Coatham Enclosure
Retail and Leisure Statement

Redcar & Cleveland Borough Council

21 February 2017

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1.0 Introduction

Scope of Statement

1.1 This Retail and Leisure Statement has been prepared by Nathaniel Lichfield & Partners Ltd (Lichfields) on behalf of Redcar & Cleveland Borough Council (RCBC). It has been prepared as part of the evidence base to inform the Redcar & Cleveland Local Plan (R&CLP).

1.2 The statement provides an assessment of proposals within the R&CLP to allocate land at Coatham for a mixed use development, comprising leisure, tourism, visitor and retail uses. In particular, it assesses the proposals against the requirements of the National Planning Policy Framework (NPPF), including the sequential and impact tests.

Structure of Statement

1.3 The remainder of this statement is structured as follows:

- Section 2.0 summarises the subject site and its surroundings;
- Section 3.0 provides a review of existing and emerging planning policy relevant to these proposals;
- Section 4.0 summarises the local retail and leisure context relevant to the proposals;
- Section 5.0 provides a summary of the findings of the Town Centre Study in relation to retail and leisure need;
- Section 6.0 summarises the methodology used in assessing the above proposals against the key sequential and impact tests;
- Section 7.0 assesses the subject proposals against the sequential approach to site selection;
- Section 8.0 assesses the impact of the subject proposals; and
- Section 9.0 provides conclusions on all of the above.

2.0 Site Context

Site and Surroundings

2.1 The Coatham site ('the subject site') currently comprises vacant open space, part of which (at the eastern end) was formerly occupied by a leisure centre. It is located 275m walking distance from the defined boundary of Redcar Town Centre and around 475m from the Primary Shopping Area, as defined in both the adopted and emerging Redcar and Cleveland Local Plans. The site, which comprises around 8.7 ha in total, is currently allocated under Policy L6 of the adopted Local Plan for major leisure and housing development.

Figure 2.1 Coatham Site

2.2 The site is bounded:

- to the north, by Majuba Road, with surface car parking, the Tuned In arts/cultural centre and boating lake, with the beach beyond;
- to the south, by residential properties on Queen Street and High Street West, with further residential areas beyond this;
- to the east by Newcomen Terrace, with residential properties, and the wider Redcar Town Centre, beyond; and
- to the west by Majuba Road, with a golf course and caravan park beyond.

Accessibility

2.3 As set out above, the site is located less than 300m walking distance from the defined boundary of Redcar Town Centre. It is also within convenient walking distance of the residential areas located immediately to the south and east of the site.

2.4 In relation to accessibility by public transport, the site is approximately 130m away from Coatham Road, which has several bus stops. There are also a large number of bus stops in Redcar Town Centre itself, including on High Street East, West Dyke Road/West Terrace and Lord Street. Services from these stands connect the town centre to the rest of Redcar itself, as well as other towns and villages in the surrounding area. These include, in the east and south east of the Borough, Saltburn, Marske, New Marske, Loftus, Brotton, Skelton, Lingdale, Boosbeck, Dunsdale, Yearby, and Carlin How. They also include Eston, South Bank, Grangetown, Ormesby and Guisborough and, further afield, larger towns such as Middlesbrough, Stockton and Darlington.

2.5 By private car, the site would be directly accessible from Majuba Road which, via Kirkleatham Lane, connects the site with the A1042 and A1085, the main routes into Redcar Town Centre from the south and west. Along with the A174 and B1268, these, in turn, help to connect the site to the rest of Redcar itself, as well as surrounding settlements, such as Marske, New Marske, Saltburn and Skelton.

Planning History

2.6 Outline planning permission (R/2006/0743/OO) was granted in May 2007 for a mixed use development on the subject site, including tourism, sport, recreation, leisure, community facilities and linked housing. As part of the outline permission, reserved matters were approved in respect of the housing (anticipated to be 359 dwellings), visitor centre and leisure centre elements of the scheme.

2.7 Based on a review of the statements submitted with the application, the proposed leisure centre included a bowling alley, sports hall, swimming pools, health and fitness facilities and sports pitches, as well as an extreme sports village. The proposals also included a bingo hall, a convenience retail/medical block and a children's nursery.

2.8 A further application for a similar development was also submitted in 2008 pursuant to this earlier permission (R/2008/0480/RSM), however, this was subsequently withdrawn.

3.0 Planning Policy Context

3.1 This section of the statement provides a summary of relevant existing national and local planning policy and guidance, including the requirements in respect of new local plans, as well as relevant policies from the emerging new Local Plan.

National Planning Policy Framework

3.2 The National Planning Policy Framework (NPPF), which was published in March 2012, sets out the Government's economic, environmental and social planning policies for England. At the heart of the Framework is a presumption in favour of sustainable development, which should be seen as a 'golden thread' running through both plan-making and decision-taking.

3.3 The NPPF confirms that the Government is committed to securing economic growth in order to generate jobs and prosperity, and that planning should operate to encourage, and not act as an impediment to, sustainable growth. Annex 2 of the NPPF confirms that main town centre uses, such as retail and leisure (including food and drink), are classed as economic development.

3.4 The NPPF states (at paragraph 23) that planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. In drawing up Local Plans, it advises that local planning authorities should, inter alia:

- recognise town centres as the heart of their communities and pursue policies which support their vitality and viability;
- define a network and hierarchy of centres that is resilient to anticipated future economic changes;
- define the extent of town centres and primary shopping areas, including primary and secondary frontages, and set policies that make clear which uses will be permitted in such locations;
- promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;
- allocate a range of suitable sites to meet the scale and type of retail, leisure and other development needed in town centres. The need for development should be met in full and should not be compromised by limited site supply;
- assess the need to expand town centres to ensure a sufficient supply of suitable sites in order to accommodate growth;
- allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available; and
- if sufficient edge of centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre.

3.5 Where town centres are in decline, the NPPF advises that local planning authorities should plan positively for their future to encourage economic activity. They should also set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres.

3.6 Whilst directed specifically to the consideration of individual planning applications, paragraphs 24 and 26 of the NPPF are also relevant, as they relate to the application of the sequential and impact tests. Paragraph 24 states that main town centre uses should be located in town centres, followed by edge-of-centre locations and, only if suitable sites are not available, should out-of-centre sites be considered. In respect of edge-of-centre and out-of-centre proposals, policies should give priority 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 26 relates to impact assessments, and states that they 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.

Planning Practice Guidance

3.8 Planning Practice Guidance (PPG) supports the NPPF and provides local planning authorities with guidance on how to ensure the vitality of town centres.

3.9 It states that development plans should develop (and keep under review) town centre strategies that plan for a 3-5 year period, whilst also giving a Local Plan lifetime view. Local authorities should take full account of relevant market signals when planning for town centres and keep their retail allocations under regular review. It acknowledges that not all successful town centre regeneration projects are retail-led.

3.10 Plans should identify the scale of need for main town centre uses and assess whether the need can be met on town centre sites, through expanding centres and/or redeveloping existing under-used space. It acknowledges that:

"It may not be possible to accommodate all forecast needs in a town centre: there may be physical or other constraints which make it inappropriate to do so. In those circumstances, planning authorities should plan positively to identify the most appropriate alternative strategy for meeting the need for these main town centre uses, having regard to the sequential and impact tests. This should ensure that any proposed main town centre uses which are not in an existing town centre are in the best locations to support the vitality and vibrancy of town centres, and that no likely significant adverse impacts on existing town centres arise, as set out in paragraph 26 of the National Planning Policy Framework."

3.11 The PPG explains that, in plan-making, the sequential approach requires a thorough assessment of the suitability, viability and availability of locations for main town centre uses. It sets out a checklist of the matters that should be considered when taking a sequential approach to plan-making, including:

- whether the need for main town centre uses has been assessed;
- whether the identified need for main town centre uses can be accommodated on town centre sites, considering the suitability, availability and viability of these sites, and the nature of the need that is to be addressed; and
- if the additional main town centre uses required cannot be accommodated in town centre sites, what are the next sequentially preferable sites that it can be accommodated on.

3.12 It states that the sequential test should recognise that certain uses have particular market and locational requirements which mean that they may only be accommodated in specific locations. It also notes that, as promoting new development on town centre locations can be more expensive and complicated, local authorities need to be realistic and flexible.

3.13 The PPG states that, if the Local Plan is based on meeting the assessed need for town centre uses in accordance with the sequential approach, issues of adverse impact should not arise. However, the impact test may be useful in determining whether proposals in certain locations would impact on existing, committed and planned public and private investment, or on the role of centres.

3.14 It also sets out a number of steps which should be taken in applying the impact test. These include establishing the state of existing centres and the nature of current shopping patterns, determining the appropriate time frame for assessing impact, examining the 'no development' scenario and assessing the proposal's turnover and trade draw. The latter should draw on information from comparable schemes, the operator's benchmark turnover of convenience and comparison goods, and carefully considering likely catchments and trade draw.

3.15 The steps also include setting out the likely impact of that proposal clearly, including on quantitative and qualitative issues, providing proportionate conclusions and the likely consequences to the viability and vitality of existing town centres – taking into account local circumstances.

Development Plan

3.16 The Redcar & Cleveland Core Strategy was adopted in July 2007. Policy CS18 define the existing hierarchy of centres in the Borough. This includes Redcar Town Centre, as well as six District Centres and ten Local Centres.

3.17 Policy CS18 seeks to focus town centre uses within the town and district centres, advising that the scale and type of development will reflect the centre's existing and proposed function and its capacity for new development. It also states that such proposals would be required to follow the approach set out in (now superseded) national planning policy, addressing issues including need, scale, sequential approach, impact and accessibility.

3.18 In order to maintain and enhance the vitality and viability of town and district centres, Policy CS18 sets out a number of measures. These include, inter alia, safeguarding their retail character and function, enhancing their appearance, safety and environmental quality, encouraging a diverse range of uses, promoting the re-use of vacant buildings and maintaining/enhancing access by sustainable modes of transport.

Emerging Development Plan

3.19 The Publication version of the draft replacement Local Plan was published in November 2016.

3.20 Draft Policy REG 1 proposes the allocation of land at Coatham (8.7 ha) for a mixed use development comprising of leisure, tourism, visitor and retail uses. It states that it is expected that the proposals will achieve the following:

- a high quality mixed use development comprising a range of leisure and tourism uses, including appropriate ancillary uses;
- ground investigation and prior completion of any necessary remediation work;
- contributions, as necessary at the time of application, towards any other services and community infrastructure enhancements;
- good accessibility by sustainable transport, including walking and cycling; and
- where development is proposed in Flood Zones 2 and 3, meeting the sequential and exceptions tests and be supported by a Flood Risk Assessment, which will inform site layout and design.

3.21 It also states that any proposal will be required to carry out a screening exercise to determine the need for Appropriate Assessment.

3.22 Other relevant policies include Draft Policy ED 1, which proposes to retain the existing hierarchy of centres in the Borough, including Redcar Town Centre, the six District Centres and ten Local Centres. It re-emphasises that main town centre uses will be focused in town and district centres.

3.23 The policy also states that such proposals will be expected to follow the sequential assessment approach set out within the NPPF – with the exception of site allocations or small-scale proposals (less than 200 sqm gross), although not where the site is safeguarded/allocated for another form of development. It also requires that an impact assessment will be required to support any retail or leisure development outside of an existing centre, where the gross floorspace would be above any of the following thresholds:

- retail development (where Redcar Town Centre is the nearest town or district centre): 1,000 sqm;
- all other retail development: 500 sqm; and
- leisure development:
- cinemas, health and fitness clubs, tenpin bowling, casinos, nightclubs and bingo halls: 1,000 sqm; and
- cafés, restaurants, pubs and, bars: 500 sqm.

3.24 Draft Policy ED1 sets out a variety of measures by which the vitality and viability of town and district centres will be maintained and enhanced, similar to Policy ED CS18 in the adopted Core Strategy.

3.25 Draft Policy ED2 states that Cleveland Retail Park will continue to play an important role as an out of centre retail park, and that bulky goods retail will be supported, where alternative viable sites cannot be found within existing centres. It also states that all other forms of retail will not be supported at Cleveland Retail Park, unless they have been clearly justified through the sequential approach and a retail impact assessment (where required) in accordance with Policy ED1.

3.26 Policy ED3 states that proposals for new hot food takeaways in centres will only be permitted where the proposed use would satisfy three criteria. In particular, it should not result in the proportion of commercial units in the centre in hot food takeaway uses exceeding 5%, result in more than two adjacent hot food takeaway uses, or be located within a designated Primary Shopping Area.

4.0 Retail and Leisure Context

4.1 This section of the statement provides a summary of the local retail hierarchy in Redcar & Cleveland, as well as a summary of the current vitality and viability of the main existing centres in the Borough. This is based on the detailed heath checks undertaken as part of the Borough-wide Study undertaken by Lichfields, on behalf of RCBC, and published in December 2016.

Local Retail Hierarchy

4.2 Redcar Town Centre is the main retail and commercial centre in the Borough, which serves a wide catchment area and is a popular seaside resort for day visitors. The role of Redcar Town Centre has changed over time, however, due to increasing competition from Middlesbrough Town Centre, as well as out-of-centre destinations, such as Cleveland Retail Park and Teesside Shopping Park.

4.3 Redcar is supported by Eston, Guisborough, Loftus, Low Grange Farm, Marske and Saltburn District Centres. Guisborough is the second largest centre in Redcar and Cleveland, primarily serving the southern parts of the Borough. Marske, Saltburn and Loftus District Centres also provide a range of commercial uses, meeting the day to day needs of their respective catchments. Eston and Low Grange Farm (formerly South Bank) are the two District Centres serving the Greater Eston area, in the west of the Borough.

4.4 There are also ten Local Centres identified in the adopted Core Strategy, which help meet the more basic needs of local communities in both urban and rural areas. In addition, a range of out-of-centre retail facilities help to meet the retail needs of the Borough, the majority of which are concentrated at Cleveland Retail Park, adjacent to the boundary with Middlesbrough.

Summary of Existing Centres

Redcar Town Centre

4.5 As set out above, Redcar Town Centre is the main shopping Centre in Redcar & Cleveland. It contains around 24,200 sqm net retail floorspace (including 5,500 sqm convenience goods and 18,000 sqm comparison goods). Though the role of the centre has changed over time, it continues to meet the retail and service needs of Redcar and the surrounding areas, particularly in the northern and eastern parts of the Borough.

Figure 4.1 High Street, Redcar Town Centre

4.6 The centre is focused around the High Street which runs from east to west through the Town Centre. The western half of the High Street is pedestrianised and the Regent Walk outdoor shopping mall provides a link through to the existing Morrisons superstore at Lord Street. To the west of High Street, a grouping of interlocking streets (including, inter alia, West Terrace, Station Road Cleveland Street and Queen Street) contain range of smaller shop/service units, predominantly occupied by independent businesses.

Figure 4.2 Station Road, Redcar Town Centre

Mix of Uses

4.7 The current mix of ground floor commercial uses with Redcar Town Centre, based on the latest Council survey in April 2016, is summarised in Table 5.3 below.

Table 4.1 Use Summary Table - Redcar Town Centre

Use Type	Number of Units	Percentage of Units
Convenience Retail	25	7.8%
Comparison Retail	127	39.6%
Service	119	37.1%
Miscellaneous	1	0.3%
Vacant	49	15.3%
Total	321	100.0%

Source: RCBC Surveys, April 2016

4.8 The percentage of convenience retail uses in the centre is around 8%, which is similar to, although slightly below the Experian Goad national average for all centres (9%). Such uses include the 3,252 sqm net Morrisons store identified above, as well as Farmfoods, Iceland and Heron stores. There are also a range of smaller specialist uses, although there are no discount foodstores within/on the edge of the centre.

4.9 Although it remains above the national average (37%), the proportion of comparison goods retailers (40%) has decreased since 2005. Notwithstanding this, there remains a range of comparison retail national multiple present in the town centre, primarily located within the pedestrianised section of the High Street and within Regent Walk. These include Clarks, Claire's Accessories, Bon Marche, JD Sports, O2, New Look, Burton, Wilko, Boots, Specsavers, B&M Household Goods and Cllintons.

4.10 The centre provides a good range of service uses, which comprise 37% of the total. Such uses include takeaways, restaurants/cafes, estate agents, hairdressers/beauty parlours and banks/financial services. Other uses in the centre include various public houses and amusement arcades, a lifeboat museum, bingo hall and small business accommodation (including the new Palace Hub on esplanade). The new Community Heart has also been developed in between Coatham Road and Kirkleatham Street, and includes a leisure centre, Council chambers, registration office, business space and a cafe. There is also a market held on High Street every Friday.

Figure 4.3 Leisure and Community Heart, Redcar Town Centre

Vacancy Rate

4.11 Based on the April 2016 survey, the unit vacancy rate in the centre is currently around 15% (or 49 units). A significant proportion of these vacant units are located along the eastern section of the High Street, although they are also dispersed across the rest of the centre.

4.12 The former Beales department store in Regent Walk recently closed and the former Marks & Spencer variety store, located opposite the northern end of Regent Walk, closed in 2014. Whilst the latter was temporarily occupied by an outlet store, it currently lies vacant. Based on site visits in January 2017, however, although the Yorkshire Trading Company (which was adjacent to Marks & Spencer) has closed down, it is shortly to be re-occupied as a Goodwins store.

Environmental Quality

4.13 The quality of the built environment varies across Redcar Town Centre. At the heart of the centre, the Regent Walk shopping centre provides a modern shopping environment. A range of street furniture is provided, including benches, bins, street lighting and public art, and there are also a number of listed buildings. To the west of the High Street, the quality of built environment in this area is also generally good.

4.14 Although there has been investment by new food and drink uses, the built quality generally deteriorates towards the eastern end of the High Street and the nature of the built environment along the southern side of Esplanade is varied. However, the seafront side of the Esplanade has experienced significant recent investment in public realm works and public art, as well as the Beacon visitor attraction.

Figure 4.4 Esplanade, Redcar Town Centre

Accessibility

4.15 The majority of the bus stands in Redcar Town Centre are located either on High Street East, West Dyke Road/West Terrace and Lord Street (adjacent to Regent Walk). Services from these stands connect the town centre to the rest of Redcar itself, as well as other towns and villages in the surrounding area. The main Redcar railway station is situated within convenient walking distance (400m) of the Prime Shopping Area.

4.16 Main roads into the Town Centre include the A1085, the A1042 Kirkleatham Lane, Redcar Lane and West Dyke Road, which provide access to Redcar from the surrounding areas. There are also a number of pay and display public car parks which serve the centre – including at Regent Walk (adjacent to Morrisons), off West Dyke Road, and smaller facilities along Esplanade - as well as on-street parking at the east of the High Street.

4.17 Along with the Regent Walk shopping centre, the western end of the High Street, is pedestrianised and there are various crossing points elsewhere in the centre which facilitate pedestrian movement. Pedestrian flows appear to be strongest in the pedestrianised areas along the High Street and Regent Walk, and are heavily influenced by the location of the Morrisons superstore and its associated car parking. Flows appear to be weaker along streets in the western parts of the centre and towards the eastern end of the High Street itself.

Figure 4.5 Regent Walk, Redcar Town Centre

Summary

4.18 Redcar Town Centre is the main shopping destination in the Borough and includes a reasonably good range of retail and service provision. This includes a variety of national multiples located within the PSA, as well as various food and drink uses, particularly on High Street East. Whilst the unit vacancy rate in the centre is above the national average, the majority of the centre provides a pleasant shopping environment.

4.19 There has also been significant investment on the Esplanade, well as in the Redcar Community Heart, and various new food and drink uses High Street East. However, it would benefit from further new investment within or in close proximity to the centre which enhances the existing range of retail and leisure provision - including new national multiples. This would help to generate additional footfall and deliver other regeneration and economic benefits for the town.

Other Centres

4.20 As set out above, there are a number of defined district centres in the Borough. These can be summarised as follows:

- **Guisborough District Centre:** this centre contains a range of uses, including a Morrison supermarket and a good selection of other national multiples and independent retailers, that serve the town itself and the surrounding areas, both in Redcar & Cleveland and North Yorkshire. It is a popular centre which is performing well, with a low vacancy rate (9%) and an attractive shopping environment - as reflected in its Conservation Area status;
- **Eston District Centre:** this centre meets the basic needs of residents in the Eston area, in the west of the Borough, although this role has declined over recent years, as a result of the nature and scale of uses it provides, and the absence of any anchor supermarket. Whilst the southern side of the centre is well occupied, the precinct on the north side contains a number of empty shops, which contribute towards an overall unit vacancy rate across the centre of around 19%;
- **Low Grange (South Bank) District Centre:** this purpose-built new centre was developed following the de-allocation of the previous centre along the northern part of Normanby Road. Whilst it will need to evolve over time to broaden-out the range of uses it

provides, the centre is currently fully occupied, and the new Tesco Extra superstore, along with other retail and food and beverage uses, helps to provide a new focus for the community in the Greater Eston area;

- **Saltburn District Centre:** with a vacancy rate around half the national average, Saltburn is an attractive centre which performs well at its level in the retail hierarchy, meeting the day to day needs of local residents. In addition to an anchor Sainsbury's supermarket, it contains a range of independent retail and service operators, which also attract trade from tourist visitors by virtue of its seaside location;
- **Marske District Centre:** although it performs a relatively localised role, Marske is also performing well, with a vacancy rate around half the national average. It contains Co-op and Sainsbury's supermarkets, as well as a range of other smaller shop and service uses which meet the day to day needs of residents of the town; and
- **Loftus District Centre**: whilst there are a significant number of vacant units in the western and central parts of the centre, the eastern end provides a pleasant shopping environment. Although it has limited influence over the wider area, it continues to provide a range of uses – including two Co-op convenience stores and various smaller shops - that meet the day to day needs of residents in Loftus.

4.21 In addition to Redcar Town Centre, and the six District Centres, the retail hierarchy set out on the emerging Redcar & Cleveland Local Plan also includes ten local centres located across the Borough. These centres are set out below:

- Brotton, Hill Street;
- Carlin How, Front Street;
- Dormanstown, Ennis Square;
- Guisborough, Enfield Chase;
- New Marske, Birkdale Road;
- Normanby;
- Nunthorpe;
- Redcar, Park Avenue;
- Redcar, Roseberry Square; and
- Skelton, High Street.

4.22 These centres vary in scale, with Dormanstown, Normanby, Roseberry Square and Skelton being amongst the largest and Carlin How and New Marske the smallest.

Other Existing Retail and Leisure Provision

4.23 Outwith existing defined centres, there are just two other foodstores in Redcar which provide over 1,000 sqm net floorspace. These comprise:

- Tesco at West Dyke Road, to the south of Redcar Town Centre, comprising 2,800 sqm net floorspace; and
- Aldi at Larkswood Road, in Redcar, which provides c. 1,400 sqm net floorspace.

4.24 There are, however, a number of other freestanding foodstores located elsewhere within the Borough, including:

- Asda at Pheasant Fields Lane, Skelton, which opened in 2013, and provides around 2,700 sqm net floorspace;

- Asda, at North Street, South Bank, to the north of the A66, which comprises c. 3,700 sqm net floorspace;
- Sainbury's at Morgan Drive, in Guisborough, comprising c. 1,400 sqm net;
- Lidl, at Enfield Chase in Guisborough providing 1,000 sqm net; and
- Aldi and Iceland stores within the former Focus DIY store, at Hill View Road, Guisborough, comprising c. 900 sqm and 400 sqm net respectively.

4.25 In relation to non-food retail, there is a Franks flooring store, alongside a McDonalds drive-thru restaurant and adjacent to the existing Tesco store at West Dyke Road. However, other than the above foodstores, there are no other large format retail developments in Redcar itself, or indeed elsewhere in the northern and eastern parts of the Borough.

4.26 Unrelated to any existing centres, Cleveland Retail Park is located immediately adjacent to the western boundary of the Borough, and contains a range of large format retail uses which attract customers from across both Redcar and Cleveland and Middlesbrough. The majority of the park comprises comparison retail operators, which include national multiples such as Currys/PC World, Bensons for Beds, Halfords, Matalan, Argos Extra, Pets at Home, Next and a large B&Q store of around 10,000 sqm net. The park also accommodates an M&S Foodhall, as well as Frankie and Benny's and Costa restaurant/cafes.

4.27 Based on the household surveys undertaken as part of the Borough-wide surveys, significant proportions of residents also visit destinations such as Middlesbrough Town Centre and, further afield, Teesside Park. A significant proportion of residents of Redcar & Cleveland also visit the Showcase cinema and Hollywood tenpin bowling facilities at Teesside Park, as well as the Cineworld cinema, at Marton Road in Middlesbrough.

Committed and Proposed Retail and Leisure Provision

4.28 There are three developments with planning permission for significant new retail and other town centre use development in Redcar & Cleveland Borough. These are as follows:

- the development of new retail warehousing on land to the south of Rectory Lane, Guisborough, comprising 3,885 sqm net floorspace, which is likely to include a new medium-sized foodstore;
- the development of a new Aldi at Pheasant Fields Lane, Skelton, comprising 1,125 sqm net, in close proximity to the new Asda there;
- 3,031 sqm net new retail floorspace, also at Pheasant Fields Lane (Skelton), along with a 380 sqm gross unit within Use Classes A3 and A5, with operators likely to include B&M Bargains and McDonalds; and
- the development of a new Marstons public house/restaurant, again, at Pheasant Fields Lane, Skelton.

Summary

4.29 In summary, therefore:

- Redcar Town Centre is the main centre within the Borough and provides a reasonable range of retail and service uses, as well as acting as a focal point for the community in the northern part of Redcar & Cleveland. Whilst the unit vacancy rate is above the national average, and the proportion of comparison goods retailers has declined, there has been recent investment in both the public realm and new visitor attractions, particularly along the Esplanade;

- whilst the range of facilities in both Eston and Loftus has declined, the six defined District Centres in the Borough all continue to meet the day to day retail and service needs of their catchment areas. Guisborough is the largest of the six, although Marske and Saltburn have a good range of independents, and the purpose-built new centre at Low Grange (anchored by Tesco) includes a number of units which will serve planned new residential development in the area;
- there are also a number of out-of-centre foodstores which serve the convenience retail needs of various parts of the Borough, including those occupied by Asda, Tesco, Sainsbury's, Lidl and Aldi. However, just two of these are within Redcar itself, with the majority being located in southern and western parts of the Borough; and
- whilst Cleveland Retail Park provides a range of large format comparison retail operators, there is only a limited choice of larger format non-food retailing in Redcar. Based on the household surveys undertaken as part of the Borough-wide surveys, significant proportions of residents in the northern and eastern parts of the Borough visit destinations such as Middlesbrough Town Centre and Teesside Park, for both non-food shopping and leisure purposes.

5.0 Retail and Leisure Need

5.1 This section provides a summary of the retail and leisure needs identified as part of the Borough-wide Town Centre Study.

Retail Need

5.2 The study provides a qualitative and quantitative assessment of the need for new retail development in the Borough. The quantitative assessment uses base population and expenditure data sourced from Experian, as well as household telephone surveys undertaken by NEMS Market Research in July/August 2016. The qualitative assessment takes into account a survey of businesses in Redcar Town Centre, as well the above household surveys, and an analysis of the scale, nature and accessibility of existing provision in the Borough.

Convenience Retail

5.3 On the basis of existing shopping patterns, the study does not forecast any expenditure capacity to support new convenience goods retail floorspace over the period to 2032, over and above existing commitments. This reflects the limited forecast growth in spending over this period, the performance of existing stores, and the fact that committed developments will absorb any capacity which does exist.

5.4 In qualitative terms, the study concludes that the Borough benefits from a good range of convenience retail provision overall. However, subject to operator demand, and the identification of a suitable opportunity, it also identifies that there may be scope to enhance the existing range of provision found within Redcar Town Centre. This will contribute towards the ongoing regeneration of this centre more generally and could potentially alleviate symptoms of overtrading in the existing Morrisons and Aldi stores in Redcar. Given that the existing Aldi at Larkswood Road is the only such operator in Redcar, such provision could come forward in the discount sector.

5.5 The study also concludes that there would also be benefits arising from the provision of a new anchor foodstore in Eston District Centre. This would provide a boost to the centre's wider vitality and viability, and enhance the range and choice of uses available to local residents there.

Comparison Retail

5.6 In relation to comparison goods, there is forecast to be expenditure capacity emerging to support new floorspace in the medium to long term, after allowing for existing commitments, of £41m over the local plan period (i.e. to 2032). This forecast is on the basis that existing market shares are maintained and does not factor in the potential for new development in Redcar to claw back spending which is currently leaking to facilities outwith the Borough.

5.7 In qualitative terms, whilst this will again depend upon operator demand, the study concludes that the priority should be to enhance the existing range of provision in Redcar Town Centre, particularly in terms of national multiples. The study also concludes that the Council should seek to enhance the range and choice of uses within Loftus and Eston District Centres and, alongside future housing growth, Low Grange District Centre.

Leisure Need

5.8 The study provides an assessment of the need for new commercial leisure and tourism facilities across the Borough, taking into account national and regional average participation rates, as well as the existing range of provision in Redcar & Cleveland.

5.9 In relation to cinemas, the study concludes that there is no clear need for new cinema provision on the basis of existing visitation patterns, which indicate high levels of leakage to facilities outside of the Borough. However, it also concluded that there would be scope to 'claw-back' cinema visits through the development of a new cinema within the Borough, ideally located within/on the edge of Redcar Town Centre.

5.10 In terms of other leisure and tourism uses, the assessment work concludes that:

- although there is theoretical scope for the development of new/additional tenpin bowling and bingo facilities, whether such facilities come forward in practice will depend upon the nature/extent of demand from operators;
- there is a clear need for new health and fitness clubs, which enhance the existing range and choice of facilities in quantitative and qualitative terms, and particularly those operated by the larger national chains;
- forecast growth in food and beverage expenditure will be able to support new uses in this sector, which should be directed to existing centres, where suitable and available opportunities exist; and
- there is scope to enhance the existing range of hotel provision in Redcar which, subject to commercial demand, could involve the development of one or more new hotels operated by national chains.

Summary

5.11 Whilst there is no quantitative capacity to support new convenience goods retail floorspace across the Borough, there is a qualitative need to enhance the range and choice of provision within Redcar. This could come forward in the form of a discount foodstore – particularly in the context that there is presently no discount foodstore provision within or on the edge of Redcar Town Centre.

5.12 There is also a quantitative and qualitative need to enhance the range of comparison goods retailing in Redcar Town Centre, including national multiples. Taking into account the nature and scale of most existing accommodation in Redcar, any new retail floorspace could come forward as modern, larger format units, which are attractive to potential occupiers. Alongside this, there is scope to claw-back cinema visits through a new cinema in the Borough, along with a need for new health and fitness, hotel and food and beverage facilities, including national multiples.

5.13 The proposed allocation of the Coatham site, as set out in Section 3.0, seeks to bring forward new development which would help to meet these needs. In particular, it seeks to promote sufficient critical mass of leisure, tourism and retail floorspace, which helps to ensure that the scheme is viable – taking into account site remediation costs - and also that it is successful and delivers wider benefits for the town centre.

6.0 Methodology

Primary Catchment Area

6.1 The quantitative retail impact assessment summarised below is based upon that contained within the Redcar & Cleveland Town Centre Study, prepared by Lichfields, and published in December 2016. It therefore uses the same Study Area as this assessment, including the eight survey zones defined therein, which are illustrated on Drg. no. 23090/02-01, as follows:

- Zone 1 (Redcar)
- Zone 2 (Eston)
- Zone 3 (Guisborough)
- Zone 4 (Marske/Saltburn)
- Zone 5 (Rural East)
- Zone 6 (East Middlesbrough)
- Zone 7 (North Yorkshire Moors)
- Zone 8 (Whitby Hinterland)

6.2 Zones 1 to 5 comprise Redcar and Cleveland Borough itself, whereas Zones 6 to 8 include areas just beyond the Borough, from which people are travelling to meet some of their needs.

6.3 Taking into account existing shopping patterns, the new retail and leisure uses being promoted as part of an allocation on the Coatham site are considered likely to draw the majority of their trade from Zones 1 and 4. However, for both consistency and robustness, the assessment summarised below analyses the impact of the development upon existing retail facilities and shopping patterns across all five zones within the Borough.

Sequential Site Assessment

6.4 The methodology adopted in identifying potential alternative sites for the development proposed at Coatham in the context of the sequential approach, has involved:

- consideration of sites allocated for development in the adopted development plan;
- discussions with Officers at RCBC;
- reviewing extant permissions and current applications for retail or leisure development; and
- identifying other sites or buildings with potential for development, through an on the ground survey.

6.5 A thorough assessment has been made to establish the suitability, availability and viability of identified sites to accommodate the retail and leisure uses being considered for the allocation on the Coatham site. The criteria adopted for the site assessments has been as follows:

- site size - any potential alternative sites would need to be able to accommodate new retail and leisure development of a similar scale and nature to that under consideration, with associated parking, servicing and landscaping, in order to meet the needs identified in Section 5.0;
- whether the site lies within, or on the edge of, existing centres;
- whether there are any development plan policies relevant to the sites identified;
- whether the sites can be satisfactorily serviced and accessed by vehicles;

- whether there are any extant permissions for development on the sites identified, and details of any other proposals;
- whether there are any land assembly issues (e.g. multiple ownership) or restrictions on use (through covenants) which could constrain the potential for future development;
- what the current land uses are at each site, and whether there is a requirement for their relocation;
- whether the site is likely to be commercially attractive to operators; and
- other potential constraints to development, for example conservation area or listed building status, tree preservation orders, topography, etc.

Impact Assessment

6.6 A quantitative assessment of the impact of the retail floorspace proposed has been undertaken. As set out above, this is based on information contained within the Redcar & Cleveland Town Centre Study (December 2016).

Population and Expenditure

6.7 Levels of population within the PCA over the period between 2015 and 2026 have been based on those set out in the above Town Centre Study. The population of the Borough and the wider Study Area between 2011 and 2032 is set out in Table 1 in Appendices 2 and 3. This table illustrates that the population of the Borough is projected to grow from 135,497 in 2016 to 139,503 in 2032 – growth of around 4,000 persons or 3%.

6.8 This is based on information obtained from Experian, which is in turn based on the 2011 Census. Going forwards, the population of the different zones over the period to 2032 has been based on 2014-based Sub-National Population Projections (SNPP) provided by the Office of National Statistics (ONS). However, it allows for extra population growth, over and above the SNPP, equating to an additional 250 persons per annum, in line with the Council's growth strategy set out in the draft replacement Local Plan.

6.9 Table 2 in Appendices 2 and 3 sets out the forecast growth in spending per head for convenience and comparison goods within each zone in the study area up to 2032. This is based upon estimated spending per capita in 2014 provided by Experian, as well as the forecast growth rates set out in their Briefing Note 13 (October 2015). In line with the above Briefing Note, a proportion of the available expenditure per capita in each year has been deducted to reflect expenditure via non-store retail sales (e.g. catalogue shopping, vending machines sales, internet purchases etc.) – making an allowance for those internet sales which still go through physical retail stores.

6.10 Total expenditure in these categories is illustrated in Table 3. As a consequence of growth in population, convenience goods spending within the Borough is forecast to increase by 1.6% (c. £4m) between 2016 and 2032, from £259.7m to £263.9m. Comparison goods spending is forecast to increase much more significantly between 2016 and 2032 (by around 64%/£261.9m), from £407.6m in 2016 to £669.5m in 2032 (all in 2014 prices).

Floorspace and Turnover of Existing Retail Facilities

6.11 The net retail floorspace data of the existing main stores and centres within the Study Area is also based on that contained within the most recent Borough-wide study. This was, in turn, obtained from a range of sources, including Oxford Retail Consultants (ORC) Storepoint database, the previous (2006) Town Centre Study and 'on the ground' surveys undertaken by RCBC in April 2016. This data relates to the proportion of stores dedicated to the sale of convenience goods and comparison goods respectively, in order to undertake a 'goods-based' analysis.

6.12 The convenience and comparison goods turnover of the main centres and stores in the Study Area in 2021 - the Design Year of the proposed development - originating from within the Study Area, has been estimated based on the 2016 Town Centre Study. These were, in turn, based on household telephone surveys across the Study Area, which were undertaken by NEMS Market Research in July/August 2016.

Floorspace and Turnover of Committed Developments

6.13 Commitments in Redcar & Cleveland Borough are summarised in Table 7 (a) of Appendix 2, and are forecast to have a total convenience goods retail turnover potential of £27.0m, taking into account information provided by the Council and the respective applicants. These commitments comprise the development of new retail warehousing on land to the south of Rectory Lane, Guisborough, which is likely to include a new foodstore (£13.0m). They also include the development of a new Aldi at Pheasant Fields Lane, Skelton (£10.4m) and other retail floorspace at Pheasant Fields Lane (estimated to have a convenience goods turnover of £3.6m).

6.14 Comparison goods retail commitments are summarised in Table 7 (b) of Appendix 3. These developments as the same as included in the convenience goods section, and include retail warehousing on land to the south of Rectory Lane, Guisborough (£14.2m comparison goods turnover), a new Aldi at Pheasant Fields Lane, Skelton (£1.6m), and other retail floorspace, also at Pheasant Fields Lane (£13.4m).

6.15 However, given their location in the south and east of the Borough, none of these developments would enhance the existing range of retail provision which is conveniently accessible to residents of Redcar.

Floorspace and Turnover of Proposed Development

6.16 The turnover of the new retail floorspace has been based on the scale and nature of operators considered likely to occupy the development currently proposed on the Coatham site, taking into account the indicative layout drawing (attached at Appendix 4). In forecasting the turnover of the proposed development, it has therefore been assumed that:

- it would include a foodstore of 2,500 sqm gross;
- this store would have a net sales area of 1,500 sqm, of which 80% (1,200 sqm) would be used for the sale of convenience goods and the remaining 20% (300 sqm net) would be used for comparison goods sales; and
- this sales floorspace achieves convenience and comparison goods turnover to floorspace ratios equivalent to £11,000 per sqm and £7,000 per sqm respectively, which equate to the broad average of the main national foodstore operators, as sourced from the 2015 Mintel Retail Rankings, allowing for VAT and the convenience/comparison split.

6.17 As illustrated in Table 9 (a) at Appendices 2 and 3, the foodstore is forecast to have a turnover potential of £13.2m and £2.1m for convenience and comparison goods respectively.

6.18 In order to forecast the turnover of the other comparison goods retail floorspace proposed, it has been assumed that:

- there would be 1,839 sqm gross other comparison retail floorspace, which would be occupied at an average net to gross ratio of 80%, resulting in net floorspace of 1,471 sqm; and
- this other floorspace achieves a comparison goods turnover to floorspace ratio of £4,000.

6.19 The proposed other comparison retail floorspace is therefore forecast to achieve a total turnover of £5.9m.

6.20 The assessment does not make any allowance for the occupation of any of the proposed retail units by other A Class (i.e. non convenience or comparison retail) uses. It is therefore possible that the impacts forecast as part of these assessments over-state the actual trade diversion which will occur in practice.

Retail Impact

6.21 The assessment of the impact of the proposed retail floorspace has regard to a quantitative assessment of the levels of trade diversion forecast upon existing stores and centres. It also considers the impact of the proposed development upon planned investment in centres and upon the vitality and viability of existing centres, taking into account consumer choice.

6.22 The quantitative assessment is based upon levels of population and expenditure within the defined Study Area, as set out above, as well as the likely origin of the turnover of both the committed and proposed new floorspace. The assessment of impact then takes into account the extent to which the new retail floorspace would draw trade from the other retailers, located both within and beyond the Study Area – having regard to the location and characteristics of competing facilities, including the nature of the retail offer in these stores.

7.0 Sequential Site Assessment

Policy Context

7.1 As set out in Section 3.0, the NPPF requires that local planning authorities should allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres. It also states that it is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability. Authorities should allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available.

7.2 Whilst specifically directed towards individual planning applications, paragraph 24 of the NPPF is also relevant. It makes clear that, in adopting a sequential approach, sites should be considered in the following order:

- town centre sites; then
- edge-of-centre locations, with preference given to accessible sites that are well connected to the town centre; and then
- out-of-centre sites, with preference again given to accessible sites which are well connected to the town centre.

7.3 The Coatham Enclosure site lies around 275m walking distance from the defined boundary of Redcar Town Centre and around 475m from the Primary Shopping Area. On this basis, it lies in an edge of centre location (for leisure/tourism purposes), although it is out-of-centre for new retail development.

7.4 It is therefore necessary to consider potential sites both within, and on the edge of, existing centres, in terms of their suitability, availability and viability to accommodate the uses covered by the proposed allocation on the Coatham site. In line with paragraph 24 of the NPPF, consideration has also been given to whether there are any other out-of-centre sites which are more accessible and well-connected to the town centre.

7.5 Whilst the Coatham site, as a whole, comprises 8.7 ha, that part of the site which is envisaged to come forward for new leisure, tourism and retail uses (i.e. the eastern part) comprises around 1.9 ha. The nature of any development which comes forward on the Coatham site will depend upon both the developers' preferences and operator demand at that time. However, as illustrated on the drawing attached at Appendix 4, the proposals could include the following elements:

- a five screen cinema, totalling 1,660 sqm gross;
- a 156 bed hotel (above the smaller retail/leisure and bar and restaurant uses), comprising 5,384 sqm gross over six storeys;
- large format retail units, totalling around 3,855 sqm gross (which could include an anchor foodstore);
- other retail/leisure units totalling 483 sqm;
- bar and restaurant uses, totalling 1,301 sqm gross floorspace;
- a health and fitness club, comprising 975 sqm gross; and
- 196 parking spaces.

7.6 Adjacent to the existing Tuned In facility, to the north of Majuba Road, there is currently a public car park with 55 spaces, which has potential for expansion to the north, in order to provide 118 in total. These spaces would be available for customers of/visitors to any development coming forward on the Coatham site.

7.7 Any potential alternative sites would need to be able to accommodate new leisure, tourism and retail floorspace of a similar scale and nature, with associated parking, servicing and landscaping, in order to meet the needs identified in Section 5.0. In particular, it is important that any development which comes forward contains sufficient critical mass of floorspace, including anchor foodstore and leisure facilities (i.e. the cinema).

7.8 This will help to ensure that the development this scheme is successful, by attracting both the required end operators and customers – including those who are currently travelling to use retail and leisure facilities outside of the area – and is commercially viable, taking into account site remediation costs. By attracting these new retail and leisure operators, and enhancing the existing range and choice of provision, the development will also help to create a new destination, which delivers wider benefits for the town centre.

7.9 The development shown on the above drawing has demonstrated flexibility by utilising existing car parking – with potential for expansion - which currently serves visitors to the adjacent Tuned In facility and other attractions to the west of the town centre, thereby reducing the amount of land required. Any hotel is also likely to be developed over several storeys. Whilst we have not therefore applied a minimum site size to this assessment, in order to be suitable, any opportunities which are identified will need to be of a similar size to the proposals set out above (i.e. 1.9 ha).

7.10 As the closest centre to the application site, and the only one which could serve a similar catchment area to the proposed development, this assessment is focused upon the suitability, availability and viability of sites located within, and on the edge of, Redcar Town Centre.

Assessment of Sites

Former M&S, High Street

7.11 The former M&S unit is located on High Street, immediately opposite the northern entrance to the Regent Walk shopping mall, and within the Primary Shopping Area. The store closed in 2014 and was most recently occupied on a temporary basis by an outlet store, although this has also recently vacated the building, which is currently being marketed for re-occupation. Whilst also recently vacated by Yorkshire Trading Company, the unit immediately to the east on High Street is currently being refurbished and is shortly to open as a Goodwins store.

7.12 The former M&S unit has a footprint of around 0.1 ha, with the ground floor being split over two levels. Whilst it offers potential for re-occupation by a new retail operator, the site is narrow, and constrained by other commercial (and occupied) properties to the east and west. Given its size, it could not accommodate new retail, leisure and tourism facilities of a similar scale to that proposed on the Coatham site, either by re-occupation of the existing building or redevelopment.

7.13 On this basis, this opportunity is not considered suitable to accommodate the proposed development or meet the needs identified in Section 6.0.

Car Park, West Dyke Road/Lord Street

7.14 The existing pay and display car park, adjacent to the junction of West Dyke Road with Lord Street, was previously occupied by a Kwiksave supermarket, which has since been cleared. The site lies outwith the existing defined Primary Shopping Area (PSA), although within the wider town centre boundary.

7.15 There is potentially scope for the site to accommodate new retail and/or leisure development, which enhances the existing range of provision in Redcar. However, the site comprises just 0.2 ha (approx.). In addition, there are a number of existing terraced shop units adjacent to the site, facing onto West Dyke Road. Along with the shape of the site, these units will impact upon the physical form of development which could come forward.

7.16 The site could therefore not accommodate the retail and leisure/tourism uses being proposed as part of the allocation of the Coatham site, which would occupy just under 2 ha, based on the above drawing. On this basis, even if it could be made available for development, it is clearly not suitable for the uses proposed.

12C West Terrace

7.17 This site is located on the western side of West Terrace, adjacent to its junction with Central Terrace. It is situated just outside of the PSA, although within the Food and Drink Late Night Opening Zone.

7.18 The site was formerly occupied by the Wetherells furniture store but is currently vacant and surrounded by hoardings. Whilst it is currently being marketed as a development site, it comprises just 0.05 ha and is therefore too small to accommodate the uses proposed at Coatham. It is therefore not suitable.

5-8 Esplanade

7.19 The site is located on the south side of Esplanade, opposite the new Beacon development - outwith the defined PSA but within the town centre boundary, as well as the Late Night Opening Zone. The site was formerly occupied by a bar/nightclub but currently comprises hardstanding, which has most recently been occupied by fairground rides, along with associated buildings.

7.20 However, even including land to the rear (adjacent to Bank Street) this site comprises less than 0.1 ha, and is also physically constrained by existing commercial premises to the east and west. It clearly could not accommodate new leisure, tourism and retail floorspace of a scale required to meet the identified needs.

35-38 Esplanade

7.21 The site is also located on the south side of Esplanade, immediately to the east of its junction with Bath Street, to the north of the PSA but within the wider town centre and the Late Night Opening Zone. It comprises units formerly occupied by a bingo hall/amusement arcade and nightclub, which are currently being marketed.

7.22 However, as with the other opportunities identified, it is small site (comprising just 0.1 ha), which is constrained by commercial properties to east and south. It is therefore too small, and not suitable for the development under consideration at Coatham.

Former Bus Station, High Street East

7.23 The former bus station lies at the far end of High Street East, immediately adjacent to, but within, the defined town centre boundary, and to the north of Lord Street. The site is currently occupied by hardstanding and the former bus station offices and, whilst it is currently being marketed, it is currently used as temporary car parking. However, the site comprises just 0.1 ha and is therefore not considered suitable, as it is too small to accommodate the development.

Land West of Oxley Street

7.24 Land west of Oxley Street is currently vacant and surrounded by hoardings. It lies around 100m to the east of the defined town centre boundary, and around 400m from the PSA. Is therefore edge of centre for leisure/tourism purposes, although out-of-centre for proposed new retail development.

7.25 On this basis, the site is not sequentially preferable to the proposed allocation at Coatham. Furthermore, the site comprises just 0.1 ha. It is therefore too small to accommodate new leisure, tourism and retail uses even approaching the scale under consideration for the Coatham site.

Land North of South Terrace

7.26 Land in between Lord Street and South Terrace is currently occupied by hardstanding and used for the storage of boats, tractors and other related vehicles/equipment. At 0.4 ha, even if it becomes available, the site could not accommodate the uses proposed at Coatham or, therefore, meet the needs identified in Section 5.0.

7.27 Furthermore, the site lies around 100m to the east of the defined town centre boundary, and around 500m from the PSA. As with land west of Oxley Street, it is therefore edge of centre for leisure/tourism purposes and out-of-centre for retail development, and not sequentially preferable to the site at Coatham.

Other Sites and Vacant Units

7.28 Elsewhere in Redcar Town Centre, opportunities for new development are limited to smaller scale, infill sites. These include other vacant units and small plots of land, dispersed across the centre, as well as a number of public car parks.

7.29 However, none of these sites or vacant units could accommodate significantly more than 1,000 sqm new commercial floorspace at ground floor level, even before any allowance is made for parking, servicing etc. They are not suitable, therefore, for the new leisure, tourism and retail uses under consideration for the proposed allocation at Coatham.

Summary

7.30 This assessment has considered the suitability, availability and viability of potential alternative opportunities within and on the edge of Redcar Town Centre to accommodate uses proposed as part of the allocation at Coatham.

7.31 Any potential alternative sites would need to be able to accommodate new leisure, tourism and retail floorspace of a similar scale and nature, with associated parking, servicing and landscaping. This is in order to meet the identified needs and ensure sufficient critical mass of floorspace is provided to create a new retail and leisure destination in Redcar, providing benefits for the town centre.

7.32 In this context, none of the sites considered are able to accommodate new uses even approaching the scale proposed as part of this allocation, as a result of their size. They are not, therefore, suitable to meet the need to enhance the existing range of retail, leisure and tourism facilities in Redcar identified in Section 5.0 of this report.

8.0 Impact Assessment

8.1 This section of the statement includes an assessment of the impact of the uses proposed as part of the Coatham Allocation. In line with paragraph 26 of the NPPF, and taking into account the PPG, this includes an 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.

Impact on Investment

8.2 The nature and scale of the development is such that it seeks to meet the need to enhance the existing range of leisure, tourism and retail facilities in Redcar. This would be achieved through, inter alia, the provision of new larger format retail units (including a foodstore), a cinema, a hotel, health and fitness club and food and beverage facilities. The cinema and foodstore, in particular, would help to anchor the development and ensure a critical mass of facilities is provided – in order to ensure that the scheme is commercially viable (given remediation costs), is successful as a destination in its own right, and also delivers wider benefits for the town centre.

8.3 Along with the other retail and leisure uses proposed, and as explained further below, these would not compete with the majority of existing uses in the centre. Rather, they would represent significant investment on a site on the edge of Redcar Town Centre (for leisure purposes) and the development proposed would help to generate linked trips with, and spin-off trade for, existing facilities within the centre. In doing so, they would help to generate interest in the re-occupation of currently vacant units within the centre itself, by other uses which enhance its vitality and viability. They would also complement other recent investment in the centre, including the new Community Heart, the Beacon, the Palace Hub and public realm improvements.

8.4 In addition, it is also necessary to take into account the fact that:

- as set out in Section 7.0, there are no sequentially preferable sites, located either within, or on the edge of, Redcar Town Centre, which are suitable and available to accommodate the development proposed at Coatham;
- there are no other schemes or investment coming forward within Redcar Town Centre which could be affected by the proposed development; and
- any other schemes which are coming forward or being promoted in other centres in the wider area, beyond the defined Study Area, are more distant from the Coatham site, and highly unlikely to be affected by the current proposals.

8.5 It is therefore not considered that the new leisure, tourism and retail floorspace proposed on the application site would have any adverse impact upon existing, committed and planned investment in existing centres, including Redcar Town Centre.

Impact on Vitality and Viability

Consumer Choice

8.6 The main convenience retail provision in Redcar Town Centre comprises the existing Morrisons store in Regent Walk, which comprises around 3,250 sqm net floorspace. As set out in Section 4.0, however, following the recent closure of the M&S Foodhall, the majority of other provision in the centre is smaller in scale, comprising Farmfoods, Iceland and Heron stores, along with a range of specialist uses.

8.7 There are a number of other stores elsewhere in Redcar, including a Tesco store at West Dyke Road (2,800 sqm net), an Aldi at Larkswood Road (1,400 sqm net) and Asda at Roseberry Road Local Centre (650 sqm net). With the exception of the latter, however, none of these stores are related to any existing centres, including Redcar Town Centre. Furthermore, whilst there are a number of commitments developments in the Borough, none of these would enhance the range of provision serving Redcar itself.

8.8 As set out in Section 5.0, whilst there is no quantitative need for new convenience retail floorspace across the Borough as a whole, there is a need to enhance the existing range of provision within Redcar Town Centre. This would also help to alleviate overtrading in the existing Morrisons and Aldi stores in Redcar, and could come forward in the form of a discount operator, reflecting the current nature of the foodstore market. However, there are no opportunities within the town centre which are capable of accommodating a store of a size which would meet this need.

8.9 The Borough-wide study also concludes that there was a need to enhance the existing range of comparison goods retail provision in Redcar Town Centre, particularly in terms of national multiples. This reflects, in part, the significant quantum of expenditure which is flowing out of Redcar & Cleveland to facilities located outwith the Borough – including those in Middlesbrough Town Centre and Teesside Park. Again, whilst there a number of vacant units dispersed across the centre, the majority of these units are small in scale and/or less suited to modern retailer requirements.

8.10 The study identifies the significant leakage of cinema visits and food and beverage spending to facilities outside of the Borough, and the scope to claw some of this spending back through new provision. It also identifies the need for new hotels and health and fitness clubs which enhance the existing range and choice of facilities, including those operated by national chains.

8.11 The proposed allocation of the Coatham site would support the development of uses on this site which meet some of the above needs. It is not considered that the development would have a significant adverse impact upon the vitality and viability of Redcar Town Centre. This reflects a number of factors, although particularly the scale, nature and identity of existing uses within the centre.

8.12 As set out above, aside from the existing Morrisons – which is currently achieving a level of turnover around 50% above the company average – the majority of existing convenience retail provision is small in scale (i.e. below 200 sqm net floorspace) and there are no discount foodstores. Any new foodstore developed on the Coatham site would not compete directly with the majority of existing facilities in Redcar Town Centre, or indeed other centres across the Borough.

8.13 Other than the Franks flooring store at West Dyke Road, there are no larger format non-food retail developments in the town, or indeed the northern or eastern parts of the Borough. As with the proposed convenience retailing, the new comparison goods floorspace is aimed at accommodating operators who are not currently represented in Redcar and cannot be accommodated in the town centre, including national multiples.

8.14 The only cinema in Redcar, and indeed the Borough as a whole, is the Regent facility on Newcomen Terrace, which is an independent cinema with just one screen and approximately 250 seats. Whilst there this facility may lose some trade to any new multiplex at Coatham, the latter would compete more directly with the existing Showcase and Cineworld cinemas at Teesside Park and Marton Road (Middlesbrough). These cinemas have 14 and 11 screens respectively and are able to show a much wider range of films in more modern auditoriums, with a broader range of customer facilities.

8.15 The number of national café/restaurant operators situated in Redcar Town Centre is also limited, particularly in comparison with centres of a similar or larger size located elsewhere. Similarly, there are only a limited number of, and generally smaller scale, hotels and health and fitness clubs within Redcar Town Centre, none of which are national chains. As set out in the Borough-wide Study, whilst there are some slightly larger 3-star hotels available such as the Park Hotel and Claxton House Hotel, there is a lack of national chains or larger hotels more suited to business use, large group visits and/or families. New provision would help to stem the recent decline in the number of people staying overnight in Redcar and, in the medium to long term, increase these numbers, to the benefit of the town centre.

8.16 In practice, the scheme would have a significant positive impact, in terms of enhancing local consumer choice, and the range and choice of retail and leisure uses accessible to residents of Redcar and the surrounding areas. Given that the proposed allocation relates to a site on the edge of Redcar Town Centre (for leisure purposes), it would also help to generate linked trips with existing facilities within the centre and complement the regeneration of the centre more generally.

Trade and Turnover

Convenience Goods Retail

8.17 Table 13 at Appendix 2 illustrates the forecast convenience goods trade diversion impacts upon existing stores and centres within the Study Area.

8.18 They show that the most significant convenience goods trade diversion impact arising from the proposed development at Coatham (13%) would be upon the existing Aldi store at Larkswood Road (20% when considered cumulatively with committed developments). This reflects the most likely identity of the foodstore proposed at Coatham and the status of this store as the only discount operator in Redcar. However, this store is unrelated to any existing defined centres and is, in any event, currently achieving a turnover level significantly above the national average. As such, there is no prospect that the proposed development would threaten the store's viability.

8.19 The forecast impact upon Morrisons at Regent Walk, in Redcar Town Centre, is 9% (or 14% with commitments). However, this store is also performing well above the company average turnover level and would continue to do so, following implementation of the proposed foodstore. The impact upon other stores in the centre is forecast to be 2% (or 3% cumulatively), reflecting their role in meeting more specialist and day to day needs, and the limited extent to which they would compete with any new store at Coatham.

8.20 Existing stores in Redcar Town Centre would also continue to benefit from a number of trading advantages. These include:

- loyalty from their existing customer base in Redcar;

- proximity to other shops and services within the centre, which will increase the extent to which they are able to benefit from passing trade; and
- the potential to attract trade from those living in residential areas in close proximity to the centre.

8.21 In the context of the above, it is not considered that impacts of this level would have any significant adverse impact upon the overall centre, particularly given the different needs that existing and proposed facilities would meet.

8.22 The impacts forecast upon Tesco at West Dyke Road and Asda at Roseberry Road are forecast to be 8% and 6% respectively (or 12% and 7% cumulatively). The Tesco store is located outwith the defined Redcar Town Centre. Whilst the Asda stores lies within a local centre, there is no prospect that this level of trade diversion would have a significant adverse impact upon the overall viability of the store. This particularly so given that it will continue to perform a different, and complementary, role to the proposed floorspace, in meeting the day to day and top-up shopping needs of its more localised catchment area, on the south side of Redcar.

8.23 All other impacts as a result of the proposed development at Coatham are forecast to be below 5%. This reflects their distance from the application site and/or their differing role and function – serving different catchments areas and/or focus upon meeting more day-to-day needs of these areas. On the basis of this level of impact, there is unlikely to be any material impact upon the overall viability of any individual stores or centres.

8.24 The cumulative impacts upon some of these stores are higher – for example, those upon the main foodstores in Guisborough (including Morrisons, Sainsbury's, Lidl and Aldi) range between 15% and 25%, and that upon Asda in Skelton is forecast to be 20%. However, the majority of this trade diversion would be a result of the committed developments in other parts of the Borough, which include new medium sized foodstores in both Guisborough and Skelton.

8.25 Furthermore, of these stores, only Morrisons in Guisborough (15% impact cumulatively) is within an existing defined centre. As with Morrisons in Redcar, this store would continue to achieve a level of turnover which is almost a third above Morrisons' company average, following implementation of the development proposed at Coatham. In this context, and given that the impact upon other stores in the centre is forecast to be less than 1%, there is no prospect that the proposals would have a significant adverse impact upon the centre as a whole.

8.26 The forecast cumulative impact upon the Sainsbury's and Co-op stores in Saltburn and Marske are 8% and 5% respectively, with that upon Co-op in Loftus being 8%. Again, however, the majority of this impact is as a result of committed developments. Furthermore, none of these stores is likely to compete directly with any new medium sized foodstore developed at Coatham, given their roles in meeting the more day to day needs of their respective catchment areas.

8.27 Overall, based on the levels of impact forecast as a result of this assessment, there is not considered to be any prospect that the development proposed as part of the Coatham allocation would have any significant adverse impact upon existing centres.

Comparison Goods Retail

8.28 Table 13 in Appendix 3 summarises the trade diversions forecast to result from the comparison goods floorspace proposed as part of the Coatham allocation.

8.29 The impact of the proposed development upon other existing facilities in Redcar Town Centre is forecast to be just 2%, with the cumulative impact being around 5%. It is not considered that an impact of this level would have any significant adverse impact upon the vitality and viability of the wider centre. Existing comparison goods floorspace within the centre as a whole is estimated to achieve a healthy level of turnover, even after implementation of the application proposals.

8.30 As explained earlier in the statement, the proposed non-food retail units are aimed at attracting larger format operators not currently represented in Redcar, and this reflects the fact that there are only a relatively limited number of larger format national multiples in the centre. The majority of existing comparison goods retail uses within Redcar Town Centre are small in scale (i.e. around or below 100 sqm net floorspace) and – whilst there is a range of national multiples - a significant proportion of these uses are specialist/independent operators.

8.31 In our experience, such operators are often more resilient to changes in circumstances and competition. In particular, they are able to change the range and type of goods they sell more easily than national operators. They also often own their own premises and are able to adapt to be able to compete and/or offer something complementary to these larger stores.

8.32 All other impacts forecast to arise from the comparison goods floorspace are around or below 1%. Even when considered cumulatively, with committed developments, the forecast impacts are all around or below 6%, with the majority being below 3%. These impacts are clearly unlikely to have any material impact upon the overall viability of any individual stores or centres.

8.33 This reflects the fact the comparison goods impacts would be spread across a range of stores and centres in the surrounding area – primarily national multiple operators - many which are in out-of-centre locations. It also reflects, in turn, the significant proportion of comparison goods/non-food expenditure (around 45%) which is currently leaking out of the Borough to such destinations – including Middlesbrough Town Centre and Teesside Park (which is not a defined centre and therefore unprotected in terms of national policy).

8.34 The majority of the forecast cumulative impact upon Guisborough District Centre (6%) would be as a result of the turnover generated by the committed development on the Former Esco Foundry site in the town. Whilst helping to meet needs in the Guisborough, this development would not enhance the availability and accessibility of larger format retailing to residents in the northern and eastern parts of the Borough. Furthermore, an impact of the level forecast would not have any significant impact upon the vitality and viability of this centre which, as set out in Section 4.0, is currently performing well, with a low unit vacancy rate.

8.35 There is therefore no prospect that the proposed development at Coatham would have any significant adverse impact upon the vitality and viability of any existing centres. All of the forecast impacts would be offset by forecast expenditure growth over time. Indeed, by enhancing the existing range of provision, and therefore the extent to which retail needs can be met locally, the development may increase the level of spending retained locally, including in Redcar Town Centre.

Cinema

8.36 The Borough-wide Town Centre Study provides an assessment of the capacity to support new cinema screens in Redcar and Cleveland. This assessment applies the national average visitation rate (2.8 trips per annum) to the Borough's estimated population in order to forecast the total number of cinema trips generated in the Borough. It forecasts that that the Borough's population will generate in the order of 383,000 cinema trips in 2021, increasing to 387,000 in 2026 and 391,000 in 2032.

8.37 In contrast, the results of the household survey undertaken as part of the study indicate that just c. 80,000 cinema trips are currently attracted to the Regent Cinema in Redcar (allowing for 10% inflow from beyond the Study Area). On this basis, only 18% of all cinema visits by residents of Redcar and Cleveland are made to cinema facilities within the Borough. There is therefore significant scope to claw–back visits being made by residents to facilities which lie beyond the Borough – including the Cineworld and Showcase facilities in Middlesbrough.

8.38 It is reasonable to assume that Borough's existing market share of cinema trips could be increased from its existing low level to between 50% and 75% through the new cinema development in Redcar. The new multiplex proposed on the Coatham site would help to enhance the availability of such provision to residents across the Borough as a whole and help to attract additional visitors to the centre. In doing so, it would help to reduce the number of trips to the above Cineworld and Showcase cinemas, thereby increasing the Borough's existing retention level.

8.39 Whilst there is potential for the existing Regent Cinema to lose trade to any new multiplex at Coatham, the latter would compete more directly with the existing Showcase and Cineworld cinemas. In any event, the Regent Cinema is currently located outwith the existing defined town centre boundary and is unlikely to generate a similar level of linked trips to that proposed at Coatham – particularly given the size of the proposed retail, leisure and tourism uses and the amount of visitors they are likely to attract.

8.40 On this basis, it is not considered that the proposed cinema would have any significant adverse impact upon Redcar or any other existing centres. Indeed, along with the wider development, it would help to generate important benefits for the town centre, including linked trips and spin-off trade for existing facilities.

Food and Beverage

8.41 As set out above, an assessment of the expenditure capacity to accommodate new food and beverage floorspace in Redcar and Cleveland was undertaken as part of the Borough-wide Town Centre Study.

8.42 As part of this assessment, it was forecast that expenditure upon eating and drinking out would increase by around £40m (around 28%) between 2016 and 2032 across the Borough. Based on the assessment, it was forecast that there could be scope for 2,218 sqm gross additional food and beverage floorspace by 2032 – which is more than that set out on the illustrative layout for the Coatham site included at Appendix 4.

8.43 This assessment was based on existing facilities within the Borough maintaining their existing market share of expenditure generated within Redcar and Cleveland (68%). It did not therefore take into account the potential to claw-back spending which is currently leaking to facilities further afield. By enhancing the range and choice of provision in Redcar, including national food and drink chains, there is clearly potential for any development coming forward at Coatham to increase this market share, by reducing the need to travel further afield to visit such facilities. This is particularly the case given the synergy between any new multiplex cinema developed at Coatham and the new food and drink uses.

8.44 Taking into account the forecast growth in spending and expenditure capacity identified above, it is not considered that the proposed new food and beverage uses would have any material adverse impact upon the viability and viability of any existing centres. This is particularly given that:

- there are only a very limited number of national food and beverage chains in Redcar Town Centre; and
- any diversion of trade would be spread across a range of facilities in the surrounding area, located both within and beyond existing centres.

8.45 Even when taking into account independent operators and local chains, food and beverage uses comprise only a small proportion of the overall number of uses within existing centres, the vast majority of which would remain unaffected by the proposed development. Indeed, in practice, the proposed uses would enhance local consumer choice, and the range and choice of facilities accessible to residents of Redcar and the surrounding area.

Summary

8.46 In summary, it is not considered that the uses under consideration as part of the proposed allocation of the Coatham site would have any significant adverse impact upon existing centres. This reflects a range of factors, including the scale and nature of the proposed retail floorspace, which is aimed at attracting new, larger format retail operators, and the strong performance of existing foodstores.

8.47 It also reflects the limited extent to which the proposed retail and leisure uses would compete with facilities within Redcar and other existing centres, and the significant extent to which for new retail and leisure uses would compete with retail and leisure facilities – including national multiples – which are located outwith the Borough. In practice, the scheme would significantly the range and choice of retail and food and drink uses accessible to local residents, and help to generate linked trips with existing facilities within the town centre, resulting in wider regeneration benefits.

9.0 Summary

9.1 This Retail and Leisure Statement has been prepared as part of the evidence base to inform the Redcar & Cleveland Local Plan (R&CLP). It provides an assessment of proposals within the R&CLP to allocate land at Coatham for a mixed use development, comprising leisure, tourism, visitor and retail uses. In particular, it assesses the proposals against the requirements of paragraphs 24 to 26 of the National Planning Policy Framework (NPPF), including the sequential and impact tests.

9.2 The proposed allocation seeks to meet the need to enhance the existing range of leisure, tourism and retail uses in Redcar, and reduce the need for local residents to travel to facilities outside of the Borough. The development will accommodate sufficient critical mass of floorspace, including national multiples, which not only creates a new retail and leisure destination, but also delivers wider benefits for the town centre.

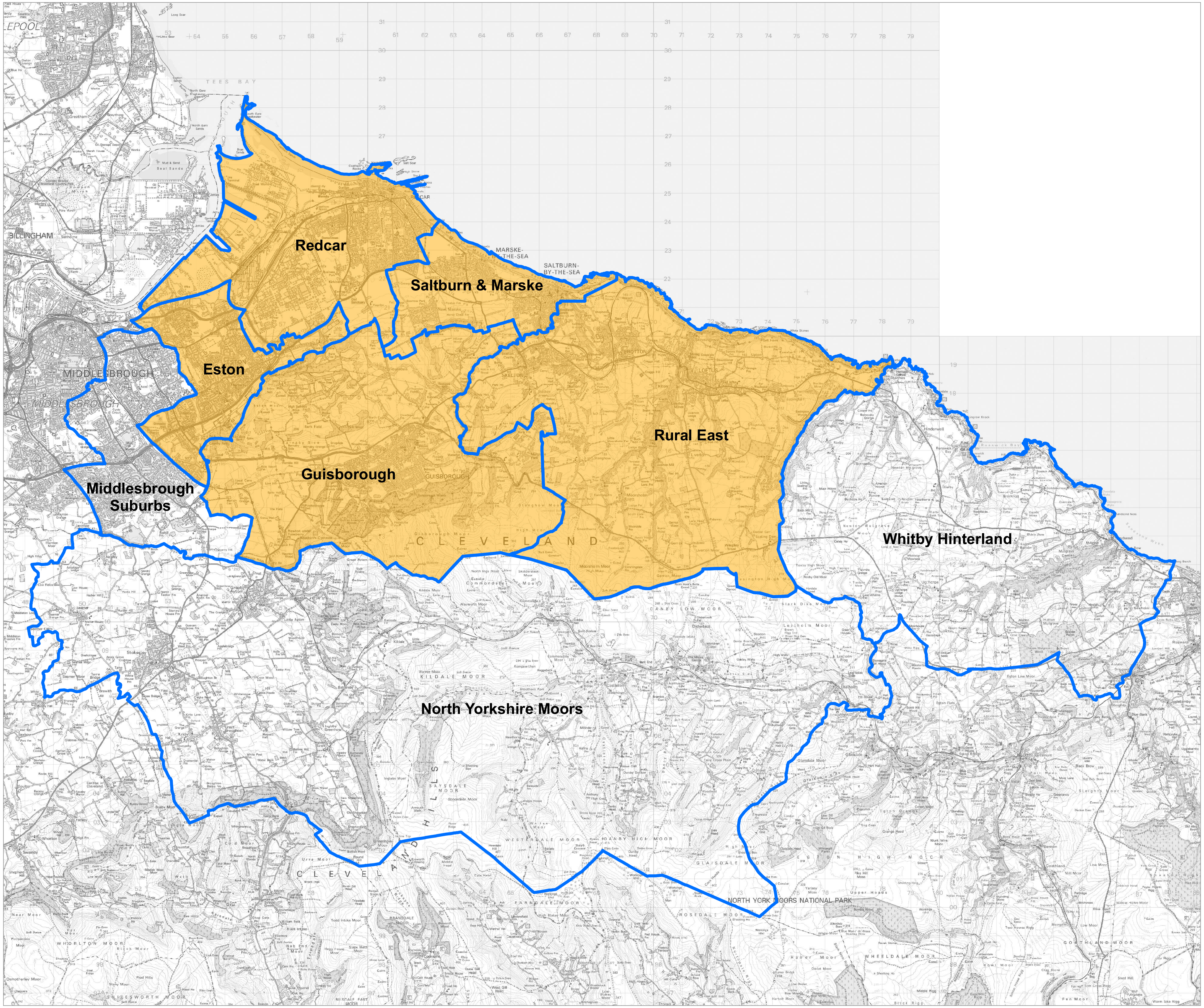
9.3 In relation to the sequential test, this assessment has considered the suitability, availability and viability of potential alternative opportunities within and on the edge of Redcar Town Centre to accommodate uses proposed as part of the allocation at Coatham. However, none of the sites considered are able to accommodate new uses of the scale proposed as part of this allocation, as a result of their size. They are not, therefore, suitable to meet the need to enhance the existing range of retail, leisure and tourism facilities in Redcar identified in Section 5.0 of this report.

9.4 It is not considered that the uses under consideration as part of the proposed allocation of the Coatham site would have any significant adverse impact upon Redcar Town Centre or any other existing centres. This takes into account a range of factors, including:

- the scale and nature of the proposed retail floorspace, which is aimed at attracting new, larger format retail operators, which are currently not represented in Redcar;
- the expenditure capacity which was identified in the Borough-wide Town Centre Study for new comparison retail and food and beverage floorspace in the Borough;
- the strong current performance of many of the existing main foodstores in the Borough, including the Morrisons facilities in both Redcar and Guisborough Town/District Centres;
- the limited extent to which the proposed retail and leisure uses would compete with facilities within Redcar and other existing centres, the majority of which are focused upon meeting more day to day and/or specialist needs;
- the absence of any multiplex cinemas in Redcar, or indeed the wider Borough, and limited range of national food and beverage, health and fitness and hotel chains in Redcar and Cleveland;
- the fact that any diversion of trade would be spread across a range of retail, leisure and tourism uses, including those which are unrelated to existing centres; and
- the significant extent to which for new retail and leisure uses would compete with retail and leisure facilities – including national multiples – which are located outwith the Borough.

9.5 In practice, the scheme would significantly the range and choice of retail and food and drink uses accessible to residents of Redcar and the surrounding areas, and help to generate linked trips with existing facilities within the town centre.

Appendix 1: Study Area and Survey Zones Plan



Key

Survey Zone Boundary

Redcar & Cleveland Local Authority Boundary

Nathaniel Lichfield & Partners
Planning. Design. Economics.

Project	Proposed Retail, Leisure and Tourism Uses: Coatham
Title	Household Survey Zones
Client	Redcar & Cleveland Borough Council
Date	01.02.2017
Scale	-
Drawn by	CS
Drg. No	GIS\23090\02-01

N

GIS Reference: S:\NE23090 - Redcar & Cleveland Town Centre Study\NE23090 - Redcar & Cleveland Town Centre Study - Survey Zones - 07.07.2016.mxd

Appendix 2: Convenience Goods Retail Impact Assessment

PROPOSED COATHAM ALLOCATION, REDCAR

CONVENIENCE GOODS RETAIL IMPACT ASSESSMENT

Table 1: Study Area Population

Zone	2011	2016	2021	2026	2032
Zone 1 - Redcar	35,692	35,771	36,128	36,485	36,829
Zone 2 - Eston	38,048	38,133	38,513	38,894	39,260
Zone 3 - Guisborough	19,463	19,506	19,701	19,896	20,083
Zone 4 - Marske/Saltburn	19,134	19,177	19,368	19,559	19,743
Zone 5 - Rural East	22,860	22,911	23,139	23,368	23,588
Borough (Sub-Total)	***135,197***	***135,497***	***136,849***	***138,201***	***139,503***
Zone 6 - East Middlesbrough	64,957	65,564	66,638	67,665	68,973
Zone 5 - North Yorkshire Moors	14,251	14,299	14,473	14,648	14,791
Zone 8 - Whitby Hinterland	3,416	3,410	3,416	3,432	3,454
Total	**217,821**	**218,770**	**221,377**	**223,946**	**226,721**

Sources: *RCBC and Experian*

Table 2: Convenience Goods Expenditure per person (£) (2014 Prices)

Zone	2016	2021	2026	2032
Zone 1 - Redcar	1,886	1,872	1,867	1,861
Zone 2 - Eston	1,862	1,848	1,844	1,838
Zone 3 - Guisborough	2,049	2,033	2,028	2,021
Zone 4 - Marske/Saltburn	1,977	1,962	1,957	1,950
Zone 5 - Rural East	1,894	1,880	1,876	1,869
Zone 6 - East Middlesbrough	1,804	1,791	1,787	1,780
Zone 5 - North Yorkshire Moors	2,203	2,186	2,181	2,173
Zone 8 - Whitby Hinterland	2,375	2,357	2,352	2,343

Sources:

Experian Local Expenditure 2014 (2014 prices)

Experian Retail Planner Briefing Note (October 2015)

Excludes Special Forms of Trading

Table 3: Total Convenience Goods Expenditure (£m) (2014 Prices)

Zone	2016	2021	2026	2032
Zone 1 - Redcar	67.46	67.63	68.12	68.54
Zone 2 - Eston	71.00	71.17	71.72	72.16
Zone 3 - Guisborough	39.97	40.05	40.35	40.59
Zone 4 - Marske/Saltburn	37.91	38.00	38.28	38.50
Zone 5 - Rural East	43.39	43.50	43.84	44.09
Borough (Sub-Total)	***259.74***	***260.36***	***262.30***	***263.87***
Zone 6 - East Middlesbrough	118.28	119.35	120.92	122.77
Zone 5 - North Yorkshire Moors	31.50	31.64	31.95	32.14
Zone 8 - Whitby Hinterland	8.10	8.05	8.07	8.09
Total	**417.62**	**419.40**	**423.24**	**426.88**

Source: Tables 1 and 2

Table 4: Base Year 2016 Convenience Goods Market Shares (%) (2014 Prices)

Centre/Facility	Zone 1 Redcar	Zone 2 Eston	Zone 3 Guisborough	Zone 4 Marske & Saltburn	Zone 5 Rural East	Zone 6 East Middlesbrough	Zone 7 North Yorkshire Moors	Zone 8 Whitby Hinterlands	% Inflow
Zone 1 - Redcar									
Morrisons, Redcar Town Centre	26.1%	4.7%	1.3%	21.6%	8.6%	0.7%	1.1%	7.7%	10.0%
Other Stores, Redcar Town Centre	7.6%	2.3%	0.0%	3.5%	1.0%	1.4%	0.0%	1.1%	5.0%
Redcar Town Centre Sub-Total	***33.7%***	***7.0%***	***1.3%***	***25.1%***	***9.6%***	***2.1%***	***1.1%***	***8.8%***	
Tesco, West Dyke Road	21.0%	0.4%	0.0%	10.5%	1.3%	0.0%	0.0%	1.0%	5.0%
Aldi, Larkswood Road	14.3%	1.9%	0.0%	17.7%	3.8%	0.4%	0.4%	0.6%	2.5%
Asda, Roseberry Road	8.4%	0.5%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	2.5%
Other Stores/Centres	7.5%	0.5%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%	2.5%
Redcar Zone Total	**84.9%**	**10.3%**	**1.8%**	**55.5%**	**14.7%**	**2.5%**	**1.5%**	**10.4%**	
Zone 2 - Eston									
Tesco, Low Grange District Centre	0.8%	18.6%	0.7%	2.7%	0.5%	2.6%	0.4%	0.0%	15.0%
Eston District Centre	0.0%	3.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.5%
Asda, North Street, South Bank	2.7%	23.7%	3.5%	1.8%	1.1%	5.6%	0.7%	0.0%	15.0%
Marks & Spencer, Cleveland Retail Park	1.4%	3.0%	2.5%	0.7%	0.6%	2.1%	0.7%	1.1%	15.0%
Other Stores/Centres	0.0%	11.9%	0.0%	0.5%	0.3%	1.2%	1.1%	0.0%	2.5%
Eston Zone Total	**4.9%**	**60.4%**	**6.7%**	**5.7%**	**2.5%**	**11.5%**	**2.9%**	**1.1%**	
Zone 3 - Guisborough									
Morrisons, Guisborough District Centre	0.0%	1.1%	32.0%	0.3%	4.6%	0.4%	7.4%	2.9%	10.0%
Other Stores, Guisborough District Centre	0.0%	0.0%	3.5%	0.5%	0.0%	0.5%	1.1%	0.0%	5.0%
Guisborough District Centre Sub-Total	***0.0%***	***1.1%***	***35.5%***	***0.8%***	***4.6%***	***0.9%***	***8.5%***	***2.9%***	
Sainsbury's, Morgan Drive	0.0%	0.2%	16.1%	0.3%	1.9%	0.4%	0.4%	0.0%	5.0%
Lid, Enfield Chase	1.1%	0.2%	9.8%	0.0%	3.4%	0.8%	6.9%	0.0%	5.0%
Aldi, Hill View Road	0.2%	0.4%	12.8%	1.0%	6.1%	0.2%	7.0%	3.3%	5.0%
Other Stores/Centres	0.9%	0.2%	10.6%	0.5%	2.5%	0.8%	6.9%	1.1%	2.5%
Guisborough Zone Total	**2.2%**	**2.1%**	**84.8%**	**2.6%**	**18.5%**	**3.1%**	**29.7%**	**7.3%**	
Zone 4 - Marske/Saltburn									
Co-op, High Street, Marske	0.2%	0.0%	0.0%	8.8%	1.0%	0.0%	0.0%	0.0%	5.0%
Other Stores, Marske District Centre	0.2%	0.0%	0.0%	4.5%	0.0%	0.0%	0.0%	0.0%	5.0%
Sainsbury's, Saltburn District Centre	0.2%	0.0%	0.3%	9.9%	4.1%	0.0%	0.0%	1.1%	5.0%
Other Stores, Saltburn District Centre	0.2%	0.0%	0.0%	3.1%	0.7%	0.0%	0.0%	0.0%	5.0%
Other Stores/Centres	0.0%	0.0%	0.0%	0.3%	0.5%	0.0%	0.0%	12.7%	2.5%
Marske/Saltburn Zone Total	**0.8%**	**0.0%**	**0.3%**	**26.6%**	**6.3%**	**0.0%**	**0.0%**	**13.8%**	
Zone 5 - Rural East									
Co-op, High Street, Loftus	0.0%	0.0%	0.0%	0.0%	4.8%	0.0%	0.0%	0.6%	5.0%
Other Floorspace, Loftus District Centre	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	5.0%
Skelton Local Centre	0.0%	0.0%	0.0%	0.0%	4.1%	0.0%	0.4%	0.0%	2.5%
Brotton Local Centre	0.0%	0.0%	0.0%	0.0%	1.8%	0.0%	0.0%	0.0%	2.5%
Asda, Pheasant Fields Lane, Skelton	2.4%	0.0%	3.8%	5.4%	37.5%	0.0%	0.4%	10.8%	10.0%
Other Stores/Centres	0.0%	0.0%	0.3%	0.0%	3.9%	0.0%	0.0%	0.0%	2.5%
Rural East Zone Total	**2.4%**	**0.0%**	**4.1%**	**5.4%**	**53.2%**	**0.0%**	**0.8%**	**11.4%**	
Borough Total	**95.2%**	**72.8%**	**97.7%**	**95.8%**	**95.2%**	**17.1%**	**34.9%**	**44.0%**	
Outside Borough	**4.8%**	**27.2%**	**2.3%**	**4.2%**	**4.8%**	**82.9%**	**65.1%**	**56.0%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey July/August 2016

Table 5: Base Year 2016 Convenience Goods Expenditure Flows (£m) (2014 Prices)

Centre/Facility	Zone 1 Redcar	Zone 2 Eston	Zone 3 Guisborough	Zone 4 Marske & Saltburn	Zone 5 Rural East	Total (Within Borough)	Zone 6 East Middlesbrough	Zone 7 North Yorkshire Moors Rural East	Zone 8 Whitby Hinterlands	Inflow	Total
Expenditure 2016	**67.46**	**71.00**	**39.97**	**37.91**	**43.39**	**259.74**	**118.28**	**31.50**	**8.10**		
Zone 1 - Redcar											
Morrisons, Redcar Town Centre	17.61	3.34	0.52	8.19	3.73	**33.39**	0.83	0.35	0.62	3.91	**39.09**
Other Stores, Redcar Town Centre	5.13	1.63	0.00	1.33	0.43	**8.52**	1.66	0.00	0.09	0.54	**10.81**
Redcar Town Centre Sub-Total	***22.74***	***4.97***	***0.52***	***9.52***	***4.17***	***41.91***	***2.48***	***0.35***	***0.71***	***4.45***	***49.90***
Tesco, West Dyke Road	14.17	0.28	0.00	3.98	0.56	**19.00**	0.00	0.00	0.08	1.00	**20.08**
Aldi, Larkswood Road	9.65	1.35	0.00	6.71	1.65	**19.36**	0.47	0.13	0.05	0.51	**20.52**
Asda, Roseberry Road	5.67	0.36	0.20	0.00	0.00	**6.22**	0.00	0.00	0.00	0.16	**6.38**
Other Stores/Centres	5.06	0.36	0.00	0.83	0.00	**6.25**	0.00	0.00	0.00	0.16	**6.41**
Redcar Zone Total	**57.28**	**7.31**	**0.72**	**21.04**	**6.38**	**92.73**	**2.96**	**0.47**	**0.84**	**6.29**	**103.29**
Zone 2 - Eston											
Tesco, Low Grange District Centre	0.54	13.21	0.28	1.02	0.22	**15.27**	3.08	0.13	0.00	3.26	**21.73**
Eston District Centre	0.00	2.27	0.00	0.00	0.00	**2.27**	0.00	0.00	0.00	0.06	**2.33**
Asda, North Street, South Bank	1.82	16.83	1.40	0.68	0.48	**21.21**	6.62	0.22	0.00	4.95	**33.00**
Marks & Spencer, Cleveland Retail Park	0.94	2.13	1.00	0.27	0.26	**4.60**	2.48	0.22	0.09	1.30	**8.70**
Other Stores/Centres	0.00	8.45	0.00	0.19	0.13	**8.77**	1.42	0.35	0.00	0.27	**10.81**
Eston Zone Total	**3.31**	**42.89**	**2.68**	**2.16**	**1.08**	**52.12**	**13.60**	**0.91**	**0.09**	**9.84**	**76.56**
Zone 3 - Guisborough											
Morrisons, Guisborough District Centre	0.00	0.78	12.79	0.11	2.00	**15.68**	0.47	2.33	0.23	2.08	**20.80**
Other Stores, Guisborough District Centre	0.00	0.00	1.40	0.19	0.00	**1.59**	0.59	0.35	0.00	0.13	**2.66**
Guisborough District Centre Sub-Total	***0.00***	***0.78***	***14.19***	***0.30***	***2.00***	***17.27***	***1.06***	***2.68***	***0.23***	***2.21***	***23.46***
Sainsbury's, Morgan Drive	0.00	0.14	6.43	0.11	0.82	**7.52**	0.47	0.13	0.00	0.43	**8.54**
Lid, Enfield Chase	0.74	0.14	3.92	0.00	1.48	**6.28**	0.95	2.17	0.00	0.49	**9.89**
Aldi, Hill View Road	0.13	0.28	5.12	0.38	2.65	**8.56**	0.24	2.20	0.27	0.59	**11.86**
Other Stores/Centres	0.61	0.14	4.24	0.19	1.08	**6.26**	0.95	2.17	0.09	0.24	**9.71**
Guisborough Zone Total	**1.48**	**1.49**	**33.89**	**0.99**	**8.03**	**45.88**	**3.67**	**9.36**	**0.59**	**3.97**	**63.47**
Zone 4 - Marske/Saltburn											
Co-op, High Street, Marske	0.13	0.00	0.00	3.34	0.43	**3.91**	0.00	0.00	0.00	0.21	**4.11**
Other Stores, Marske District Centre	0.13	0.00	0.00	1.71	0.00	**1.84**	0.00	0.00	0.00	0.10	**1.94**
Sainsbury's, Saltburn District Centre	0.13	0.00	0.12	3.75	1.78	**5.79**	0.00	0.00	0.09	0.31	**6.19**
Other Stores, Saltburn District Centre	0.13	0.00	0.00	1.18	0.30	**1.61**	0.00	0.00	0.00	0.08	**1.70**
Other Stores/Centres	0.00	0.00	0.00	0.11	0.22	**0.33**	0.00	0.00	1.03	0.03	**1.39**
Marske/Saltburn Zone Total	**0.54**	**0.00**	**0.12**	**10.08**	**2.73**	**13.48**	**0.00**	**0.00**	**1.12**	**0.73**	**15.33**
Zone 5 - Rural East											
Co-op, High Street, Loftus	0.00	0.00	0.00	0.00	2.08	**2.08**	0.00	0.00	0.05	0.11	**2.24**
Other Floorspace, Loftus District Centre	0.00	0.00	0.00	0.00	0.48	**0.48**	0.00	0.00	0.00	0.03	**0.50**
Skelton Local Centre	0.00	0.00	0.00	0.00	1.78	**1.78**	0.00	0.13	0.00	0.05	**1.95**
Brotton Local Centre	0.00	0.00	0.00	0.00	0.78	**0.78**	0.00	0.00	0.00	0.02	**0.80**
Asda, Pheasant Fields Lane, Skelton	1.62	0.00	1.52	2.05	16.27	**21.46**	0.00	0.13	0.87	2.50	**24.95**
Other Stores/Centres	0.00	0.00	0.12	0.00	1.69	**1.81**	0.00	0.00	0.00	0.05	**1.86**
Rural East Zone Total	**1.62**	**0.00**	**1.64**	**2.05**	**23.09**	**28.39**	**0.00**	**0.25**	**0.92**	**2.75**	**32.31**
Borough Total	**64.23**	**51.69**	**39.05**	**36.32**	**41.31**	**232.60**	**20.23**	**10.99**	**3.56**	**23.58**	**290.96**
Outside Borough	**3.24**	**19.31**	**0.92**	**1.59**	**2.08**	**27.15**	**98.05**	**20.51**	**4.53**		
TOTAL	**67.46**	**71.00**	**39.97**	**37.91**	**43.39**	**259.74**	**118.28**	**31.50**	**8.10**		

Source: Table 3 and 4 (Please note some figures may not total precisely due to rounding)

Table 6: 2021 Convenience Goods Expenditure Flows (£m) (2014 Prices)

Centre/Facility	Zone 1 Redcar	Zone 2 Eston	Zone 3 Guisborough	Zone 4 Marske & Saltburn	Zone 5 Rural East	Total (Within Borough)	Zone 6 East Middlesbrough	Zone 7 North Yorkshire Moors Rural East	Zone 8 Whitby Hinterlands	Inflow	Total
Expenditure 2016	**67.63**	**71.17**	**40.05**	**38.00**	**43.50**	**260.36**	**119.35**	**31.64**	**8.05**		
Zone 1 - Redcar											
Morrisons, Redcar Town Centre	17.65	3.35	0.52	8.21	3.74	33.47	0.84	0.35	0.62	3.92	**39.19**
Other Stores, Redcar Town Centre	5.14	1.64	0.00	1.33	0.44	8.54	1.67	0.00	0.09	0.54	**10.84**
Redcar Town Centre Sub-Total	***22.79***	***4.98***	***0.52***	***9.54***	***4.18***	***42.01***	***2.51***	***0.35***	***0.71***	***4.46***	***50.03***
Tesco, West Dyke Road	14.20	0.28	0.00	3.99	0.57	19.04	0.00	0.00	0.08	1.01	**20.13**
Aldi, Larkswood Road	9.67	1.35	0.00	6.73	1.65	19.40	0.48	0.13	0.05	0.51	**20.57**
Asda, Roseberry Road	5.68	0.36	0.20	0.00	0.00	6.24	0.00	0.00	0.00	0.16	**6.40**
Other Stores/Centres	5.07	0.36	0.00	0.84	0.00	6.26	0.00	0.00	0.00	0.16	**6.42**
Redcar Zone Total	**57.42**	**7.33**	**0.72**	**21.09**	**6.39**	**92.96**	**2.98**	**0.47**	**0.84**	**6.30**	**103.55**
Zone 2 - Eston											
Tesco, Low Grange District Centre	0.54	13.24	0.28	1.03	0.22	15.30	3.10	0.13	0.00	3.27	**21.80**
Eston District Centre	0.00	2.28	0.00	0.00	0.00	2.28	0.00	0.00	0.00	0.06	**2.34**
Asda, North Street, South Bank	1.83	16.87	1.40	0.68	0.48	21.26	6.68	0.22	0.00	4.97	**33.13**
Marks & Spencer, Cleveland Retail Park	0.95	2.14	1.00	0.27	0.26	4.61	2.51	0.22	0.09	1.31	**8.74**
Other Stores/Centres	0.00	8.47	0.00	0.19	0.13	8.79	1.43	0.35	0.00	0.27	**10.84**
Eston Zone Total	**3.31**	**42.99**	**2.68**	**2.17**	**1.09**	**52.24**	**13.73**	**0.92**	**0.09**	**9.88**	**76.85**
Zone 3 - Guisborough											
Morrisons, Guisborough District Centre	0.00	0.78	12.82	0.11	2.00	15.71	0.48	2.34	0.23	2.09	**20.85**
Other Stores, Guisborough District Centre	0.00	0.00	1.40	0.19	0.00	1.59	0.60	0.35	0.00	0.13	**2.67**
Guisborough District Centre Sub-Total	***0.00***	***0.78***	***14.22***	***0.30***	***2.00***	***17.31***	***1.07***	***2.69***	***0.23***	***2.22***	***23.52***
Sainsbury's, Morgan Drive	0.00	0.14	6.45	0.11	0.83	7.53	0.48	0.13	0.00	0.43	**8.56**
Lid, Enfield Chase	0.74	0.14	3.93	0.00	1.48	6.29	0.95	2.18	0.00	0.50	**9.92**
Aldi, Hill View Road	0.14	0.28	5.13	0.38	2.65	8.58	0.24	2.21	0.27	0.59	**11.89**
Other Stores/Centres	0.61	0.14	4.25	0.19	1.09	6.27	0.95	2.18	0.09	0.24	**9.74**
Guisborough Zone Total	**1.49**	**1.49**	**33.96**	**0.99**	**8.05**	**45.98**	**3.70**	**9.40**	**0.59**	**3.98**	**63.65**
Zone 4 - Marske/Saltburn											
Co-op, High Street, Marske	0.14	0.00	0.00	3.34	0.44	3.91	0.00	0.00	0.00	0.21	**4.12**
Other Stores, Marske District Centre	0.14	0.00	0.00	1.71	0.00	1.85	0.00	0.00	0.00	0.10	**1.94**
Sainsbury's, Saltburn District Centre	0.14	0.00	0.12	3.76	1.78	5.80	0.00	0.00	0.09	0.31	**6.20**
Other Stores, Saltburn District Centre	0.14	0.00	0.00	1.18	0.30	1.62	0.00	0.00	0.00	0.09	**1.70**
Other Stores/Centres	0.00	0.00	0.00	0.11	0.22	0.33	0.00	0.00	1.02	0.03	**1.39**
Marske/Saltburn Zone Total	**0.54**	**0.00**	**0.12**	**10.11**	**2.74**	**13.51**	**0.00**	**0.00**	**1.11**	**0.73**	**15.35**
Zone 5 - Rural East											
Co-op, High Street, Loftus	0.00	0.00	0.00	0.00	2.09	2.09	0.00	0.00	0.05	0.11	**2.25**
Other Floorspace, Loftus District Centre	0.00	0.00	0.00	0.00	0.48	0.48	0.00	0.00	0.00	0.03	**0.50**
Skelton Local Centre	0.00	0.00	0.00	0.00	1.78	1.78	0.00	0.13	0.00	0.05	**1.96**
Brotton Local Centre	0.00	0.00	0.00	0.00	0.78	0.78	0.00	0.00	0.00	0.02	**0.80**
Asda, Pheasant Fields Lane, Skelton	1.62	0.00	1.52	2.05	16.31	21.51	0.00	0.13	0.87	2.50	**25.01**
Other Stores/Centres	0.00	0.00	0.12	0.00	1.70	1.82	0.00	0.00	0.00	0.05	**1.86**
Rural East Zone Total	**1.62**	**0.00**	**1.64**	**2.05**	**23.14**	**28.46**	**0.00**	**0.25**	**0.92**	**2.75**	**32.39**
Borough Total	**64.39**	**51.81**	**39.13**	**36.40**	**41.41**	**233.15**	**20.41**	**11.04**	**3.54**	**23.65**	**291.79**
Outside Borough	**3.25**	**19.36**	**0.92**	**1.60**	**2.09**	**27.21**	**98.94**	**20.60**	**4.51**		
TOTAL	**67.63**	**71.17**	**40.05**	**38.00**	**43.50**	**260.36**	**119.35**	**31.64**	**8.05**		

Source: Table 3 and 4 (Please note some figures may not total precisely due to rounding)

Table 7 (a): Forecast Turnover of Convenience Goods Commitments (2014 Prices)

Store	Sales Floorspace (sq.m net)	Convenience Goods Floorspace (%)	Convenience Goods Floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
Former Esco Foundry, Rectory Lane, Guisborough	3885	32%	1227	10594	13.00
Aldi, Pheasant Fields Lane, Skelton	1125	80%	900	11557	10.40
Retail Development, Pheasant Fields Lane, Skelton	3031	18%	532	6736	3.58
Total	**8,041**		**2,659**		**£26.98**

Source: Redcar & Cleveland Borough Council and Minter

Table 7 (b): Origin of Turnover of Convenience Goods Commitments (2014 Prices)

Store	Former Esco Foundry			Aldi, Skelton			Pheasant Fields Lane, Skelton			Total		
	Proportion of Trade Drawn		Penetration Rate	Proportion of Trade Drawn		Penetration Rate	Proportion of Trade Drawn		Penetration Rate	Proportion of Trade Drawn		Penetration Rate
	%	£m	%	%	£m	%	%	£m	%	%	£m	%
Zone 1 - Redcar	5.0%	0.65	1.0%	3.0%	0.31	0.5%	3.0%	0.11	0.2%	4.0%	1.07	1.6%
Zone 2 - Eston	5.0%	0.65	0.9%	2.0%	0.21	0.3%	2.0%	0.07	0.1%	3.4%	0.93	1.3%
Zone 3 - Guisborough	50.0%	6.50	16.2%	5.0%	0.52	1.3%	5.0%	0.18	0.4%	26.7%	7.20	18.0%
Zone 4 - Marske/Saltburn	5.0%	0.65	1.7%	10.0%	1.04	2.7%	10.0%	0.36	0.9%	7.6%	2.05	5.4%
Zone 5 - Rural East	10.0%	1.30	3.0%	60.0%	6.24	14.3%	60.0%	2.15	4.9%	35.9%	9.69	22.3%
Borough (Sub-Total)	***75.0%***	***9.75***	***3.7%***	***80.0%***	***8.32***	***3.2%***	***80.0%***	***2.87***	***1.1%***	***77.6%***	***20.94***	***8.0%***
Zone 6 - East Middlesbrough	4.0%	0.52	0.4%	1.0%	0.10	0.1%	1.0%	0.04	0.0%	2.4%	0.66	0.6%
Zone 7 - North Yorkshire Moors	10.0%	1.30	4.1%	5.0%	0.52	1.6%	5.0%	0.18	0.6%	7.4%	2.00	6.3%
Zone 8 - Whitby Hinterland	1.0%	0.13	1.6%	4.0%	0.42	5.2%	4.0%	0.14	1.8%	2.6%	0.69	8.6%
Study Area (Sub-Total)	***15.0%***	***1.95***	***0.5%***	***10.0%***	***1.04***	***0.2%***	***10.0%***	***0.36***	***0.1%***	***12.4%***	***3.35***	***0.8%***
Inflow	10.0%	1.30		10.0%	1.04		10.0%	0.36		10.0%	2.70	
Total	**100.0%**	**13.00**		**100.0%**	**10.40**		**100.0%**	**3.58**		**100.0%**	**26.98**	

Source: Redcar & Cleveland Borough Council and Minter

Table 8: 2021 Convenience Goods Expenditure Flows - with Committed Developments (£m) (2014 Prices)

Centre/Facility	Zone 1 Redcar	Zone 2 Eston	Zone 3 Guisborough	Zone 4 Marske & Saltburn	Zone 5 Rural East	Total (Within Borough)	Zone 6 East Middlesbrough	Zone 7 North Yorkshire Moors Rural East	Zone 8 Whitby Hinterlands	Inflow	Total
Expenditure 2016	**67.63**	**71.17**	**40.05**	**38.00**	**43.50**	**260.36**	**119.35**	**31.64**	**8.05**		
Committed Developments	**1.07**	**0.93**	**7.20**	**2.05**	**9.69**	**20.94**	**0.66**	**2.00**	**0.69**	**2.70**	**26.98**
Zone 1 - Redcar											
Morrisons, Redcar Town Centre	17.37	3.31	0.42	7.74	2.80	31.64	0.83	0.33	0.58	3.69	**37.07**
Other Stores, Redcar Town Centre	5.12	1.63	0.00	1.31	0.40	8.45	1.67	0.00	0.09	0.53	**10.74**
Redcar Town Centre Sub-Total	***22.49***	***4.94***	***0.42***	***9.04***	***3.20***	***40.09***	***2.50***	***0.33***	***0.67***	***4.22***	***47.82***
Tesco, West Dyke Road	13.91	0.28	0.00	3.69	0.38	18.26	0.00	0.00	0.07	0.93	**19.26**
Aldi, Larkswood Road	9.43	1.33	0.00	6.12	1.00	17.89	0.48	0.12	0.04	0.47	**19.00**
Asda, Roseberry Road	5.65	0.35	0.19	0.00	0.00	6.20	0.00	0.00	0.00	0.16	**6.35**
Other Stores/Centres	5.06	0.36	0.00	0.83	0.00	6.24	0.00	0.00	0.00	0.16	**6.40**
Redcar Zone Total	**56.55**	**7.26**	**0.61**	**19.69**	**4.58**	**88.68**	**2.98**	**0.45**	**0.79**	**5.94**	**98.84**
Zone 2 - Eston											
Tesco, Low Grange District Centre	0.53	13.05	0.22	0.95	0.15	14.91	3.09	0.12	0.00	3.04	**21.16**
Eston District Centre	0.00	2.27	0.00	0.00	0.00	2.27	0.00	0.00	0.00	0.06	**2.33**
Asda, North Street, South Bank	1.80	16.68	1.14	0.64	0.36	20.61	6.66	0.21	0.00	4.68	**32.17**
Marks & Spencer, Cleveland Retail Park	0.93	2.11	0.79	0.25	0.19	4.26	2.50	0.21	0.08	1.22	**8.28**
Other Stores/Centres	0.00	8.45	0.00	0.19	0.13	8.77	1.43	0.35	0.00	0.27	**10.81**
Eston Zone Total	**3.26**	**42.57**	**2.14**	**2.04**	**0.82**	**50.82**	**13.68**	**0.89**	**0.08**	**9.27**	**74.75**
Zone 3 - Guisborough											
Morrisons, Guisborough District Centre	0.00	0.77	10.63	0.11	1.54	13.05	0.48	2.25	0.22	1.98	**17.98**
Other Stores, Guisborough District Centre	0.00	0.00	1.32	0.19	0.00	1.51	0.60	0.34	0.00	0.13	**2.58**
Guisborough District Centre Sub-Total	***0.00***	***0.77***	***11.95***	***0.30***	***1.54***	***14.57***	***1.07***	***2.60***	***0.22***	***2.11***	***20.56***
Sainsbury's, Morgan Drive	0.00	0.14	5.27	0.11	0.62	6.14	0.48	0.12	0.00	0.40	**7.14**
Lidl, Enfield Chase	0.73	0.14	3.02	0.00	1.02	4.91	0.95	2.07	0.00	0.46	**8.39**
Aldi, Hill View Road	0.13	0.28	3.71	0.35	1.67	6.14	0.24	2.08	0.24	0.54	**9.25**
Other Stores/Centres	0.61	0.14	4.07	0.19	1.03	6.03	0.95	2.16	0.09	0.24	**9.47**
Guisborough Zone Total	**1.47**	**1.48**	**28.02**	**0.94**	**5.88**	**37.78**	**3.69**	**9.04**	**0.55**	**3.76**	**54.81**
Zone 4 - Marske/Saltburn											
Co-op, High Street, Marske	0.13	0.00	0.00	3.29	0.40	3.82	0.00	0.00	0.00	0.20	**4.02**
Other Stores, Marske District Centre	0.13	0.00	0.00	1.69	0.00	1.83	0.00	0.00	0.00	0.10	**1.93**
Sainsbury's, Saltburn District Centre	0.13	0.00	0.11	3.66	1.58	5.49	0.00	0.00	0.09	0.30	**5.88**
Other Stores, Saltburn District Centre	0.13	0.00	0.00	1.17	0.29	1.60	0.00	0.00	0.00	0.08	**1.68**
Other Stores/Centres	0.00	0.00	0.00	0.11	0.21	0.32	0.00	0.00	1.01	0.03	**1.37**
Marske/Saltburn Zone Total	**0.54**	**0.00**	**0.11**	**9.93**	**2.48**	**13.06**	**0.00**	**0.00**	**1.10**	**0.72**	**14.88**
Zone 5 - Rural East											
Co-op, High Street, Loftus	0.00	0.00	0.00	0.00	1.92	1.92	0.00	0.00	0.05	0.11	**2.08**
Other Floorspace, Loftus District Centre	0.00	0.00	0.00	0.00	0.46	0.46	0.00	0.00	0.00	0.02	**0.49**
Skelton Local Centre	0.00	0.00	0.00	0.00	1.68	1.68	0.00	0.13	0.00	0.05	**1.85**
Brotton Local Centre	0.00	0.00	0.00	0.00	0.74	0.74	0.00	0.00	0.00	0.02	**0.76**
Asda, Pheasant Fields Lane, Skelton	1.60	0.00	1.26	1.94	12.53	17.33	0.00	0.12	0.82	2.37	**20.64**
Other Stores/Centres	0.00	0.00	0.12	0.00	1.63	1.75	0.00	0.00	0.00	0.05	**1.79**
Rural East Zone Total	**1.60**	**0.00**	**1.38**	**1.94**	**18.96**	**23.88**	**0.00**	**0.25**	**0.87**	**2.62**	**27.61**
Borough Total	**64.48**	**52.23**	**39.46**	**36.58**	**42.41**	**235.16**	**21.01**	**12.63**	**4.07**	**25.00**	**297.88**
Outside Borough	**3.15**	**18.94**	**0.59**	**1.42**	**1.09**	**25.20**	**98.34**	**19.01**	**3.98**		
TOTAL	**67.63**	**71.17**	**40.05**	**38.00**	**43.50**	**260.36**	**119.35**	**31.64**	**8.05**		

Source: Tables 3, 4, 6 and 7 (Please note some figures may not total precisely due to rounding,

Table 9 (a): Forecast Turnover of Proposed Convenience Goods Floorspace, 2016 (2014 Prices)

Store	Sales Floorspace (sq.m gross)	Sales Floorspace (sq.m net)	Convenience Goods Floorspace (%)	Convenience Goods Floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
Foodstore	2500	1500	80%	1200	11000	13.20
Total	**2,500**	**1,500**		**1,200**		**£13.20**

Source: Redcar & Cleveland Borough Council and Mintel

Table 9 (b): Origin of Turnover of Proposed Convenience Goods Floorspace, 2016 (2014 Prices)

	Foodstore		
	Proportion of Trade Drawn %	£m	Penetration Rate %
Zone 1 - Redcar	50.0%	6.60	9.8%
Zone 2 - Eston	7.5%	0.99	1.4%
Zone 3 - Guisborough	5.0%	0.66	1.6%
Zone 4 - Marske/Saltburn	20.0%	2.64	6.9%
Zone 5 - Rural East	7.5%	0.99	2.3%
Borough (Sub-Total)	***90.0%***	***11.88***	***4.6%***
Zone 6 - East Middlesbrough	2.5%	0.33	0.3%
Zone 7 - North Yorkshire Moors	2.0%	0.26	0.8%
Zone 8 - Whitby Hinterland	0.5%	0.07	0.8%
Study Area (Sub-Total)	***5.0%***	***0.66***	***0.2%***
Inflow	5.0%	0.66	
Total	**100.0%**	**13.20**	

Source: Redcar & Cleveland Borough Council and Mintel

Table 10: 2021 Convenience Goods Expenditure Flows - with Committed Developments and Proposed Coatham Development (£m) (2014 Prices)

Centre/Facility	Zone 1 Redcar	Zone 2 Eston	Zone 3 Guisborough	Zone 4 Marske & Saltburn	Zone 5 Rural East	Total (Within Borough)	Zone 6 East Middlesbrough	Zone 7 North Yorkshire Moors Rural East	Zone 8 Whitby Hinterlands	Inflow	Total
Expenditure 2016	**67.63**	**71.17**	**40.05**	**38.00**	**43.50**	**260.36**	**119.35**	**31.64**	**8.05**		
Proposed Coatham Development	**6.60**	**0.99**	**0.66**	**2.64**	**0.99**	**11.88**	**0.33**	**0.26**	**0.07**	**0.66**	**13.20**
Committed Developments	**0.98**	**0.91**	**7.06**	**1.91**	**9.44**	**20.30**	**0.66**	**1.98**	**0.68**	**2.62**	**26.24**
Zone 1 - Redcar											
Morrisons, Redcar Town Centre	15.07	3.22	0.41	6.95	2.69	28.34	0.83	0.33	0.57	3.53	**33.60**
Other Stores, Redcar Town Centre	4.95	1.62	0.00	1.27	0.40	8.24	1.67	0.00	0.09	0.53	**10.52**
Redcar Town Centre Sub-Total	***20.02***	***4.84***	***0.41***	***8.22***	***3.09***	***36.58***	***2.50***	***0.33***	***0.66***	***4.05***	***44.12***
Tesco, West Dyke Road	12.68	0.28	0.00	3.44	0.37	16.77	0.00	0.00	0.07	0.90	**17.74**
Aldi, Larkswood Road	7.87	1.29	0.00	5.34	0.96	15.46	0.47	0.12	0.04	0.44	**16.53**
Asda, Roseberry Road	5.28	0.35	0.19	0.00	0.00	5.82	0.00	0.00	0.00	0.15	**5.97**
Other Stores/Centres	5.00	0.35	0.00	0.82	0.00	6.18	0.00	0.00	0.00	0.16	**6.34**
Redcar Zone Total	**50.86**	**7.11**	**0.60**	**17.83**	**4.41**	**80.80**	**2.97**	**0.45**	**0.78**	**5.71**	**90.70**
Zone 2 - Eston											
Tesco, Low Grange District Centre	0.50	12.91	0.21	0.91	0.15	14.69	3.09	0.12	0.00	2.98	**20.88**
Eston District Centre	0.00	2.27	0.00	0.00	0.00	2.27	0.00	0.00	0.00	0.06	**2.33**
Asda, North Street, South Bank	1.68	16.46	1.12	0.61	0.35	20.22	6.65	0.21	0.00	4.58	**31.66**
Marks & Spencer, Cleveland Retail Park	0.91	2.10	0.79	0.24	0.19	4.22	2.50	0.21	0.08	1.22	**8.23**
Other Stores/Centres	0.00	8.44	0.00	0.19	0.13	8.75	1.43	0.35	0.00	0.27	**10.79**
Eston Zone Total	**3.09**	**42.18**	**2.12**	**1.96**	**0.81**	**50.15**	**13.66**	**0.89**	**0.08**	**9.10**	**73.88**
Zone 3 - Guisborough											
Morrisons, Guisborough District Centre	0.00	0.77	10.50	0.10	1.52	12.88	0.48	2.24	0.22	1.94	**17.76**
Other Stores, Guisborough District Centre	0.00	0.00	1.32	0.19	0.00	1.51	0.60	0.34	0.00	0.13	**2.58**
Guisborough District Centre Sub-Total	***0.00***	***0.77***	***11.82***	***0.29***	***1.52***	***14.39***	***1.07***	***2.59***	***0.22***	***2.07***	***20.34***
Sainsbury's, Morgan Drive	0.00	0.14	5.20	0.10	0.61	6.05	0.48	0.12	0.00	0.40	**7.05**
Lidl, Enfield Chase	0.61	0.14	2.91	0.00	0.97	4.62	0.95	2.04	0.00	0.43	**8.05**
Aldi, Hill View Road	0.11	0.27	3.60	0.31	1.60	5.91	0.24	2.06	0.24	0.52	**8.96**
Other Stores/Centres	0.60	0.14	4.06	0.19	1.02	6.00	0.95	2.16	0.09	0.24	**9.45**
Guisborough Zone Total	**1.32**	**1.46**	**27.58**	**0.89**	**5.72**	**36.98**	**3.68**	**8.97**	**0.54**	**3.66**	**53.84**
Zone 4 - Marske/Saltburn											
Co-op, High Street, Marske	0.13	0.00	0.00	3.17	0.40	3.70	0.00	0.00	0.00	0.20	**3.90**
Other Stores, Marske District Centre	0.13	0.00	0.00	1.68	0.00	1.81	0.00	0.00	0.00	0.10	**1.91**
Sainsbury's, Saltburn District Centre	0.13	0.00	0.11	3.54	1.56	5.34	0.00	0.00	0.09	0.30	**5.72**
Other Stores, Saltburn District Centre	0.13	0.00	0.00	1.16	0.29	1.58	0.00	0.00	0.00	0.08	**1.67**
Other Stores/Centres	0.00	0.00	0.00	0.11	0.21	0.32	0.00	0.00	1.01	0.03	**1.37**
Marske/Saltburn Zone Total	**0.52**	**0.00**	**0.11**	**9.66**	**2.46**	**12.75**	**0.00**	**0.00**	**1.10**	**0.71**	**14.56**
Zone 5 - Rural East											
Co-op, High Street, Loftus	0.00	0.00	0.00	0.00	1.91	1.91	0.00	0.00	0.05	0.11	**2.07**
Other Floorspace, Loftus District Centre	0.00	0.00	0.00	0.00	0.46	0.46	0.00	0.00	0.00	0.02	**0.48**
Skelton Local Centre	0.00	0.00	0.00	0.00	1.67	1.67	0.00	0.13	0.00	0.05	**1.85**
Brotton Local Centre	0.00	0.00	0.00	0.00	0.73	0.73	0.00	0.00	0.00	0.02	**0.75**
Asda, Pheasant Fields Lane, Skelton	1.46	0.00	1.23	1.81	12.21	16.71	0.00	0.12	0.81	2.30	**19.95**
Other Stores/Centres	0.00	0.00	0.12	0.00	1.63	1.74	0.00	0.00	0.00	0.05	**1.79**
Rural East Zone Total	**1.46**	**0.00**	**1.35**	**1.81**	**18.61**	**23.24**	**0.00**	**0.25**	**0.86**	**2.54**	**26.89**
Borough Total	**64.83**	**52.64**	**39.47**	**36.70**	**42.45**	**236.09**	**21.31**	**12.80**	**4.11**	**25.00**	**299.32**
Outside Borough	**2.80**	**18.53**	**0.58**	**1.30**	**1.05**	**24.27**	**98.04**	**18.84**	**3.94**		
TOTAL	**67.63**	**71.17**	**40.05**	**38.00**	**43.50**	**260.36**	**119.35**	**31.64**	**8.05**		

Source: Tables 3, 4, 8 and 9 (Please note some figures may not total precisely due to rounding)

Table 11: 2026 Convenience Goods Expenditure Flows (£m) - with Committed Developments and Proposed Coatham Development (2014 Prices)

Centre/Facility	Zone 1 Redcar	Zone 2 Eston	Zone 3 Guisborough	Zone 4 Marske & Saltburn	Zone 5 Rural East	Total (Within Borough)	Zone 6 East Middlesbrough	Zone 7 North Yorkshire Moors Rural East	Zone 8 Whitby Hinterlands	Inflow	Total
Expenditure 2016	**68.12**	**71.72**	**40.35**	**38.28**	**43.84**	**262.30**	**120.92**	**31.95**	**8.07**		
Proposed Coatham Development	**6.65**	**1.00**	**0.66**	**2.66**	**1.00**	**11.97**	**0.33**	**0.27**	**0.07**	0.66	**13.30**
Committed Developments	**0.98**	**0.92**	**7.11**	**1.92**	**9.52**	**20.45**	**0.67**	**2.00**	**0.69**	2.64	**26.44**
Zone 1 - Redcar											
Morrisons, Redcar Town Centre	15.18	3.25	0.41	7.00	2.71	28.55	0.84	0.33	0.58	3.37	**33.66**
Other Stores, Redcar Town Centre	4.98	1.63	0.00	1.28	0.40	8.30	1.69	0.00	0.09	0.53	**10.60**
Redcar Town Centre Sub-Total	***20.16***	***4.88***	***0.41***	***8.28***	***3.11***	***36.85***	***2.53***	***0.33***	***0.66***	***3.90***	***44.27***
Tesco, West Dyke Road	12.77	0.28	0.00	3.46	0.37	16.89	0.00	0.00	0.07	0.89	**17.86**
Aldi, Larkswood Road	7.93	1.30	0.00	5.38	0.96	15.57	0.48	0.12	0.04	0.42	**16.63**
Asda, Roseberry Road	5.32	0.35	0.19	0.00	0.00	5.86	0.00	0.00	0.00	0.15	**6.01**
Other Stores/Centres	5.04	0.36	0.00	0.83	0.00	6.23	0.00	0.00	0.00	0.16	**6.38**
Redcar Zone Total	**51.23**	**7.16**	**0.60**	**17.96**	**4.44**	**81.39**	**3.01**	**0.45**	**0.78**	**5.51**	**91.14**
Zone 2 - Eston											
Tesco, Low Grange District Centre	0.51	13.01	0.22	0.92	0.15	14.80	3.13	0.12	0.00	3.19	**21.24**
Eston District Centre	0.00	2.29	0.00	0.00	0.00	2.29	0.00	0.00	0.00	0.06	**2.34**
Asda, North Street, South Bank	1.69	16.59	1.13	0.62	0.35	20.38	6.74	0.21	0.00	4.82	**32.15**
Marks & Spencer, Cleveland Retail Park	0.92	2.11	0.79	0.25	0.19	4.25	2.53	0.21	0.08	1.25	**8.33**
Other Stores/Centres	0.00	8.50	0.00	0.19	0.13	8.82	1.45	0.35	0.00	0.27	**10.89**
Eston Zone Total	**3.11**	**42.50**	**2.14**	**1.97**	**0.82**	**50.53**	**13.84**	**0.90**	**0.08**	**9.59**	**74.94**
Zone 3 - Guisborough											
Morrisons, Guisborough District Centre	0.00	0.77	10.57	0.10	1.53	12.98	0.48	2.27	0.22	1.77	**17.72**
Other Stores, Guisborough District Centre	0.00	0.00	1.33	0.19	0.00	1.52	0.60	0.35	0.00	0.13	**2.60**
Guisborough District Centre Sub-Total	***0.00***	***0.77***	***11.90***	***0.29***	***1.53***	***14.50***	***1.09***	***2.61***	***0.22***	***1.90***	***20.32***
Sainsbury's, Morgan Drive	0.00	0.14	5.24	0.10	0.62	6.10	0.48	0.12	0.00	0.35	**7.06**
Lid, Enfield Chase	0.61	0.14	2.93	0.00	0.98	4.65	0.96	2.06	0.00	0.40	**8.08**
Aldi, Hill View Road	0.12	0.27	3.63	0.31	1.62	5.95	0.24	2.08	0.24	0.45	**8.96**
Other Stores/Centres	0.60	0.14	4.09	0.19	1.03	6.05	0.97	2.18	0.09	0.24	**9.52**
Guisborough Zone Total	**1.33**	**1.47**	**27.78**	**0.90**	**5.77**	**37.25**	**3.73**	**9.06**	**0.55**	**3.34**	**53.94**
Zone 4 - Marske/Saltburn											
Co-op, High Street, Marske	0.13	0.00	0.00	3.20	0.40	3.73	0.00	0.00	0.00	0.20	**3.92**
Other Stores, Marske District Centre	0.13	0.00	0.00	1.69	0.00	1.83	0.00	0.00	0.00	0.10	**1.92**
Sainsbury's, Saltburn District Centre	0.13	0.00	0.11	3.57	1.57	5.38	0.00	0.00	0.09	0.29	**5.75**
Other Stores, Saltburn District Centre	0.13	0.00	0.00	1.17	0.29	1.59	0.00	0.00	0.00	0.08	**1.68**
Other Stores/Centres	0.00	0.00	0.00	0.11	0.21	0.32	0.00	0.00	1.01	0.03	**1.37**
Marske/Saltburn Zone Total	**0.53**	**0.00**	**0.11**	**9.73**	**2.48**	**12.85**	**0.00**	**0.00**	**1.10**	**0.70**	**14.65**
Zone 5 - Rural East											
Co-op, High Street, Loftus	0.00	0.00	0.00	0.00	1.93	1.93	0.00	0.00	0.05	0.10	**2.08**
Other Floorspace, Loftus District Centre	0.00	0.00	0.00	0.00	0.46	0.46	0.00	0.00	0.00	0.02	**0.49**
Skelton Local Centre	0.00	0.00	0.00	0.00	1.69	1.69	0.00	0.13	0.00	0.05	**1.86**
Brotton Local Centre	0.00	0.00	0.00	0.00	0.74	0.74	0.00	0.00	0.00	0.02	**0.76**
Asda, Pheasant Fields Lane, Skelton	1.47	0.00	1.24	1.82	12.30	16.84	0.00	0.12	0.82	1.98	**19.75**
Other Stores/Centres	0.00	0.00	0.12	0.00	1.64	1.76	0.00	0.00	0.00	0.05	**1.80**
Rural East Zone Total	**1.47**	**0.00**	**1.36**	**1.82**	**18.76**	**23.41**	**0.00**	**0.25**	**0.86**	**2.21**	**26.74**
Borough Total	**57.67**	**51.13**	**31.99**	**32.39**	**32.26**	**205.44**	**20.58**	**10.66**	**3.37**	**21.36**	**261.41**
Outside Borough	**2.82**	**18.67**	**0.58**	**1.31**	**1.06**	**24.45**	**99.33**	**19.02**	**3.95**		
TOTAL	**68.12**	**71.72**	**40.35**	**38.28**	**43.84**	**262.30**	**120.92**	**31.95**	**8.07**		

Source: Table 3 and 10 (Please note some figures may not total precisely due to rounding,

Table 12: 2032 Convenience Goods Expenditure Flows (£m) - with Committed Developments and Proposed Coatham Development (2014 Prices)

Centre/Facility	Zone 1 Redcar	Zone 2 Eston	Zone 3 Guisborough	Zone 4 Marske & Saltburn	Zone 5 Rural East	Total (Within Borough)	Zone 6 East Middlesbrough	Zone 7 North Yorkshire Moors Rural East	Zone 8 Whitby Hinterlands	Inflow	Total
Expenditure 2016	**68.54**	**72.16**	**40.59**	**38.50**	**44.09**	**263.87**	**122.77**	**32.14**	**8.09**		
Proposed Coatham Development	**6.69**	**1.00**	**0.67**	**2.67**	**1.00**	**12.04**	**0.34**	**0.27**	**0.07**	**0.67**	**13.38**
Committed Developments	**0.99**	**0.93**	**7.15**	**1.93**	**9.57**	**20.57**	**0.68**	**2.02**	**0.69**	**2.65**	**26.60**
Zone 1 - Redcar											
Morrisons, Redcar Town Centre	15.28	3.27	0.42	7.04	2.72	28.72	0.85	0.34	0.58	3.57	34.06
Other Stores, Redcar Town Centre	5.01	1.64	0.00	1.29	0.40	8.35	1.72	0.00	0.09	0.53	10.69
Redcar Town Centre Sub-Total	***20.29***	***4.91***	***0.42***	***8.33***	***3.13***	***37.07***	***2.57***	***0.34***	***0.66***	***4.11***	***44.75***
Tesco, West Dyke Road	12.85	0.28	0.00	3.48	0.37	16.99	0.00	0.00	0.07	0.91	17.98
Aldi, Larkswood Road	7.98	1.30	0.00	5.42	0.97	15.67	0.49	0.12	0.04	0.45	16.76
Asda, Roseberry Road	5.35	0.35	0.19	0.00	0.00	5.89	0.00	0.00	0.00	0.16	6.05
Other Stores/Centres	5.07	0.36	0.00	0.83	0.00	6.26	0.00	0.00	0.00	0.16	6.42
Redcar Zone Total	**51.54**	**7.21**	**0.60**	**18.06**	**4.47**	**81.88**	**3.06**	**0.45**	**0.78**	**5.79**	**91.96**
Zone 2 - Eston											
Tesco, Low Grange District Centre	0.51	13.09	0.22	0.93	0.15	14.89	3.17	0.12	0.00	3.03	21.22
Eston District Centre	0.00	2.30	0.00	0.00	0.00	2.30	0.00	0.00	0.00	0.06	2.36
Asda, North Street, South Bank	1.70	16.69	1.14	0.62	0.36	20.50	6.84	0.21	0.00	4.66	32.21
Marks & Spencer, Cleveland Retail Park	0.92	2.13	0.80	0.25	0.19	4.28	2.57	0.21	0.08	1.24	8.38
Other Stores/Centres	0.00	8.55	0.00	0.19	0.13	8.87	1.47	0.35	0.00	0.27	10.96
Eston Zone Total	**3.13**	**42.76**	**2.15**	**1.98**	**0.82**	**50.84**	**14.06**	**0.90**	**0.08**	**9.26**	**75.14**
Zone 3 - Guisborough											
Morrisons, Guisborough District Centre	0.00	0.78	10.64	0.10	1.54	13.06	0.49	2.28	0.22	1.97	18.01
Other Stores, Guisborough District Centre	0.00	0.00	1.34	0.19	0.00	1.53	0.61	0.35	0.00	0.13	2.62
Guisborough District Centre Sub-Total	***0.00***	***0.78***	***11.97***	***0.30***	***1.54***	***14.58***	***1.10***	***2.63***	***0.22***	***2.10***	***20.63***
Sainsbury's, Morgan Drive	0.00	0.14	5.27	0.10	0.62	6.14	0.49	0.12	0.00	0.40	7.15
Lid, Enfield Chase	0.62	0.14	2.94	0.00	0.98	4.68	0.97	2.08	0.00	0.44	8.17
Aldi, Hill View Road	0.12	0.28	3.65	0.32	1.63	5.99	0.24	2.09	0.24	0.53	9.09
Other Stores/Centres	0.61	0.14	4.11	0.19	1.04	6.09	0.98	2.20	0.09	0.24	9.59
Guisborough Zone Total	**1.34**	**1.48**	**27.95**	**0.90**	**5.80**	**37.47**	**3.79**	**9.12**	**0.55**	**3.71**	**54.64**
Zone 4 - Marske/Saltburn											
Co-op, High Street, Marske	0.13	0.00	0.00	3.22	0.40	3.75	0.00	0.00	0.00	0.20	3.95
Other Stores, Marske District Centre	0.14	0.00	0.00	1.70	0.00	1.84	0.00	0.00	0.00	0.10	1.94
Sainsbury's, Saltburn District Centre	0.13	0.00	0.11	3.59	1.58	5.41	0.00	0.00	0.09	0.30	5.79
Other Stores, Saltburn District Centre	0.14	0.00	0.00	1.17	0.30	1.60	0.00	0.00	0.00	0.09	1.69
Other Stores/Centres	0.00	0.00	0.00	0.11	0.21	0.32	0.00	0.00	1.02	0.03	1.38
Marske/Saltburn Zone Total	**0.53**	**0.00**	**0.11**	**9.79**	**2.49**	**12.92**	**0.00**	**0.00**	**1.10**	**0.72**	**14.74**
Zone 5 - Rural East											
Co-op, High Street, Loftus	0.00	0.00	0.00	0.00	1.94	1.94	0.00	0.00	0.05	0.11	2.10
Other Floorspace, Loftus District Centre	0.00	0.00	0.00	0.00	0.46	0.46	0.00	0.00	0.00	0.03	0.49
Skelton Local Centre	0.00	0.00	0.00	0.00	1.70	1.70	0.00	0.13	0.00	0.05	1.87
Brotton Local Centre	0.00	0.00	0.00	0.00	0.74	0.74	0.00	0.00	0.00	0.02	0.76
Asda, Pheasant Fields Lane, Skelton	1.48	0.00	1.25	1.84	12.37	16.94	0.00	0.12	0.82	2.33	20.21
Other Stores/Centres	0.00	0.00	0.12	0.00	1.65	1.77	0.00	0.00	0.00	0.05	1.81
Rural East Zone Total	**1.48**	**0.00**	**1.37**	**1.84**	**18.86**	**23.55**	**0.00**	**0.25**	**0.87**	**2.58**	**27.24**
Borough Total	**58.02**	**51.44**	**32.18**	**32.58**	**32.45**	**206.67**	**20.90**	**10.72**	**3.38**	**22.05**	**263.72**
Outside Borough	**2.84**	**18.79**	**0.59**	**1.32**	**1.07**	**24.60**	**100.86**	**19.13**	**3.96**		
TOTAL	**68.54**	**72.16**	**40.59**	**38.50**	**44.09**	**263.88**	**122.77**	**32.14**	**8.09**		

Source: Table 3 and 11 (Please note some figures may not total precisely due to rounding,

Table 13: Summary of Convenience Goods Expenditure Flows and Forecast Trade Diversion Impacts (2014 Prices)

Centre/Facility	Turnover in 2021 - No New Development	Turnover in 2021 - No New Development	Trade Diversion to Commitments	Trade Diversion to Commitments	Turnover in 2021 - With Commitments	Turnover in 2021 - With Commitments	Trade Diversion to Proposed Coatham Development	Trade Diversion to Proposed Coatham Development	Turnover in 2021 - With Proposed Coatham Development	Turnover in 2021 - With Proposed Coatham Development	Cumulative Trade Diversion	Cumulative Trade Diversion	Turnover in 2026 - With Proposed Coatham Development	Turnover in 2026 - With Proposed Coatham Development	Turnover in 2032 - With Proposed Coatham Development	Turnover in 2032 - With Proposed Coatham Development
	(£m)	(£ per sqm)	(£m)	(%)	(£m)	(£ per sqm)	(£m)	(%)	(£m)	(£ per sqm)	(£m)	(%)	(£m)	(£ per sqm)	(£m)	(£ per sqm)
Proposed Coatham Development									13.20	11000			13.30	11082	13.38	11152
Committed Developments					26.98	10148	0.74	2.8%	26.24	9868			26.44	9944	26.60	10004
Zone 1 - Redcar																
Morrisons, Redcar Town Centre	39.19	16068	2.11	5.4%	37.07	15201	3.47	9.4%	33.60	13776	5.59	14.3%	33.66	13803	34.06	13965
Other Stores, Redcar Town Centre	10.84	3466	0.10	0.9%	10.74	3434	0.22	2.1%	10.52	3362	0.33	3.0%	10.60	3389	10.69	3415
Redcar Town Centre Sub-Total	***50.03***		***2.21***		***47.82***		***3.70***		***44.12***		***5.91***		***44.27***		***44.75***	
Tesco, West Dyke Road	20.13	11112	0.87	4.3%	19.26	10634	1.52	7.9%	17.74	9795	2.39	11.9%	17.86	9856	17.98	9925
Aldi, Larkswood Road	20.57	19453	1.57	7.6%	19.00	17967	2.46	13.0%	16.53	15637	4.04	19.6%	16.63	15726	16.76	15852
Asda, Roseberry Road	6.40	11478	0.04	0.7%	6.35	11401	0.39	6.1%	5.97	10710	0.43	6.7%	6.01	10779	6.05	10854
Other Stores/Centres	6.42		0.02	0.3%	6.40		0.06	1.0%	6.34		0.09	1.3%	6.38		6.42	
Redcar Zone Total	**103.55**		**4.72**		**98.84**		**8.13**		**90.70**		**12.85**		**91.14**		**91.96**	
Zone 2 - Eston																
Tesco, Low Grange District Centre	21.80	7525	0.65	3.0%	21.16	7302	0.28	1.3%	20.88	7206	0.92	4.2%	21.24	7329	21.22	7324
Eston District Centre	2.34	4897	0.00	0.2%	2.33	4888	0.01	0.2%	2.33	4877	0.01	0.4%	2.34	4915	2.36	4945
Asda, North Street, South Bank	33.13	15096	0.96	2.9%	32.17	14657	0.51	1.6%	31.66	14425	1.47	4.4%	32.15	14648	32.21	14676
Marks & Spencer, Cleveland Retail Park	8.74	13790	0.46	5.3%	8.28	13064	0.05	0.6%	8.23	12985	0.51	5.8%	8.33	13144	8.38	13231
Other Stores/Centres	10.84		0.03	0.2%	10.81		0.02	0.2%	10.79		0.05	0.4%	10.89		10.96	
Eston Zone Total	**76.85**		**2.10**		**74.75**		**0.87**		**73.88**		**2.97**		**74.94**		**75.14**	
Zone 3 - Guisborough																
Morrisons, Guisborough District Centre	20.85	16311	2.87	13.8%	17.98	14064	0.22	1.2%	17.76	13892	3.09	14.8%	17.72	13860	18.01	14088
Other Stores, Guisborough District Centre	2.67	3156	0.09	3.2%	2.58	3055	0.01	0.2%	2.58	3048	0.09	3.4%	2.60	3073	2.62	3101
Guisborough District Centre Sub-Total	***23.52***		***2.96***		***20.56***		***0.23***		***20.34***		***3.18***		**20.32**		**20.63**	
Sainsbury's, Morgan Drive	8.56	8298	1.43	16.6%	7.14	6916	0.09	1.3%	7.05	6829	1.52	17.7%	7.06	6837	7.15	6928
Lidl, Enfield Chase	9.92	12461	1.53	15.4%	8.39	10537	0.35	4.1%	8.05	10103	1.88	18.9%	8.08	10148	8.17	10264
Aldi, Hill View Road	11.89	16960	2.65	22.2%	9.25	13187	0.29	3.1%	8.96	12778	2.93	24.7%	8.96	12773	9.09	12959
Other Stores/Centres	9.74				9.47				9.45		0.00		9.52		9.59	
Guisborough Zone Total	**63.65**				**54.81**				**53.84**		**9.51**		**53.94**		**54.64**	
Zone 4 - Marske/Saltburn																
Co-op, High Street, Marske	4.12	5666	0.10	2.3%	4.02	5533	0.13	3.1%	3.90	5360	0.22	5.4%	3.92	5393	3.95	5431
Other Stores, Marske District Centre	1.94	4905	0.02	0.8%	1.93	4864	0.02	0.8%	1.91	4823	0.03	1.7%	1.92	4857	1.94	4887
Sainsbury's, Saltburn District Centre	6.20	8022	0.32	5.2%	5.88	7604	0.16	2.7%	5.72	7401	0.48	7.7%	5.75	7440	5.79	7498
Other Stores, Saltburn District Centre	1.70	3718	0.02	1.4%	1.68	3668	0.01	0.8%	1.67	3640	0.04	2.1%	1.68	3665	1.69	3688
Other Stores/Centres	1.39		0.02	1.4%	1.37		0.00	0.2%	1.37		0.02	1.6%	1.37		1.38	
Marske/Saltburn Zone Total	**15.35**		**0.48**		**14.88**		**0.31**		**14.56**		**0.79**		**14.65**		**14.74**	
Zone 5 - Rural East																
Co-op, High Street, Loftus	2.25	8141	0.17	7.4%	2.08	7536	0.01	0.6%	2.07	7488	0.18	8.0%	2.08	7522	2.10	7587
Other Floorspace, Loftus District Centre	0.50	828	0.02	3.7%	0.49	798	0.00	0.3%	0.48	795	0.02	4.0%	0.49	800	0.49	806
Skelton Local Centre	1.96	4886	0.11	5.4%	1.85	4621	0.01	0.3%	1.85	4606	0.11	5.7%	1.86	4638	1.87	4669
Brotton Local Centre	0.80	2695	0.05	5.7%	0.76	2540	0.00	0.3%	0.75	2532	0.05	6.0%	0.76	2549	0.76	2566
Asda, Pheasant Fields Lane, Skelton	25.01	14369	4.36	17.4%	20.64	11862	0.70	3.4%	19.95	11460	5.06	20.2%	19.75	11351	20.21	11610
Other Stores/Centres	1.86		0.07	3.7%	1.79		0.01	0.3%	1.79		0.07	4.0%	1.80		1.81	
Rural East Zone Total	**32.39**		**4.77**		**27.61**		**0.73**		**26.89**		**5.50**		**26.74**		**27.24**	
Borough Total	**291.79**		**12.07**		**270.89**		**10.04**		**259.88**		**31.62**		**261.41**		**263.72**	

Source: Tables 6, 8, 10-12 (Please note some figures may not total precisely due to rounding)

Appendix 3: Comparison Goods Retail Impact Assessment

PROPOSED COATHAM ALLOCATION, REDCAR

COMPARISON GOODS RETAIL IMPACT ASSESSMENT

Table 1: Study Area Population

Zone	2011	2016	2021	2026	2032
Zone 1 - Redcar	35,692	35,771	36,128	36,485	36,829
Zone 2 - Eston	38,048	38,133	38,513	38,894	39,260
Zone 3 - Guisborough	19,463	19,506	19,701	19,896	20,083
Zone 4 - Marske/Saltburn	19,134	19,177	19,368	19,559	19,743
Zone 5 - Rural East	22,860	22,911	23,139	23,368	23,588
Borough (Sub-Total)	***135,197***	***135,497***	***136,849***	***138,201***	***139,503***
Zone 6 - East Middlesbrough	64,957	65,564	66,638	67,665	68,973
Zone 5 - North Yorkshire Moors	14,251	14,299	14,473	14,648	14,791
Zone 8 - Whitby Hinterland	3,416	3,410	3,416	3,432	3,454
Total	**217,821**	**218,770**	**221,377**	**223,946**	**226,721**

Sources: *RCBC and Experian*

Table 2: Comparison Goods Expenditure per person (£) (2014 Prices)

Zone	2016	2021	2026	2032
Zone 1 - Redcar	2,904	3,264	3,813	4,634
Zone 2 - Eston	2,683	3,015	3,522	4,280
Zone 3 - Guisborough	3,491	3,923	4,583	5,569
Zone 4 - Marske/Saltburn	3,509	3,943	4,607	5,598
Zone 5 - Rural East	2,882	3,238	3,783	4,597
Zone 6 - East Middlesbrough	2,725	3,063	3,578	4,348
Zone 5 - North Yorkshire Moors	3,574	4,016	4,692	5,701
Zone 8 - Whitby Hinterland	3,543	3,982	4,652	5,653

Sources:
Experian Local Expenditure 2014 (2014 prices)
Experian Retail Planner Briefing Note (October 2015)
Excludes Special Forms of Trading

Table 3: Total Comparison Goods Expenditure (£m) (2014 Prices)

Zone	2016	2021	2026	2032
Zone 1 - Redcar	103.88	117.92	139.12	170.66
Zone 2 - Eston	102.31	116.12	136.98	168.03
Zone 3 - Guisborough	68.10	77.29	91.18	111.84
Zone 4 - Marske/Saltburn	67.29	76.37	90.11	110.52
Zone 5 - Rural East	66.03	74.93	88.40	108.43
Borough (Sub-Total)	***407.61***	***462.62***	***545.79***	***669.50***
Zone 6 - East Middlesbrough	178.66	204.11	242.11	299.89
Zone 5 - North Yorkshire Moors	51.10	58.12	68.73	84.32
Zone 8 - Whitby Hinterland	12.08	13.60	15.96	19.53
Total	**649.45**	**738.46**	**872.59**	**1073.24**

Source: Tables 1 and 2

Table 4: Base Year 2016 Comparison Goods Market Shares (%) (2014 Prices)

Centre/Facility	Zone 1 Redcar	Zone 2 Eston	Zone 3 Guisborough	Zone 4 Marske & Saltburn	Zone 5 Rural East	Zone 6 East Middlesbrough	Zone 7 North Yorkshire Moors	Zone 8 Whitby Hinterlands	% Inflow
Redcar Town Centre	40.3%	8.9%	7.1%	26.0%	17.0%	1.4%	1.7%	7.0%	10.0%
Low Grange District Centre	0.8%	5.7%	0.0%	0.0%	0.0%	1.8%	0.5%	0.0%	5.0%
Eston District Centre	0.0%	2.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%
Guisborough District Centre	0.1%	1.1%	36.2%	0.8%	7.5%	0.1%	12.5%	3.5%	10.0%
Marske District Centre	0.2%	0.0%	0.2%	6.0%	0.1%	0.0%	0.0%	0.0%	5.0%
Saltburn District Centre	0.0%	0.2%	0.3%	5.7%	3.5%	0.0%	0.2%	0.4%	10.0%
Loftus District Centre	0.0%	0.0%	0.0%	0.0%	1.7%	0.0%	0.0%	0.8%	5.0%
Cleveland Retail Park	12.3%	22.3%	12.2%	12.6%	11.7%	10.4%	5.5%	3.0%	15.0%
Out of Centre Foodstores	3.6%	3.2%	3.0%	1.0%	15.0%	0.2%	0.0%	0.5%	5.0%
Other Stores/Centres	0.5%	1.7%	1.4%	0.5%	5.4%	1.0%	0.5%	1.0%	7.5%
Borough Total	**57.8%**	**45.1%**	**60.6%**	**52.6%**	**61.9%**	**14.9%**	**20.9%**	**16.2%**	
Outside Borough	**42.2%**	**54.9%**	**39.4%**	**47.4%**	**38.1%**	**85.1%**	**79.1%**	**83.8%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey July/August 2016

Table 5: Base Year 2016 Comparison Goods Expenditure Flows (£m) (2014 Prices)

Centre/Facility	Zone 1 Redcar	Zone 2 Eston	Zone 3 Guisborough	Zone 4 Marske & Saltburn	Zone 5 Rural East	Total (Within Borough)	Zone 6 East Middlesbrough	Zone 7 North Yorkshire Moors Rural East	Zone 8 Whitby Hinterlands	Inflow	Total
Expenditure 2016	**103.88**	**102.31**	**68.10**	**67.29**	**66.03**	**407.61**	**178.66**	**51.10**	**12.08**		
Redcar Town Centre	41.86	9.11	4.83	17.50	11.22	**84.52**	2.50	0.87	0.85	9.86	**98.60**
Low Grange District Centre	0.83	5.83	0.00	0.00	0.00	**6.66**	3.22	0.26	0.00	0.53	**10.67**
Eston District Centre	0.00	2.05	0.14	0.00	0.00	**2.18**	0.00	0.00	0.00	0.11	**2.30**
Guisborough District Centre	0.10	1.13	24.65	0.54	4.95	**31.37**	0.18	6.39	0.42	4.26	**42.62**
Marske District Centre	0.21	0.00	0.14	4.04	0.07	**4.45**	0.00	0.00	0.00	0.23	**4.68**
Saltburn District Centre	0.00	0.20	0.20	3.84	2.31	**6.56**	0.00	0.10	0.05	0.75	**7.45**
Loftus District Centre	0.00	0.00	0.00	0.00	1.12	**1.12**	0.00	0.00	0.10	0.06	**1.28**
Cleveland Retail Park	12.78	22.82	8.31	8.48	7.73	**60.10**	18.58	2.81	0.36	14.45	**96.30**
Out of Centre Foodstores	3.74	3.27	2.04	0.67	9.90	**19.63**	0.36	0.00	0.06	1.06	**21.11**
Other Stores/Centres	0.52	1.74	0.95	0.34	3.57	**7.11**	1.79	0.26	0.12	0.75	**10.03**
Borough Total	**60.04**	**46.14**	**41.27**	**35.39**	**40.87**	**223.72**	**26.62**	**10.68**	**1.96**	**32.07**	**295.04**
Outside Borough	**43.84**	**56.17**	**26.83**	**31.90**	**25.16**	**183.89**	**152.04**	**40.42**	**10.12**		
TOTAL	**103.88**	**102.31**	**68.10**	**67.29**	**66.03**	**407.61**	**178.66**	**51.10**	**12.08**		

Source: Table 3 and 4 (Please note some figures may not total precisely due to rounding

Table 6: 2021 Comparison Goods Expenditure Flows (£m) (2014 Prices)

Centre/Facility	Zone 1 Redcar	Zone 2 Eston	Zone 3 Guisborough	Zone 4 Marske & Saltburn	Zone 5 Rural East	Total (Within Borough)	Zone 6 East Middlesbrough	Zone 7 North Yorkshire Moors Rural East	Zone 8 Whitby Hinterlands	Inflow	Total
Expenditure 2016	**117.92**	**116.12**	**77.29**	**76.37**	**74.93**	**462.62**	**204.11**	**58.12**	**13.60**		
Redcar Town Centre	47.52	10.33	5.49	19.86	12.74	**95.94**	2.86	0.99	0.95	11.19	**111.93**
Low Grange District Centre	0.94	6.62	0.00	0.00	0.00	**7.56**	3.67	0.29	0.00	0.61	**12.13**
Eston District Centre	0.00	2.32	0.15	0.00	0.00	**2.48**	0.00	0.00	0.00	0.13	**2.61**
Guisborough District Centre	0.12	1.28	27.98	0.61	5.62	**35.60**	0.20	7.27	0.48	4.84	**48.39**
Marske District Centre	0.24	0.00	0.15	4.58	0.07	**5.05**	0.00	0.00	0.00	0.27	**5.31**
Saltburn District Centre	0.00	0.23	0.23	4.35	2.62	**7.44**	0.00	0.12	0.05	0.85	**8.46**
Loftus District Centre	0.00	0.00	0.00	0.00	1.27	**1.27**	0.00	0.00	0.11	0.07	**1.46**
Cleveland Retail Park	14.50	25.89	9.43	9.62	8.77	**68.22**	21.23	3.20	0.41	16.42	**109.47**
Out of Centre Foodstores	4.25	3.72	2.32	0.76	11.24	**22.28**	0.41	0.00	0.07	1.20	**23.96**
Other Stores/Centres	0.59	1.97	1.08	0.38	4.05	**8.07**	2.04	0.29	0.14	0.85	**11.40**
Borough Total	**68.16**	**52.37**	**46.84**	**40.17**	**46.38**	**253.91**	**30.41**	**12.15**	**2.20**	**36.43**	**335.10**
Outside Borough	**49.76**	**63.75**	**30.45**	**36.20**	**28.55**	**208.71**	**173.70**	**45.98**	**11.40**		
TOTAL	**117.92**	**116.12**	**77.29**	**76.37**	**74.93**	**462.62**	**204.11**	**58.12**	**13.60**		

Source: Table 3 and 4 (Please note some figures may not total precisely due to rounding

Table 7 (a): Forecast Turnover of Comparison Goods Commitments (2014 Prices)

Store	Sales Floorspace (sq.m net)	Comparison Goods Floorspace (%)	Comparison Goods Floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
Former Esco Foundry, Rectory Lane, Guisborough	3885	68%	2658	5324	14.15
Aldi, Pheasant Fields Lane, Skelton	1125	20%	225	6980	1.57
Retail Development, Pheasant Fields Lane, Skelton	3031	82%	2499	5368	13.41
Total	**8,041**		**5,382**		**£29.14**

Source: Redcar & Cleveland Borough Council and Mintel

Table 7 (b): Origin of Turnover of Comparison Goods Commitments (2014 Prices)

Store	Former Esco Foundry			Aldi, Skelton			Pheasant Fields Lane, Skelton			Total		
	Proportion of Trade Drawn %	£m	Penetration Rate %	Proportion of Trade Drawn %	£m	Penetration Rate %	Proportion of Trade Drawn %	£m	Penetration Rate %	Proportion of Trade Drawn %	£m	Penetration Rate %
Zone 1 - Redcar	5.0%	0.71	0.0%	2.5%	0.04	0.0%	2.5%	0.34	0.0%	3.7%	1.08	0.1%
Zone 2 - Eston	5.0%	0.71	1.0%	2.5%	0.04	0.1%	2.5%	0.34	0.5%	3.7%	1.08	1.6%
Zone 3 - Guisborough	50.0%	7.08	9.9%	5.0%	0.08	0.1%	5.0%	0.67	0.9%	26.9%	7.83	11.0%
Zone 4 - Marske/Saltburn	5.0%	0.71	1.8%	10.0%	0.16	0.4%	10.0%	1.34	3.3%	7.6%	2.21	5.5%
Zone 5 - Rural East	10.0%	1.42	3.7%	60.0%	0.94	2.5%	60.0%	8.05	21.2%	35.7%	10.41	27.4%
Borough (Sub-Total)	***75.0%***	***10.61***	***24.4%***	***80.0%***	***1.26***	***2.9%***	***80.0%***	***10.73***	***24.7%***	***77.6%***	***22.60***	***52.0%***
Zone 6 - East Middlesbrough	1.0%	0.14	0.1%	1.0%	0.02	0.0%	1.0%	0.13	0.1%	1.0%	0.29	0.1%
Zone 7 - North Yorkshire Moors	12.5%	1.77	1.5%	5.0%	0.08	0.1%	5.0%	0.67	0.6%	8.6%	2.52	2.1%
Zone 8 - Whitby Hinterland	1.5%	0.21	0.7%	4.0%	0.06	0.2%	4.0%	0.54	1.7%	2.8%	0.81	2.6%
Study Area (Sub-Total)	***15.0%***	***2.12***	***26.4%***	***10.0%***	***0.16***	***2.0%***	***10.0%***	***1.34***	***16.7%***	***12.4%***	***3.62***	***45.0%***
Inflow	10.0%	1.42		10.0%	0.16		10.0%	1.34		10.0%	2.91	
Total	**100.0%**	**14.15**		**100.0%**	**1.57**		**100.0%**	**13.41**		**100.0%**	**29.14**	

Source: Redcar & Cleveland Borough Council and Mintel

Table 8: 2021 Comparison Goods Expenditure Flows (£m) - with Committed Development (2014 Prices)

Centre/Facility	Zone 1 Redcar	Zone 2 Eston	Zone 3 Guisborough	Zone 4 Marske & Saltburn	Zone 5 Rural East	Total (Within Borough)	Zone 6 East Middlesbrough	Zone 7 North Yorkshire Moors Rural East	Zone 8 Whitby Hinterlands	Inflow	Total
Expenditure 2016	**117.92**	**116.12**	**77.29**	**76.37**	**74.93**	**462.62**	**204.11**	**58.12**	**13.60**		
Committed Development	**1.08**	**1.08**	**7.83**	**2.21**	**10.41**	**22.60**	**0.29**	**2.52**	**0.81**	**2.91**	**29.14**
Redcar Town Centre	47.23	10.28	5.10	19.46	11.41	**93.47**	2.86	0.96	0.92	10.78	**108.99**
Low Grange District Centre	0.94	6.60	0.00	0.00	0.00	**7.54**	3.67	0.29	0.00	0.59	**12.09**
Eston District Centre	0.00	2.32	0.15	0.00	0.00	**2.47**	0.00	0.00	0.00	0.13	**2.60**
Guisborough District Centre	0.12	1.27	26.01	0.60	5.03	**33.03**	0.20	7.09	0.46	4.66	**45.44**
Marske District Centre	0.24	0.00	0.15	4.56	0.07	**5.03**	0.00	0.00	0.00	0.26	**5.29**
Saltburn District Centre	0.00	0.23	0.22	4.31	2.50	**7.27**	0.00	0.11	0.05	0.83	**8.27**
Loftus District Centre	0.00	0.00	0.00	0.00	1.26	**1.26**	0.00	0.00	0.11	0.07	**1.44**
Cleveland Retail Park	14.33	25.62	8.18	9.26	7.05	**64.44**	21.20	3.05	0.38	15.28	**104.35**
Out of Centre Foodstores	4.23	3.70	2.21	0.75	10.45	**21.34**	0.41	0.00	0.07	1.17	**22.98**
Other Stores/Centres	0.59	1.97	1.04	0.38	3.81	**7.79**	2.04	0.29	0.13	0.84	**11.09**
Borough Total	**68.75**	**53.06**	**50.89**	**41.54**	**52.00**	**243.64**	**30.67**	**14.30**	**2.94**	**37.53**	**322.54**
Outside Borough	**49.17**	**63.06**	**26.39**	**34.83**	**22.93**	**196.38**	173.44	43.82	10.67		
TOTAL	**117.92**	**116.12**	**77.29**	**76.37**	**74.93**	**440.02**	**204.11**	**58.12**	**13.60**		

Source: Tables 3, 4, 6 and 7 (Please note some figures may not total precisely due to rounding)

Table 9 (a): Forecast Turnover of Proposed Comparison Goods Floorspace (2014 Prices)

Store	Sales Floorspace (sq.m gross)	Sales Floorspace (sq.m net)	Comparison Goods Floorspace (%)	Comparison Goods Floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
Foodstore	2500	1500	20%	300	7000	2.10
Non-Food Retail Warehousing	1839	1471	100%	1471	4000	5.88
Total		**2,971**		**1,771**		**£7.98**

Source: Redcar & Cleveland Borough Council and Mintel

Table 9 (b): Origin of Turnover of Proposed Comparison Goods Floorspace (2014 Prices)

Store	Foodstore			Non-Food Retail Warehousing			Total		
	Proportion of Trade Drawn %	£m	Penetration Rate %	Proportion of Trade Drawn %	£m	Penetration Rate %	Proportion of Trade Drawn %	£m	Penetration Rate %
Zone 1 - Redcar	55.0%	1.16	1.7%	50.0%	2.94	2.5%	51.3%	4.10	6.1%
Zone 2 - Eston	5.0%	0.11	0.1%	5.0%	0.29	0.3%	5.0%	0.40	0.6%
Zone 3 - Guisborough	2.5%	0.05	0.1%	2.5%	0.15	0.2%	2.5%	0.20	0.5%
Zone 4 - Marske/Saltburn	20.0%	0.42	1.1%	20.0%	1.18	1.5%	20.0%	1.60	4.2%
Zone 5 - Rural East	7.5%	0.16	0.4%	7.5%	0.44	0.6%	7.5%	0.60	1.4%
Borough (Sub-Total)	***90.0%***	***1.89***	***0.7%***	***85.0%***	***5.00***	***1.9%***	***86.3%***	***6.89***	***2.6%***
Zone 6 - East Middlesbrough	2.0%	0.04	0.1%	2.5%	0.15	0.1%	2.4%	0.19	0.2%
Zone 7 - North Yorkshire Moors	2.0%	0.04	0.1%	2.0%	0.12	0.2%	2.0%	0.16	0.5%
Zone 8 - Whitby Hinterland	1.0%	0.02	0.1%	0.5%	0.03	0.2%	0.6%	0.05	0.6%
Study Area (Sub-Total)	***5.0%***	***0.11***	***0.3%***	***5.0%***	***0.29***	***0.8%***	***5.0%***	***0.40***	***0.1%***
Inflow	5.0%	0.11		10.0%	0.59		8.7%	0.69	
Total	**100.0%**	**2.10**		**100.0%**	**5.88**		**100.0%**	**7.98**	

Source: Redcar & Cleveland Borough Council and Mintel

Table 10: 2021 Comparison Goods Expenditure Flows (£m) - with Committed Development and Proposed Coatham Development (2014 Prices)

Centre/Facility	Zone 1 Redcar	Zone 2 Eston	Zone 3 Guisborough	Zone 4 Marske & Saltburn	Zone 5 Rural East	Total (Within Borough)	Zone 6 East Middlesbrough	Zone 7 North Yorkshire Moors Rural East	Zone 8 Whitby Hinterlands	Inflow	Total
Expenditure 2016	**117.92**	**116.12**	**77.29**	**76.37**	**74.93**	**462.62**	**204.11**	**58.12**	**13.60**		
Proposed Coatham Development	**4.10**	**0.40**	**0.20**	**1.60**	**0.60**	**6.89**	**0.19**	**0.16**	**0.05**	**0.69**	**7.98**
Committed Development	**1.05**	**1.08**	**7.81**	**2.17**	**10.33**	**22.44**	**0.29**	**2.51**	**0.81**	**2.90**	**28.95**
Redcar Town Centre	45.57	10.24	5.08	19.01	11.30	**91.20**	2.85	0.96	0.92	10.71	**106.64**
Low Grange District Centre	0.93	6.59	0.00	0.00	0.00	**7.52**	3.67	0.29	0.00	0.59	**12.07**
Eston District Centre	0.00	2.32	0.15	0.00	0.00	**2.47**	0.00	0.00	0.00	0.13	**2.60**
Guisborough District Centre	0.12	1.27	25.97	0.59	5.02	**32.96**	0.20	7.08	0.46	4.65	**45.35**
Marske District Centre	0.23	0.00	0.15	4.56	0.07	**5.02**	0.00	0.00	0.00	0.26	**5.28**
Saltburn District Centre	0.00	0.23	0.22	4.28	2.49	**7.23**	0.00	0.11	0.05	0.83	**8.23**
Loftus District Centre	0.00	0.00	0.00	0.00	1.26	**1.26**	0.00	0.00	0.11	0.07	**1.44**
Cleveland Retail Park	13.86	25.53	8.16	9.06	6.99	**63.59**	21.18	3.04	0.38	15.19	**103.38**
Out of Centre Foodstores	4.10	3.69	2.20	0.74	10.36	**21.09**	0.41	0.00	0.07	1.16	**22.73**
Other Stores/Centres	0.58	1.97	1.04	0.37	3.80	**7.76**	2.04	0.29	0.13	0.84	**11.06**
Borough Total	**70.54**	**53.30**	**50.99**	**42.37**	**52.23**	**269.43**	**30.83**	**14.44**	**2.98**	**38.02**	**355.70**
Outside Borough	**47.38**	**62.81**	**26.30**	**33.99**	**22.70**	**193.19**	**173.28**	**43.69**	**10.63**		
TOTAL	**117.92**	**116.12**	**77.29**	**76.37**	**74.93**	**462.62**	**204.11**	**58.12**	**13.60**		

Source: Tables 3, 4, 8 and 9 (Please note some figures may not total precisely due to rounding)

Table 11: 2026 Comparison Goods Expenditure Flows (£m) (2014 Prices)

Centre/Facility	Zone 1 Redcar	Zone 2 Eston	Zone 3 Guisborough	Zone 4 Marske & Saltburn	Zone 5 Rural East	Total (Within Borough)	Zone 6 East Middlesbrough	Zone 7 North Yorkshire Moors Rural East	Zone 8 Whitby Hinterlands	Inflow	Total
Expenditure 2016	**139.12**	**136.98**	**91.18**	**90.11**	**88.40**	**545.79**	**242.11**	**68.73**	**15.96**		
Proposed Coatham Development	**4.83**	**0.47**	**0.24**	**1.88**	**0.71**	**8.13**	**0.22**	**0.19**	**0.06**	**0.82**	**9.42**
Committed Developments	**1.24**	**1.27**	**9.21**	**2.56**	**12.19**	**26.47**	**0.35**	**2.97**	**0.95**	**3.42**	**34.16**
Redcar Town Centre	53.76	12.08	6.00	22.43	13.34	**107.60**	3.38	1.14	1.08	12.64	**125.83**
Low Grange District Centre	1.10	7.77	0.00	0.00	0.00	**8.87**	4.35	0.34	0.00	0.70	**14.26**
Eston District Centre	0.00	2.74	0.18	0.00	0.00	**2.92**	0.00	0.00	0.00	0.15	**3.07**
Guisborough District Centre	0.14	1.50	30.64	0.70	5.92	**38.89**	0.24	8.37	0.54	5.48	**53.52**
Marske District Centre	0.28	0.00	0.18	5.38	0.09	**5.92**	0.00	0.00	0.00	0.31	**6.23**
Saltburn District Centre	0.00	0.27	0.26	5.05	2.94	**8.53**	0.00	0.14	0.06	0.98	**9.70**
Loftus District Centre	0.00	0.00	0.00	0.00	1.48	**1.48**	0.00	0.00	0.13	0.09	**1.69**
Cleveland Retail Park	16.35	30.11	9.62	10.69	8.25	**75.02**	25.12	3.59	0.45	17.94	**122.13**
Out of Centre Foodstores	4.84	4.35	2.60	0.87	12.23	**24.88**	0.48	0.00	0.08	1.37	**26.82**
Other Stores/Centres	0.69	2.32	1.23	0.44	4.49	**9.16**	2.42	0.34	0.16	0.99	**13.06**
Borough Total	**83.22**	**62.88**	**60.15**	**50.00**	**61.62**	**317.87**	**36.57**	**17.07**	**3.49**	**44.89**	**419.90**
Outside Borough	**55.90**	**74.10**	**31.03**	**40.11**	**26.78**	**227.92**	**205.53**	**51.66**	**12.47**		
TOTAL	**139.12**	**136.98**	**91.18**	**90.11**	**88.40**	**545.79**	**242.11**	**68.73**	**15.96**		

Source: Table 3 and 10 (Please note some figures may not total precisely due to rounding

Table 12: 2032 Comparison Goods Expenditure Flows (£m) (2014 Prices)

Centre/Facility	Zone 1 Redcar	Zone 2 Eston	Zone 3 Guisborough	Zone 4 Marske & Saltburn	Zone 5 Rural East	Total (Within Borough)	Zone 6 East Middlesbrough	Zone 7 North Yorkshire Moors Rural East	Zone 8 Whitby Hinterlands	Inflow	Total
Expenditure 2016	**170.66**	**168.03**	**111.84**	**110.52**	**108.43**	**669.50**	**299.89**	**84.32**	**19.53**		
Proposed Coatham Development	**5.93**	**0.58**	**0.29**	**2.31**	**0.87**	**9.97**	**0.28**	**0.23**	**0.07**	**1.00**	**11.56**
Committed Developments	**1.52**	**1.56**	**11.29**	**3.14**	**14.95**	**32.47**	**0.43**	**3.65**	**1.16**	**4.20**	**41.90**
Redcar Town Centre	65.95	14.81	7.36	27.51	16.36	**131.99**	4.19	1.39	1.32	15.51	**154.40**
Low Grange District Centre	1.35	9.54	0.00	0.00	0.00	**10.88**	5.39	0.42	0.00	0.86	**17.55**
Eston District Centre	0.00	3.36	0.22	0.00	0.00	**3.58**	0.00	0.00	0.00	0.19	**3.77**
Guisborough District Centre	0.17	1.83	37.58	0.86	7.26	**47.70**	0.30	10.27	0.66	6.73	**65.66**
Marske District Centre	0.34	0.00	0.22	6.59	0.11	**7.26**	0.00	0.00	0.00	0.38	**7.64**
Saltburn District Centre	0.00	0.33	0.32	6.19	3.61	**10.46**	0.00	0.17	0.08	1.20	**11.90**
Loftus District Centre	0.00	0.00	0.00	0.00	1.82	**1.82**	0.00	0.00	0.16	0.10	**2.08**
Cleveland Retail Park	20.06	36.94	11.80	13.11	10.12	**92.03**	31.12	4.41	0.55	22.06	**150.16**
Out of Centre Foodstores	5.93	5.34	3.19	1.07	15.00	**30.52**	0.60	0.00	0.10	1.68	**32.90**
Other Stores/Centres	0.84	2.84	1.50	0.54	5.50	**11.24**	3.00	0.42	0.19	1.21	**16.05**
Borough Total	**102.09**	**77.14**	**73.78**	**61.33**	**75.58**	**389.92**	**45.30**	**20.94**	**4.27**	**55.13**	**515.57**
Outside Borough	**68.57**	**90.90**	**38.06**	**49.20**	**32.85**	**279.58**	**254.59**	**63.38**	**15.25**		
TOTAL	**170.66**	**168.03**	**111.84**	**110.52**	**108.43**	**669.50**	**299.89**	**84.32**	**19.53**		

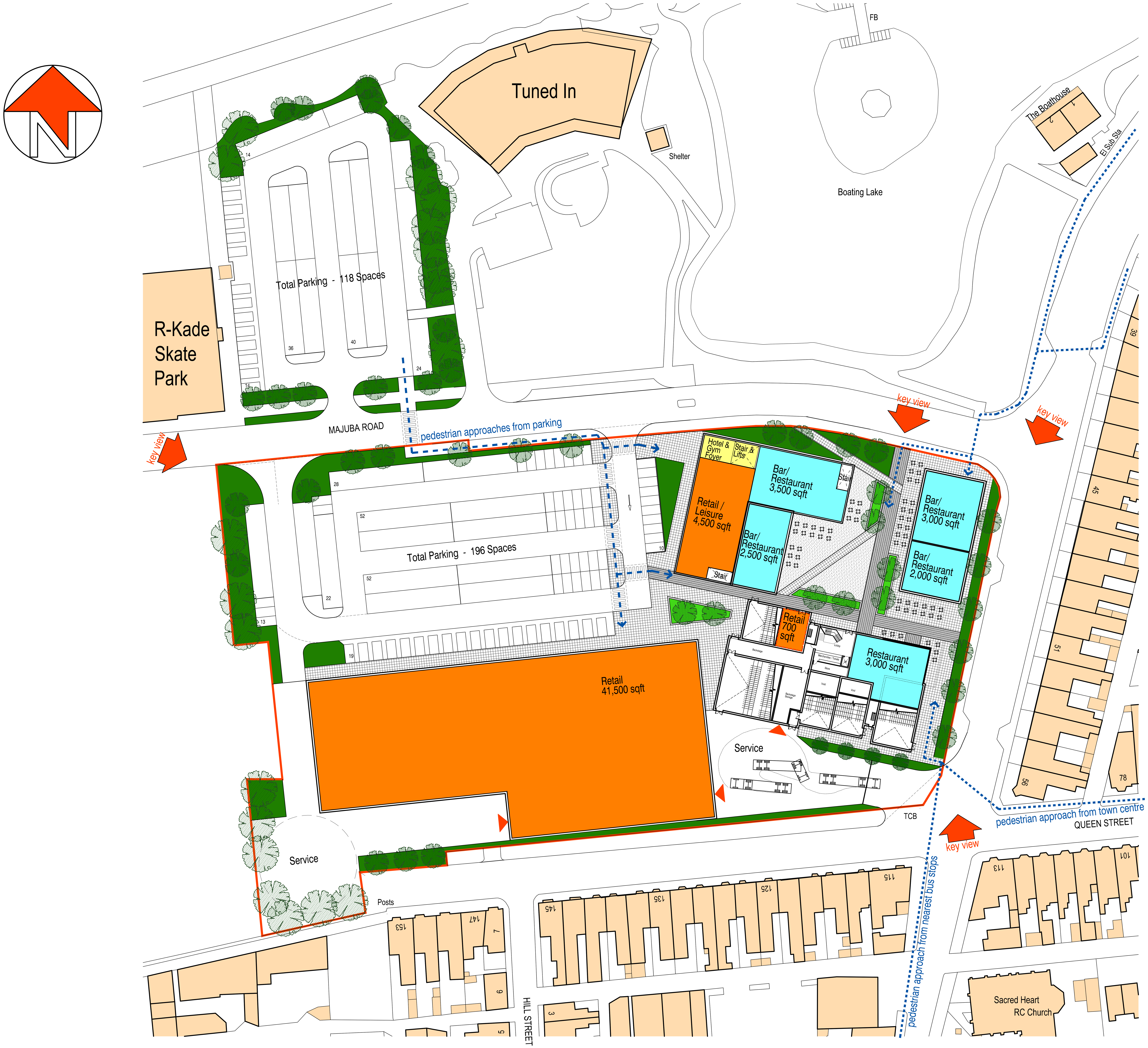
Source: Table 3 and 11 (Please note some figures may not total precisely due to rounding

Table 13: Summary of Comparison Goods Expenditure Flows and Forecast Trade Diversion Impacts (2014 Prices)

Centre/Facility	Turnover in 2021 - No New Development (£m)	Turnover in 2021 - No New Development (£ per sqm)	Trade Diversion to Commitments (£m)	Trade Diversion to Commitments (%)	Turnover in 2021 - With Commitments (£m)	Turnover in 2021 - With Commitments (£ per sqm)	Trade Diversion to Proposed Coatham Development (£m)	Trade Diversion to Proposed Coatham Development (%)	Turnover in 2021 - With Proposed Coatham Development (£m)	Turnover in 2021 - With Proposed Coatham Development (£ per sqm)	Cumulative Trade Diversion (£m)	Cumulative Trade Diversion (%)	Turnover in 2026 - With Proposed Coatham Development (£m)	Turnover in 2026 - With Proposed Coatham Development (£ per sqm)	Turnover in 2032 - With Proposed Coatham Development (£m)	Turnover in 2032 - With Proposed Coatham Development (£ per sqm)
Proposed Coatham Development									**7.98**	**4508**			**9.42**	**5320**	**11.56**	**6527**
Committed Developments					**29.14**	**5414**	**0.19**	**0.6%**	**28.95**	**5379**			**34.16**	**1832**	**41.90**	**7785**
Redcar Town Centre	111.93	6004	2.94	2.6%	108.99	5847	2.35	2.2%	106.64	5721	5.29	4.7%	125.83	6750	154.40	8283
Low Grange District Centre	12.13	4379	0.04	0.4%	12.09	4363	0.02	0.2%	12.07	4356	0.06	0.5%	14.26	5148	17.55	6334
Eston District Centre	2.61	4793	0.00	0.1%	2.60	4786	0.00	0.0%	2.60	4785	0.00	0.2%	3.07	5644	3.77	6924
Guisborough District Centre	48.39	8396	2.95	6.1%	45.44	7884	0.09	0.2%	45.35	7869	3.04	6.3%	53.52	9287	65.66	11393
Marske District Centre	5.31	3907	0.02	0.4%	5.29	3890	0.01	0.2%	5.28	3883	0.03	0.6%	6.23	4582	7.64	5620
Saltburn District Centre	8.46	4457	0.18	2.1%	8.27	4362	0.05	0.6%	8.23	4336	0.23	2.7%	9.70	5116	11.90	6275
Loftus District Centre	1.46	2281	0.02	1.2%	1.44	2253	0.00	0.1%	1.44	2252	0.02	1.3%	1.69	2655	2.08	3256
Cleveland Retail Park	109.47	4721	5.12	4.7%	104.35	4500	0.97	0.9%	103.38	4458	6.09	5.6%	122.13	5267	150.16	6476
Out of Centre Foodstores	23.96	6160	0.98	4.1%	22.98	5909	0.25	1.1%	22.73	5844	1.23	5.1%	26.82	6895	32.90	8459
Other Stores/Centres	11.40		0.31	2.7%	11.09		0.03	0.2%	11.06		0.34	3.0%	13.06		**16.05**	

Source: Tables 6, 8, 10-12 (Please note some figures may not total precisely due to rounding)

Appendix 4: Indicative Site Proposals



Notes

Do not scale this drawing.
This drawing is available in .dxf or .dwg format on disk

SCHEDULE OF ACCOMMODATION

5 Screen Cinema 1 x 250 seat 2 x 150 seat 2 x 100 seat	-	17,870 sq ft
Total Retail	-	46,700 sq ft
Total Bar/Restauarnt	-	14,000 sq ft
Total Gym (First floor)	-	10,500 sq ft
Hotel - 156 bed (Levels 3-8)	-	57,950 sq ft
Parking within site Parking adj Tuned In	- -	196 spaces 118 spaces
Total Parking	-	314 spaces
Site Area (Red line)	-	1.9 Ha,. 4.7 Ac.

revision date

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client
Warrior Developments Ltd.

project
Proposed Leisure Development
Majuba Road
Coatham, Redcar

drawing title
Proposed Site Layout

drawn	checked	scale
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