OPDC
OLD OAK AND PARK ROYAL DEVELOPMENT CORPORATION

Retail and Leisure Needs Study - Addendum

LOCAL PLAN SUPPORTING STUDY

June 2018

MAYOR OF LONDON

Old Oak and Park Royal
Retail and Leisure Needs Study

2018 Addendum

On behalf of **Old Oak and Royal Park Development Corporation**

OPDC
OLD OAK AND
PARK ROYAL
DEVELOPMENT
CORPORATION

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A	2.5.18	Draft for client review	FR/CH	CH	KR
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Appendices

1 Introduction

1.1.1 Peter Brett Associates LLP (PBA) prepared the Old Oak and Park Royal Retail and Leisure Needs Study (RLNS) on behalf of the Old Oak and Park Royal Development Corporation (OPDC). The RLNS was published in February 2016 as a supporting evidence base document for the draft Local Plan.

1.1.2 Some minor modifications were subsequently made to the RLNS in November 2016 in response to comments received from the public consultation which ran during February and March 2016.

1.2 Scope of this addendum

1.2.1 PBA has now been commissioned prepare a focused update to the RLNS which takes account of the latest development trajectory underpinning the Local Plan and rolls forward the interval years from 2017, 2022, 2027, 2032 and 2037 to 2018, 2023, 2028, 2033 and 2038. While outside the plan period, the final year of the development has been amended from 2051 to 2048; this is also reflected in this addendum.

1.2.2 This addendum study is underpinned by most of the same inputs and assumptions which informed the RLNS, including the same household survey data, wider area population forecasts, and retail and leisure spending data. Where data has been updated, this is made clear within this addendum; similarly, where the findings of the RLNS have been superseded or replaced by these updates, this is clearly explained. However, the two studies are intended to be read together.

2 Quantitative assessment

2.1 Introduction

2.1.1 This section should be read alongside Section 6 of the RLNS. This addendum does not revisit the following sub-sections of the RLNS:

- The method and assumptions (Section 6.2), including the definition of the Study Area[1], underpinning the quantitative assessment remain unchanged.
- The review of existing and future population and spending within the Study Area (Section 6.3) and provided detail on the existing and future in the wider Study Area, and how that related to the OPDC area[2]. This addendum uses the same population and expenditure data for the Study Area.
- The quantitative performance of existing centres (Section 6.5) is not revised because the data inputs in terms of existing shopping patterns, population growth and future expenditure remain unchanged.
- The physical capacity (Section 6.6) of the OPDC area, which identified scope for 65,250 sqm gross main town centre uses, is not revisited.
- The impact of development within the OPDC area (Section 6.7) was tested based on varying levels of comparison expenditure retention (15-25%) and modelled the anticipated impact on existing provision in 2037. This is not reviewed as part of this addendum given the reduced OPDC population growth over the plan period.

2.1.2 Section 2.2 below on the OPDC area updates Section 6.4 of the RLNS. Following on from this, Section 2.3 updates elements of Section 6.8, specifically on floorspace requirements for the OPDC area. Finally Section 2.4, on the commercial leisure uses in the OPDC area, updates Section 6.9 of the RLNS.

2.1.3 PBA advise that the longer-term quantitative forecasts set out in this assessment (post-2023) should be treated as indicative.

2.2 OPDC area

Future resident population

2.2.1 The resident population and anticipated phasing of the OPDC area has been provided based on the latest development trajectory. The forecast population in the OPDC area is set out below; this supersedes Table 6-3 of the RLNS.

Table 2.1 OPDC area population projections

Year	Cumulative population
2023	8,866
2028	24,345
2033	34,362
2038	44,378

[1] As defined at Figure 6-1 (RLNS)
[2] As defined at Figure 1-1 (RLNS)

Year	Cumulative population
2038 onwards	58,351

Source: Tables A-C Appendix A

2.2.2 While in overall terms, the population of the OPDC area will be higher than set out in the RLNS, the latest development trajectory indicates that fewer homes will be delivered in the plan period. Because the other inputs to the RLNS in terms of expenditure growth are the same, albeit moved forward a year to reflect the new interval years and plan period, this will mean that there is reduced spending capacity. Further detail is provided below.

Expenditure

2.2.3 The same approach of taking average per capita expenditure across the OPDC area, as outlined at paragraphs 6.4.2-6.4.5 of the RNLS has been adopted in this addendum. The table below supersedes Table 6-5 and sets out the per capita expenditure at the new interval years.

Table 2.2: Per capita expenditure in OPDC area

	Convenience goods	Comparison goods	A3-5 uses
2018	£1,813	£2,744	£1,317
2023	£1,795	£3,175	£1,406
2028	£1,786	£3,759	£1,507
2033	£1,781	£4,494	£1,616
2038	£1,781	£5,340	£1,732
2048	£1,781	£7,540	£1,806

Source: Tables A & D Appendix A

2.2.4 By applying per capita expenditure figures to the forecast population within the OPDC area, a resident-generated spending capacity has been generated. This was summarised in Table 6-6 of the RLNS which is superseded by the table below.

Table 2.3: Resident retail and leisure cumulative expenditure within the OPDC area (£M)

	Convenience goods	Comparison goods	A3-5 uses
2023	£15.92	£28.15	£4.88
2028	£43.48	£91.51	£52.39
2033	£61.19	£154.43	£68.06
2038	£79.03	£236.99	£85.73
2048	£103.91	£439.94	£105.37

Source: Tables A&C Appendix A

Workforce population and expenditure within the OPDC area

2.2.5 In relation to jobs at Old Oak, the latest trajectory indicates that approximately 3,000 fewer jobs will be delivered during the plan period. The same assumptions in relation to additional jobs at Park Royal as set out at paragraph 6.4.9 of the RLNS i.e. that a further 10,000 jobs will come forward through intensification in that part of the Opportunity Area (OA).

2.2.6 The table below summarises the implications of this[3] across the OPDC area and replaces RLNS Table 6-7. This shows that by the end of the plan period, the lower workforce population will increase the available comparison expenditure in the OPDC area by £22.7m i.e. a more modest addition than the £23.6m previously anticipated in the RLNS. Similarly, convenience spending is reduced from the £45m set out in the RLNS to £39.5m.

Table 2.4: OPDC workforce population and daytime cumulative expenditure (£M)

	Population	Convenience goods	Comparison goods
2023	7,983	£6.23	£2.19
2028	21,034	£16.41	£6.68
2033	35,807	£27.93	£13.46
2038	50,580	£39.45	£22.73
2048	70,485	£54.98	£37.64

Source: Table A Appendix A

Interchange expenditure

2.2.7 The RLNS assumed that interchange expenditure was linked to station operations so rather than estimating spending per passenger, an assumption that the station development would provide in 7,500 sqm gross A1, A3, A4 and A5 space was adopted. This is held constant in this update.

Available retail expenditure in the OPDC area

2.2.8 The table below (which replaces RLNS Table 6-8) draws together the updates set out in the preceding tables to quantify the amount of retail expenditure (daytime worker expenditure and residential expenditure) that is theoretically available. As expected, the level available during the plan period is lower than set out in the RLNS.

Table 2.5: OPDC available retail expenditure (£M)

	Convenience goods	Comparison goods
2023	£22.14	£30.34
2028	£59.89	£98.18
2033	£89.12	£167.89
2038	£118.48	£259.72
2048	£158.89	£477.58

Source: Table A Appendix A

2.2.9 As set out in the RLNS, not all this expenditure will be retained in the OPDC area. This is considered further below.

2.3 Retention within the OPDC area

2.3.1 This section considers the degree to which future expenditure generated within the OPDC area could be served by new floorspace within it. Following analysis of the existing centres in

[3] The assumptions set out at paragraphs 6.4.10 and 6.4.11 in relation to workplace spending retention are unchanged.

the wider area, the RLNS tested a comparison expenditure retention range of between 15-25% and a convenience expenditure retention level of 75%.

2.3.2 The table below adopts these same retention levels, as well as assumptions about sales densities as set out at paragraph 6.8.4 of the RLNS. However, the table draws on the updated analysis set out in the preceding parts of this addendum, and so replaces RLNS Table 6-15.

Table 2.6: OPDC area floorspace requirements (to 2048)

	Baseline (15% comparison)	Scenario 1 (20% comparison)	Scenario 2 (25% comparison)
Resident expenditure			
Comparison	£65.99	£87.99	£109.99
Convenience	£77.93	£77.93	£77.93
Workforce expenditure			
Comparison	£37.64	£37.32	£37.32
Convenience	£54.98	£54.98	£54.98
Total retained expenditure			
Comparison	£103.63	£125.63	£147.63
Convenience	£132.91	£132.91	£132.91
Floorspace requirement			
Comparison	12,871	15,603	18,335
Convenience	9,661	9,661	9,661

Source: Tables A-C Appendix A. All monetary values are £M and floorspace figures are net sales area.

2.3.3 The table below then sets these requirements out for the plan period, as well as converting the net sales requirements into gross floor areas (75% net to gross ratio). To reflect the two retention scenarios, the comparison figures are expressed as a range. This replaces RLNS Table 6-16.

Table 2.7: Retail floorspace requirements

	Within the plan period: 2038	End of development: 2048
Comparison		
Net	8,400-11,820 sqm	12,870-18,340 sqm
Gross	11,200-15,760 sqm	17,160-24,450 sqm
Convenience		
Net	7,390 sqm	9,660 sqm
Gross	9,860 sqm	12,880 sqm
Total		
Net	15,790-19,210 sqm	22,530-28,000 sqm
Gross	21,060-25,610 sqm	30,040-37,330 sqm

Source: Tables A-C Appendix A

2.3.4 Section 3 of this addendum considers the implications of these lower floorspace requirements for the plan period to 2038 in the context of the previous policy recommendations.

2.4 Commercial leisure uses in the OPDC area

2.4.1 The table below shows cumulative leisure expenditure generated by future OPDC residents over the plan period. This replaces Table 6-17 of the RNLS, and shows a reduction in available spending during the plan period (£106m by 2038, compared to £119m by 2037 in the RNLS) but an increase in the period to 2048 (£146m by 2048, when compared to the RLNS's £141m by 2051).

Table 2.8: Leisure expenditure generated within the OPDC area (£M)

	A3-A5 uses	Cultural services[4]	Games of chance[5]	Recreation services
2023	£12.47	£2.49	£0.96	£1.35
2028	£36.69	£7.32	£2.84	£3.98
2033	£55.52	£11.08	£4.29	£6.02
2038	£76.86	£15.33	£5.95	£8.33
2048	£105.37	£21.02	£8.15	£11.42

Source: Table D Appendix A

2.4.2 Caution was recommended in seeking to generate floorspace requirements based on leisure spending in most of the categories outlined above. However, in relation to A3-5 uses, by applying the same assumptions as set out at paragraph 6.9.3 of the RLNS, this indicates demand for up to 7,500 sqm of gross floorspace by 2038.

[4] e.g. cinema, theatre, museums, TV subscriptions

[5] e.g. lottery, bingo, bookmakers

3 Recommendations for Old Oak and Park Royal

3.1 Introduction

3.1.1 The RLNS set out its recommendations in the context of the existing hierarchy of centres and the needs of the developments, and how that might address existing deficiencies in provision. This addendum does not update that analysis. However, this section sets out the updated recommendations in relation to total quantitative need and phasing provided at Section 7.4 of the RLNS.

3.1.2 It remains the case that the OPDC development is long term in nature so the space recommendations set out in the RLNS and now in the addendum are intended as a guide rather than definitive cap on town centre uses.

3.2 Total quantitative need and phasing

3.2.1 The table below sets out the updated quantitative capacity for the range of A Class uses. This replaces Table 7-1 of the RLNS and adopts the same approach of calculating the capacity for A1 service uses and A2 floorspace on a proportionate basis to the forecast A1 retail floorspace. Included within these figures is the allowance made for 7,500 sqm gross floorspace within the new Old Oak Common station (comprising 3,750 sqm A1 retail and 3,750 sqm A3-5 floorspace).

Table 3.1: Indicative capacity for A Class Uses to completion of development (gross)

Use	Floorspace by 2038	Floorspace by development's completion
A1 retail	24,810-29,360 sqm	33,790-41,080 sqm
A1 service and A2	14,040-17,080 sqm	20,030-24,990 sqm
A3, A4 and A5	15,450-17,980 sqm	20,440-24,490 sqm
Total	54,300-64,400 sqm	74,300-90,500 sqm

3.2.2 These updated figures show a reduced level of quantitative need during the plan period. The RLNS showed need for between 57,700-68,400 sqm in the period to 2037. This need has reduced to between 54,300-64,400 sqm; this reduction is because of the lower level of planned housing delivery and so population growth in the OPDC area during the plan period than that tested for the RLNS.

3.3 Spatial distribution of floorspace

3.3.1 The RLNS sought to balance the quantitative findings with resolving qualitative issues in existing provision and achieving place-making objectives for the new developments within the OPDC area. Section 7.5 of the RLNS sets this analysis out with reference to Old Oak, Park Royal, North Acton and Atlas Road.

- **Old Oak (future major centre):** it was recommended that 55,000 sqm gross A class uses (80% of total retail and leisure floorspace in the OPDC area) should be provided in three new quarters: Old Oak Common station (comprising a mix of smaller convenience stores, sandwich shops, cafes, bars and restaurants and some selected high-quality comparison retailers to serve a transient population), north and south of the Grand Union canal (food, drink and leisure quarter) and High Street north (providing a mix of convenience and comparison units in a more traditional high street arrangement intended to complement Harlesden's district centre role).

- **Park Royal (future neighbourhood/local centre):** the RLNS recommended that up to 2,500-3,000 sqm gross A Class uses could be accommodated at Park Royal as part of a strategy to broaden the range of uses within the centre and support improvements in the public realm so that it functions more akin to designated centre rather than an out-of-centre foodstore.
- **North Acton (future neighbourhood/local centre):** in the order of 5,000 sqm gross additional A Class floorspace was recommended in this location, because of the limited existing provision there for current residents and its good public transport accessibility.
- **Atlas Road (future neighbourhood/local centre):** identified as a location for intensifying retail and leisure provision around an existing cluster of town centre uses. Scope for up to 3,500 sqm was recommended.

Table 3.2: Recommended spatial distribution of floorspace (gross, sqm)

	Existing	Additional				Total (with existing)
	Total A Class	A1 retail	A1 service and A2	A3, A4 and A5	Total Additional	
Old Oak[6]	0	25,600	12,850	15,000	53,450	53,450
Park Royal	10,000	500	1,500	1,000	3,000	13,000
North Acton	3,000	1,850	1,750	1,000	4,600	7,600
Atlas Road[7]	300	1,450	1,000	1,000	3,450	3,750
Total	**-**	**29,400**	**17,100**	**18,000**	**64,500**	**-**

Source: PBA

3.3.2 For reference, these figures are shown side by side with the findings from the RLNS, together with the change. This shows that while the updated figures indicate slightly lower need over the plan period, the overall recommendations in terms of the role and function of the future centres in the OPDC area remain unchanged from those set out in the RLNS.

Table 3.3: Comparison of the recommended spatial distribution of floorspace from the RLNS and as updated (gross, sqm)

Centre	RLNS findings	Updated findings	Difference
Old Oak	57,250	53,450	-3,800
Park Royal	13,000	13,000	0
North Acton	7,750	7,600	-150
Atlas Road	3,800	3,750	-50

Source: PBA

[6] Includes 7,500 sqm floorspace within the station

[7] Additional floorspace aligns with permission 15/0091/FUL with judgement applied to provide a split between non-A1 retail space.

3.4 Implications for the wider hierarchy of centres

3.4.1 The RLNS considered the network of centre in Section 4 and also modelled the impact by the end of the plan period of different scales of retail provision within the OPDC area on those centres. The updated floorspace requirements identify lower need during the plan period, so it follows that rerunning the impact assessments would also identify lower notional impact on those centres.

3.4.2 It is important to reiterate that much of the forecast impact is notional because without the significant population and jobs growth coming forward in the OPDC area, there would not be same scale of resident and workforce population in the area to support additional retail and leisure space in the existing network of centres. It is for this reason that where appropriate, the RLNS recommended the development of strategies to enhance existing centres.

3.4.3 To put this in the context of one of the existing town centres: the RLNS[8] identified that there would be notional diversion from Harlesden by 2037 of just under £31m in comparison goods terms and £0.6m in convenience goods terms. However, even with this notional impact, Harlesden's comparison and convenience turnovers would increase by at least £20m in comparison terms and £4.4m in convenience from the 2014 level. Taking account of this reduced floorspace requirement at the end of the plan period would still allow Harlesden's turnover increase to at least the extent predicted in the RLNS impact assessment.

3.5 Advice on Local Plan development management policies

3.5.1 Because this addendum has broadly confirmed the scale and distribution of floorspace as that previously identified in the RLNS, most of the policy recommendations set out in that study at Section 7.8 remain unchanged.

3.5.2 However, the opportunity is taken to resolve a comment provided during the draft Local Plan consultations on cumulative retail impacts, and whether the Local Plan policy should specifically identify circumstances when cumulative impact should be considered.

3.5.3 There are no specific provisions within the NPPF (either current or the proposed revisions) on cumulative impact. Paragraph 26 of the NPPF sets out that assessments should take account of planned investment when assessing impact. The PPG furthers this in its direction that within the range of possible scenarios, the impacts of 'existing, committed and planned investment within the given area catchment area'[9] should be considered.

3.5.4 The RLNS identified a series of policy pre-conditions, the second of which related to retail impact and is repeated here:

Pre-condition 2: Retail impact assessment

- *Trigger for requirement: over relevant impact threshold*
- *Justification and expected contents: due to the long-term development programme and due to the fact that the centres are not yet established, for those applications that are caught by the relevant threshold, a full retail impact assessment will be provided to address the requirements of paragraph 26 of the NPPF, specifically ensuring that the scale of the development is appropriate within the wider hierarchy of centres. Where necessary, this will need to take into account the cumulative effect of permissions.*
- *Key criteria: it will assess the likelihood of a significant adverse impact on planned, existing and committed investment within existing centres, and on their vitality and*

[8] Tables 6-12 and 6-13

[9] Reference ID: 2b-018-20140306

viability, taking into account the health of the existing centres, and the contents of any vision statement that accompanies an application (as per Pre-condition 1). Any mitigation being offered by the applicant should be set out clearly.

3.5.5 The RLNS confirmed at para. 7.8.13 that the recommended impact assessment thresholds were 5,000 sqm gross within Old Oak 'centre' and then elsewhere in the OPDC area, a 2,500 sqm gross threshold (i.e. the default threshold of the NPPF). This was accompanied by the recommendation that the scope of such assessments should be agreed at the pre-application stage. This could include confirming the committed schemes for any cumulative impact assessment.

3.5.6 In line with RLNS pre-condition 2, while the relevant draft Local Plan policies (TCC1 and TCC3) do not make explicit reference to cumulative impact, the supporting text to Policy TCC1 is clear in setting out that 'where necessary, [impact assessments] will need to take into account the cumulative effect of permissions'.

3.5.7 In considering the recommended impact thresholds, it is relevant to note the PPG's instruction that it should be 'undertaken in a proportionate and locally appropriate way'[10]. As set out at paragraph 7.8.10 of the RLNS, because of the very significant scale of development and change planned which will create a large new community at Old Oak, at this early stage, imposing lower thresholds would not be appropriate. However, with reference to the PPG's advice that setting locally appropriate thresholds should have regard to the 'cumulative effects of recent developments', it may be appropriate to consider imposing a lower impact threshold as development comes forward in the OPDC area and the on-the-ground effects on the existing and proposed hierarchy of centres become apparent.

3.5.8 A number of schemes could come forward which fall below the relevant thresholds which, when taken together, the total floorspace may exceed those thresholds. While the OPDC has the ability to require any application which is above the relevant threshold to factor such schemes into their assessment of impact, there would be no requirement for the applicant to promoting those below-threshold schemes to submit an impact assessment. In such circumstances, there was previously scope in the now-revoked PPS4 for schemes under this level to be required to undertake an assessment of impact; however, this was not carried forward into the NPPF.

3.5.9 Given the step back in national policy terms in factoring in cumulative impact and the long-term nature of development in the OPDC area, at this early stage, it is therefore considered that the policy makes appropriate provision to ensure cumulative impact can be assessed in any applications exceed the recommended thresholds. This will be something that the OPDC should monitor over the life of the plan and consider scope for revision in consequent iterations.

3.6 Summary

3.6.1 This addendum study has updated the quantitative findings of the RLNS to take account of the latest development trajectory and new timeframe for the draft OPDC Local Plan. This has shown that while there is has been modest reduction in the scale of A Class need identified during the plan period, there is no need for any significant amendment to the overall retail and leisure strategy for the OA.

[10] Reference ID: 2b-015-20140306

Appendix A Quantitative analysis

Table A: Retail capacity generated in OPDC area - BASELINE

	Units	**Population**
2018-22	4,030	8,866
2023-27	7,036	15,479
2028-38	9,106	20,033
2038 onwards	6,351	13,972
Total	26,523	58,351

Cumulative population	**2023**	**2028**	**2033**	**2038**	***2048***
	8,866	24,345	34,362	44,378	*58,351*

Per capita spending	**2018**	**2023**	**2028**	**2033**	**2038**	***2048***
Comparison	£2,744	£3,175	£3,759	£4,494	£5,340	*£7,540*
Convenience	£1,813	£1,795	£1,786	£1,781	£1,781	*£1,781*

Total spending	**2023**	**2028**	**2033**	**2038**	***2048***
Comparison capacity	£28.15	£91.51	£154.43	£236.99	*£439.94*
Convenience capacity	£15.92	£43.48	£61.19	£79.03	*£103.91*
Total capacity	£44	£135	£216	£316	*£544*

Floorspace (100% retention)	**2023**	**2028**	**2033**	**2038**	***2048***
Comparison capacity	5,072	15,307	23,979	34,159	54,640
Convenience capacity	1,247	3,356	4,652	5,919	7,553
Total capacity	6,319	18,663	28,631	40,078	*62,193*

Workforce spend	**2023**	**2028**	**2033**	**2038**	***2048***
Population	7,983	21,034	35,807	50,580	70,485
Daytime spending					
Comparison	*£2.19*	*£6.68*	*£13.46*	*£22.73*	*£37.64*
Convenience	£6.23	£16.41	£27.93	£39.45	*£54.98*
Total	£8.42	£23.08	£41.39	£62.18	*£92.62*

Floorspace (inc. daytime)	**2023**	**2028**	**2033**	**2038**	***2048***
Comparison capacity	5,467	16,424	26,069	37,435	59,315
Convenience capacity	1,735	4,622	6,776	8,874	11,549
Total capacity	7,202	21,046	32,845	46,309	*70,864*

Floorspace (retained spend only)	**2023**	**2028**	**2033**	**2038**	***2048***
Comparison capacity	1,156	3,413	5,687	8,400	12,871
Convenience capacity	1,423	3,783	5,613	7,394	9,661
Total capacity	2,578	7,196	11,299	15,794	*22,532*

Floorspace (gross)	**2023**	**2028**	**2033**	**2038**	***2048***
Comparison capacity	1,541	4,551	7,582	11,200	17,161
Convenience capacity	1,897	5,044	7,483	9,859	12,881
Total capacity	3,438	9,595	15,066	21,059	30,042

Notes:
Phasing derived from OPDC (April 2018)
Average rate of growth applied to 2028-38 and 2038-48 to obtain population interval data
Per capita spending data assumed to be at the average level for zones 3, 4 and 27 combined
Retention: 15% comparison & 75% convenience
Net to gross ratio of 75% applied

Table B: Retail capacity generated in OPDC area - Scenario A

	Units	Population
2018-22	4,030	8,866
2023-27	7,036	15,479
2028-38	9,106	20,033
2038 onwards	6,351	13,972
Total	26,523	58,351

Cumulative population	**2023**	**2028**	**2033**	**2038**	***2048***
	8,866	24,345	34,362	44,378	*58,351*

Per capita spending	**2018**	**2023**	**2028**	**2033**	**2038**	***2048***
Comparison	£2,744	£3,175	£3,759	£4,494	£5,340	£7,540
Convenience	£1,813	£1,795	£1,786	£1,781	£1,781	£1,781

Total spending	**2023**	**2028**	**2033**	**2038**	***2048***
Comparison capacity	£28.15	£91.51	£154.43	£236.99	*£439.94*
Convenience capacity	£15.92	£43.48	£61.19	£79.03	*£103.91*
Total capacity	£44	£135	£216	£316	*£544*

Net floorspace (100% retention)	**2023**	**2028**	**2033**	**2038**	***2048***
Comparison capacity	5,072	15,307	23,979	34,159	54,640
Convenience capacity	1,247	3,356	4,652	5,919	7,553
Total capacity	6,319	18,663	28,631	40,078	*62,193*

Workforce spend	**2023**	**2028**	**2033**	**2038**	***2048***
Population	7,983	21,034	35,807	50,580	*70,485*
Daytime spending					
Comparison	£2.19	£6.68	£13.46	£22.73	£37.64
Convenience	£6.23	£16.41	£27.93	£39.45	*£54.98*
Total	£8.42	£23.08	£41.39	£62.18	*£92.62*

Floorspace (inc. daytime)	**2023**	**2028**	**2033**	**2038**	***2048***
Comparison capacity	5,467	16,424	26,069	37,435	59,315
Convenience capacity	1,735	4,622	6,776	8,874	11,549
Total capacity	7,202	21,046	32,845	46,309	*70,864*

Floorspace (retained spend only)	**2023**	**2028**	**2033**	**2038**	***2048***
Comparison capacity	1,409	4,178	6,886	10,108	15,603
Convenience capacity	1,423	3,783	5,613	7,394	9,661
Total capacity	2,832	7,961	12,498	17,502	*25,264*

Floorspace (gross)	**2023**	**2028**	**2033**	**2038**	***2048***
Comparison capacity	1,879	5,571	9,181	13,478	20,804
Convenience capacity	1,897	5,044	7,483	9,859	12,881
Total capacity	3,776	10,615	16,664	23,337	33,685

Notes:
Phasing derived from OPDC (April 2018)
Average rate of growth applied to 2028-38 and 2038-48 to obtain population interval data
Per capita spending data assumed to be at the average level for zones 3, 4 and 27 combined
Retention: 20% comparison & 75% convenience
Net to gross ratio of 75% applied

Table C: Retail capacity generated in OPDC area - Scenario B

	Units	Population
2018-22	4,030	8,866
2023-27	7,036	15,479
2028-38	9,106	20,033
2038 onwards	6,351	13,972
Total	26,523	58,351

Cumulative population	**2023**	**2028**	**2033**	**2038**	***2048***
	8,866	24,345	34,362	44,378	*58,351*

Per capita spending	**2018**	**2023**	**2028**	**2033**	**2038**	***2048***
Comparison	£2,744	£3,175	£3,759	£4,494	£5,340	£7,540
Convenience	£1,813	£1,795	£1,786	£1,781	£1,781	£1,781

Total spending	**2023**	**2028**	**2033**	**2038**	***2048***
Comparison capacity	£28.15	£91.51	£154.43	£236.99	*£439.94*
Convenience capacity	£15.92	£43.48	£61.19	£79.03	*£103.91*
Total capacity	£44.06	£134.99	£215.62	£316.01	*£543.85*

Floorspace (100% retention)	**2023**	**2028**	**2033**	**2038**	***2048***
Comparison capacity	5,072	15,307	23,979	34,159	54,640
Convenience capacity	1,247	3,356	4,652	5,919	7,553
Total capacity	6,319	18,663	28,631	40,078	*62,193*

Workforce spend	**2023**	**2028**	**2033**	**2038**	***2048***
Population	7,983	21,034	35,807	50,580	*70,485*
Daytime spending					
Comparison	£2.19	£6.68	£13.46	£22.73	£37.64
Convenience	£6.23	£16.41	£27.93	£39.45	*£54.98*
Total	£8.42	£23.08	£41.39	£62.18	*£92.62*

Floorspace (inc. daytime)	**2023**	**2028**	**2033**	**2038**	***2048***
Comparison capacity	5,467	16,424	26,069	37,435	59,315
Convenience capacity	1,735	4,622	6,776	8,874	11,549
Total capacity	7,202	21,046	32,845	46,309	*70,864*

Floorspace (retained spend only)	**2023**	**2028**	**2033**	**2038**	***2048***
Comparison capacity	1,663	4,944	8,085	11,816	18,335
Convenience capacity	1,423	3,783	5,613	7,394	9,661
Total capacity	3,086	8,727	13,697	19,210	*27,996*

Floorspace (gross)	**2023**	**2028**	**2033**	**2038**	***2048***
Comparison capacity	2,217	6,592	10,780	15,755	24,446
Convenience capacity	1,897	5,044	7,483	9,859	12,881
Total capacity	4,114	11,636	18,263	25,614	37,328

Notes:
Phasing derived from OPDC (April 2018)
Average rate of growth applied to 2028-38 and 2038-48 to obtain population interval data
Per capita spending data assumed to be at the average level for zones 3, 4 and 27 combined
Retention: 25% comparison & 75% convenience
Net to gross ratio of 75% applied

Table D: Leisure spending generated by OPDC area

	Units	Population
2018-22	4,030	8,866
2023-27	7,036	15,479
2028-38	9,106	20,033
2038 onwards	6,351	13,972
Total	26,523	58,351

Cumulative population	**2023**	**2028**	**2033**	**2038**	**2048**
	8,866	24,345	34,362	44,378	58,351

Per capita expenditure		**A3-5**	**Cultural services**	**Games of chance**	**Recreation services**
	2014	£1,226	£245	£95	£133
	2018	£1,317	£263	£102	£143
	2023	£1,406	£280	£109	£152
	2028	£1,507	£301	£117	£163
	2033	£1,616	£322	£125	£175
	2038	£1,732	£346	£134	£188
	2048	£1,806	£360	£140	£196

Total expenditure (£M)		**A3-5 uses**	**Cultural services**	**Games of chance**	**Recreation services**
	2023	£12.47	£2.49	£0.96	£1.35
	2028	£36.69	£7.32	£2.84	£3.98
	2033	£55.52	£11.08	£4.29	£6.02
	2038	£76.86	£15.33	£5.95	£8.33
	2048	£105.37	£21.02	£8.15	£11.42

Notes
2014 prices
Per capita expenditure figures derived from Experian 2015 (MMG3)
Growth rates derived from Experian Retail Planner Briefing Note 13 (2015)
Expenditure levels in 2048 held constant at 2041 per capita levels