Aldi, Towngate, Leyland	0.0	0.0	0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Booths, Liverpool Road, Preston	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.6	0.0	0.0	0.0	0.0	0.0	1.1	0.0
Lidl, Churchill Way Development, Churchill Way, Leyland	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.9
Liverpool Road, Penwortham District Centre	0.0	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	0.0	0.0	0.0	0.0	0.0	0.0
Morrisons, Olympian Way Retail Park, Olympian Way, Leyland	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	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Morrisons, Station Road, Preston	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.7	0.0
Sainsbury's Local, Birch Avenue, Preston	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sainsbury's, Cuerden Way, Preston	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	1.1
Tesco Express, Canberra Road, Leyland	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	0.0	0.0	0.0	0.0	0.0	0.0
Waitrose, Capitol Centre Retail Park, Preston	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	0.0	0.0	0.0	0.0	0.0
Sub Total Outside Study Area - South Ribble District	**0.0**	**0.0**	**0.0**	**0.0**	**0.8**	**0.7**	**0.3**	**0.0**	**0.3**	**0.0**	**0.0**	**1.1**	**0.6**	**0.0**	**0.8**	**0.0**	**0.0**	**0.0**	**2.1**	**5.0**
Outside Study Area - Wyre District																				
Aldi, Moss Lane, Preston	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	7.8	0.9	0.0	0.0	1.0	1.1
Booths, Park Hill Road, Preston	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	1.2	0.0	0.0	0.0	0.0	0.0
Great Eccleston	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.8
Sainsbury's, Park Hill Road, Preston	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.8	0.0	0.0	0.0	0.0	0.0
Sub Total Outside Study Area - Wyre District	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.2**	**0.0**	**12.9**	**0.9**	**0.0**	**0.0**	**1.0**	**7.9**
Outside Study Area - Other																				
Cumbria	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.0	0.3	0.0
Wales	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	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub Total Outside Study Area - Other	**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**	**0.0**	**0.0**	**0.0**	**0.5**	**0.0**	**0.3**	**0.0**
SUB TOTAL OUTSIDE STUDY AREA	**1.0**	**0.0**	**0.3**	**0.0**	**1.5**	**0.7**	**5.1**	**1.7**	**2.6**	**0.0**	**0.4**	**1.1**	**1.2**	**0.0**	**15.8**	**2.7**	**3.6**	**0.5**	**21.5**	**19.9**
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**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Notes:

a. Market shares for 'main' and 'top-up' shopping derived directly from NEMS 2017 Household Survey

b. Excludes 'don't know/varies', markets and internet sales

c. Red indicates destination in Blackpool Borough

TABLE 4: STUDY AREA RESIDENTS' EXPENDITURE (£m) - CONVENIENCE GOODS 2019

Destination	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Study Area	
	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	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	Main Food £m	Top-up £m
INSIDE STUDY AREA																						
Zone 1																						
Blackpool Town Centre	0.00	0.55	0.21	0.54	1.25	4.58	0.00	0.24	0.00	0.22	0.00	0.58	0.00	0.00	0.00	0.08	0.00	0.18	0.00	0.00	**1.46**	**6.97**
Sainsbury's, Talbot Road, Blackpool	5.29	1.74	3.05	0.28	3.71	0.47	0.00	0.00	0.21	0.00	3.05	0.41	1.72	0.78	1.16	0.04	0.00	0.00	0.28	0.00	**18.47**	**3.72**
Iceland, Topping Street, Blackpool	0.85	0.00	0.79	0.07	1.56	0.47	0.16	0.00	0.00	0.00	0.71	0.00	0.00	0.00	0.00	0.00	0.81	0.00	0.00	0.00	**4.89**	**0.54**
Marks & Spencer, Church Street, Blackpool	0.19	0.00	0.52	0.21	1.08	0.51	0.12	0.00	0.10	0.28	0.25	0.00	0.00	0.00	0.25	0.00	0.00	0.00	0.00	0.17	**2.52**	**1.17**
Co-op, Abingdon Street, Blackpool	0.06	0.00	0.00	0.31	0.00	0.00	0.00	0.18	0.00	0.28	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.06**	**0.76**
Co-op, Warley Road, Blackpool	0.13	0.06	0.00	0.00	0.00	0.17	0.00	0.00	0.00	0.00	0.00	1.52	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.13**	**1.75**
Local shops, Zone 1	0.00	0.32	0.00	0.14	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.00**	**0.46**
Sub Total Zone 1	**6.53**	**2.67**	**4.57**	**1.54**	**7.61**	**6.19**	**0.28**	**0.42**	**0.31**	**0.77**	**4.02**	**2.51**	**1.72**	**0.78**	**1.41**	**0.11**	**0.81**	**0.18**	**0.28**	**0.17**	**27.54**	**15.36**
Zone 2																						
Lidl, Bloomfield Road, Blackpool	0.15	0.00	3.43	0.99	0.37	0.43	0.51	0.21	0.77	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**5.23**	**1.63**
Tesco Express, Ansdell Road, Blackpool	0.00	0.00	0.10	1.36	0.00	0.00	0.00	0.09	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.10**	**1.45**
Tesco Express, Central Drive, Blackpool	0.00	0.00	0.25	0.54	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.26	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.51**	**0.54**
Local shops, Zone 2	0.00	0.00	0.00	1.41	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.00**	**1.41**
Sub Total Zone 2	**0.15**	**0.00**	**3.78**	**4.30**	**0.37**	**0.43**	**0.51**	**0.30**	**0.77**	**0.00**	**0.00**	**0.00**	**0.26**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**5.84**	**5.03**
Zone 3																						
Co-op, Layton Road, Blackpool	0.00	0.00	0.00	0.00	0.43	2.75	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.43**	**2.75**
Co-op, Normoss Road, Blackpool	0.00	0.00	0.00	0.00	0.00	2.36	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.00**	**2.36**
Layton District Centre	0.00	0.00	0.00	0.00	0.15	0.59	0.00	0.00	0.00	0.00	0.00	0.10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.15**	**0.69**
Lidl, Devonshire Road, Blackpool	1.89	0.90	0.21	0.39	2.67	0.41	0.00	0.00	0.00	0.00	0.37	0.50	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**5.14**	**2.21**
Marks & Spencer, Blackpool Victoria Hospital, Whinney Heys Road, Blackpool	0.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.13**	**0.00**
Sainsbury's Local, Whitegate Drive, Blackpool	0.00	0.11	0.10	0.21	0.21	0.33	0.16	1.81	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.47**	**2.45**
Tesco Express, Westcliffe Drive, Blackpool	0.06	0.26	0.00	0.00	0.37	0.12	0.00	0.00	0.00	0.00	0.00	0.10	0.00	0.00	0.00	0.00	0.00	0.00	2.64	0.00	**3.07**	**0.48**
Tesco Express, Whitegate Drive, Blackpool	0.00	0.13	0.21	0.61	0.31	0.09	0.00	0.00	0.00	0.00	0.00	0.40	0.00	0.00	0.00	0.00	0.00	0.00	0.28	0.00	**0.80**	**1.23**
Whitegate Drive District Centre	0.00	0.00	0.00	0.14	0.42	0.41	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.42**	**0.55**
Local shops, Zone 3 (Blackpool)	0.00	0.20	0.00	0.00	0.00	0.31	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.00**	**0.51**
Local shops, Zone 3 (Fylde)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.36	0.00	0.00	0.00	0.00	0.00	0.00	**0.00**	**2.36**
Sub Total Zone 3	**2.08**	**1.61**	**0.52**	**1.35**	**4.57**	**7.37**	**0.16**	**1.81**	**0.00**	**0.00**	**0.37**	**1.11**	**0.00**	**2.36**	**0.00**	**0.00**	**0.00**	**0.00**	**2.93**	**0.00**	**10.63**	**15.60**
Zone 4																						
Aldi, Blackpool Retail Park, Blackpool	0.00	0.00	0.00	0.00	0.00	0.00	7.34	1.75	0.81	1.95	0.00	0.00	0.45	0.00	0.00	0.00	0.51	0.09	0.00	0.00	**9.11**	**3.78**
Aldi, Parkinson Way Retail Park, Waterloo Road, Blackpool	0.22	0.00	3.84	0.66	3.62	0.00	1.67	0.09	2.31	0.21	0.00	0.00	0.38	0.00	0.00	0.00	0.23	0.00	0.00	0.00	**12.28**	**0.96**
Co-op, Harrowside, Blackpool	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.32	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.00**	**0.32**
Highfield Road District Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.00**	**0.00**
Tesco Express, Highfield Road, Blackpool	0.00	0.00	0.00	0.00	0.00	0.00	0.28	1.66	0.00	0.21	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.28**	**1.86**
Waterloo Road/South Shore District Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.00**	**0.00**
Iceland, Waterloo Road, Blackpool	0.00	0.00	0.52	0.00	0.00	0.00	1.29	0.27	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**1.81**	**0.27**
Tesco Express, Lytham Road, Blackpool	0.00	0.00	0.14	0.21	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.14**	**0.21**
Tesco Express, Marton Drive, Blackpool	0.00	0.00	0.00	0.33	0.15	0.00	0.23	2.23	0.29	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.23	0.00	0.21	0.00	**1.12**	**2.56**
Local shops, Zone 4 (Blackpool)	0.00	0.00	0.00	0.14	0.00	0.00	0.00	0.45	0.00	0.74	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.18	0.00	0.00	**0.00**	**1.51**
Morrisons, Squires Gate Lane, Blackpool	0.32	0.00	3.30	0.00	1.93	0.00	14.81	2.21	2.31	0.07	0.89	0.15	0.45	0.00	0.43	0.00	10.90	0.00	0.66	0.17	**35.99**	**2.61**
Sub Total Zone 4	**0.54**	**0.00**	**7.80**	**1.34**	**5.71**	**0.00**	**25.62**	**8.97**	**5.72**	**3.17**	**0.89**	**0.15**	**1.28**	**0.00**	**0.43**	**0.00**	**11.88**	**0.27**	**0.87**	**0.17**	**60.73**	**14.08**
Zone 5																						
Aldi, Park Road, Blackpool	2.11	0.10	2.66	0.98	5.76	0.12	1.06	0.96	1.01	0.35	0.17	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.37	0.00	**13.14**	**2.51**
Asda, Cherry Tree Road, Blackpool	1.84	0.26	3.66	0.28	9.73	1.40	5.09	0.36	14.72	1.49	1.20	0.21	0.71	0.16	0.00	0.00	0.88	0.57	2.30	0.00	**40.13**	**4.72**
Asda, Wellbeck Avenue, Blackpool	0.06	0.00	0.91	0.50	0.00	0.00	1.18	0.00	0.64	0.90	0.00	0.00	0.00	0.00	0.00	0.00	0.23	0.00	0.00	0.00	**3.03**	**1.40**
Iceland, Vicarage Lane, Blackpool	0.15	0.00	0.00	0.14	0.00	0.00	0.90	0.21	0.48	0.57	0.67	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**2.20**	**0.92**
Tesco Extra, Clifton Road Retail Park, Sandhams Way, Blackpool	1.50	0.00	7.11	0.07	10.84	0.76	4.45	0.00	5.97	0.79	5.15	0.00	4.47	0.00	3.80	0.00	9.22	0.25	6.95	0.00	**59.46**	**1.87**
Vicarage Lane Commercial Area, Blackpool	0.00	0.00	0.00	0.00	0.00	0.12	0.00	0.00	0.00	0.07	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.00**	**0.19**
Local shops, Zone 5 (Blackpool)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.80	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.00**	**1.80**
Sub Total Zone 5	**5.68**	**0.36**	**14.33**	**1.97**	**26.34**	**2.40**	**12.67**	**1.52**	**22.82**	**5.97**	**7.18**	**0.21**	**5.17**	**0.16**	**3.80**	**0.00**	**10.33**	**0.82**	**9.62**	**0.00**	**117.95**	**13.41**
Zone 6																						
Bispham District Centre	0.00	0.23	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.80	0.00	0.12	0.00	0.00	0.00	0.00	0.00	0.00	**0.00**	**1.15**
Co-op, Red Bank Road, Blackpool	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.51	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.00**	**0.51**
Devonshire Road, Blackpool	0.00	0.42	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.00**	**0.42**
Red Bank Road District Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.00**	**0.00**
Sainsbury's, Red Bank Road District Centre, Blackpool	1.79	0.64	0.49	0.00	1.04	0.09	0.00	0.00	0.25	0.00	10.96	4.87	4.69	0.67	0.00	0.00	0.00	0.00	0.00	0.00	**19.22**	**6.27**
Tesco Express, All Hallows Road, Blackpool	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.17	1.49	0.45	0.87	0.00	0.00	0.00	0.00	0.21	0.00	**0.83**	**2.36**
Local shops, Zone 6	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.17	0.56	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.17**	**0.56**
Sub Total Zone 6	**1.79**	**1.29**	**0.49**	**0.00**	**1.04**	**0.09**	**0.00**	**0.00**	**0.25**	**0.00**	**11.31**	**8.23**	**5.14**	**1.66**	**0.00**	**0.00**	**0.00**	**0.00**	**0.21**	**0.00**	**20.22**	**11.26**

Destination	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Study Area	
	Main Food	Top-up	Main Food	Top-up	Main Food	Top-up	Main Food	Top-up	Main Food	Top-up	Main Food	Top-up	Main Food	Top-up	Main Food	Top-up	Main Food	Top-up	Main Food	Top-up	Main Food	Top-up
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m
Zone 7																						
Aldi, Crescent West, Thornton-Cleveleys	0.46	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7.33	0.15	18.85	3.00	0.26	0.00	0.00	0.00	0.00	0.00	**26.89**	**3.15**
Aldi, Poulton Road, Fleetwood	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12.35	1.45	0.57	0.05	0.00	0.00	0.00	0.00	**12.92**	**1.50**
Aldi, Tithebarn Street, Poulton-le-Fylde	0.15	0.00	0.10	0.00	0.31	0.00	0.00	0.00	0.00	0.00	1.13	0.00	7.18	0.28	5.10	0.05	0.00	0.00	1.82	1.12	**15.79**	**1.45**
Asda, Cop Lane, Fleetwood	0.06	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.17	0.00	25.64	2.70	2.80	0.29	0.00	0.00	0.70	0.00	**29.37**	**2.99**
Booths, Teanlowe Centre, Blackpool Old Road, Poulton-le-Fylde	0.13	0.00	0.00	0.00	1.66	0.38	0.00	0.00	0.00	0.00	0.00	0.00	5.25	1.59	0.23	0.23	0.00	0.00	1.68	1.00	**8.95**	**3.20**
Cleveleys Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.12	0.15	0.52	1.76	0.00	0.00	0.00	0.00	0.00	0.00	**0.64**	**1.91**
Co-op, Fleetwood Road North, Thornton-Cleveleys	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.57	0.00	0.05	0.00	0.00	0.42	0.00	**0.42**	**3.62**
Co-op, Larkholme Parade, Fleetwood	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.40	0.00	0.00	0.00	0.00	0.00	0.48	**0.00**	**3.87**
Co-op, Thornton Centre, Victoria Road East, Thornton-Cleveleys	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.95	2.67	0.00	0.00	0.00	0.00	0.00	0.00	**0.95**	**2.67**
Fleetwood Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.22	0.00	0.00	0.00	0.00	0.00	0.00	**0.00**	**1.22**
Iceland, Lord Street, Fleetwood	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.90	0.51	0.32	0.00	0.00	0.00	0.00	0.00	**1.22**	**0.51**
Lidl, Anchorsholme Lane West, Thornton-Cleveleys	0.06	0.11	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.30	0.08	3.57	1.73	0.00	0.00	0.00	0.00	0.00	0.00	**5.93**	**1.92**
M&S Simply Food, Victoria Road West, Thornton-Cleveleys	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.15	1.28	1.34	0.13	0.10	0.00	0.00	0.42	0.00	**1.83**	**1.59**
Morrisons, Amounderness Way, Thornton-Cleveleys	0.39	0.13	0.00	0.00	1.00	0.21	0.16	0.00	0.00	0.00	2.65	0.13	31.54	2.66	3.30	0.11	0.00	0.00	0.21	0.00	**39.25**	**3.25**
Poulton-le-Fylde Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.26	0.00	0.43	0.00	0.00	0.00	0.59	**0.00**	**3.27**
Sainsbury's Local, Victoria Road West, Thornton-Cleveleys	0.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.38	1.07	0.00	0.00	0.00	0.00	0.00	0.00	**0.51**	**1.07**
Tesco Express, Garstang Road East, Poulton-le-Fylde	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.12	0.00	0.05	0.00	0.00	0.00	0.24	**0.00**	**1.40**
Tesco Express, Lighthouse Ford, Hatfield Avenue, Fleetwood	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.19	0.55	0.00	0.00	0.00	0.00	0.00	0.00	**0.19**	**0.55**
Tesco Express, Marsh Mill Village, Fleetwood Road North, Thornton-Cleveleys	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.34	0.87	0.13	0.00	0.00	0.00	0.00	0.00	**0.48**	**0.87**
Tesco Metro, Victoria Road West, Thornton-Cleveleys	0.00	0.00	0.00	0.07	1.66	0.00	0.00	0.00	0.00	0.00	0.17	0.00	2.34	0.83	0.00	0.00	0.00	0.00	0.00	0.00	**4.17**	**0.90**
Local shops, Zone 7 (Wyre)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.92	0.00	0.00	0.00	0.00	0.00	0.00	**0.00**	**5.92**
Sub Total Zone 7	**1.40**	**0.24**	**0.10**	**0.07**	**4.63**	**0.59**	**0.16**	**0.00**	**0.00**	**0.00**	**13.87**	**0.66**	**111.25**	**40.50**	**12.85**	**1.38**	**0.00**	**0.00**	**5.24**	**3.42**	**149.49**	**46.86**
Zone 8																						
Co-op, Lancaster Road, Poulton-le-Fylde	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.51	0.96	0.00	0.00	0.00	0.00	**0.51**	**0.96**
Co-op, Sandy Lane, Poulton-le-Fylde	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.45	1.25	0.00	0.00	0.00	0.00	**0.45**	**1.25**
Hambleton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.07	0.85	0.00	0.00	0.00	0.00	**0.07**	**0.85**
Knott End-on-Sea	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.56	0.00	0.00	0.00	0.00	**0.00**	**0.56**
Pilling	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.95	0.00	0.00	0.00	0.00	**0.00**	**0.95**
Spar, Hambleton Service Station, Shard Lane, Hambleton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.56	0.00	0.00	0.00	0.00	**0.00**	**0.56**
Spar, Lancaster Road, Knott End-on-Sea	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.34	0.08	0.00	0.00	0.00	0.00	**0.34**	**0.08**
Stalmine	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.92	0.00	0.00	0.00	0.00	**0.00**	**0.92**
Local shops, Zone 8	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.13	0.27	0.00	0.00	0.00	0.00	**0.13**	**0.27**
Sub Total Zone 8	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**1.50**	**6.39**	**0.00**	**0.00**	**0.00**	**0.00**	**1.50**	**6.39**
Zone 9																						
Aldi, Clifton Drive North, Lytham St Annes	0.00	0.00	0.00	0.00	0.00	0.00	0.90	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	16.14	1.57	0.21	0.00	**17.25**	**1.57**
Booths, Haven Road, Lytham St Annes	0.00	0.00	0.00	0.00	0.00	0.16	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	8.24	0.51	0.21	0.35	**8.45**	**1.02**
Booths, Main Drive, Heyhouses Lane, Lytham St Annes	0.06	0.11	0.00	0.00	0.00	0.00	0.23	0.18	0.21	0.16	0.00	0.00	0.00	0.00	0.00	0.00	6.22	1.51	1.19	0.59	**7.91**	**2.55**
Co-op, Headroomgate Road, Lytham St Annes	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.41	1.98	0.00	0.00	**0.41**	**1.98**
Co-op, Woodlands Road, Lytham St Annes	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.16	0.00	0.00	0.00	0.00	0.00	0.00	0.75	3.00	0.00	0.00	**0.75**	**3.16**
Lidl, Preston Road, Lytham St Annes	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.63	1.33	0.78	0.17	**6.40**	**1.50**
Local shops, Lytham St Annes	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.52	0.00	0.00	**0.00**	**0.52**
Lytham Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.36	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.85	0.00	0.35	**0.00**	**1.55**
Lytham/St Annes Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.24	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.36	0.00	0.00	**0.00**	**1.61**
M&S Simply Food, Clifton Drive South, Lytham St Annes	0.00	0.00	0.00	0.00	0.28	0.00	0.23	0.48	0.14	0.09	0.00	0.00	0.00	0.00	0.00	0.00	3.36	0.88	0.21	0.00	**4.22**	**1.45**
Sainsbury's Local, Clifton Street, Lytham St Annes	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.54	6.62	0.00	0.17	**3.54**	**6.80**
Sainsbury's, St Andrews Road North, Lytham St Annes	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9.91	1.47	0.00	0.00	**9.91**	**1.47**
Spar, Whalley Place, Lytham St. Annes	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.64	0.00	0.00	**0.00**	**0.64**
Tesco Express, Clifton Street, Lytham St Annes	0.12	0.00	0.00	0.00	0.63	0.24	0.28	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.47	1.19	0.21	0.24	**1.70**	**1.66**
Tesco Express, Kilnhouse Lane, Lytham St Annes	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.09	0.00	0.00	**0.00**	**0.09**
Tesco Express, St Annes Road West, Lytham St Annes	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.25	0.00	0.17	**0.00**	**0.42**
Tesco Express, St Davids Road North, Lytham St Annes	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.76	0.00	0.00	**0.00**	**1.76**
Sub Total Zone 9	**0.18**	**0.11**	**0.00**	**0.00**	**0.91**	**0.40**	**1.64**	**1.26**	**0.35**	**0.42**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**54.67**	**25.52**	**2.80**	**2.04**	**60.56**	**29.74**
Zone 10																						
Aldi, Mill Farm Sports Village, Coronation Way, Wesham	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.34	0.00	0.00	0.00	0.00	0.00	0.00	0.12	11.66	0.24	**12.00**	**0.36**
Co-op, Lytham Road, Freckleton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.42	0.65	**0.42**	**0.65**
Co-op, Market Square, Kirkham	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.24	**0.00**	**0.24**
Co-op, Weeton Road, Wesham	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.42	1.17	**0.42**	**1.17**
Freckleton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.00	**0.00**	**1.00**
Kirkham Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.24	**0.00**	**1.24**
Lidl, Clarke Street, Poulton-le-Fylde	0.30	0.00	0.00	0.00	1.41	0.21	0.16	0.00	0.00	0.00	1.52	0.21	15.89	2.00	0.50	0.04	0.00	0.00	2.72	1.11	**22.50**	**3.56**
Morrisons, Mill Street, Kirkham	0.00	0.00	0.00	0.00	0.00	0.00	0.16	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.07	0.00	0.47	0.00	12.36	4.72	**13.05**	**4.72**
Sainsbury's Local, Euro Garages, Coronation Way, Wesham	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.21	0.00	**0.21**	**0.00**
Local shops, Zone 10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.76	**0.00**	**0.76**
Sub Total Zone 10	**0.30**	**0.00**	**0.00**	**0.00**	**1.41**	**0.21**	**0.32**	**0.00**	**0.00**	**0.00**	**1.86**	**0.21**	**15.89**	**2.00**	**0.56**	**0.04**	**0.47**	**0.12**	**27.78**	**11.11**	**48.59**	**13.68**
SUB-TOTAL BLACKPOOL BOROUGH	**16.5**	**6.04**	**28.21**	**10.50**	**43.71**	**16.49**	**24.42**	**10.81**	**27.56**	**9.85**	**25.18**	**12.13**	**16.69**	**4.33**	**5.21**	**0.11**	**12.13**	**1.26**	**13.25**	**0.17**	**212.86**	**71.70**
SUB TOTAL INSIDE STUDY AREA	**18.65**	**6.28**	**31.61**	**10.57**	**52.59**	**17.68**	**41.34**	**14.28**	**30.21**	**10.34**	**39.49**	**13.07**	**140.71**	**47.46**	**20.55**	**7.92**	**78.17**	**26.91**	**49.72**	**16.91**	**503.05**	**171.42**

Destination	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Study Area	
	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	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	Main Food £m	Top-up £m
OUTSIDE STUDY AREA																						
Outside Study Area - Lancaster District																						
Lancaster City Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.04	0.00	0.00	0.00	0.00	**0.00**	**0.04**
Morrisons, Central Drive Retail Park, Central Drive, Morecambe	0.06	0.00	0.00	0.00	0.00	0.00	0.48	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.54**	**0.00**
Sainsbury's, Cable Street, Lancaster	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.32	0.00	0.00	0.00	0.00	0.00	**0.32**	**0.00**
Sub Total Outside Study Area - Lancaster District	**0.06**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.48**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.32**	**0.04**	**0.00**	**0.00**	**0.00**	**0.00**	**0.86**	**0.04**
Outside Study Area - Manchester																						
Greater Manchester	0.06	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.06**	**0.00**
Sub Total Outside Study Area - Manchester	**0.06**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.06**	**0.00**
Outside Study Area - Preston District																						
Aldi, Corporation Street Retail Park, Corporation Street, Preston	0.00	0.00	0.00	0.00	0.00	0.00	0.16	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.07	0.00	0.00	0.00	0.00	0.00	**0.23**	**0.00**
Aldi, Deepdale Retail Park, Blackpool Road, Preston	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.47	0.00	**3.47**	**0.00**
Asda, Pittman Way, Preston	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.07	0.00	0.00	0.00	0.00	0.24	**0.07**	**0.24**
Co-op, Norbreck Drive, Preston	0.00	0.00	0.10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.10**	**0.00**
Iceland, Market Street, Preston	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.12	0.00	0.00	**0.00**	**0.12**
Lidl, New Hall Lane, Preston	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.49	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.28	0.00	**0.78**	**0.00**
Lidl, West Strand, Preston	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.21	0.00	**0.21**	**0.00**
Marks & Spencer, Fishergate, Preston	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.41	0.00	0.00	0.00	**0.41**	**0.00**
Morrisons, Blackpool Road, Preston	0.06	0.00	0.00	0.00	0.00	0.00	1.02	0.00	0.21	0.00	0.00	0.00	0.52	0.00	0.00	0.00	1.63	0.00	4.33	0.17	**7.77**	**0.17**
Morrisons, Riverside Retail Park, Mariners Way, Preston	0.00	0.00	0.00	0.00	0.00	0.00	0.16	0.00	0.00	0.00	0.17	0.00	0.00	0.00	0.07	0.00	0.23	0.00	2.67	1.06	**3.30**	**1.06**
Preston City Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.10	0.00	0.00	0.00	0.00	**0.00**	**0.10**
Sainsbury's, Flintoff Way, Preston	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.23	0.00	0.00	0.00	**0.23**	**0.00**
Tesco Express, Blackpool Road, Preston	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.24	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.21	0.00	**0.21**	**0.24**
Tesco Express, Church Street, Preston	0.00	0.00	0.00	0.00	0.00	0.00	0.32	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.32**	**0.00**
Tesco Express, Longsands Lane, Preston	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.28	0.00	**0.28**	**0.00**
Sub Total Outside Study Area - Preston District	**0.06**	**0.00**	**0.10**	**0.00**	**0.00**	**0.00**	**1.65**	**0.24**	**0.70**	**0.00**	**0.17**	**0.00**	**0.52**	**0.00**	**0.20**	**0.10**	**2.51**	**0.12**	**11.45**	**1.47**	**17.37**	**1.94**
Outside Study Area - South Ribble District																						
Aldi, Cuerden Way, Preston	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.18	0.00	0.00	0.00	0.00	0.00	**0.18**	**0.00**
Aldi, Towngate, Leyland	0.00	0.00	0.00	0.00	0.28	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.28**	**0.00**
Booths, Liverpool Road, Preston	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.90	0.00	0.00	0.00	0.00	0.00	0.70	0.00	**1.60**	**0.00**
Lidl, Churchill Way Development, Churchill Way, Leyland	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.82	**0.00**	**0.82**
Liverpool Road, Penwortham District Centre	0.00	0.00	0.00	0.00	0.15	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.15**	**0.00**
Morrisons, Olympian Way Retail Park, Olympian Way, Leyland	0.00	0.00	0.00	0.00	0.00	0.00	0.12	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.12**	**0.00**
Morrisons, Station Road, Preston	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.42	0.00	**0.42**	**0.00**
Sainsbury's Local, Birch Avenue, Preston	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.15	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.00**	**0.15**
Sainsbury's, Cuerden Way, Preston	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.21	0.24	**0.21**	**0.24**
Tesco Express, Canberra Road, Leyland	0.00	0.00	0.00	0.00	0.00	0.12	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.00**	**0.12**
Waitrose, Capitol Centre Retail Park, Preston	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.10**	**0.00**
Sub Total Outside Study Area - South Ribble District	**0.00**	**0.00**	**0.00**	**0.00**	**0.43**	**0.12**	**0.12**	**0.00**	**0.10**	**0.00**	**0.00**	**0.15**	**0.90**	**0.00**	**0.18**	**0.00**	**0.00**	**0.00**	**1.32**	**1.06**	**3.06**	**1.33**
Outside Study Area - Wyre District																						
Aldi, Moss Lane, Preston	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.91	0.08	0.00	0.00	0.62	0.24	**2.54**	**0.31**
Booths, Park Hill Road, Preston	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.26	0.00	0.29	0.00	0.00	0.00	0.00	0.00	**0.55**	**0.00**
Great Eccleston	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.43	**0.00**	**1.43**
Sainsbury's, Park Hill Road, Preston	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.94	0.00	0.00	0.00	0.00	0.00	**0.94**	**0.00**
Sub Total Outside Study Area - Wyre District	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.26**	**0.00**	**3.14**	**0.08**	**0.00**	**0.00**	**0.62**	**1.66**	**4.03**	**1.74**
Outside Study Area - Other																						
Cumbria	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.41	0.00	0.21	0.00	**0.61**	**0.00**
Wales	0.00	0.00	0.00	0.00	0.37	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.37**	**0.00**
Sub Total Outside Study Area - Other	**0.00**	**0.00**	**0.00**	**0.00**	**0.37**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.41**	**0.00**	**0.21**	**0.00**	**0.98**	**0.00**
SUB TOTAL OUTSIDE STUDY AREA	**0.19**	**0.00**	**0.10**	**0.00**	**0.80**	**0.12**	**2.24**	**0.24**	**0.80**	**0.00**	**0.17**	**0.15**	**1.68**	**0.00**	**3.85**	**0.22**	**2.92**	**0.12**	**13.60**	**4.20**	**26.36**	**5.05**
TOTAL	**18.84**	**6.28**	**31.72**	**10.57**	**53.39**	**17.80**	**43.59**	**14.53**	**31.02**	**10.34**	**39.66**	**13.22**	**142.38**	**47.46**	**24.41**	**8.14**	**81.08**	**27.03**	**63.33**	**21.11**	**529.41**	**176.47**

Notes:

a. Convenience goods expenditure calculated by multiplying the market share of each destination for 'main' and 'top-up' shopping within each zone at 2017 (Table 3) by the total main and top-up convenience goods expenditure by the residents within each zone at 2019 (Table 2b)

NEXUS PLANNING
BLACKPOOL RETAIL STUDY - 2019 UPDATED TABLES

TABLE 5: STUDY AREA RESIDENTS' EXPENDITURE (£m and %) - CONVENIENCE GOODS 2019

Destination	Zone 1 All Convenience		Zone 2 All Convenience		Zone 3 All Convenience		Zone 4 All Convenience		Zone 5 All Convenience		Zone 6 All Convenience		Zone 7 All Convenience		Zone 8 All Convenience		Zone 9 All Convenience		Zone 10 All Convenience		Blackpool Zones All Convenience		Study Area All Convenience	
	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%
INSIDE STUDY AREA																								
Zone 1																								
Blackpool Town Centre	0.55	2.2	0.75	1.8	5.83	8.2	0.24	0.4	0.22	0.5	0.58	1.1	0.00	0.0	0.08	0.2	0.18	0.2	0.00	0.0	8.17	2.8	8.43	1.2
Sainsbury's, Talbot Road, Blackpool	7.03	28.0	3.33	7.9	4.17	5.9	0.00	0.0	0.21	0.5	3.46	6.6	2.51	1.3	1.20	3.7	0.00	0.0	0.28	0.3	18.20	6.3	22.19	3.1
Iceland, Topping Street, Blackpool	0.85	3.4	0.86	2.0	2.03	2.9	0.16	0.3	0.00	0.0	0.71	1.4	0.00	0.0	0.00	0.0	0.81	0.8	0.00	0.0	4.62	1.6	5.43	0.8
Marks & Spencer, Church Street, Blackpool	0.19	0.8	0.73	1.7	1.59	2.2	0.12	0.2	0.38	0.9	0.25	0.5	0.00	0.0	0.25	0.8	0.00	0.0	0.17	0.2	3.26	1.1	3.69	0.5
Co-op, Abingdon Street, Blackpool	0.06	0.3	0.31	0.7	0.00	0.0	0.18	0.3	0.28	0.7	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.83	0.3	0.83	0.1
Co-op, Warley Road, Blackpool	0.19	0.7	0.00	0.0	0.17	0.2	0.00	0.0	0.00	0.0	1.52	2.9	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	1.88	0.6	1.88	0.3
Local shops, Zone 1	0.32	1.3	0.14	0.3	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.46	0.2	0.46	0.1
Sub Total Zone 1	**9.19**	**36.6**	**6.12**	**14.5**	**13.80**	**19.4**	**0.70**	**1.2**	**1.08**	**2.6**	**6.53**	**12.3**	**2.51**	**1.3**	**1.53**	**4.7**	**0.99**	**0.9**	**0.46**	**0.5**	**37.42**	**12.9**	**42.90**	**6.1**
Zone 2																								
Lidl, Bloomfield Road, Blackpool	0.15	0.6	4.42	10.4	0.80	1.1	0.72	1.2	0.77	1.9	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	6.86	2.4	6.86	1.0
Tesco Express, Ansdell Road, Blackpool	0.00	0.0	1.46	3.5	0.00	0.0	0.09	0.2	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	1.55	0.5	1.55	0.2
Tesco Express, Central Drive, Blackpool	0.00	0.0	0.79	1.9	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.26	0.1	0.00	0.0	0.00	0.0	0.00	0.0	0.79	0.3	1.05	0.1
Local shops, Zone 2	0.00	0.0	1.41	3.3	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	1.41	0.5	1.41	0.2
Sub Total Zone 2	**0.15**	**0.6**	**8.08**	**19.1**	**0.80**	**1.1**	**0.81**	**1.4**	**0.77**	**1.9**	**0.00**	**0.0**	**0.26**	**0.1**	**0.00**	**0.0**	**0.00**	**0.0**	**0.00**	**0.0**	**10.61**	**3.6**	**10.87**	**1.5**
Zone 3																								
Co-op, Layton Road, Blackpool	0.00	0.0	0.00	0.0	3.18	4.5	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	3.18	1.1	3.18	0.5
Co-op, Normoss Road, Blackpool	0.00	0.0	0.00	0.0	2.36	3.3	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	2.36	0.8	2.36	0.3
Layton District Centre	0.00	0.0	0.00	0.0	0.74	1.0	0.00	0.0	0.00	0.0	0.10	0.2	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.85	0.3	0.85	0.1
Lidl, Devonshire Road, Blackpool	2.79	11.1	0.60	1.4	3.09	4.3	0.00	0.0	0.00	0.0	0.88	1.7	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	7.35	2.5	7.35	1.0
Marks & Spencer, Blackpool Victoria Hospital, Whinney Heys Road, Blackpool	0.13	0.5	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.13	0.0	0.13	0.0
Sainsbury's Local, Whitegate Drive, Blackpool	0.11	0.4	0.31	0.7	0.54	0.8	1.97	3.4	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	2.93	1.0	2.93	0.4
Tesco Express, Westcliffe Drive, Blackpool	0.33	1.3	0.00	0.0	0.49	0.7	0.00	0.0	0.00	0.0	0.10	0.2	0.00	0.0	0.00	0.0	0.00	0.0	2.64	3.1	0.92	0.3	3.56	0.5
Tesco Express, Whitegate Drive, Blackpool	0.13	0.5	0.82	1.9	0.40	0.6	0.00	0.0	0.00	0.0	0.40	0.8	0.00	0.0	0.00	0.0	0.00	0.0	0.28	0.3	1.75	0.6	2.03	0.3
Whitegate Drive District Centre	0.00	0.0	0.14	0.3	0.84	1.2	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.98	0.3	0.98	0.1
Local shops, Zone 3 (Blackpool)	0.20	0.8	0.00	0.0	0.31	0.4	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.51	0.2	0.51	0.1
Local shops, Zone 3 (Fylde)	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	2.36	1.2	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	2.36	0.3
Sub Total Zone 3	**3.69**	**14.7**	**1.87**	**4.4**	**11.94**	**16.8**	**1.97**	**3.4**	**0.00**	**0.0**	**1.48**	**2.8**	**2.36**	**1.2**	**0.00**	**0.0**	**0.00**	**0.0**	**2.93**	**3.5**	**20.95**	**7.2**	**26.24**	**3.7**
Zone 4																								
Aldi, Blackpool Retail Park, Blackpool	0.00	0.0	0.00	0.0	0.00	0.0	9.08	15.6	2.76	6.7	0.00	0.0	0.45	0.2	0.00	0.0	0.60	0.6	0.00	0.0	11.84	4.1	12.89	1.8
Aldi, Parkinson Way Retail Park, Waterloo Road, Blackpool	0.22	0.9	4.50	10.7	3.62	5.1	1.76	3.0	2.52	6.1	0.00	0.0	0.38	0.2	0.00	0.0	0.23	0.2	0.00	0.0	12.62	4.3	13.24	1.9
Co-op, Harrowside, Blackpool	0.00	0.0	0.00	0.0	0.00	0.0	0.32	0.6	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.32	0.1	0.32	0.0
Highfield Road District Centre	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0
Tesco Express, Highfield Road, Blackpool	0.00	0.0	0.00	0.0	0.00	0.0	1.93	3.3	0.21	0.5	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	2.14	0.7	2.14	0.3
Waterloo Road/South Shore District Centre	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0
Iceland, Waterloo Road, Blackpool	0.00	0.0	0.52	1.2	0.00	0.0	1.56	2.7	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	2.08	0.7	2.08	0.3
Tesco Express, Lytham Road, Blackpool	0.00	0.0	0.35	0.8	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.35	0.1	0.35	0.0
Tesco Express, Marton Drive, Blackpool	0.00	0.0	0.33	0.8	0.15	0.2	2.46	4.2	0.29	0.7	0.00	0.0	0.00	0.0	0.00	0.0	0.23	0.2	0.21	0.2	3.24	1.1	3.68	0.5
Local shops, Zone 4 (Blackpool)	0.00	0.0	0.14	0.3	0.00	0.0	0.45	0.8	0.74	1.8	0.00	0.0	0.00	0.0	0.00	0.0	0.18	0.2	0.00	0.0	1.33	0.5	1.51	0.2
Morrisons, Squires Gate Lane, Blackpool	0.32	1.3	3.30	7.8	1.93	2.7	17.03	29.3	2.37	5.7	1.04	2.0	0.45	0.2	0.43	1.3	10.90	10.1	0.83	1.0	25.99	8.9	38.59	5.5
Sub Total Zone 4	**0.54**	**2.2**	**9.15**	**21.6**	**5.71**	**8.0**	**34.59**	**59.5**	**8.89**	**21.5**	**1.04**	**2.0**	**1.28**	**0.7**	**0.43**	**1.3**	**12.15**	**11.2**	**1.04**	**1.2**	**59.91**	**20.6**	**74.81**	**10.6**
Zone 5																								
Aldi, Park Road, Blackpool	2.21	8.8	3.64	8.6	5.88	8.3	2.01	3.5	1.36	3.3	0.17	0.3	0.00	0.0	0.00	0.0	0.00	0.0	0.37	0.4	15.28	5.3	15.65	2.2
Asda, Cherry Tree Road, Blackpool	2.11	8.4	3.93	9.3	11.14	15.6	5.45	9.4	16.21	39.2	1.40	2.7	0.87	0.5	0.00	0.0	1.45	1.3	2.30	2.7	40.24	13.8	44.85	6.4
Asda, Wellbeck Avenue, Blackpool	0.06	0.3	1.41	3.3	0.00	0.0	1.18	2.0	1.54	3.7	0.00	0.0	0.00	0.0	0.00	0.0	0.23	0.2	0.00	0.0	4.19	1.4	4.43	0.6
Iceland, Vicarage Lane, Blackpool	0.15	0.6	0.14	0.3	0.00	0.0	1.11	1.9	1.04	2.5	0.67	1.3	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	3.11	1.1	3.11	0.4
Tesco Extra, Clifton Road Retail Park, Sandhams Way, Blackpool	1.50	6.0	7.18	17.0	11.61	16.3	4.45	7.7	6.77	16.4	5.15	9.7	4.47	2.4	3.80	11.7	9.47	8.8	6.95	8.2	36.65	12.6	61.33	8.7
Vicarage Lane Commercial Area, Blackpool	0.00	0.0	0.00	0.0	0.12	0.2	0.00	0.0	0.07	0.2	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.19	0.1	0.19	0.0
Local shops, Zone 5 (Blackpool)	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	1.80	4.4	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	1.80	0.6	1.80	0.3
Sub Total Zone 5	**6.04**	**24.0**	**16.30**	**38.6**	**28.74**	**40.4**	**14.19**	**24.4**	**28.79**	**69.6**	**7.39**	**14.0**	**5.33**	**2.8**	**3.80**	**11.7**	**11.15**	**10.3**	**9.62**	**11.4**	**101.46**	**34.9**	**131.36**	**18.6**
Zone 6																								
Bispham District Centre	0.23	0.9	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.80	1.5	0.12	0.1	0.00	0.0	0.00	0.0	0.00	0.0	1.03	0.4	1.15	0.2
Co-op, Red Bank Road, Blackpool	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.51	1.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.51	0.2	0.51	0.1
Devonshire Road, Blackpool	0.42	1.7	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.42	0.1	0.42	0.1
Red Bank Road District Centre	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0
Sainsbury's, Red Bank Road District Centre, Blackpool	2.42	9.7	0.49	1.2	1.13	1.6	0.00	0.0	0.25	0.6	15.84	30.0	5.35	2.8	0.00	0.0	0.00	0.0	0.00	0.0	20.13	6.9	25.49	3.6
Tesco Express, All Hallows Road, Blackpool	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	1.66	3.1	1.32	0.7	0.00	0.0	0.00	0.0	0.21	0.2	1.66	0.6	3.18	0.5
Local shops, Zone 6	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.73	1.4	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.73	0.3	0.73	0.1
Sub Total Zone 6	**3.08**	**12.3**	**0.49**	**1.2**	**1.13**	**1.6**	**0.00**	**0.0**	**0.25**	**0.6**	**19.53**	**36.9**	**6.79**	**3.6**	**0.00**	**0.0**	**0.00**	**0.0**	**0.21**	**0.2**	**24.48**	**8.4**	**31.48**	**4.5**

Destination	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Blackpool Zones		Study Area	
	All Convenience		All Convenience		All Convenience		All Convenience		All Convenience		All Convenience		All Convenience		All Convenience		All Convenience		All Convenience		All Convenience		All Convenience	
	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	%
Zone 7																								
Aldi, Crescent West, Thornton-Cleveleys	0.46	1.8	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	7.48	14.1	21.85	11.5	0.26	0.8	0.00	0.0	0.00	0.0	**7.94**	**2.7**	**30.04**	**4.3**
Aldi, Poulton Road, Fleetwood	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	13.80	7.3	0.62	1.9	0.00	0.0	0.00	0.0	**0.00**	**0.0**	**14.42**	**2.0**
Aldi, Tithebarn Street, Poulton-le-Fylde	0.15	0.6	0.10	0.2	0.31	0.4	0.00	0.0	0.00	0.0	1.13	2.1	7.45	3.9	5.16	15.8	0.00	0.0	2.94	3.5	**1.70**	**0.6**	**17.25**	**2.4**
Asda, Cop Lane, Fleetwood	0.06	0.3	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.17	0.3	28.34	14.9	3.09	9.5	0.00	0.0	0.70	0.8	**0.24**	**0.1**	**32.36**	**4.6**
Booths, Teanlowe Centre, Blackpool Old Road, Poulton-le-Fylde	0.13	0.5	0.00	0.0	2.04	2.9	0.00	0.0	0.00	0.0	0.00	0.0	6.83	3.6	0.46	1.4	0.00	0.0	2.68	3.2	**2.17**	**0.7**	**12.15**	**1.7**
Cleveleys Town Centre	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.27	0.5	2.28	1.2	0.00	0.0	0.00	0.0	0.00	0.0	**0.27**	**0.1**	**2.56**	**0.4**
Co-op, Fleetwood Road North, Thornton-Cleveleys	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	3.57	1.9	0.05	0.2	0.00	0.0	0.42	0.5	**0.00**	**0.0**	**4.04**	**0.6**
Co-op, Larkholme Parade, Fleetwood	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	3.40	1.8	0.00	0.0	0.00	0.0	0.48	0.6	**0.00**	**0.0**	**3.87**	**0.5**
Co-op, Thornton Centre, Victoria Road East, Thornton-Cleveleys	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	3.62	1.9	0.00	0.0	0.00	0.0	0.00	0.0	**0.00**	**0.0**	**3.62**	**0.5**
Fleetwood Town Centre	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	1.22	0.6	0.00	0.0	0.00	0.0	0.00	0.0	**0.00**	**0.0**	**1.22**	**0.2**
Iceland, Lord Street, Fleetwood	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	1.41	0.7	0.32	1.0	0.00	0.0	0.00	0.0	**0.00**	**0.0**	**1.73**	**0.2**
Lidl, Anchorsholme Lane West, Thornton-Cleveleys	0.18	0.7	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	2.37	4.5	5.30	2.8	0.00	0.0	0.00	0.0	0.00	0.0	**2.55**	**0.9**	**7.85**	**1.1**
M&S Simply Food, Victoria Road West, Thornton-Cleveleys	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.15	0.3	2.61	1.4	0.24	0.7	0.00	0.0	0.42	0.5	**0.15**	**0.1**	**3.42**	**0.5**
Morrisons, Amounderness Way, Thornton-Cleveleys	0.52	2.1	0.00	0.0	1.21	1.7	0.16	0.3	0.00	0.0	2.78	5.3	34.20	18.0	3.42	10.5	0.00	0.0	0.21	0.2	**4.67**	**1.6**	**42.50**	**6.0**
Poulton-le-Fylde Town Centre	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	2.26	1.2	0.43	1.3	0.00	0.0	0.59	0.7	**0.00**	**0.0**	**3.27**	**0.5**
Sainsbury's Local, Victoria Road West, Thornton-Cleveleys	0.13	0.5	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	1.45	0.8	0.00	0.0	0.00	0.0	0.00	0.0	**0.13**	**0.0**	**1.58**	**0.2**
Tesco Express, Garstang Road East, Poulton-le-Fylde	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	1.12	0.6	0.05	0.2	0.00	0.0	0.24	0.3	**0.00**	**0.0**	**1.40**	**0.2**
Tesco Express, Lighthouse Ford, Hatfield Avenue, Fleetwood	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.74	0.4	0.00	0.0	0.00	0.0	0.00	0.0	**0.00**	**0.0**	**0.74**	**0.1**
Tesco Express, Marsh Mill Village, Fleetwood Road North, Thornton-Cleveleys	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	1.21	0.6	0.13	0.4	0.00	0.0	0.00	0.0	**0.00**	**0.0**	**1.35**	**0.2**
Tesco Metro, Victoria Road West, Thornton-Cleveleys	0.00	0.0	0.07	0.2	1.66	2.3	0.00	0.0	0.00	0.0	0.17	0.3	3.17	1.7	0.00	0.0	0.00	0.0	0.00	0.0	**1.90**	**0.7**	**5.07**	**0.7**
Local shops, Zone 7 (Wyre)	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	5.92	3.1	0.00	0.0	0.00	0.0	0.00	0.0	**0.00**	**0.0**	**5.92**	**0.8**
Sub Total Zone 7	**1.64**	**6.5**	**0.17**	**0.4**	**5.22**	**7.3**	**0.16**	**0.3**	**0.00**	**0.0**	**14.53**	**27.5**	**151.75**	**79.9**	**14.23**	**43.7**	**0.00**	**0.0**	**8.66**	**10.3**	**21.72**	**7.5**	**196.35**	**27.8**
Zone 8																								
Co-op, Lancaster Road, Poulton-le-Fylde	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	1.46	4.5	0.00	0.0	0.00	0.0	**0.00**	**0.0**	**1.46**	**0.2**
Co-op, Sandy Lane, Poulton-le-Fylde	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	1.71	5.3	0.00	0.0	0.00	0.0	**0.00**	**0.0**	**1.71**	**0.2**
Hambleton	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.92	2.8	0.00	0.0	0.00	0.0	**0.00**	**0.0**	**0.92**	**0.1**
Knott End-on-Sea	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.56	1.7	0.00	0.0	0.00	0.0	**0.00**	**0.0**	**0.56**	**0.1**
Pilling	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.95	2.9	0.00	0.0	0.00	0.0	**0.00**	**0.0**	**0.95**	**0.1**
Spar, Hambleton Service Station, Shard Lane, Hambleton	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.56	1.7	0.00	0.0	0.00	0.0	**0.00**	**0.0**	**0.56**	**0.1**
Spar, Lancaster Road, Knott End-on-Sea	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.41	1.3	0.00	0.0	0.00	0.0	**0.00**	**0.0**	**0.41**	**0.1**
Stalmine	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.92	2.8	0.00	0.0	0.00	0.0	**0.00**	**0.0**	**0.92**	**0.1**
Local shops, Zone 8	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.40	1.2	0.00	0.0	0.00	0.0	**0.00**	**0.0**	**0.40**	**0.1**
Sub Total Zone 8	**0.00**	**0.0**	**0.00**	**0.0**	**0.00**	**0.0**	**0.00**	**0.0**	**0.00**	**0.0**	**0.00**	**0.0**	**0.00**	**0.0**	**7.89**	**24.2**	**0.00**	**0.0**	**0.00**	**0.0**	**0.00**	**0.0**	**7.89**	**1.1**
Zone 9																								
Aldi, Clifton Drive North, Lytham St Annes	0.00	0.0	0.00	0.0	0.00	0.0	0.90	1.5	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	17.71	16.4	0.21	0.2	**0.90**	**0.3**	**18.82**	**2.7**
Booths, Haven Road, Lytham St Annes	0.00	0.0	0.00	0.0	0.16	0.2	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	8.76	8.1	0.56	0.7	**0.16**	**0.1**	**9.47**	**1.3**
Booths, Main Drive, Heyhouses Lane, Lytham St Annes	0.18	0.7	0.00	0.0	0.00	0.0	0.41	0.7	0.37	0.9	0.00	0.0	0.00	0.0	0.00	0.0	7.73	7.1	1.78	2.1	**0.96**	**0.3**	**10.46**	**1.5**
Co-op, Headroomgate Road, Lytham St Annes	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	2.39	2.2	0.00	0.0	**0.00**	**0.0**	**2.39**	**0.3**
Co-op, Woodlands Road, Lytham St Annes	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.16	0.4	0.00	0.0	0.00	0.0	0.00	0.0	3.75	3.5	0.00	0.0	**0.16**	**0.1**	**3.91**	**0.6**
Lidl, Preston Road, Lytham St Annes	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	6.96	6.4	0.95	1.1	**0.00**	**0.0**	**7.91**	**1.1**
Local shops, Lytham St Annes	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.52	0.5	0.00	0.0	**0.00**	**0.0**	**0.52**	**0.1**
Lytham Town Centre	0.00	0.0	0.00	0.0	0.00	0.0	0.36	0.6	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.85	0.8	0.35	0.4	**0.36**	**0.1**	**1.55**	**0.2**
Lytham/St Annes Town Centre	0.00	0.0	0.00	0.0	0.00	0.0	0.24	0.4	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	1.36	1.3	0.00	0.0	**0.24**	**0.1**	**1.61**	**0.2**
M&S Simply Food, Clifton Drive South, Lytham St Annes	0.00	0.0	0.00	0.0	0.28	0.4	0.71	1.2	0.24	0.6	0.00	0.0	0.00	0.0	0.00	0.0	4.24	3.9	0.21	0.2	**1.23**	**0.4**	**5.67**	**0.8**
Sainsbury's Local, Clifton Street, Lytham St Annes	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	10.17	9.4	0.17	0.2	**0.00**	**0.0**	**10.34**	**1.5**
Sainsbury's, St Andrews Road North, Lytham St Annes	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	11.38	10.5	0.00	0.0	**0.00**	**0.0**	**11.38**	**1.6**
Spar, Whalley Place, Lytham St. Annes	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.64	0.6	0.00	0.0	**0.00**	**0.0**	**0.64**	**0.1**
Tesco Express, Clifton Street, Lytham St Annes	0.12	0.5	0.00	0.0	0.87	1.2	0.28	0.5	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	1.66	1.5	0.45	0.5	**1.27**	**0.4**	**3.37**	**0.5**
Tesco Express, Kilnhouse Lane, Lytham St Annes	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.09	0.1	0.00	0.0	**0.00**	**0.0**	**0.09**	**0.0**
Tesco Express, St Annes Road West, Lytham St Annes	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.25	0.2	0.17	0.2	**0.00**	**0.0**	**0.42**	**0.1**
Tesco Express, St Davids Road North, Lytham St Annes	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	1.76	1.6	0.00	0.0	**0.00**	**0.0**	**1.76**	**0.2**
Sub Total Zone 9	**0.29**	**1.2**	**0.00**	**0.0**	**1.31**	**1.8**	**2.90**	**5.0**	**0.77**	**1.9**	**0.00**	**0.0**	**0.00**	**0.0**	**0.00**	**0.0**	**80.19**	**74.2**	**4.84**	**5.7**	**5.27**	**1.8**	**90.30**	**12.8**
Zone 10																								
Aldi, Mill Farm Sports Village, Coronation Way, Wesham	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.34	0.6	0.00	0.0	0.00	0.0	0.12	0.1	11.89	14.1	**0.34**	**0.1**	**12.36**	**1.8**
Co-op, Lytham Road, Freckleton	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	1.06	1.3	**0.00**	**0.0**	**1.06**	**0.2**
Co-op, Market Square, Kirkham	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.24	0.3	**0.00**	**0.0**	**0.24**	**0.0**
Co-op, Weeton Road, Wesham	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	1.59	1.9	**0.00**	**0.0**	**1.59**	**0.2**
Freckleton	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	1.00	1.2	**0.00**	**0.0**	**1.00**	**0.1**
Kirkham Town Centre	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	1.24	1.5	**0.00**	**0.0**	**1.24**	**0.2**
Lidl, Clarke Street, Poulton-le-Fylde	0.30	1.2	0.00	0.0	1.62	2.3	0.16	0.3	0.00	0.0	1.72	3.3	17.89	9.4	0.53	1.6	0.00	0.0	3.83	4.5	**3.80**	**1.3**	**26.05**	**3.7**
Morrisons, Mill Street, Kirkham	0.00	0.0	0.00	0.0	0.00	0.0	0.16	0.3	0.00	0.0	0.00	0.0	0.00	0.0	0.07	0.2	0.47	0.4	17.08	20.2	**0.16**	**0.1**	**17.77**	**2.5**
Sainsbury's Local, Euro Garages, Coronation Way, Wesham	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.21	0.2	**0.00**	**0.0**	**0.21**	**0.0**
Local shops, Zone 10	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.76	0.9	**0.00**	**0.0**	**0.76**	**0.1**
Sub Total Zone 10	**0.30**	**1.2**	**0.00**	**0.0**	**1.62**	**2.3**	**0.32**	**0.5**	**0.00**	**0.0**	**2.06**	**3.9**	**17.89**	**9.4**	**0.60**	**1.9**	**0.59**	**0.5**	**38.88**	**46.1**	**4.30**	**1.5**	**62.27**	**8.8**
SUB-TOTAL BLACKPOOL BOROUGH	**22.5**	**89.8**	**38.7**	**91.5**	**60.2**	**84.6**	**35.2**	**60.6**	**37.4**	**90.4**	**37.3**	**70.6**	**21.0**	**11.1**	**5.3**	**16.4**	**13.4**	**12.4**	**13.4**	**15.9**	**231.40**	**79.5**	**284.55**	**40.3**
SUB TOTAL INSIDE STUDY AREA	**24.93**	**99.2**	**42.19**	**99.8**	**70.27**	**98.7**	**55.63**	**95.7**	**40.55**	**98.1**	**52.56**	**99.4**	**188.17**	**99.1**	**28.47**	**87.5**	**105.07**	**97.2**	**66.63**	**78.9**	**286.12**	**98.3**	**674.47**	**95.5**

Destination	Zone 1 All Convenience £m	Zone 1 All Convenience %	Zone 2 All Convenience £m	Zone 2 All Convenience %	Zone 3 All Convenience £m	Zone 3 All Convenience %	Zone 4 All Convenience £m	Zone 4 All Convenience %	Zone 5 All Convenience £m	Zone 5 All Convenience %	Zone 6 All Convenience £m	Zone 6 All Convenience %	Zone 7 All Convenience £m	Zone 7 All Convenience %	Zone 8 All Convenience £m	Zone 8 All Convenience %	Zone 9 All Convenience £m	Zone 9 All Convenience %	Zone 10 All Convenience £m	Zone 10 All Convenience %	Blackpool Zones All Convenience £m	Blackpool Zones All Convenience %	Study Area All Convenience £m	Study Area All Convenience %
OUTSIDE STUDY AREA																								
Outside Study Area - Lancaster District																								
Lancaster City Centre	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.04	0.1	0.00	0.0	0.00	0.0	**0.00**	**0.0**	**0.04**	**0.0**
Morrisons, Central Drive Retail Park, Central Drive, Morecambe	0.06	0.3	0.00	0.0	0.00	0.0	0.48	0.8	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	**0.54**	**0.2**	**0.54**	**0.1**
Sainsbury's, Cable Street, Lancaster	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.32	1.0	0.00	0.0	0.00	0.0	**0.00**	**0.0**	**0.32**	**0.0**
Sub Total Outside Study Area - Lancaster District	**0.06**	**0.3**	**0.00**	**0.0**	**0.00**	**0.0**	**0.48**	**0.8**	**0.00**	**0.0**	**0.00**	**0.0**	**0.00**	**0.0**	**0.36**	**1.1**	**0.00**	**0.0**	**0.00**	**0.0**	**0.54**	**0.2**	**0.90**	**0.1**
Outside Study Area - Manchester																								
Greater Manchester	0.06	0.3	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	**0.06**	**0.0**	**0.06**	**0.0**
Sub Total Outside Study Area - Manchester	**0.06**	**0.3**	**0.00**	**0.0**	**0.00**	**0.0**	**0.00**	**0.0**	**0.00**	**0.0**	**0.00**	**0.0**	**0.00**	**0.0**	**0.00**	**0.0**	**0.00**	**0.0**	**0.00**	**0.0**	**0.06**	**0.0**	**0.06**	**0.0**
Outside Study Area - Preston District																								
Aldi, Corporation Street Retail Park, Corporation Street, Preston	0.00	0.0	0.00	0.0	0.00	0.0	0.16	0.3	0.00	0.0	0.00	0.0	0.00	0.0	0.07	0.2	0.00	0.0	0.00	0.0	**0.16**	**0.1**	**0.23**	**0.0**
Aldi, Deepdale Retail Park, Blackpool Road, Preston	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	3.47	4.1	**0.00**	**0.0**	**3.47**	**0.5**
Asda, Pittman Way, Preston	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.07	0.2	0.00	0.0	0.24	0.3	**0.00**	**0.0**	**0.31**	**0.0**
Co-op, Norbreck Drive, Preston	0.00	0.0	0.10	0.2	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	**0.10**	**0.0**	**0.10**	**0.0**
Iceland, Market Street, Preston	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.12	0.1	0.00	0.0	**0.00**	**0.0**	**0.12**	**0.0**
Lidl, New Hall Lane, Preston	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.49	1.2	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.28	0.3	**0.49**	**0.2**	**0.78**	**0.1**
Lidl, West Strand, Preston	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.21	0.2	**0.00**	**0.0**	**0.21**	**0.0**
Marks & Spencer, Fishergate, Preston	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.41	0.4	0.00	0.0	**0.00**	**0.0**	**0.41**	**0.1**
Morrisons, Blackpool Road, Preston	0.06	0.3	0.00	0.0	0.00	0.0	1.02	1.7	0.21	0.5	0.00	0.0	0.52	0.3	0.00	0.0	1.63	1.5	4.50	5.3	**1.29**	**0.4**	**7.94**	**1.1**
Morrisons, Riverside Retail Park, Mariners Way, Preston	0.00	0.0	0.00	0.0	0.00	0.0	0.16	0.3	0.00	0.0	0.17	0.3	0.00	0.0	0.07	0.2	0.23	0.2	3.73	4.4	**0.33**	**0.1**	**4.36**	**0.6**
Preston City Centre	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.10	0.3	0.00	0.0	0.00	0.0	**0.00**	**0.0**	**0.10**	**0.0**
Sainsbury's, Flintoff Way, Preston	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.23	0.2	0.00	0.0	**0.00**	**0.0**	**0.23**	**0.0**
Tesco Express, Blackpool Road, Preston	0.00	0.0	0.00	0.0	0.00	0.0	0.24	0.4	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.21	0.2	**0.24**	**0.1**	**0.45**	**0.1**
Tesco Express, Church Street, Preston	0.00	0.0	0.00	0.0	0.00	0.0	0.32	0.5	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	**0.32**	**0.1**	**0.32**	**0.0**
Tesco Express, Longsands Lane, Preston	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.28	0.3	**0.00**	**0.0**	**0.28**	**0.0**
Sub Total Outside Study Area - Preston District	**0.06**	**0.3**	**0.10**	**0.2**	**0.00**	**0.0**	**1.89**	**3.3**	**0.70**	**1.7**	**0.17**	**0.3**	**0.52**	**0.3**	**0.31**	**0.9**	**2.63**	**2.4**	**12.92**	**15.3**	**2.93**	**1.0**	**19.31**	**2.7**
Outside Study Area - South Ribble District																								
Aldi, Cuerden Way, Preston	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.18	0.6	0.00	0.0	0.00	0.0	**0.00**	**0.0**	**0.18**	**0.0**
Aldi, Towngate, Leyland	0.00	0.0	0.00	0.0	0.28	0.4	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	**0.28**	**0.1**	**0.28**	**0.0**
Booths, Liverpool Road, Preston	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.90	0.5	0.00	0.0	0.00	0.0	0.70	0.8	**0.00**	**0.0**	**1.60**	**0.2**
Lidl, Churchill Way Development, Churchill Way, Leyland	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.82	1.0	**0.00**	**0.0**	**0.82**	**0.1**
Liverpool Road, Penwortham District Centre	0.00	0.0	0.00	0.0	0.15	0.2	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	**0.15**	**0.1**	**0.15**	**0.0**
Morrisons, Olympian Way Retail Park, Olympian Way, Leyland	0.00	0.0	0.00	0.0	0.00	0.0	0.12	0.2	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	**0.12**	**0.0**	**0.12**	**0.0**
Morrisons, Station Road, Preston	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.42	0.5	**0.00**	**0.0**	**0.42**	**0.1**
Sainsbury's Local, Birch Avenue, Preston	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.15	0.3	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	**0.15**	**0.1**	**0.15**	**0.0**
Sainsbury's, Cuerden Way, Preston	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.45	0.5	**0.00**	**0.0**	**0.45**	**0.1**
Tesco Express, Canberra Road, Leyland	0.00	0.0	0.00	0.0	0.12	0.2	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	**0.12**	**0.0**	**0.12**	**0.0**
Waitrose, Capitol Centre Retail Park, Preston	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.10	0.3	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	**0.10**	**0.0**	**0.10**	**0.0**
Sub Total Outside Study Area - South Ribble District	**0.00**	**0.0**	**0.00**	**0.0**	**0.55**	**0.8**	**0.12**	**0.2**	**0.10**	**0.3**	**0.15**	**0.3**	**0.90**	**0.5**	**0.18**	**0.6**	**0.00**	**0.0**	**2.39**	**2.8**	**0.92**	**0.3**	**4.39**	**0.6**
Outside Study Area - Wyre District																								
Aldi, Moss Lane, Preston	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	1.99	6.1	0.00	0.0	0.86	1.0	**0.00**	**0.0**	**2.85**	**0.4**
Booths, Park Hill Road, Preston	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.26	0.1	0.29	0.9	0.00	0.0	0.00	0.0	**0.00**	**0.0**	**0.55**	**0.1**
Great Eccleston	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	1.43	1.7	**0.00**	**0.0**	**1.43**	**0.2**
Sainsbury's, Park Hill Road, Preston	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.94	2.9	0.00	0.0	0.00	0.0	**0.00**	**0.0**	**0.94**	**0.1**
Sub Total Outside Study Area - Wyre District	**0.00**	**0.0**	**0.00**	**0.0**	**0.00**	**0.0**	**0.00**	**0.0**	**0.00**	**0.0**	**0.00**	**0.0**	**0.26**	**0.1**	**3.22**	**9.9**	**0.00**	**0.0**	**2.29**	**2.7**	**0.00**	**0.0**	**5.76**	**0.8**
Outside Study Area - Other																								
Cumbria	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.41	0.4	0.21	0.2	**0.00**	**0.0**	**0.61**	**0.1**
Wales	0.00	0.0	0.00	0.0	0.37	0.5	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	0.00	0.0	**0.37**	**0.1**	**0.37**	**0.1**
Sub Total Outside Study Area - Other	**0.00**	**0.0**	**0.00**	**0.0**	**0.37**	**0.5**	**0.00**	**0.0**	**0.00**	**0.0**	**0.00**	**0.0**	**0.00**	**0.0**	**0.00**	**0.0**	**0.41**	**0.4**	**0.21**	**0.2**	**0.37**	**0.1**	**0.98**	**0.1**
SUB TOTAL OUTSIDE STUDY AREA	**0.19**	**0.8**	**0.10**	**0.2**	**0.92**	**1.3**	**2.49**	**4.3**	**0.80**	**1.9**	**0.32**	**0.6**	**1.68**	**0.9**	**4.07**	**12.5**	**3.04**	**2.8**	**17.80**	**21.1**	**4.83**	**1.7**	**31.41**	**4.5**
TOTAL	**25.12**	**100.0**	**42.29**	**100.0**	**71.19**	**100.0**	**58.12**	**100.0**	**41.35**	**100.0**	**52.88**	**100.0**	**189.84**	**100.0**	**32.54**	**100.0**	**108.11**	**100.0**	**84.43**	**100.0**	**290.95**	**100.0**	**705.88**	**100.0**

Notes:

a. The total convenience goods expenditure is calculated by summing the 'main' and 'top-up' expenditure within each zone for each destination (Table 4). The percentage market share of expenditure is calculated by dividing the expenditure at each destination by the total convenience goods expenditure by the residents of each zone.

TABLE 6: SURVEY-DERIVED PERFORMANCE OF STORES COMPARED TO EXPECTED BENCHMARK PERFORMANCE AT 2019

Destination	Benchmark Convenience Goods Turnover					Survey Turnover	Over/under-trading (Excluding Inflow)*
	Gross	Net Sales Area	Convenience Sales Area	Sales Density	Benchmark Turnover		
	sq.m	sq.m	sq.m	£ per sq.m	£m	£m	£m
INSIDE STUDY AREA							
Zone 1							
Blackpool Town Centre	2,950	2,065	2,065	-	8.4	8.4	0.0
Sainsbury's, Talbot Road, Blackpool	12,584	5,388	3,233	11,356	36.7	22.2	-14.5
Iceland, Topping Street, Blackpool	643	450	431	6,663	2.9	5.4	2.6
Marks & Spencer, Church Street, Blackpool	1,977	1,186	1,023	10,176	10.4	3.7	-6.7
Co-op, Abingdon Street, Blackpool	519	363	316	10,514	3.3	0.8	-2.5
Co-op, Warley Road, Blackpool	372	240	209	10,514	2.2	1.9	-0.3
Local shops, Zone 1	-	-	-	-	0.5	0.5	0.0
Sub Total Zone 1	**-**	**-**	**-**	**-**	**64.4**	**42.9**	**-21.5**
Zone 2							
Lidl, Bloomfield Road, Blackpool	1,511	1,068	831	9,814	8.2	6.9	-1.3
Tesco Express, Ansdell Road, Blackpool	277	194	174	13,401	2.3	1.6	-0.8
Tesco Express, Central Drive, Blackpool	232	168	151	13,401	2.0	1.0	-1.0
Local shops, Zone 2	-	-	-	-	1.4	1.4	0.0
Sub Total Zone 2	**-**	**-**	**-**	**-**	**13.9**	**10.9**	**-3.1**
Zone 3							
Co-op, Layton Road, Blackpool	443	194	169	10,514	1.8	3.2	1.4
Co-op, Normoss Road, Blackpool	333	163	141	10,514	1.5	2.4	0.9
Layton District Centre	815	571	571	-	0.8	0.8	0.0
Lidl, Devonshire Road, Blackpool	1,257	889	692	9,814	6.8	7.4	0.6
Marks & Spencer, Blackpool Victoria Hospital, Whinney Heys Road, Blackpool	174	113	102	10,176	1.0	0.1	-0.9
Sainsbury's Local, Whitegate Drive, Blackpool	384	253	228	11,356	2.6	2.9	0.3
Tesco Express, Westcliffe Drive, Blackpool	422	278	250	13,401	3.3	3.6	0.2
Tesco Express, Whitegate Drive, Blackpool	301	210	189	13,401	2.5	2.0	-0.5
Whitegate Drive District Centre	584	409	409	-	1.0	1.0	0.0
Local shops, Zone 3 (Blackpool)	-	-	-	-	0.5	0.5	0.0
Local shops, Zone 3 (Fylde)	-	-	-	-	2.4	2.4	0.0
Sub Total Zone 3	**-**	**-**	**-**	**-**	**24.2**	**26.2**	**2.0**
Zone 4							
Aldi, Blackpool Retail Park, Blackpool	1,685	1,255	1,032	10,517	10.8	12.9	2.0
Aldi, Parkinson Way Retail Park, Waterloo Road, Blackpool	1,591	1,096	901	10,517	9.5	13.2	3.8
Co-op, Harrowside, Blackpool	92	58	50	10,514	0.5	0.3	-0.2
Highfield Road District Centre	635	445	445	-	0.0	0.0	0.0
Tesco Express, Highfield Road, Blackpool	198	139	125	13,401	1.7	2.1	0.5
Waterloo Road/South Shore District Centre	2,193	1,535	1,535	-	0.0	0.0	0.0
Iceland, Waterloo Road, Blackpool	703	352	337	6,663	2.2	2.1	-0.2
Tesco Express, Lytham Road, Blackpool	709	495	339	13,401	4.5	0.4	-4.2
Tesco Express, Marton Drive, Blackpool	382	233	210	13,401	2.8	3.7	0.9
Local shops, Zone 4 (Blackpool)	-	-	-	-	1.5	1.5	0.0
Morrisons, Squires Gate Lane, Blackpool	7,534	4,392	3,231	12,293	39.7	38.6	-1.1
Sub Total Zone 4	**-**	**-**	**-**	**-**	**73.4**	**74.8**	**1.5**
Zone 5							
Aldi, Park Road, Blackpool	1,648	1,135	933	10,517	9.8	15.7	5.8
Asda, Cherry Tree Road, Blackpool	10,427	6,338	3,803	13,268	50.5	44.8	-5.6
Asda, Wellbeck Avenue, Blackpool	1,146	834	521	13,268	6.9	4.4	-2.5
Iceland, Vicarage Lane, Blackpool	823	412	395	6,663	2.6	3.1	0.5
Tesco Extra, Clifton Road Retail Park, Sandhams Way, Blackpool	13,817	9,477	5,686	13,401	76.2	61.3	-14.9
Vicarage Lane Commercial Area, Blackpool	-	-	-	-	0.2	0.2	0.0
Local shops, Zone 5 (Blackpool)	-	-	-	-	1.8	1.8	0.0
Sub Total Zone 5	**-**	**-**	**-**	**-**	**148.0**	**131.4**	**-16.6**
Zone 6							
Bispham District Centre	489	318	318	-	1.2	1.2	0.0
Co-op, Red Bank Road, Blackpool	782	314	273	10,514	2.9	0.5	-2.4
Devonshire Road, Blackpool	-	-	-	-	0.4	0.4	0.0
Red Bank Road District Centre	337	219	219	-	0.0	0.0	0.0
Sainsbury's, Red Bank Road District Centre, Blackpool	4,527	2,783	1,972	11,356	22.4	25.5	3.1
Tesco Express, All Hallows Road, Blackpool	222	165	148	13,401	2.0	3.2	1.2
Local shops, Zone 6	-	-	-	-	0.7	0.7	0.0
Sub Total Zone 6	**-**	**-**	**-**	**-**	**29.6**	**31.5**	**1.9**
Zone 7							
Lidl, Anchorsholme Lane West, Thornton-Cleveleys	1,631	1,153	897	9,814	8.8	7.8	-1.0
Sub Total Zone 7	**-**	**-**	**-**	**-**	**8.8**	**7.8**	**-1.0**
TOTAL BLACKPOOL BOROUGH	**-**	**-**	**-**	**-**	**320.2**	**284.6**	**-35.7**

Notes:

a. Gross floorspace for other stores sourced from planning application material, the Valuation Office Agency database, Experian GOAD or Council database.

b. Net sales area floorspace sourced from planning application material where available, or based on WYG professional judgement (generally assumed to be 70% of gross floorspace for smaller stores where not specifically known)

c. Net convenience goods sales area floorspace for top 10 operators (i.e. Aldi, Asda, Co-op, Iceland, Lidl, M&S Food, Morrisons, Sainsbury's, Tesco and Waitrose) derived from company average split between convenience and comparison floorspace as identified by Verdict UK Food & Grocery Retailer Update 2017 with the exception of large food superstores (i.e. over 7,000 sq.m gross) and small convenience stores (i.e. under 500 sq.m gross) operated by the top 4 operators (Asda, Morrisons, Sainsbury's and Tesco), for which 60% and 95% of net sales area floorspace respectivley is assumed to be convenience goods floorspace. Booths assumed have 85% of net sales dedicated to convenience goods. Net convenience goods sales area floorspace for other destinations in Blackpool town centre and Blackpool's district centres assumed to equal net sales area.

d. Sales densities relate to the monetary turnover of each square metre of net sales area. Company average sales densities are derived from Verdict 2018 or Mintel Retail Rankings 2018

e. Benchmark turnover for named convenience stores is calculated as the convenience sales area multiplied by the company average sales density. It has been assumed that all unnamed convenience stores are 'trading at equilibrium' (i.e. their 'benchmark' turnover equates to that identified by the survey)

f. Survey derived convenience goods turnover is the turnover derived from residents of the Study Area only as estimated in Table 4

g. Over/undertrading deducts the benchmark turnover from the survey derived turnover.

TABLE 7: TURNOVER OF CONVENIENCE GOODS COMMITMENTS IN STUDY AREA

Planning Application Reference	Location	Description of Development	Gross Retail Floorspace sq.m	Net Retail Floorspace sq.m	Net Convenience Sales Area Floorspace sq.m	Estimated Convenience Sales Density £ per sq.m	Estimated Convenience Turnover at 2017 £m	Percentage Diversion from Blackpool Borough %	Convenience Turnover Diverted from Blackpool Borough £m	Planning Status
Zone 1										
16/0429	Former Post Office, 26-30 Abingdon Street, Blackpool	Redevelopment for retail, restaurants and cafes, office and leisure uses (A1, A3, B1 (a), D2) and a 50 bed hotel	1,061	743	0	-	-	-	-	Full planning permission granted 23/11/2016 - Extant
17/0276	Wilko store, Talbot Road, Blackpool	New hotel and associated development including 5 new retail units	667	0	-	-	-	-	-	Full planning permission granted 05/07/2017- Extant
Zone 2										
16/0538	Lidl, Bloomfield Road, Blackpool	Extension to existing Lidl store	394	276	215	9,814	2.11	100%	2.11	Full planning permission granted 04/01/2017 - Extant
17/0453	Tower Street Car Park, Tower Street, Blackpool	Extension to the Houndshill Shopping Centre for resturant, retail unit (Wilko) and cinema	2,090	0	-	-	-	-	-	Full planning permission granted 27/09/2017 - Extant
Zone 3										
16/0537	Lidl, Devonshire Road, Blackpool	Extension to existing Lidl store	367	217	169	9,814	1.66	100%	1.66	Under construction at August 2017
Zone 5										
16/0564	Former Booths, Highfield Road, Blackpool	Redevelopment for residential and convenience store	450	315	284	5,000	1.42	100%	1.42	Outline planning permission granted 04/01/2017
14/0822	Site 3, Whitehills Business Park, Hallam Way, Blackpool (Fylde)	Erection of non-food bulky goods retail unit	10,195	7,137	0	-	-	-	-	Full planning permission granted 03/03/2016 - Extant. Full planning application for revised scheme pending determination (ref. 17/0359).
Zone 7										
11/00473/FULMAJ	Freeport Fleetwood Outlet Village, Anchorage Road, Fleetwood	Three new retail units	2,101	1,471	0	-	-	-	-	Development commenced (15/00202/LAWP), but scheme is not currently being progressed
18/00065/LMAJ	Land at Norcross, Norcross Lane, Thornton-Cleveleys	Mixed use development including supermarket, frozen food store and non-food retail units (Class A1)								Full planning permission granted 21/03/2018 - Extant
		Supermarket	1,115	836	836	11,253	9.41	35%	3.29	
		Frozen food store	1,096	767	652	6,510	4.25	35%	1.49	
		Non-food units	3,901	3,121	0	-	-	-	-	
16/00853/FULMAJ	Former Bourne Poacher, 325 Fleetwood Road North, Thornton-Cleveleys	Retirement apartments and retail unit	402	248	248	5,000	1.24	0%	0.00	
Zone 9										
16/0317	Former Westgate House, Squires Gate Lane, Squires Gate, Blackpool (Fylde)	Erection of Lidl foodstore	2,469	1,424	1,108	9,814	10.88	90%	9.79	Opened 26/10/2017
TOTAL INSIDE STUDY AREA			**-**	**-**	**3,512**	**-**	**30.95**	**-**	**19.75**	

Notes:

a. Former Post Office: Gross retail floorspace sourced from planning application. Assumed net to gross ratio of 70%. Assumed 100% of retail floorspace will be comparison floorspace. Sales density based on WYG judgement for the type of units proposed.

b. Wilko, Talbot Road: Gross retail floorpsace sourced from planning application material. Existing Wilko stiore on site relocating to Tower Street Car Park development (application ref 17/0453). No net uplift in retail floorspace once the relocation and redevelopment of Wilko's exisitng store is taken into account.

c. Lidl, Bloomfield Road: Gross retail floorspace sourced from planning application. Assumed net to gross ratio of 70%. Assumed company average comparison/convenience floorspace split and sales densities for Lidl sourced from Verdict 2017.

d. Tower Street Car Park: Gross retail floorspace sourced from planning application. Wilko relocating from existing store on Talbot Road in Blackpool. Site of existing store to be redeveloped for a tram terminus and hotel uses (application ref 17/0276). No net uplift in retail floorspace once the relocation and redevelopment of Wilko's exisitng store is taken into account.

e. Lidl, Devonshire Road: Gross and net retail floorspace sourced from planning application. Assumed company average comparison/convenience floorspace split and sales densities for Lidl sourced from Verdict 2017.

f. Former Booths, Highfield Road: Gross retail floorspace sourced from planning application. Assumed net to gross ratio of 70%. Assumed 90% of retail floorspace will be convenience floorspace and 10% will be comparison floorspace. Sales density based on WYG judgement for the type of unit proposed.

g. Site 3, Whitehills Business Park: Gross retail floorspace sourced from planning application. Assumed net to gross ratio of 70%. Assumed 100% of retail floorspace will be comparison floorspace. Sales density based on WYG judgement for the type of unit proposed.

h. Freeport Fleetwood Outlet Village: Gross retail floorspace sourced from planning application. Assumed net to gross ratio of 70%. Assumed 100% of retail floorspace will be comparison floorspace. Sales density based on WYG judgement for the type of unit proposed.

i. Land at Norcross: Retail floorspace sourced from planning application. Frozen food store - assumed average of company average sales densities for Iceland, Farmfoods and Heron Foods derived from Verdict 2017 and Mintel Retail Rankings 2017. Supermarket - assumed average of company average sales densities for the top 10 convenience operators sourced from Verdict 2017. Non-food units - sales density based on

j. Former Bourne Poacher: Gross and net retail floorspace sourced from planning application. Assumed 100% of retail floorspace will be convenience floorspace. Sales density based on WYG judgement for the type of unit proposed.

k. Former Westgate House, Squires Gate Lane: Gross and net retail floorspace sourced from planning application. Assumed company average comparison/convenience floorspace split and sales densities for Lidl sourced from Verdict 2017.

l. Percentage diversion from Blackpool Borough based on WYG professional judgement.

m. Red indicates destination in Blackpool Borough

ESTIMATED (BASELINE) CAPACITY FOR NEW CONVENIENCE GOODS PROVISION WITHIN BLACKPOOL BOROUGH

Table 8a: Estimated 'Capacity' for Convenience Goods Facilities in Blackpool Borough

Year	Benchmark Turnover of Existing Stores[1]	Market Share of Study Area Expenditure*	Expenditure Drawn from Study Area[2]	Inflow from Outside Study Area[3]	Total available expenditure[4]	Surplus Expenditure[5]
	£m	%	£m	£m	£m	£m
2019	320.2	40.3	284.6	55.2	339.7	19.5
2024	324.1	40.3	286.8	55.6	342.4	18.3
2029	324.7	40.3	289.7	56.1	345.8	21.1
2034	324.7	40.3	292.3	56.7	349.0	24.3

Notes:

1. Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 16 (Dec 2018)
2. Assumes constant market share claimed by Zones 1 to 6 of 40.2% from Study Area
3. Assumes that the proportion of the total available expenditure in Blackpool Borough derived through the inflow is maintained over the study period.
4. Sum of expenditure drawn from the study area and inflow from outside the study area
5. Surplus calculated by subtracting the benchmark turnover of existing stores from the total available expenditure

Table 8b: Quantitative Need for Additional Convenience Goods Floorspace in Blackpool Borough

Year	Surplus Expenditure	Convenience Goods Floorspace Requirement	
		Min[1*]	Max[2*]
	£m	sq.m	sq.m
2019	19.5	1,500	2,700
2024	18.3	1,400	2,500
2029	21.1	1,700	2,900
2034	24.3	1,900	3,300

Notes:

1. Average sales density assumed to be £12,573 per sq.m based on the average sales density of the leading four supermarkets as identified by Verdict 2018
2. Average sales density assumed to be £8,000 per sq.m which is more typical for discount operators

* Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 16 (Dec 2018)

Table 8c: Net Quantitative Need for Additional Convenience Goods Floorspace in Blackpool Borough (with Deduction for Planning Commitments)

Year	Surplus Expenditure	Convenience Goods			
		Turnover of Commitments[1]	Residual Expenditure[2]	Floorspace Requirement	
				Min[3*]	Max[4*]
	£m	£m	£m	sq.m	sq.m
2019	19.5	19.7	-0.3	0	0
2024	18.3	20.0	-1.7	-100	-200
2029	21.1	20.0	1.0	100	100
2034	24.3	20.0	4.3	300	600

Notes:

1. Convenience turnover of commitments diverted from Blackpool Borough (Table 6). Includes floorspace implemented since the 2017 household survey was undertaken and extant planning permissions.
2. Residual calculated by subtracting turnover of commitments from surplus expenditure
3. Average sales density assumed to be £12,542 per sq.m based on the average sales density of the leading four supermarkets as identified by Verdict 2017
4. Average sales density assumed to be £8,000 per sq.m which is more typical for discount operators

* Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 16 (Dec 2018)

Appendix B: Impact Assessment

Blackpool Town Centre - Potential Discount Foodstore
Retail Impact Assessment Tables

NEXUS PLANNING

Table 1: Population

Zone	2019	2024
1	12,653	12,625
2	20,116	20,026
3	32,335	32,514
4	25,983	25,956
5	18,142	18,172
6	23,530	23,376
7	85,435	86,519
Total	**218,194**	**219,188**

Table 2a: Convenience Goods Expenditure Per Capita (2019)

Zone	2017	2019	2024
1	1,970	1,985	1,981
2	2,086	2,102	2,098
3	2,184	2,202	2,197
4	2,219	2,237	2,232
5	2,261	2,280	2,275
6	2,230	2,247	2,243
7	2,204	2,222	2,218

Table 3a: Total Convenience Goods Expenditure

Zone	2019	2024
1	25.1	25.0
2	42.3	42.0
3	71.2	71.4
4	58.1	57.9
5	41.4	41.3
6	52.9	52.4
7	189.8	191.9
Total	**480.8**	**482.1**

Table 3b: Main and Top-up Split at 2019

Zone	Main	Top-up
1	18.8	6.3
2	31.7	10.6
3	53.4	17.8
4	43.6	14.5
5	31.0	10.3
6	39.7	13.2
7	142.4	47.5
Total	**360.6**	**120.2**

Table 3c: Main and Top-up Split at 2024

Zone	Main	Top-up
1	18.8	6.3
2	31.5	10.5
3	53.6	17.9
4	43.5	14.5
5	31.0	10.3
6	39.3	13.1
7	143.9	48.0
Total	**361.5**	**120.5**

Notes

a. Zones based on postcode sectors derived from Blackpool Retail, Leisure and Hotel Study 2018

b. Population estimates at 2019 and 2024 derived from Experian MMG3 2018 data release

c. Expenditure estimates at 2018 derived from Experian MMG3 2018 data release

d. Expenditure estimates projected forward in accordance with forecasts set out at Figure 6 of Experian Retail Planner Briefing Note 16

2017 Prices

Blackpool Town Centre - Potential Discount Foodstore
Retail Impact Assessment Tables

Table 4a: Total Convenience Goods Turnover at 2019 and 2024 (Not Including Inflow)

Destination	Turnover at 2019			Turnover at 2024		
	Main	Top-up	Total	Main	Top-up	Total
Zone 1						
Blackpool Town Centre	1.5	7.0	**8.4**	1.5	7.0	**8.4**
Sainsbury's, Talbot Road, Blackpool	18.5	3.7	**22.2**	18.5	3.7	**22.2**
Iceland, Topping Street, Blackpool	4.9	0.5	**5.4**	4.9	0.5	**5.4**
Marks & Spencer, Church Street, Blackpool	2.5	1.2	**3.7**	2.5	1.2	**3.7**
Co-op, Abingdon Street, Blackpool	0.1	0.8	**0.8**	0.1	0.8	**0.8**
Co-op, Warley Road, Blackpool	0.1	1.7	**1.9**	0.1	1.7	**1.9**
Local shops, Zone 1	0.0	0.5	**0.5**	0.0	0.5	**0.5**
Sub Total Zone 1	**27.5**	**15.4**	**42.9**	**27.5**	**15.4**	**42.9**
Zone 2						
Lidl, Bloomfield Road, Blackpool	5.2	1.6	**6.9**	5.2	1.6	**6.8**
Tesco Express, Ansdell Road, Blackpool	0.1	1.4	**1.6**	0.1	1.4	**1.5**
Tesco Express, Central Drive, Blackpool	0.5	0.5	**1.0**	0.5	0.5	**1.0**
Local shops, Zone 2	0.0	1.4	**1.4**	0.0	1.4	**1.4**
Sub Total Zone 2	**5.8**	**5.0**	**10.9**	**5.8**	**5.0**	**10.8**
Zone 3						
Co-op, Layton Road, Blackpool	0.4	2.8	**3.2**	0.4	2.8	**3.2**
Co-op, Normoss Road, Blackpool	0.0	2.4	**2.4**	0.0	2.4	**2.4**
Layton District Centre	0.2	0.7	**0.8**	0.2	0.7	**0.8**
Lidl, Devonshire Road, Blackpool	5.1	2.2	**7.4**	5.1	2.2	**7.3**
Marks & Spencer, Blackpool Victoria Hospital, Whinney Heys Road, Blackpool	0.1	0.0	**0.1**	0.1	0.0	**0.1**
Sainsbury's Local, Whitegate Drive, Blackpool	0.5	2.5	**2.9**	0.5	2.4	**2.9**
Tesco Express, Westcliffe Drive, Blackpool	3.1	0.5	**3.6**	3.1	0.5	**3.6**
Tesco Express, Whitegate Drive, Blackpool	0.8	1.2	**2.0**	0.8	1.2	**2.0**
Whitegate Drive District Centre	0.4	0.6	**1.0**	0.4	0.6	**1.0**
Local shops, Zone 3 (Blackpool)	0.0	0.5	**0.5**	0.0	0.5	**0.5**
Local shops, Zone 3 (Fylde)	0.0	2.4	**2.4**	0.0	2.4	**2.4**
Sub Total Zone 3	**10.6**	**15.6**	**26.2**	**10.7**	**15.6**	**26.3**
Zone 4						
Aldi, Blackpool Retail Park, Blackpool	9.1	3.8	**12.9**	9.1	3.8	**12.9**
Aldi, Parkinson Way Retail Park, Waterloo Road, Blackpool	12.3	1.0	**13.2**	12.3	1.0	**13.2**
Co-op, Harrowside, Blackpool	0.0	0.3	**0.3**	0.0	0.3	**0.3**
Highfield Road District Centre	0.0	0.0	**0.0**	0.0	0.0	**0.0**
Tesco Express, Highfield Road, Blackpool	0.3	1.9	**2.1**	0.3	1.9	**2.1**
Waterloo Road/South Shore District Centre	0.0	0.0	**0.0**	0.0	0.0	**0.0**
Iceland, Waterloo Road, Blackpool	1.8	0.3	**2.1**	1.8	0.3	**2.1**
Tesco Express, Lytham Road, Blackpool	0.1	0.2	**0.4**	0.1	0.2	**0.3**
Tesco Express, Marton Drive, Blackpool	1.1	2.6	**3.7**	1.1	2.6	**3.7**
Local shops, Zone 4 (Blackpool)	0.0	1.5	**1.5**	0.0	1.5	**1.5**
Morrisons, Squires Gate Lane, Blackpool	36.0	2.6	**38.6**	36.1	2.6	**38.7**
Sub Total Zone 4	**60.7**	**14.1**	**74.8**	**60.8**	**14.0**	**74.9**
Zone 5						
Aldi, Park Road, Blackpool	13.1	2.5	**15.7**	13.1	2.5	**15.6**
Asda, Cherry Tree Road, Blackpool	40.1	4.7	**44.8**	40.2	4.7	**44.9**
Asda, Wellbeck Avenue, Blackpool	3.0	1.4	**4.4**	3.0	1.4	**4.4**
Iceland, Vicarage Lane, Blackpool	2.2	0.9	**3.1**	2.2	0.9	**3.1**
Tesco Extra, Clifton Road Retail Park, Sandhams Way, Blackpool	59.5	1.9	**61.3**	59.8	1.9	**61.7**
Vicarage Lane Commercial Area, Blackpool	0.0	0.2	**0.2**	0.0	0.2	**0.2**
Local shops, Zone 5 (Blackpool)	0.0	1.8	**1.8**	0.0	1.8	**1.8**
Sub Total Zone 5	**118.0**	**13.4**	**131.4**	**118.3**	**13.4**	**131.7**
Zone 6						
Bispham District Centre	0.0	1.2	**1.2**	0.0	1.1	**1.1**
Co-op, Red Bank Road, Blackpool	0.0	0.5	**0.5**	0.0	0.5	**0.5**
Devonshire Road, Blackpool	0.0	0.4	**0.4**	0.0	0.4	**0.4**
Red Bank Road District Centre	0.0	0.0	**0.0**	0.0	0.0	**0.0**
Sainsbury's, Red Bank Road District Centre, Blackpool	19.2	6.3	**25.5**	19.2	6.2	**25.4**
Tesco Express, All Hallows Road, Blackpool	0.8	2.4	**3.2**	0.8	2.4	**3.2**
Local shops, Zone 6	0.2	0.6	**0.7**	0.2	0.6	**0.7**
Sub Total Zone 6	**20.2**	**11.3**	**31.5**	**20.2**	**11.2**	**31.4**
Zone 7						
Aldi, Crescent West, Thornton-Cleveleys	26.9	3.2	**30.0**	27.0	3.2	**30.2**
Aldi, Poulton Road, Fleetwood	12.9	1.5	**14.4**	13.1	1.5	**14.6**
Aldi, Tithebarn Street, Poulton-le-Fylde	15.8	1.5	**17.2**	16.0	1.5	**17.5**
Asda, Cop Lane, Fleetwood	29.4	3.0	**32.4**	29.7	3.0	**32.7**
Booths, Teanlowe Centre, Blackpool Old Road, Poulton-le-Fylde	8.9	3.2	**12.1**	9.1	3.2	**12.3**
Cleveleys Town Centre	0.6	1.9	**2.6**	0.6	1.9	**2.6**
Co-op, Fleetwood Road North, Thornton-Cleveleys	0.4	3.6	**4.0**	0.4	3.7	**4.1**
Co-op, Larkholme Parade, Fleetwood	0.0	3.9	**3.9**	0.0	3.9	**3.9**
Co-op, Thornton Centre, Victoria Road East, Thornton-Cleveleys	0.9	2.7	**3.6**	1.0	2.7	**3.7**
Fleetwood Town Centre	0.0	1.2	**1.2**	0.0	1.2	**1.2**
Iceland, Lord Street, Fleetwood	1.2	0.5	**1.7**	1.2	0.5	**1.7**
Lidl, Anchorsholme Lane West, Thornton-Cleveleys	5.9	1.9	**7.8**	6.0	1.9	**7.9**
M&S Simply Food, Victoria Road West, Thornton-Cleveleys	1.8	1.6	**3.4**	1.9	1.6	**3.5**
Morrisons, Amounderness Way, Thornton-Cleveleys	39.3	3.2	**42.5**	39.6	3.3	**42.9**
Poulton-le-Fylde Town Centre	0.0	3.3	**3.3**	0.0	3.3	**3.3**
Sainsbury's Local, Victoria Road West, Thornton-Cleveleys	0.5	1.1	**1.6**	0.5	1.1	**1.6**
Tesco Express, Garstang Road East, Poulton-le-Fylde	0.0	1.4	**1.4**	0.0	1.4	**1.4**
Tesco Express, Lighthouse Ford, Hatfield Avenue, Fleetwood	0.2	0.6	**0.7**	0.2	0.6	**0.7**
Tesco Express, Marsh Mill Village, Fleetwood Road North, Thornton-Cleveleys	0.5	0.9	**1.3**	0.5	0.9	**1.4**
Tesco Metro, Victoria Road West, Thornton-Cleveleys	4.2	0.9	**5.1**	4.2	0.9	**5.1**
Local shops, Zone 7 (Wyre)	0.0	5.9	**5.9**	0.0	6.0	**6.0**
Sub Total Zone 7	**149.5**	**46.9**	**196.4**	**150.9**	**47.4**	**198.3**

Blackpool Town Centre - Potential Discount Foodstore
Retail Impact Assessment Tables

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Table 5: Estimated Proposal Convenience Goods Turnover at 2024

	Gross Internal Area (sq.m)	Net Sales Floorspace (sq.m)	Net Convenience Floorspace (sq.m)	Sales Density	Turnover at 2019	Turnover at 2024
Convenience Floorspace	1,951	1,268	1,015	11,500	11.7	11.6
Comparison Floorspace			253	7,000	1.8	1.9
Total	**1,951**	**1,268**	**1,268**	**-**	**13.4**	**13.6**

Notes

a. Proposal foodstore net sales area based on our understanding of operational requirements

b. Convenience and comparison goods sales density for proposal foodstore based on company averages of Aldi and Lidl as derived from Verdict 2018 and Mintel Retail Rankings 2018

c. Turnover of units to 2023 adjusted in accordance with recommendations provided at Figures 4a and 4b of Experian Retail Planner Briefing Note 16

2017 Prices

Blackpool Town Centre - Potential Discount Foodstore
Retail Impact Assessment Tables

Table 6a: Trade Draw Assumptions

Trade Draw								
1	2	3	4	5	6	7	Inflow	Total
40.0%	15.0%	10.0%	2.0%	3.0%	17.5%	2.0%	10%	100%
4.7	1.7	1.2	0.2	0.3	2.0	0.2	1.2	11.6

Table 6b: Trade Diversion Assumptions on a Zonal Basis

Destination	Zonal Diversion (%)							Zonal Diversion at 2024							
	1	2	3	4	5	6	7	1	2	3	4	5	6	7	Total
Zone 1															
Blackpool Town Centre	1%	1%	4%	0%	0%	1%	0%	0.04	0.01	0.05	0.00	0.00	0.01	0.00	**0.12**
Sainsbury's, Talbot Road, Blackpool	38%	12%	10%	0%	1%	12%	3%	1.78	0.21	0.12	0.00	0.00	0.24	0.01	**2.36**
Iceland, Topping Street, Blackpool	2%	1%	2%	0%	0%	1%	0%	0.09	0.02	0.02	0.00	0.00	0.02	0.00	**0.15**
Marks & Spencer, Church Street, Blackpool	0%	1%	2%	0%	1%	0%	0%	0.02	0.02	0.02	0.00	0.00	0.01	0.00	**0.07**
Co-op, Abingdon Street, Blackpool	0%	0%	0%	0%	0%	0%	0%	0.00	0.01	0.00	0.00	0.00	0.00	0.00	**0.01**
Co-op, Warley Road, Blackpool	0%	0%	0%	0%	0%	2%	0%	0.01	0.00	0.00	0.00	0.00	0.03	0.00	**0.05**
Local shops, Zone 1	1%	0%	0%	0%	0%	0%	0%	0.03	0.00	0.00	0.00	0.00	0.00	0.00	**0.04**
Sub Total Zone 1	**42%**	**16%**	**18%**	**1%**	**2%**	**15%**	**3%**	**1.98**	**0.28**	**0.21**	**0.00**	**0.01**	**0.31**	**0.01**	**2.79**
Zone 2															
Lidl, Bloomfield Road, Blackpool	1%	16%	2%	3%	3%	0%	0%	0.04	0.28	0.02	0.01	0.01	0.00	0.00	**0.36**
Tesco Express, Ansdell Road, Blackpool	0%	2%	0%	0%	0%	0%	0%	0.00	0.04	0.00	0.00	0.00	0.00	0.00	**0.04**
Tesco Express, Central Drive, Blackpool	0%	1%	0%	0%	0%	0%	0%	0.00	0.02	0.00	0.00	0.00	0.00	0.00	**0.02**
Local shops, Zone 2	0%	2%	0%	0%	0%	0%	0%	0.00	0.03	0.00	0.00	0.00	0.00	0.00	**0.03**
Sub Total Zone 2	**1%**	**21%**	**2%**	**3%**	**3%**	**0%**	**0%**	**0.04**	**0.36**	**0.02**	**0.01**	**0.01**	**0.00**	**0.00**	**0.44**
Zone 3															
Co-op, Layton Road, Blackpool	0%	0%	2%	0%	0%	0%	0%	0.00	0.00	0.03	0.00	0.00	0.00	0.00	**0.03**
Co-op, Normoss Road, Blackpool	0%	0%	2%	0%	0%	0%	0%	0.00	0.00	0.02	0.00	0.00	0.00	0.00	**0.02**
Layton District Centre	0%	0%	1%	0%	0%	0%	0%	0.00	0.00	0.01	0.00	0.00	0.00	0.00	**0.01**
Lidl, Devonshire Road, Blackpool	15%	2%	7%	0%	0%	3%	0%	0.71	0.04	0.09	0.00	0.00	0.06	0.00	**0.89**
Marks & Spencer, Blackpool Victoria Hospital, Whinney Heys Road, Blackpool	0%	0%	0%	0%	0%	0%	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.00**
Sainsbury's Local, Whitegate Drive, Blackpool	0%	0%	0%	2%	0%	0%	0%	0.01	0.01	0.00	0.01	0.00	0.00	0.00	**0.02**
Tesco Express, Westcliffe Drive, Blackpool	1%	0%	0%	0%	0%	0%	0%	0.02	0.00	0.00	0.00	0.00	0.00	0.00	**0.03**
Tesco Express, Whitegate Drive, Blackpool	0%	1%	0%	0%	0%	0%	0%	0.01	0.02	0.00	0.00	0.00	0.01	0.00	**0.04**
Whitegate Drive District Centre	0%	0%	1%	0%	0%	0%	0%	0.00	0.00	0.01	0.00	0.00	0.00	0.00	**0.01**
Local shops, Zone 3 (Blackpool)	0%	0%	0%	0%	0%	0%	0%	0.02	0.00	0.00	0.00	0.00	0.00	0.00	**0.02**
Local shops, Zone 3 (Fylde)	0%	0%	0%	0%	0%	0%	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.00**
Sub Total Zone 3	**16%**	**4%**	**14%**	**2%**	**0%**	**4%**	**0%**	**0.76**	**0.06**	**0.16**	**0.01**	**0.00**	**0.07**	**0.00**	**1.07**
Zone 4															
Aldi, Blackpool Retail Park, Blackpool	0%	0%	0%	36%	11%	0%	1%	0.00	0.00	0.00	0.08	0.04	0.00	0.00	**0.12**
Aldi, Parkinson Way Retail Park, Waterloo Road, Blackpool	1%	16%	9%	7%	10%	0%	0%	0.06	0.29	0.10	0.02	0.04	0.00	0.00	**0.50**
Co-op, Harrowside, Blackpool	0%	0%	0%	0%	0%	0%	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.00**
Highfield Road District Centre	0%	0%	0%	0%	0%	0%	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.00**
Tesco Express, Highfield Road, Blackpool	0%	0%	0%	2%	0%	0%	0%	0.00	0.00	0.00	0.01	0.00	0.00	0.00	**0.01**
Waterloo Road/South Shore District Centre	0%	0%	0%	0%	0%	0%	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.00**
Iceland, Waterloo Road, Blackpool	0%	1%	0%	2%	0%	0%	0%	0.00	0.01	0.00	0.00	0.00	0.00	0.00	**0.01**
Tesco Express, Lytham Road, Blackpool	0%	0%	0%	0%	0%	0%	0%	0.00	0.01	0.00	0.00	0.00	0.00	0.00	**0.01**
Tesco Express, Marton Drive, Blackpool	0%	0%	0%	3%	0%	0%	0%	0.00	0.01	0.00	0.01	0.00	0.00	0.00	**0.02**
Local shops, Zone 4 (Blackpool)	0%	0%	0%	1%	1%	0%	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.01**
Morrisons, Squires Gate Lane, Blackpool	0%	0%	0%	0%	0%	0%	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.00**
Sub Total Zone 4	**1%**	**18%**	**9%**	**51%**	**23%**	**0%**	**1%**	**0.06**	**0.31**	**0.10**	**0.12**	**0.08**	**0.00**	**0.00**	**0.67**
Zone 5															
Aldi, Park Road, Blackpool	12%	13%	14%	8%	6%	1%	0%	0.56	0.23	0.17	0.02	0.02	0.01	0.00	**1.01**
Asda, Cherry Tree Road, Blackpool	7%	9%	16%	13%	40%	3%	1%	0.32	0.15	0.19	0.03	0.14	0.06	0.00	**0.89**
Asda, Wellbeck Avenue, Blackpool	0%	3%	0%	3%	4%	0%	0%	0.01	0.05	0.00	0.01	0.01	0.00	0.00	**0.08**
Iceland, Vicarage Lane, Blackpool	0%	0%	0%	1%	1%	1%	0%	0.01	0.00	0.00	0.00	0.00	0.01	0.00	**0.04**
Tesco Extra, Clifton Road Retail Park, Sandhams Way, Blackpool	5%	16%	17%	11%	17%	11%	3%	0.23	0.27	0.20	0.02	0.06	0.21	0.01	**1.00**
Vicarage Lane Commercial Area, Blackpool	0%	0%	0%	0%	0%	0%	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.00**
Local shops, Zone 5 (Blackpool)	0%	0%	0%	0%	2%	0%	0%	0.00	0.00	0.00	0.00	0.01	0.00	0.00	**0.01**
Sub Total Zone 5	**24%**	**41%**	**47%**	**35%**	**69%**	**15%**	**4%**	**1.13**	**0.71**	**0.55**	**0.08**	**0.24**	**0.30**	**0.01**	**3.02**
Zone 6															
Bispham District Centre	0%	0%	0%	0%	0%	1%	0%	0.02	0.00	0.00	0.00	0.00	0.02	0.00	**0.03**
Co-op, Red Bank Road, Blackpool	0%	0%	0%	0%	0%	1%	0%	0.00	0.00	0.00	0.00	0.00	0.01	0.00	**0.01**
Devonshire Road, Blackpool	1%	0%	0%	0%	0%	0%	0%	0.03	0.00	0.00	0.00	0.00	0.00	0.00	**0.03**
Red Bank Road District Centre	0%	0%	0%	0%	0%	0%	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.00**
Sainsbury's, Red Bank Road District Centre, Blackpool	8%	1%	2%	0%	1%	32%	4%	0.37	0.02	0.02	0.00	0.00	0.66	0.01	**1.08**
Tesco Express, All Hallows Road, Blackpool	0%	0%	0%	0%	0%	2%	1%	0.00	0.00	0.00	0.00	0.00	0.03	0.00	**0.04**
Local shops, Zone 6	0%	0%	0%	0%	0%	1%	0%	0.00	0.00	0.00	0.00	0.00	0.02	0.00	**0.02**
Sub Total Zone 6	**9%**	**1%**	**2%**	**0%**	**1%**	**36%**	**5%**	**0.42**	**0.02**	**0.02**	**0.00**	**0.00**	**0.74**	**0.01**	**1.21**
Zone 7															
Aldi, Crescent West, Thornton-Cleveleys	2%	0%	0%	0%	0%	15%	17%	0.07	0.00	0.00	0.00	0.00	0.31	0.04	**0.42**
Aldi, Poulton Road, Fleetwood	0%	0%	0%	0%	0%	0%	9%	0.00	0.00	0.00	0.00	0.00	0.00	0.02	**0.02**
Aldi, Tithebarn Street, Poulton-le-Fylde	1%	0%	0%	0%	0%	2%	6%	0.02	0.00	0.01	0.00	0.00	0.05	0.01	**0.09**
Asda, Cop Lane, Fleetwood	0%	0%	0%	0%	0%	0%	11%	0.00	0.00	0.00	0.00	0.00	0.00	0.03	**0.03**
Booths, Teanlowe Centre, Blackpool Old Road, Poulton-le-Fylde	0%	0%	1%	0%	0%	0%	3%	0.01	0.00	0.02	0.00	0.00	0.00	0.01	**0.03**
Cleveleys Town Centre	0%	0%	0%	0%	0%	0%	1%	0.00	0.00	0.00	0.00	0.00	0.01	0.00	**0.01**
Co-op, Fleetwood Road North, Thornton-Cleveleys	0%	0%	0%	0%	0%	0%	1%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.00**
Co-op, Larkholme Parade, Fleetwood	0%	0%	0%	0%	0%	0%	1%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.00**
Co-op, Thornton Centre, Victoria Road East, Thornton-Cleveleys	0%	0%	0%	0%	0%	0%	1%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.00**
Fleetwood Town Centre	0%	0%	0%	0%	0%	0%	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.00**
Iceland, Lord Street, Fleetwood	0%	0%	0%	0%	0%	0%	1%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.00**
Lidl, Anchorsholme Lane West, Thornton-Cleveleys	1%	0%	0%	0%	0%	5%	4%	0.03	0.00	0.00	0.00	0.00	0.10	0.01	**0.14**
M&S Simply Food, Victoria Road West, Thornton-Cleveleys	0%	0%	0%	0%	0%	0%	1%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.01**
Morrisons, Amounderness Way, Thornton-Cleveleys	1%	0%	1%	0%	0%	3%	13%	0.04	0.00	0.01	0.00	0.00	0.06	0.03	**0.14**
Poulton-le-Fylde Town Centre	0%	0%	0%	0%	0%	0%	1%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.00**
Sainsbury's Local, Victoria Road West, Thornton-Cleveleys	0%	0%	0%	0%	0%	0%	1%	0.01	0.00	0.00	0.00	0.00	0.00	0.00	**0.01**
Tesco Express, Garstang Road East, Poulton-le-Fylde	0%	0%	0%	0%	0%	0%	1%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.00**
Tesco Express, Lighthouse Ford, Hatfield Avenue, Fleetwood	0%	0%	0%	0%	0%	0%	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.00**
Tesco Express, Marsh Mill Village, Fleetwood Road North, Thornton-Cleveleys	0%	0%	0%	0%	0%	0%	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.00**
Tesco Metro, Victoria Road West, Thornton-Cleveleys	0%	0%	1%	0%	0%	0%	1%	0.00	0.00	0.01	0.00	0.00	0.00	0.00	**0.02**
Local shops, Zone 7 (Wyre)	0%	0%	0%	0%	0%	0%	1%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.00**
Sub Total Zone 7	**4%**	**0%**	**4%**	**0%**	**0%**	**26%**	**73%**	**0.18**	**0.01**	**0.05**	**0.00**	**0.00**	**0.53**	**0.17**	**0.94**

Blackpool Town Centre - Potential Discount Foodstore
Retail Impact Assessment Tables

Table 7: Estimated Trade Diversion

Destination	Survey Derived Pre-Development Turnover at 2024	Inflow	Total Turnover at 2024	Trade Diversion		Post Development Turnover	Impact
				%	£m		
Zone 1							
Blackpool Town Centre	8.4	1.6	10.1	1.0%	0.12	10.0	1.2%
Sainsbury's, Talbot Road, Blackpool	22.2	4.3	26.5	20.3%	2.36	24.1	8.9%
Iceland, Topping Street, Blackpool	5.4	1.1	6.5	1.3%	0.15	6.3	2.3%
Marks & Spencer, Church Street, Blackpool	3.7	0.7	4.4	0.6%	0.07	4.3	1.5%
Co-op, Abingdon Street, Blackpool	0.8	0.2	1.0	0.1%	0.01	1.0	1.3%
Co-op, Warley Road, Blackpool	1.9	0.4	2.2	0.4%	0.05	2.2	2.1%
Local shops, Zone 1	0.5	0.1	0.5	0.3%	0.04	0.5	6.6%
Potential Foodstore Allocation	-	-	11.6	-	-	11.6	-
Sub Total Zone 1	**42.9**	**8.3**	**62.9**	**24.0%**	**2.79**	**60.1**	**4.4%**
Zone 2							
Lidl, Bloomfield Road, Blackpool	6.8	1.3	8.2	3.1%	0.36	7.8	4.4%
Tesco Express, Ansdell Road, Blackpool	1.5	0.3	1.8	0.3%	0.04	1.8	2.0%
Tesco Express, Central Drive, Blackpool	1.0	0.2	1.2	0.2%	0.02	1.2	1.6%
Local shops, Zone 2	1.4	0.3	1.7	0.2%	0.03	1.7	1.6%
Sub Total Zone 2	**10.8**	**2.1**	**12.9**	**4%**	**0.44**	**12.5**	**3.4%**
Zone 3							
Co-op, Layton Road, Blackpool	3.2	0.6	3.8	0.2%	0.03	3.8	0.7%
Co-op, Normoss Road, Blackpool	2.4	0.5	2.8	0.2%	0.02	2.8	0.7%
Layton District Centre	0.8	0.2	1.0	0.1%	0.01	1.0	0.8%
Lidl, Devonshire Road, Blackpool	7.3	1.4	8.8	7.7%	0.89	7.9	10.2%
Marks & Spencer, Blackpool Victoria Hospital, Whinney Heys Road, Blackpool	0.1	0.0	0.2	0.0%	0.00	0.2	0.0%
Sainsbury's Local, Whitegate Drive, Blackpool	2.9	0.6	3.5	0.2%	0.02	3.5	0.7%
Tesco Express, Westcliffe Drive, Blackpool	3.6	0.7	4.3	0.3%	0.03	4.3	0.7%
Tesco Express, Whitegate Drive, Blackpool	2.0	0.4	2.4	0.3%	0.04	2.4	1.5%
Whitegate Drive District Centre	1.0	0.2	1.2	0.1%	0.01	1.2	0.8%
Local shops, Zone 3 (Blackpool)	0.5	0.1	0.6	0.2%	0.02	0.6	2.9%
Local shops, Zone 3 (Fylde)	2.4	0.5	2.8	0.0%	0.00	2.8	0.0%
Sub Total Zone 3	**26.3**	**5.1**	**31.4**	**9.2%**	**1.07**	**30.3**	**3.4%**
Zone 4							
Aldi, Blackpool Retail Park, Blackpool	12.9	2.5	15.4	1.1%	0.12	15.2	0.8%
Aldi, Parkinson Way Retail Park, Waterloo Road, Blackpool	13.2	2.6	15.8	4.3%	0.50	15.3	3.1%
Co-op, Harrowside, Blackpool	0.3	0.1	0.4	0.0%	0.00	0.4	0.2%
Highfield Road District Centre	0.0	0.0	0.0	0.0%	0.00	0.0	0.0%
Tesco Express, Highfield Road, Blackpool	2.1	0.4	2.5	0.1%	0.01	2.5	0.2%
Waterloo Road/South Shore District Centre	0.0	0.0	0.0	0.0%	0.00	0.0	0.0%
Iceland, Waterloo Road, Blackpool	2.1	0.4	2.5	0.1%	0.01	2.5	0.6%
Tesco Express, Lytham Road, Blackpool	0.3	0.1	0.4	0.1%	0.01	0.4	1.6%
Tesco Express, Marton Drive, Blackpool	3.7	0.7	4.4	0.1%	0.02	4.4	0.4%
Local shops, Zone 4 (Blackpool)	1.5	0.3	1.8	0.1%	0.01	1.8	0.4%
Morrisons, Squires Gate Lane, Blackpool	38.7	7.5	46.2	0.0%	0.00	46.2	0.0%
Sub Total Zone 4	**74.9**	**14.5**	**89.4**	**6%**	**0.67**	**88.7**	**0.8%**
Zone 5							
Aldi, Park Road, Blackpool	15.6	3.0	18.7	8.6%	1.01	17.7	5.4%
Asda, Cherry Tree Road, Blackpool	44.9	8.7	53.6	7.6%	0.89	52.7	1.7%
Asda, Wellbeck Avenue, Blackpool	4.4	0.9	5.3	0.7%	0.08	5.2	1.6%
Iceland, Vicarage Lane, Blackpool	3.1	0.6	3.7	0.3%	0.04	3.7	1.0%
Tesco Extra, Clifton Road Retail Park, Sandhams Way, Blackpool	61.7	11.9	73.6	8.6%	1.00	72.6	1.4%
Vicarage Lane Commercial Area, Blackpool	0.2	0.0	0.2	0.0%	0.00	0.2	0.6%
Local shops, Zone 5 (Blackpool)	1.8	0.3	2.1	0.1%	0.01	2.1	0.4%
Sub Total Zone 5	**131.7**	**25.5**	**157.2**	**26.0%**	**3.02**	**154.2**	**1.9%**
Zone 6							
Bispham District Centre	1.1	0.2	1.4	0.3%	0.03	1.3	2.5%
Co-op, Red Bank Road, Blackpool	0.5	0.1	0.6	0.1%	0.01	0.6	1.8%
Devonshire Road, Blackpool	0.4	0.1	0.5	0.3%	0.03	0.5	6.4%
Red Bank Road District Centre	0.0	0.0	0.0	0.0%	0.00	0.0	0.0%
Sainsbury's, Red Bank Road District Centre, Blackpool	25.4	4.9	30.3	9.3%	1.08	29.2	3.6%
Tesco Express, All Hallows Road, Blackpool	3.2	0.6	3.8	0.3%	0.04	3.8	0.9%
Local shops, Zone 6	0.7	0.1	0.9	0.1%	0.02	0.8	1.8%
Sub Total Zone 6	**31.4**	**6.1**	**37.5**	**10.4%**	**1.21**	**36.3**	**3.2%**
Zone 7							
Aldi, Crescent West, Thornton-Cleveleys	30.2	5.9	36.1	3.6%	0.42	35.6	1.2%
Aldi, Poulton Road, Fleetwood	14.6	2.8	17.4	0.2%	0.02	17.4	0.1%
Aldi, Tithebarn Street, Poulton-le-Fylde	17.5	3.4	20.9	0.8%	0.09	20.8	0.4%
Asda, Cop Lane, Fleetwood	32.7	6.3	39.1	0.3%	0.03	39.0	0.1%
Booths, Teanlowe Centre, Blackpool Old Road, Poulton-le-Fylde	12.3	2.4	14.7	0.3%	0.03	14.6	0.2%
Cleveleys Town Centre	2.6	0.5	3.1	0.1%	0.01	3.1	0.3%
Co-op, Fleetwood Road North, Thornton-Cleveleys	4.1	0.8	4.9	0.0%	0.00	4.9	0.1%
Co-op, Larkholme Parade, Fleetwood	3.9	0.8	4.7	0.0%	0.00	4.7	0.1%
Co-op, Thornton Centre, Victoria Road East, Thornton-Cleveleys	3.7	0.7	4.4	0.0%	0.00	4.4	0.1%
Fleetwood Town Centre	1.2	0.2	1.5	0.0%	0.00	1.5	0.1%
Iceland, Lord Street, Fleetwood	1.7	0.3	2.1	0.0%	0.00	2.1	0.1%
Lidl, Anchorsholme Lane West, Thornton-Cleveleys	7.9	1.5	9.4	1.2%	0.14	9.3	1.4%
M&S Simply Food, Victoria Road West, Thornton-Cleveleys	3.5	0.7	4.1	0.0%	0.01	4.1	0.1%
Morrisons, Amounderness Way, Thornton-Cleveleys	42.9	8.3	51.2	1.2%	0.14	51.1	0.3%
Poulton-le-Fylde Town Centre	3.3	0.6	4.0	0.0%	0.00	4.0	0.1%
Sainsbury's Local, Victoria Road West, Thornton-Cleveleys	1.6	0.3	1.9	0.1%	0.01	1.9	0.6%
Tesco Express, Garstang Road East, Poulton-le-Fylde	1.4	0.3	1.7	0.0%	0.00	1.7	0.1%
Tesco Express, Lighthouse Ford, Hatfield Avenue, Fleetwood	0.7	0.1	0.9	0.0%	0.00	0.9	0.1%
Tesco Express, Marsh Mill Village, Fleetwood Road North, Thornton-Cleveleys	1.4	0.3	1.6	0.0%	0.00	1.6	0.1%
Tesco Metro, Victoria Road West, Thornton-Cleveleys	5.1	1.0	6.1	0.2%	0.02	6.1	0.4%
Local shops, Zone 7 (Wyre)	6.0	1.2	7.1	0.0%	0.00	7.1	0.0%
Sub Total Zone 7	**198.3**	**38.4**	**236.7**	**8.1%**	**0.9**	**235.7**	**0.4%**
Other Stores Outside Study Area	-	-	-	12.9%	1.5	-	-
Total	**516.3**	**99.9**	**627.9**	**100.0%**	**11.6**	**617.8**	**-**

Notes

a. Estimated turnover derived from convenience goods market shares set out at Table 4 and assumed available zonal expenditure for 2024 set out at Table 3a

b. Estimated trade diversion are Nexus' professional judgements based on shopping patterns, nature of existing destination and proximity to the proposed development

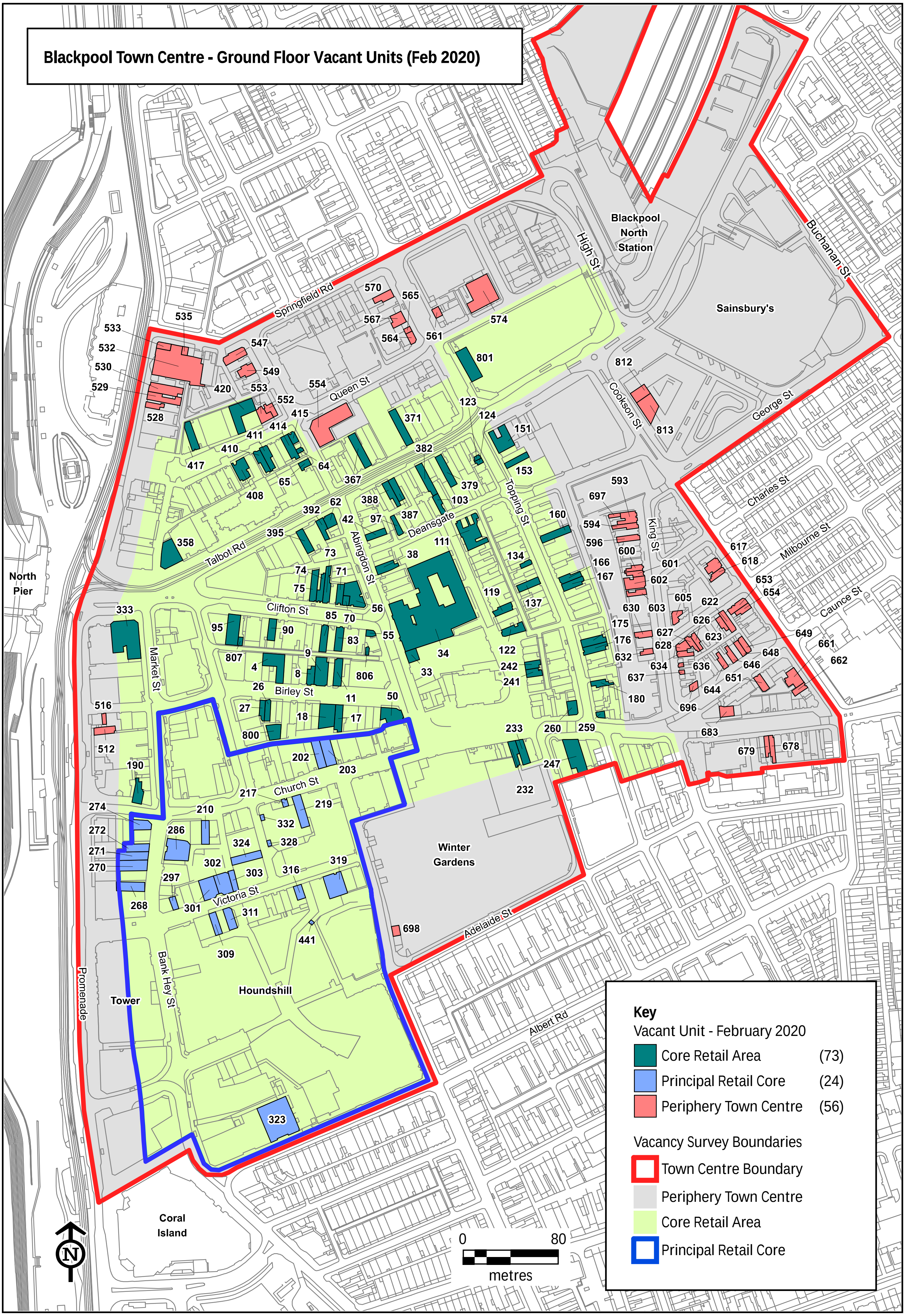
c. Post development turnover calculated by deducting the trade diversion from the survey derived turnovers

d. Gross floorspace figures for existing stores taken from VOA where available. Net figures calculated using Verdict Global Data averages

e. Sales densities for existing foodstores taken from Verdict GlobalData 2018

2017 prices

Appendix C: Blackpool Town Centre - Vacancy Plans



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