Town Centre Study

Final Study Report

Redcar & Cleveland Borough Council

8 December 2016

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1.0 # Introduction

Scope of Report

1.1 Nathaniel Lichfield & Partners (NLP) has been commissioned by Redcar & Cleveland Borough Council (RCBC) to prepare a Town Centre Study. This study seeks to provide a robust and credible evidence base to inform the development of policy within the Council's emerging new Local Plan. It takes into account the most up to date information in relation to population and expenditure, as well as new household telephone and on-street shopper surveys undertaken by NEMS Market Research, and a survey of businesses in Redcar Town Centre.

1.2 The study includes:

- a review of current convenience and comparison shopping and leisure visitation patterns across the borough, including any changes since the findings of previous studies;
- a review of the role, vitality and viability of the main centres in the Borough, including any potential future threats;
- an assessment of the future quantitative and qualitative need for additional retail and leisure floor space over the period to 2032, having regard to planned new/committed developments;
- an assessment of the level and type of new retail and leisure development which would be appropriate for the Borough, including where any identified need should be directed;
- the identification of any deficiencies in the provision of local convenience shopping and other day to day facilities;
- an assessment of the need to review the boundaries of town, district and local centres and primary shopping areas, including any suggested changes;
- a review of the threshold requiring developers to submit a retail impact assessment; and
- a review of the Council's hot food takeaway policy and the need for/ability to introduce similar restrictions for bookmakers and payday loan shops.

Report Structure

1.3 The Report is structured as follows:

- Section 2.0 includes a summary of national and local planning policy relevant to this study;
- Section 3.0 provides an overview of current trends in retail and leisure, and their implications for existing centres;

- Section 4.0 provides an analysis of the results of the household telephone, on-street and business surveys undertaken as part of this study;
- Section 5.0 of this report describes the existing retail and leisure hierarchy in Redcar & Cleveland;
- Section 6.0 assesses the quantitative and qualitative need for new retail floorspace in the Borough;
- Section 7.0 assesses the need for other town centre uses in the Borough; and
- Section 8.0 considers where any identified needs can be met; and
- Section 9.0 provides recommendations on an appropriate planning policy strategy for Redcar & Cleveland.

2.0 Planning Policy Context

National Planning Policy Framework

2.1 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.

2.2 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.

2.3 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. It confirms that Local Plans should recognise town centres as the heart of their communities and pursue policies which support their vitality and viability.

2.4 Paragraph 23 indicates that local plans should 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. In order to accommodate growth, local planning authorities should assess the need to expand town centres to ensure a sufficient supply of suitable sites.

2.5 The NPPF (paragraphs 23 and 24) indicates local planning authorities should define a network and hierarchy of centres that is resilient to anticipated future economic changes and apply a sequential approach for development. The NPPF suggests that in drawing up development plans, local authorities should, in addition to defining the extent of town centres and primary shopping areas, define primary and secondary frontages within designated centres, and set policies that make clear which uses will be permitted in such locations.

2.6 The NPPF also states that local planning authorities should recognise that residential development can play an important role in ensuring the vitality of centres. Where town centres are in decline, local planning authorities should plan positively for their future to encourage economic activity. Local authorities should also set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres.

2.7 In this context, paragraph 24 states that planning applications for main town centre uses which are not in a defined centre and don't accord with an up-to-date development plan should be subject to a sequential test. Such 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.

2.8 Paragraph 26 of the NPPF states that when assessing applications for retail, leisure and office development outside of town centres, which are not in accordance with an up-to-date Local Plan, local planning authorities should require an impact assessment if the development is over a proportionate, locally set floorspace threshold (if there is no locally set threshold, the default threshold is 2,500 sqm). This should include assessment of:

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

2.9 Where an application fails to satisfy the sequential test or is likely to have significant adverse impact on one or more of the above factors, it should be refused.

Planning Practice Guidance

2.10 Planning Practice Guidance (PPG) supports the NPPF and provides guidance on how to ensure the vitality of town centres, advocating a town centre first approach. 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. Plans should identify the scale of need for main town centre uses and assess whether the need can be met on town centre sites or through expanding centres, with the sequential test to be followed.

2.11 The PPG sets out that a clear definition of centre boundaries, and policies the designation relates to, should be provided in development plan policies, in order to ensure policies are not open to misinterpretation. When considering emerging town and local centre policies, the Council should consider the following issues:

- Is it necessary to designate separate town centre boundaries and shopping areas, or will one boundary be sufficient?
- Is it necessary to define separate primary and secondary shopping frontages or will one frontage be appropriate?
- Should the designated shopping frontages relate to the same area as the shopping area or town centre boundary?

2.12 The PPG states that local planning 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, or will involve significant new developments. Public realm, transport and accessibility improvements can play important roles. Town centre car parking strategies are to encourage improvements to both the quality and quantity of provision, where required to enhance the performance of town centres.

2.13 It states that the use of the sequential test should recognise that certain main town centre uses have particular market and locational requirements which mean that they may only be accommodated in specific locations. The NPPG also states that, if setting a locally appropriate threshold, it is important to consider:

- the scale of proposals relative to town centres;
- the existing viability and vitality of town centres;
- cumulative effects of recent developments;
- whether local town centres are vulnerable;
- likely effects of development on any town centre strategy; and
- the impact on any other planned investment.

Redcar & Cleveland Local Development Framework

Core Strategy

2.14 The Redcar & Cleveland Core Strategy was adopted July 2007 in order to address the issues and priorities for the Borough and provide a vision and strategy for its future.

2.15 Policy CS18 define the existing hierarchy of centres, and this hierarchy is set out in Table 2.1, below.

Table 2.1 Existing Hierarchy of Centres in Redcar and Cleveland

Type of Centre	Location
Town Centre	Redcar
District Centre	Eston
	Guisborough
	Loftus
	Marske
	Saltburn
	South Bank (Proposed at Low Grange)
Local Centre	Brotton, Hill Street
	Carlin How, Front Street
	Dormanstown, Ennis Square
	Guisborough, Enfield Chase

Type of Centre	Location
	New Marske, Birkdale Road
	Normanby
	Nunthorpe
	Redcar, Park Avenue
	Redcar, Roseberry Square
	Skelton, High Street

Source: Policy CS18, Redcar and Cleveland Core Strategy (July 2007)

2.16 Policy CS18 states that development proposals for town centre uses will be focused within the town and district centres and 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 will be required to follow the approach set out in (now superseded) national planning policy, addressing issues including need, scale, sequential approach, impact and accessibility.

2.17 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 safeguarding the retail character and function of the centre, enhancing its appearance, safety and environmental quality, encouraging a diverse range of uses, promoting the re-use of vacant buildings and maintaining/enhancing access to centres by sustainable modes of transport. Finally, it seeks to maintain and strengthen the role of local centres in the Borough and protect neighbourhood shops located outside of centres where they are important to day to day needs.

Draft Redcar and Cleveland Local Plan

2.18 Consultation on the emerging draft replacement Local Plan ended on 21 July 2016.

2.19 Draft Policy ED 1 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, with the scale and type of development reflecting its capacity for new development. It also states that any proposal which would increase the floorspace of a centre by 10% or more must be supported by a retail impact assessment.

2.20 The policy 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:

a retail development (where Redcar Town Centre is the nearest town or district centre): 1,000 sqm;

b all other retail development: 500 sqm; and

c leisure development:

- theatres, concert halls, casinos and ice rinks: 2,500 sqm;
- bingo halls, cinemas, nightclubs and bowling centres: 1,500 sqm; and
- cafés, restaurants, pubs, bars, health clubs, gyms, swimming pools, leisure centres, museums and libraries: 1,000 sqm.

2.21 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.

2.22 Draft Policy ED2 states that Cleveland Retail Park will continue to provide 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.

2.23 Policy ED3 states that proposals for new hot food takeaways in centres will only be permitted where the proposed use would satisfy one of 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.

2.24 Policy ED4 sets out a number of circumstances where retail uses proposed on industrial estates and business parks will be permitted. These comprise proposals for the sale of bulky goods which cannot be accommodated within/on the edge of existing town or district centres, those ancillary to/inextricably linked with a business/industrial use (where the main use would be inappropriate in the centre), or small scale retail and food uses providing a service to those working in the area (with the total gross floorspace of units not exceeding 200 sqm).

Interim Policy on Hot Food Takeaways

2.25 An Interim Policy on Hot Food Takeaways was adopted by the Council on 17 July 2008 following consultation. This policy broadly reflects the approach proposed in draft Policy ED3. In addition, it requires consideration of the potential impact upon amenity, through controlling hours of opening and ensuring satisfactory ventilation, and states that developer contributions and legal agreements will be sought to mitigate the effects of developments. However, it does not seek to prevent such uses being located within a Primary Shopping Area.

Summary

2.26 Local planning authorities are required to assess the needs for new retail and other main town centre uses over the plan period. When planning for growth in their town centres, local planning authorities should allocate a range of suitable sites to meet the scale and type of retail development needed. It is important that the needs for retail and other main town centre uses are met in full and not compromised by limited site availability.

2.27 The overarching objectives are supported by adopted and emerging planning policy which emphasises the need to adopt a sequential approach in line with the requirements set out in the National Planning Policy Framework. The emerging Local Plan sets out various thresholds whereby proposals will be required to undertake impact assessments, as well as policy which specifically addresses proposals for new food and drink uses. It also acknowledges that role that Cleveland Retail Park will continue to play in meeting bulky goods retail needs, where such needs cannot be met within defines centres.

2.28 Section 9.0 of this study provides recommendations in respect of these draft policies, taking into account the analysis contained in the following chapters.

3.0 Trends in Retail and Leisure

3.1 This section provides an overview of changes in the town centres and retail/leisure sector nationally and how they could relate to Redcar & Cleveland.

3.2 Whilst some sectors are experiencing a resurgence, particularly value retailing, the changing economic climate over the period since 2008 has had a significant impact on town centres and the retail sector. A large number of national operators have failed, including Comet, BHS, HMV, JJB Sports, Woolworths, MFI, Borders, La Senza and Habitat. This has left voids within centres and a challenge for local authorities and other stakeholders to attract new operators to anchor their centres. Many town centre development schemes have been delayed, which has affected the ability of centres to meet the needs of their catchments and compete with other, stronger centres.

3.3 Whilst the large foodstore operators have seen a reduction in growth and have significantly curtailed any expansion plans, the discount sector is thriving. Both Aldi and Lidl significantly expanded their store estate in 2015 (by around 11% and 5% respectively), whilst the majority of other operators increased their floorspace by between 3%-5%, and Tesco grew by just 1%.

3.4 Comparison retailers have also responded to market conditions. The bulky goods warehouse sector has seen some rationalisation, leading to voids on retail warehouse parks and proposals to extend the range of goods sold to non-bulky goods. Indeed, many traditional high street retailers are now seeking large out-of-centre stores - for example Next – and indeed a number of these stores are found at Cleveland Retail Park. Larger retail parks with sub-regional catchment areas, including not only Cleveland Retail Park but also Teesside Park in Stockton, have growth in both size and popularity.

3.5 Within town centres, many multiple comparison retailers have changed their format and have increasingly sought larger modern shop units (e.g. over 200 sqm). There has been an increasing polarisation of activity, with the larger regional and sub-regional centres becoming stronger. New investment has being concentrated in a number of key locations, with smaller centres struggling to attract new development and weakening in relative terms.

3.6 Redcar Town Centre now includes non-food discount operators, such as Wilko, Home Bargains, B&M and Poundworld. The charity shop sector has also grown steadily over the past 20 years, with such shops occupying shop premises vacated during the recession. In some cases, charity shops can afford higher rents than small independent occupiers because of business rate discounts.

3.7 Careful consideration should be given to the appropriate level of expenditure growth to be adopted as part of the retail capacity assessment. Projecting expenditure levels forward based on trends is not always appropriate, particularly given the fluctuating economic conditions over the period since

2008 and the structural changes in the retail sector. Nevertheless, the study will need to take a long term view for the plan period, which recognises the cyclical nature of growth and the need to plan positively, as required by the National Planning Policy Framework (NPPF). Changes in population, growth in turnover efficiency and home shopping/internet sales will all need to be considered.

3.8 Online shopping has accelerated over the last five to ten years in particular. On the basis of information in Experian's latest Retail Planner Briefing Note (October 2015), the total quantum of money spent via Special Forms of Trading (SFT) – which is primarily internet shopping, but also includes mail order, stalls/markets, door to door and telephone sales - increased from £17.1bn in 2006 to £44.1bn by 2014, and is forecast to continue to grow significantly, to around £94.4bn in 2026.

3.9 The impact of multi-channel, and e-tailing in particular, will therefore be carefully addressed, taking into account the latest information on its market share and how this is likely to affect the demand for new space in future. Though some internet shopping (e.g. through large foodstores, such as Asda and Tesco) still uses existing retail stores as a means of transferring goods to customers, others (e.g. Amazon) do not have such stores. Whilst it is possible that online shopping will plateau eventually, this will not be without further growth.

3.10 Town centres are constantly evolving and the leisure industry is a highly dynamic sector. The way we experience leisure is also changing, in line with wider socio-economic trends. It is important to examine these trends (and the underlying factors and their implications) in assessing the need for new other town centre uses in Redcar and Cleveland, particularly given the recent fluctuating fortunes of the retail sector.

3.11 Non-retail uses have become increasingly important in maintaining and enhancing the vitality and viability of existing centres and it is essential that this is recognised in future planning policy. The food and beverage sector, in particular, has experienced significant growth in recent years, both in terms of the range of operators and numbers of outlets.

3.12 Against this background, and given the strong competition town centres have faced from both online shopping and out-of-centre destinations, it is clear that centres need to offer something more than just shops in order to secure their future. The vitality and viability of town centres must be underpinned by a broad mix of uses, including not only retail, but leisure/entertainment, arts/cultural, offices, residential and community facilities. Indeed, the evening economy can be as important in some centres as the day time economy.

3.13 As set out above, the food and beverage sector has been resurgent in recent years, bucking the recent economic downturn. It is also constantly evolving, with business models continually developing and new concepts emerging. The recent increase in eating out is down to a variety of reasons, including:

- changing lifestyles;

- increased choice - through a variety of formats meeting a range of different tastes;
- new legislation (including the smoking ban in public places);
- increased emphasis upon healthy lifestyles; and
- convenience.

3.14 The cinema sector has also been resurgent in recent years. New cinema technologies such as e-ticketing systems, mobile tickets, 4D cinemas and growth in the number of 3D and IMAX films have helped to increase admission numbers and box office revenues. Furthermore, the combination of ‘freebie’ incentives and targeted advertising has huge potential to encourage return trips and a further boost in cinema-going numbers. Although the vast majority are currently travelling to facilities outside of the Borough, a significant proportion of Redcar and Cleveland residents indicated through the household survey that they visit the cinema – highlighting significant untapped potential in this sector.

3.15 Existing leisure formats are evolving and new ones emerging. There has been a significant increase in the number of trampoline centres across the country. Other emerging activities include climbing centres, as well as class-based health and fitness facilities - which promote group exercises, combined with nutritional advice, as a means of helping people improve their fitness and general wellbeing. Along with more established sectors, including indoor adventure playgrounds/soft play areas, such uses have helped broaden the overall range of leisure pursuits available to families.

3.16 It may not be possible to accommodate all of the different types of leisure activities within existing centres. Notwithstanding this, however, growth in the leisure sector brings with it great opportunities. These include:

- the ability of such uses to extend dwell-time in centres, complementing the wider retail offer;
- the increase in the number of leisure-led schemes coming forward (including the use of cinemas as anchors);
- the changing role of shopping centres, including the use of food courts as anchors and the return of leisure uses within such centres (such as gyms and cinemas); and
- investment in new arts and cultural facilities, such as museums, art galleries and performing arts venues (which can assist in the promotion of individual towns and cities as a visitor destination).

3.17 It is important that any future planning strategy for Redcar Town Centre grasps these opportunities, seeking to provide additional reasons for people to visit and to extend dwell time.

3.18 The study will need to take a long term view for the plan period, which recognises the cyclical nature of growth and the need to plan positively, as required by the National Planning Policy Framework (NPPF). Population and expenditure forecasts, as well as current and projected participation rates for a range of uses, will all need to be considered. This is not least given that assumptions on such forecasts can lead to wide variations in the end results in terms of future needs. Overall, a positive yet deliverable strategy will need to be adopted to harness the potential of growth in all of these sectors.

4.0 # Survey Analysis

Household Telephone Surveys

4.1 A total of 800 (approx.) household telephone surveys were undertaken across eight separate zones, both within and immediately beyond Redcar & Cleveland Borough, in July and August 2016. The number of surveys undertaken in of these each zones (which are also illustrated in the plan attached at **Appendix 1**) were as follows:

- Zone 1 (Redcar) – 126 surveys
- Zone 2 (Eston) – 126 surveys
- Zone 3 (Guisborough) – 10 surveys
- Zone 4 (Marske/Saltburn) – 100 surveys
- Zone 5 (Rural East) – 100 surveys
- Zone 6 (East Middlesbrough) – 125 surveys
- Zone 7 (North Yorkshire Moors) – 75 surveys
- Zone 8 (Whitby Hinterland) – 50 surveys

4.2 The results of the surveys helped to establish existing shopping and leisure patterns across the area and are summarised in more detail below. Where appropriate, comparison is also made with the results from a household survey undertaken by NEMS across the Borough in September 2005 as part of a similar study, which was published in 2006.

Main Food and Grocery Shopping

4.3 **Question 1**, the results of which are set out in Table 4.1 below, sought to establish where respondents last undertook their main food and grocery shopping.

Table 4.1 Main Food Shopping Patterns

Zone	Main Food Shopping Destinations (2016)	Main Food Shopping Destinations (2005)
Redcar	Morrisons, Lord Street, Redcar (33%) Tesco, West Dyke Road, Redcar (25%) Aldi, Larkswood Road, Redcar (15.%)	Morrisons, Lord Street, Redcar (48%) Tesco, West Dyke Road, Redcar (28%)
Guisborough	Morrisons, Westgate, Guisborough (31%) Sainsbury's, Morgan Drive, Guisborough (21%) Aldi, Hill View Road,	Morrisons, Westgate, Guisborough (61%) Sainsbury's, Morgan Drive, Guisborough (17%) Morrisons, Bewick Hills

Zone	Main Food Shopping Destinations (2016)	Main Food Shopping Destinations (2005)
	Guisborough (14%)	(6%)
Marske and Saltburn	Morrisons, Lord Street, Redcar (28%) Aldi, Larkswood Road, Redcar (19%) Sainsbury's, Milton Street, Saltburn-By-The-Sea (12%)	Morrisons, Lord Street, Redcar (40%) Tesco, West Dyke Road, Redcar (24%) Somerfield, Milton Street, Saltburn-By-The-Sea (13%) Co-op, Marske (7%) Asda, South Bank (5%)
Rural East	Asda, Pheasant Fields Lane, Skelton (45%) Morrisons, Lord Street, Redcar (10%)	Morrisons, Lord Street, Redcar (43%) Asda, South Bank (11%) Tesco, West Dyke Road, Redcar (11%) Morrisons, Westgate (8%)
Eston	Asda, North Street, South Bank (30%) Tesco Extra, Low Grange District Centre, Trunk Road, Middlesbrough (21%) Morrisons, Berwick Hills District Centre, Middlesbrough (10%)	Asda, North Street, South Bank (52%) Morrisons, Berwick Hills District Centre, Middlesbrough (26%) Morrisons, Lord Street, Redcar (5%)

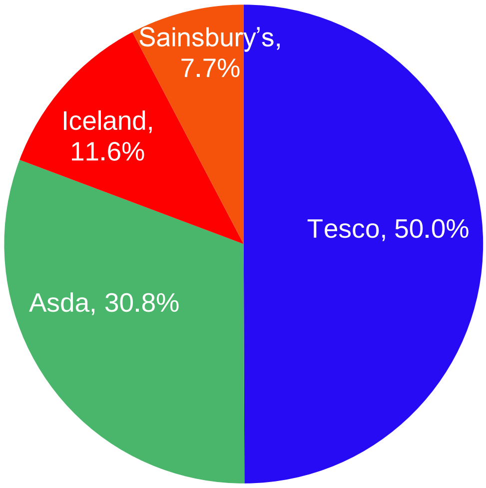
Source: NEMS Household Survey August 2016

4.4 As shown in Table 4.1, whilst the existing Morrisons and Asda stores in Redcar, Guisborough and South Bank still have the most significant influence over the Borough, their share of main food shopping spend has decreased significantly since the previous (2005) surveys. The results of this question also show the increase in popularity in the discount foodstore operators, particularly the Aldi stores at Redcar and Guisborough, and Lidl in Guisborough. As with Morrisons in Redcar, the Aldi store at Larkswood Road draws trade from across the northern and eastern parts of the Borough, including a significant proportion from the Marske and Saltburn zone.

4.5 The results also show the emergence of the Asda store at Pheasants Fields Lane, Skelton, which did not exist at the time of the previous survey, and now attracts trade from all zones within the Borough (except for Guisborough). Whilst they also show the emergence of the Tesco Extra at the new Low Grange District Centre, and a significant reduction in the amount of spending flowing to both Asda at South Bank and Morrisons at Berwick Hills, Asda remains the most popular store in that zone.

4.6 **Question 2** of the survey asked those respondents which indicated that they did their main food shopping online which retailer they used. The results are set out in Figure 4.2 below:

Figure 4.1 Operators Used When Food Shopping Online



4.7 Whilst the results should be viewed in the context of the small sample size (26 persons), half of respondents said that they did their online shopping with Tesco, followed by around 31% at Asda, 12% at Iceland and 8% at Sainsbury's. No other retailers were mentioned, reflecting the fact that such retailers have less well developed online capabilities, these capabilities do not cover Redcar and Cleveland and/or they do not offer any delivery or click and collect facilities at all.

4.8 Table 4.2 below displays the results of **Question 3**, which asked people the main reason why they chose to use a particular store for their main food/grocery shopping.

Table 4.2 Key Reasons for Choice of Store

Key Reasons	% of Respondents from All Sectors
Near to home	30%
Lower prices	13%
Habit/ always use it/ preference for retailer	9%
Generally convenient	7%
Quality of food goods available	6%

Source: NEMS Household Survey August 2016

4.9 By far the most important reasons for the choice of main food shopping destination across all zones were the store's proximity to home (around 30%) and the lower prices on offer (13%). These figures have decreased and increased respectively from those achieved in the September 2005 surveys (down/up from 43% and 9%) – reflecting, in part, the increased emphasis on value for money amongst shoppers. The other main reasons for using a particular store included habit/preference for a retailer and, to a lesser extent, the choice and quality of goods available.

4.10 Those who mentioned a specific foodstore in response to Question 1 were also asked (**Question 4**) how they travelled to that store. The vast majority (82%) of respondents indicated that they travelled in a car/van as a passenger or driver, whilst around 10% said they walked and 6% travelled via bus or coach. There is some variation across the different zones, including in Guisborough and Eston where a higher percentage (19% and 11% respectively) of respondents walked or used a bus/coach to carry out their main food shopping – highlighting the importance of providing locally accessible facilities in these zones.

Top-up Shopping

4.11 In response to **Question 6** of the survey, 71% of households surveyed indicated that they make small scale/ top up shopping trips for basic goods such as bread and milk, in between shopping trips. This patter is broadly consistent across all areas in the Borough, although the figure is higher (79%) for the Rural East zone.

4.12 **Question 7** asked those who indicated that they did small scale/top up food shopping where they undertook this shopping. The results of this question are displayed in Table 4.3 below.

Table 4.3 Top up Food Shopping Destinations

Zone	Top up Food Shopping Destinations
Redcar	Sainsbury's Local, Greenstones Road, Redcar (19%) Asda, The Courts, Roseberry Road, Redcar (15%) Redcar Town Centre (12%) Tesco, West Dyke Road, Redcar (11%)
Guisborough	Morrisons, Westgate, Guisborough (28%) Sainsbury's Local, The Avenue, Guisborough (13%)
Marske and Saltburn	Co-op, High Street, Marske-By-The-Sea (25%) Morrisons, Lord Street, Redcar (10%) Sainsbury's, Milton Street, Saltburn-By-The-Sea (10%)
Rural East	Asda, Pheasant Fields Lane, Skelton (34%) Co-op, High Street, Loftus (17%) Co-op, High Street, Skelton (11%)

Zone	Top up Food Shopping Destinations
Eston	Tesco Extra, Low Grange District Centre, Trunk Road, Middlesbrough (14%) Asda, North Street, South Bank (10%) Tesco Express, High Street, Normanby (9%)

Source: NEMS Household Survey August 2016

4.13 The results of this question show that respondents use a combination of stores of varying sizes to undertake their top-up food shopping. However, although patterns in the majority of the Borough are more dispersed, the new Asda store at Skelton and Morrisons in Guisborough attract a significant proportion of top-up spend within their respective zones.

Non-Food Shopping

4.14 **Question 10** of the survey asked households where they buy most of their non-food shopping, in overall terms, and the results of this question are illustrated in Table 4.4 below.

Table 4.4 Non Food Shopping Destinations

Zone	Non Food Shopping Destinations (2016)	Non Food Shopping Destinations (2005)
Redcar	Redcar Town Centre (45%) Middlesbrough Town Centre (23%) Teesside Retail Park (10%)	Redcar Town Centre (62%) Middlesbrough Town Centre (27%)
Guisborough	Guisborough Town Centre (25%) Middlesbrough Town Centre (17%) Teesside Retail Park, Stockton-on-Tees (15%) Cleveland Retail Park(12%) Redcar Town Centre (8%)	Guisborough Town Centre (37%) Middlesbrough Town Centre (35%) Redcar Town Centre (12%) Teesside Retail Park, Stockton-on-Tees (5%)
Marske and Saltburn	Middlesbrough Town Centre (26%) Redcar Town Centre (24%) Cleveland Retail Park (Skippers Lane)(10%)	Redcar Town Centre (43%) Middlesbrough Town Centre (39%)
Rural East	Teesside Retail Park, Stockton-on-Tees (21%) Middlesbrough Town Centre (20%) Redcar Town Centre (18%) Internet (14%)	Redcar Town Centre (46%) Middlesbrough Town Centre (32%) Guisborough (4%)
Eston	Middlesbrough Town Centre (52%)	Middlesbrough Town Centre

Zone	Non Food Shopping Destinations (2016)	Non Food Shopping Destinations (2005)
	Cleveland Retail Park (Skippers Lane)(12%) Redcar Town Centre (10%)	(72%) Redcar Town Centre (10%) South Bank (5%) Eston (3%)

Source: NEMS Household Survey August 2016

4.15 Whilst Redcar Town Centre and Guisborough District Centre remain the most popular destination for non-food in their zones (at 45% and 25% of respondents respectively), these figures have decreased significantly since 2005. This reflects a range of factors, although particularly the strengthening of major retail park destinations in the sub-region, such as Cleveland Retail Park and Teesside Park (in Stockton-on-Tees Borough).

4.16 As previously, Middlesbrough was also identified as the most popular destination for non-food shopping in the Eston zone – albeit to a lesser extent than in 2005 – and the second most popular destination in the Redcar, Guisborough and Rural East zones. Whilst the market share of Middlesbrough has also reduced since 2005 – largely as a result of Teesside Park's increase in popularity – there continues to be a significant proportion of non-food spending flowing there from parts of the Borough to the east, and the other side, of Redcar.

4.17 **Question 11** asked households what the main reason was for their choice of non-food shopping destination. Overall, the most frequent responses were because it was near to home (30%) and generally convenient (13%), along with the choice of non-food goods available (14%). The popularity of the first two answers would appear to contradict some of the results of Question 10, which suggests that residents in parts of the Borough are travelling significant distances to undertake non-food shopping. However, they also highlight the potential to capture some of the spending which is currently leaking out of the area, with improvements to the existing range and choice of provision in the Borough.

4.18 **Question 12** asked respondents how they usually travelled to the destination mentioned in Question 10. The responses show that, whilst slightly lower than for main food trips, the vast majority (around 75%) of households travel to undertake their non-food shopping in a car or van to carry out their non-food shopping, with 14% using a bus/coach and 6% walking. The main differences from this overall trend were, again, in Eston and Guisborough, where 25% and 14% used the bus and walked respectively, whilst a much higher proportion travel by car in the Rural East zone – unsurprisingly, given the different geographic and socio-economic characteristics of these areas.

4.19 Table 4.5, below, illustrates the results of **Questions 13-20**, which asked respondents where they last bought different types of non-food goods.

Table 4.5 Results of Questions on Types of Non-Food Shopping

Zone	Clothing and Footwear	Furniture, Soft Furnishings and Floor Coverings	Fridges and Kitchen Items	TVs, Hi-fis and Computers
Redcar	Middlesbrough Town Centre (32%) Redcar Town Centre (21%) Teesside Retail Park, Stockton-on-Tees (14%) Internet (11%)	Redcar Town Centre (24%) Portrack Lane Retail Park, Portrack Lane, Stockton (14%) Cleveland Retail Park (Skippers Lane)(11%) Internet (11%)	Internet (33%) Cleveland Retail Park (Skippers Lane)(20%) Redcar Town Centre (18%) Teesside Retail Park, Stockton-on-Tees (15%)	Teesside Retail Park, Stockton-on-Tees (25%) Internet (23%) Cleveland Retail Park (Skippers Lane)(15%) Redcar Town Centre (14%)
Guisborough	Middlesbrough Town Centre (33%) Guisborough Town Centre (14%) Teesside Retail Park, Stockton-on-Tees (12%) Internet (11%)	Portrack Lane Retail Park, Portrack Lane, Stockton (15%) Guisborough Town Centre (14%) Internet (11%)	Cleveland Retail Park (Skippers Lane)(27%) Internet (25%) Teesside Retail Park (16%)	Cleveland Retail Park (Skippers Lane)(25%) Internet (23%) Teesside Retail Park, Stockton-on-Tees (18%)
Marske and Saltburn	Middlesbrough Town Centre (34%) Redcar Town Centre (14%) Teesside Retail Park (14%)	Portrack Lane Retail Park, Portrack Lane, Stockton (18%) Redcar Town Centre (14%) Teesside Retail Park, Stockton-on-Tees (13%)	Internet (26%) Cleveland Retail Park (Skippers Lane)(18%) Redcar Town Centre (16%) Teesside Retail Park, Stockton-on-Tees (16%)	Cleveland Retail Park (Skippers Lane)(26%) Teesside Retail Park, Stockton-on-Tees (18%) Internet (17%) Redcar Town Centre (10%)
Rural East	Middlesbrough Town Centre (24%) Internet (16%) Redcar Town Centre (13%) Teesside Retail Park, Stockton-on-Tees (12%)	Portrack Lane Retail Park, Portrack Lane, Stockton (14%) Teesside Retail Park, Stockton-on-Tees (12%) Internet (12%)	Internet (27%) Teesside Retail Park, Stockton-on-Tees (21%) Cleveland Retail Park (Skippers Lane)(17%)	Teesside Retail Park, Stockton-on-Tees (30%) Internet (30%) Cleveland Retail Park (Skippers Lane)(20%)
Eston	Middlesbrough Town Centre (50%)	Middlesbrough Town Centre (12%) Portrack Lane Retail Park, Portrack Lane, Stockton (10%)	Cleveland Retail Park (Skippers Lane)(38%) Teesside Retail Park, Stockton-on-Tees (14%) Internet (10%)	Cleveland Retail Park (Skippers Lane)(33%) Teesside Retail Park, Stockton-on-Tees (14%)

Source: NEMS Household Survey August 2016

Table 4.6 Results of Questions on Types of Non-Food Shopping

Zone	DIY and Hardware	Garden Items	Health, Beauty and Chemist Items	Other Non-Food Items
Redcar	Cleveland Retail Park (Skippers Lane)(50%) Redcar Town Centre (14%)	Cleveland Retail Park (Skippers Lane)(37%) Redcar Town Centre (21%)	Redcar Town Centre (71%)	Internet (35%) Redcar Town Centre (20%) Middlesbrough Town Centre (%)
Guisborough	Cleveland Retail Park (Skippers Lane)(37%) Guisborough Town Centre (19%)	Cleveland Retail Park (Skippers Lane)(25%) Guisborough Town Centre (25%)	Guisborough Town Centre (73%)	Internet (26%) Guisborough (22%)
Marske and Saltburn	Cleveland Retail Park (Skippers Lane)(48%)	Cleveland Retail Park (Skippers Lane)(33%) Marske District Centre (17%)	Redcar Town Centre (28%) Marske District Centre (23%) Saltburn District Centre (13%)	Internet (37%) Redcar Town Centre (14%) Middlesbrough Town Centre (10%)
Rural East	Cleveland Retail Park (Skippers Lane)(40%)	Cleveland Retail Park (Skippers Lane)(28%	Guisborough Town Centre (15%) Redcar Town Centre (14%) Saltburn District Centre (10%)	Internet (47%)
Eston	Cleveland Retail Park (Skippers Lane)(52%)	Cleveland Retail Park (Skippers Lane)(39%)	Middlesbrough Town Centre (27%) Cleveland Retail Park (Skippers Lane)(22%)	Internet (21%) Middlesbrough Town Centre (18%)

Source: NEMS Household Survey August 2016

4.20 The above results can be summarised as follows:

- the most popular destination for clothing and footwear across all sectors was Middlesbrough, with Redcar only popular to any significant extent in northern and eastern parts of the Borough. Teesside Shopping Park (in Stockton-on-Tees Borough) has an influence across the Borough as a whole, with a significant proportion of residents across the study area (10% overall) now using the internet for clothing and footwear shopping;
- whilst Redcar Town Centre attracted the most trips in the town itself, retail warehousing at Portrack Lane was the most popular destination for furniture, soft furnishings and floor coverings shopping in Guisborough, Marske, Saltburn and the Rural East – having increased its market share in this sector, despite its location in Stockton. Middlesbrough Town Centre, Teesside Park and Cleveland Retail Park also attract trips from certain parts of the Borough;
- the two main destinations for domestic electrical appliances are Cleveland Retail Park and Teesside Park, with Redcar only attracting a significant proportion of spending from the Redcar and Markse and Saltburn zones. The internet also attracts a significant proportion of spending, ranging between 25% and 33% in the four zones excluding Eston, which was much lower at 10%;
- Teesside Retail Park and Cleveland Retail Park are the two most popular destinations for other electrical goods, although a significant proportion of purchases (around 20% across the study area as a whole) are, again, undertaken on the internet. Redcar Town Centre attracts around 14% and 10% of trips from the Redcar and Marske and Saltburn zones respectively, but much smaller proportions from the other zones within the Borough;
- Cleveland Retail Park is by far the most popular destination for purchasing DIY and hardware goods in every zone – and indeed has significantly increased its market share since 2005 in all zones except for Eston - reflecting the existence of a large (9,500 sqm gross) B&Q store there. Guisborough Town Centre and Redcar Town Centre also play a secondary role in their respective zones;
- as with DIY/hardware products, Cleveland Retail Park is by far the most popular destination for purchasing garden items, although Redcar, Guisborough and Marske all also attract a significant proportion of shoppers from within their respective zones (21%, 25% and 17% respectively);

- the surveys illustrate the more localised nature of shopping patterns for health/beauty products as, although the proportions have reduced slightly since 2005, Redcar and Guisborough Centres dominate the market in their respective zones, with around 70-73% of trips, and also attract trade from the Marske and Saltburn and Rural East zones. The vast majority of residents in Eston appear to be visiting Middlesbrough Town Centre or Cleveland Retail Park; and
- the most popular means of purchasing other non-food items for residents of all zones is the internet - having significantly increased in importance since the previous (2005) surveys. Redcar Town Centre, Guisborough District Centre and, beyond the Borough, Middlesbrough Town Centre meet needs to varying degrees across the Borough, although all have experienced a reduction in their market share since 2005.

Leisure Activities

4.21 **Question 21** asked respondents which leisure activities they or their families partake in, and the results are illustrated in Table 4.7 below.

Table 4.7 Leisure Activities

Leisure Activity	% of Respondents in Study Area (2016)	% of Respondents in Study Area (2005)
Restaurant	65%	71%
Pub / Bar	53%	61%
Cinema	45%	50%
Health & Fitness Club	20%	16% (Private) / 34% (Public)
Tenpin Bowling	13%	25%
Bingo	8%	17%
Nightclub	4%	16%

Source: NEMS Household Survey August 2016

4.22 The findings indicate that, across the whole study area, by far the most popular leisure activities are visiting restaurants (65%), public houses and bars (53%) and the cinema (45%). However, these percentages have all reduced slightly from the previous survey in 2005, as have the proportions of people going tenpin bowling, a bingo hall or nightclub. This could suggest that there is a decreasing demand for leisure activities in the study area although, alternatively, it may also highlight the need to enhance the existing range of provision.

Cinema Destinations

4.23 Table 4.8 below illustrates the most popular cinema facilities with respondents and their families across the different zones (**Question 22**).

Table 4.8 Cinema Destinations

Zone	Cinema Destinations
Redcar	Regent Cinema, Redcar (41%) Cineworld, Marton Road, Middlesbrough (37%) Showcase, Teesside Leisure Park (21%)
Guisborough	Cineworld, Marton Road, Middlesbrough (65%) Showcase, Teessside Leisure Park (26%)
Marske and Saltburn	Cineworld, Marton Road, Middlesbrough (47%) Regent Cinema, Redcar (25%) Showcase, Teessside Leisure Park (25%)
Rural East	Cineworld, Marton Road, Middlesbrough (62%) Showcase, Teessside Leisure Park (28%)
Eston	Cineworld, Marton Road, Middlesbrough (67%) Showcase, Teessside Leisure Park (15%)

Source: NEMS Household Survey August 2016

4.24 Cineworld in Middlesbrough – which lies in relatively close proximity to the Borough to the west - is the most popular cinema destination in all parts of the Borough except for the Redcar zone, where the Regent Cinema attracts 41% of trips. The latter represents a significant increase from 12% in 2005, which could reflect investment made in the building, including new signage, a new roof and other external improvements, in 2014.

4.25 The Showcase Cinema at Teesside Leisure Park (in Stockton) also attracts between 15% and 28% of trips from each zone. Although the existing Regent facility in Redcar performs an important role in serving and attracting visitors to the town centre, these results would suggest that there is significant scope to claw-back cinema spending into the Borough through new provision, subject to commercial demand.

Public House/Bars and Restaurants Destinations

4.26 **Questions 23 and 24** sought to establish the locations where respondents last visited a public house/bar of restaurant.

Table 4.9 : Public House/ Bar Destinations

Zone	Public House/Bar Destinations	Restaurant Destinations
Redcar	Redcar (79%)	Redcar (40%) Saltburn (17%) Middlesbrough (15%)
Guisborough	Guisborough (76%) Saltburn (9%)	Guisborough (61%) Middlesbrough (6%)

Zone	Public House/Bar Destinations	Restaurant Destinations
	Middlesbrough (7%)	Saltburn (6%)
Marske and Saltburn	Marske (35%) Saltburn (32%) Redcar (22%)	Salburn (37%) Redcar (21%)
Rural East	Skelton (18%) Redcar (16%) Guisborough (13%) Scarborough (13%) Loftus (11%)	Guisborough (19%) Scarborough (19%)
Eston	Eston (32%) Middlesbrough (29%)	Middlesbrough (39%)

Source: NEMS Household Survey August 2016

4.27 The above table illustrates that Redcar and Guisborough are the most popular destinations for both pubs/bars and restaurants in their respective zones, with Marske, Saltburn and Redcar all being popular in the Marske and Saltburn zone. However, patterns are more dispersed in the Rural East, particularly for pubs/bars, with most people in this area using restaurants in Guisborough and Scarborough, reflecting the more limited range of facilities in this zone. Whilst the most popular destination for pubs/bars in Eston was Eston itself, Middlesbrough is more popular for restaurants – reflecting the limited range of provision in this zone.

Night Club / Live Music Venues

4.28 As set out above, the majority of respondents indicated that they do not visit night clubs or live music venues. However, of those that do, the results to **Question 25** indicated that Middlesbrough and Redcar are the most popular destinations (49% and 30% of respondents respectively), with much smaller proportions visiting Yarm (9%), Whitby (6%) and, even further afield, Richmond (3%).

Bingo

4.29 **Question 26** relates to the main bingo destinations used by residents of the Borough. As with night clubs and live music venues, the survey results indicate that the majority of people do not visit bingo halls. However, of those that do, the majority indicated that they visit either Gala, at Longlands Road in Middlesbrough (26%), Mecca in Stockton (15%) or Beacon Bingo, on Esplanade, in Redcar (12%).

4.30 It should be noted the proportion of respondents visiting these facilities may be higher than set out above, as a number of people simply indicated that they travelled to Middlesbrough, Redcar and Stockton for such purposes. Notwithstanding this, however, based on current usage patterns, there may be scope to retain more bingo trips within the Borough in future through enhanced new provision.

Health Clubs / Gyms

4.31 **Question 27** asked which health clubs/gyms destinations were last used by respondents/their families, and the results are illustrated in the table below.

Table 4.10 Health Club / Gym Destinations

Primary Health and Fitness Destinations	% of Respondents in Study Area
Redcar	23%
Middlesbrough	23%
Saltburn	12%
Guisborough	9%
Stokesley	9%
Loftus	7%
Eston	5%
Marske	2%
Stockton	2%

Source: NEMS Household Survey August 2016

4.32 Across the study area as a whole, whilst Redcar is the most popular destination for health and fitness clubs, facilities Middlesbrough also attract a significant proportion of residents. Whilst there was variation across the different zones, respondents generally stated that they visited gyms within those zones.

Ten Pin Bowling

4.33 **Question 28** sought to establish which locations respondents visit to go ten-pin bowling. Across the study area, the results show that the vast majority of people (90%) visit Hollywood Bowl at Teesside Leisure Park, with only very small proportions using other facilities in surrounding areas further afield. Whilst these results highlight the potential to bring forward new provision in the Borough, as with any new cinemas, this is likely to be subject to commercial demand – particularly given the scale of catchment likely to be required.

Electronic Home Shopping

4.34 **Questions 29, 30 and 31** relate to electronic/home/internet shopping more generally, including what items currently purchase by this method and what they may buy in future.

4.35 The results of Question 29 indicate that 60% of respondents use internet shopping, with just 1% using tele-shopping and 4% using both. Question 30 indicates that the frequently purchased items online are:

- clothes / footwear (41%);
- books (34%);
- CDs / music / videos (29%);
- small electrical items (24%);
- major electrical items (21%); and
- gifts (11%).

4.36 Question 31 also indicates that the above items are also those which respondents were most likely to purchase in future.

On-Street Surveys

4.37 In addition to the household telephone survey, 150 on-street surveys were undertaken in August 2016 in Redcar Town Centre by NEMS Market Research. These surveys were undertaken in order to obtain an up to date picture in relation to the role that the centre currently plays. In particular, it provided information on, inter alia, the reasons for people visiting the centre, how long they spend there, how much money they spend, how they get there and their main likes/dislikes about the centre.

4.38 In order to obtain the views of a cross-section of visitors, including not only local residents but also tourists and other visitors, the surveys were undertaken in a variety of locations across the town centre. A summary of the results of this survey are provided below, with comparisons made to the results of a similar survey undertaken in October 2005 as part of a previous Strategic Retail, Leisure and Office Study (2006).

Main Purpose of Visit

4.39 **Question no. 1** asked sought to establish the main purpose of respondents' visit to Redcar Town Centre and the results are set out in Table 4.11 below.

Table 4.11 Main Purpose of Visit to the Centre

Reason for Visit	% Respondents (2016)	% Respondents (2005)
Shopping for food only	28%	20%
Shopping for non-food goods only	14%	24%
To have a walk / stroll around	13%	12%
Shopping for both food & non-food items	12%	18%

To use services e.g. bank, post office, hairdresser	11%	2%
Work / business purposes	10%	9%
Tourism, e.g. holiday, day trip	9%	2%
To go to the beach / seafront	8%	3%
Window shopping	5%	13%
Social / leisure reason e.g. meeting friends, going to gym	4%	3%
To visit the Market	2%	1%
To visit a restaurant / café / public house	1%	1%
Healthcare e.g. doctor, dentist, optician	1%	1%
For educational purposes (e.g. school/college)	0%	2%

Source: NEMS On-Street Survey August 2016

4.40 The results indicate that shopping is the main purpose of just over half of the respondents visits (54%), including that for food only (28%), non-food only (14%) and a combination of the two (12%). The other main reasons given included to have a walk (13%), to use services or for work purposes (both around 10%). Only small proportions of those interviewed were visiting Redcar to visit the market (2%), to visit a restaurant, café or public house (both 1%).

4.41 These results indicate that the role of the centre in meeting food shopping needs has increased, or at least been maintained, since 2005, notwithstanding a drop in the market share achieved by Morrisons at Regent Walk. However, the role performed by the centre in meeting non-food shopping needs has declined since the previous (2006) study was undertaken.

4.42 The survey results also indicate that its role as a tourism or visitor destination has increased, with around 9% of respondents citing this as their main reason for visiting (compared to less than 2% in 2005). Whilst the results may have been influenced by the location of the interviewers and/or the weather, this may also reflect the investment made in public realm along the seafront, along with other developments there, such as the Beacon and Palace Hub.

4.43 **Question 1 (a)** indicated that, of those who were visiting for tourism purposes, 85% were on a day visit, with 15% staying in the area. The increase in the proportion of people visiting the centre for tourism purposes is clearly positive.

However, the fact that only small proportions were staying or visiting eating or drinking facilities indicates that there is potential to increase the amount of money spent by these visitors in the centre as well as, more generally, improve the range and quality of visitor accommodation.

4.44 **Question 2** of the survey asked respondents who were shopping for food or non-food items if they would be visiting Morrisons (Lord Street) or Tesco (West Dyke Road) during their visit. Around 55% said they would be visiting Morrisons, reflecting its role as an anchor store for the town centre, with 9% indicating that they would be visiting Tesco (which is located to the south of, and outwith, the centre).

4.45 **Question 3** of the survey asked those who were not shopping for food or non-food items if they intended to do any shopping in Redcar that day. Around 51% of respondents said yes, whereas 28% said no and 21% did not know.

4.46 Table 4.12 below sets out the results of **Question 4**, which sought to establish the intended purchases of visitors to Redcar Town Centre.

Table 4.12 Reason for Visit

Reason for visit	% of Respondents
Food and Groceries	70%
Clothing / Footwear	17%
Health / Beauty / Chemist items	8%
DIY / Hardware / Gardening	7%
Newspapers / Magazines	6%
Furniture / Carpets / Soft Furnishings	4%
Books / CDs / Videos / DVDs / Toys / Hobbies	4%
(Don’t Know)	4%
Other Electrical Goods (TV, Hi-Fi, etc)	4%
Other Household Goods	4%
Other (PLEASE WRITE IN)	3%
Confectionery / Tobacco	1%
Domestic Electrical goods	1%
Gifts / Jewellery / China and Glass	1%
Cards	1%
Flowers	1%

Source: NEMS On-Street Survey August 2016

NB: Respondents could provide more than one answer

4.47 The results illustrate that, of those who indicated that they would be shopping during their visit, the vast majority of (70%) said that they would be purchasing food and groceries. Around 50% indicated that they would be purchasing non-food items, with clothing and footwear (17%) being the most popular category of goods.

4.48 The proportion of respondents who were shopping for food and groceries has increased since 2005 (from 59%). However, the proportion shopping for clothing or footwear has decreased from 28%. This could be indicative of a decline in the range and quality of stores in the clothing/footwear sector as well as, more generally, a shift in the balance of the centre towards food shopping and away from non-food, as more people shop for the latter goods elsewhere.

Expenditure During Visit

4.49 The results of **Question 5**, which asked respondents visiting the centre to shop how much money they intended to spend on food/groceries, non-food goods and eating/drinking out during their visit, are shown in Table 4.13 below.

Table 4.13 Food and Grocery Expenditure During Visit

Retail Expenditure	Food/Groceries (% of Respondents)	Non-Food Items (% of Respondents)	Eating/Drinking (% of Respondents)
Nothing	21%	42%	54%
Less than £5.00	9%	8%	21%
£5.01-£10.00	18%	13%	9%
£10.01-£20.00	16%	13%	4%
£20.01-£30.00	10%	5%	2%
£30.01-£40.00	4%	3%	0%
£40.01-£50.00	5%	3%	0%
£50.01-£75.00	7%	2%	0%
£75.01-£100.00	1%	0%	0%
More than £100.00	0%	0%	0%
(Don't know)	10%	11%	10%
Average Spend	**£16.75**	**£8.66**	**£2.52**

Source: NEMS On-Street Survey August 2016

4.50 The results indicate that the average amount of money intended to be spent on food and groceries has increased slightly from £13.40 in 2005 to £16.75 (although inflation will account for some of the difference). They also indicate that 21% of visitors did not intend to spend any money on food/groceries during their visit to the Centre, having reduced from 31% in 2005.

4.51 In relation to non-food items, 42% of respondents said that they would spend nothing during their visit, which is an increase from 26% in 2005. Furthermore, the average spend has almost halved since then, from £15.10 to £8.66. This appears to be further evidence of a decline in non-food shopping, and particularly its economic contribution to the centre, over the last ten years or so.

4.52 54% of respondents indicated that they would spend nothing on eating/drinking out during their visit, and a further 21% of respondents said they would spend under £5. However; the average spend has increased slightly from £1.72 to £2.52.

Frequency and Duration of Visit

4.53 **Question 6** asked visitors how often they visit Redcar Town Centre and the results are set out below.

Table 4.14 Frequency of visit

Frequency of Visit	% of Respondents
Everyday	25%
2-3 Times a Week	33%
Once a Week	21%
Once a Fortnight	9%
Once a Month	5%
Less than Once a Mo0nth	5%
First Time Today	1%
(Don't Know)	1%

Source: NEMS On-Street Survey August 2016

4.54 The highest proportion of visitors (33%) indicated that they visited Redcar 2-3 times a week. Approximately 25% of people said that they visit the centre every day, which is a slight increase from 19% in 2005, although both figures are likely to be influenced by the numbers of people working in Redcar Town Centre.

4.55 **Question 7** asked respondents how they travelled to Redcar Town Centre. The results of this question were similar to the 2005 survey and illustrated that visitors use a range of means of transport to visit the centre. Whilst the most significant proportion (43%) use a car (as driver or passenger), significant proportions also take the bus (27%) and walk (22%). This reflects a range of factors, including, inter alia, the relatively localised nature of the town centre's catchment, as well as the relative ease of accessibility via non-car modes. The results of **Question 8** indicated that, of those who came via car, 91% found it either very easy or easy to find a car parking space.

4.56 **Question 10** asked visitors to Redcar Town Centre how long they intended to spend there.

Table 4.15 Length of Visit

Length of Visit	% of Respondents
0-15 Minutes	1%
16-30 Minutes	7%
31 Minutes – 1 Hour	21%
More than 1 hour, but less than 1½ hours	14%
More than 1½ hours, but less than 2 hours	18%
More than 2 hours, but less than 3 hours	12%

3 hours or more	23%
(Don't know)	4%

Source: NEMS On-Street Survey August 2016

4.57 Around 62% of visitors indicated that they intended to spend up to 2 hours in the town centre, with around half of these (29%) staying for up to an hour, and the most significant proportion (21%) spending between 31 minutes – 1 hour in the centre. Around 35% indicated that they would spend more than two hours in the centre, although this may reflect the high proportion of visitors who also undertake a main food/grocery shop in Morrisons at Regents Walk as part of their visit to the centre.

Other Shopping Destinations

4.58 Respondents were also asked, in **Question 9**, which other shopping centres or towns they used regularly (i.e. at least once a month). Those centres/destinations which scored above 1% are set out in Table 4.16 below.

Table 4.16 Other Shopping destinations

Other Shopping Destination	% of Respondents (2016)	% of Respondents (2005)
Middlesbrough Town Centre	45%	51%
(No others)	24%	27%
Teesside Park, Stockton on Tees	13%	4%
Guisborough	11%	3%
Saltburn-by-the-Sea	8%	2%
Cleveland Retail Park (Skippers Lane)	6%	3%
Darlington Town Centre	5%	7%
Stockton-on-Tees Town Centre	5%	5%
Skelton	3%	0%
Whitby	3%	2%
Hartlepool Town Centre	2%	3%
Marske-by-the-Sea	2%	1%
Northallerton	2%	1%
York City Centre	2%	1%
Durham City Centre	1%	2%

Source: NEMS On-Street Survey August 2016

4.59 The most frequently visited alternative destination mentioned by respondents was Middlesbrough Town Centre (45%), with 24% of those asked said they did not visit other centres regularly. Of other popular alternative destinations, Teesside Park appears to have increased in popularity since 2005, as have

Guisborough, Saltburn-by-the-Sea and Cleveland Retail Park. The results to this question highlight the range of destinations against which Redcar needs to successfully compete, in order to maintain – and, over time, increase - its market share of local retail spending.

Visitor Perceptions

4.60 Respondents were asked, in **Questions 11 and 12**, what they liked and disliked about the centre. The results to both questions are set out in Table 4.17 below.

Table 4.17 Perceptions of Redcar Town Centre

Issue	% of Respondents Like	% of Respondents Dislike
Nothing in Particular	25%	31%
Close to Home / Easy To Get To	25%	1%
Choice of Shops and Services	13%	14%
Choice of Pubs/Bars and Restaurants	3%	0%
Plenty of Parking	3%	2%
Cheap Car Parking	1%	1%
Accessibility by Public Transport	1%	3%
Specialist Shops	3%	4%
Quality of Shops	4%	0%
Quality of Pubs/Bars and Restaurants	1%	3%
General Character / Atmosphere	11%	0%
Attractive Environment	6%	0%
Beach / Seafront	22%	4%
Other	0%	10%
Cheap Prices	1%	3%
Easy to Walk Around	2%	2%
Everything	1%	3%
Familiarity	1%	0%
Good Reputation	1%	1%
It's Compact	3%	1%
It's English	1%	1%
It's Pedestrianised	2%	5%
The History	1%	3%
Don’t Know	3%	13%

Source: NEMS On-Street Survey August 2016

4.61 A significant proportion of respondents (25%) indicated that they liked 'Nothing in particular' about Redcar Town Centre, which is slightly less than the 33% in 2005. 25% also said that they liked the fact that that the town centre was close to home, and 22% said they liked the beach/sea front, a significant increase from 7% in 2005 – which may again reflect the public realm enhancements that have taken place along the sea front (although also potentially the timing of the surveys).

4.62 Whilst around 13% of respondents indicated that they liked the choice of shops available, a similar number (14%) said they disliked the choice of shops. Only 3% indicated that they liked the choice of pubs/bars/restaurants.

4.63 Having established the likes and dislikes of respondents, visitors to the town centre were asked in **Question 13** to name up to three improvements which could be made in order to encourage them to visit more often.

Table 4.18 Suggested Improvements

Improvement	% of Respondents
Refurbish / improve existing shopping facilities	21%
(Nothing in particular)	21%
(No opinion)	13%
Develop new shopping facilities	10%
Improve choice of multiple shops	5%
Clean shopping streets	5%
Improve range of independent / specialist shops	3%
Improve public transport links	2%
Cleaner beach	2%
Attract larger retailers	1%
Other new shop - Primark	1%
More pedestrianisation	1%
More parking spaces for disabled	1%
Improve policing / other security measures	1%

Source: NEMS On-Street Survey August 2016

4.64 Around 21% of respondents said they would improve nothing in particular, and 13% had no specific views on this subject. However, a significant proportion (around 31%) of respondents indicated that they would like to see shopping facilities improved/refurbished or new ones developed – reflecting a wider view on the quality of the non-food shopping offer available within the centre. Around 5% of respondents said they would like to improve the choice of multiple shops and 5% would like to see cleaner shopping streets.

Leisure

4.65 In **Question 14**, visitors were asked if they ever came to Redcar Town Centre for leisure purposes during the day or evening. In response to this question:

- around 61% of people indicated that they came to the town centre for leisure purposes during the day; and
- only around a quarter (27%) said they came to the centre for leisure purposes during the evening.

4.66 The proportion of people who indicated that they came to the centre during the evening is low and similar to the previous (2005) survey. There would therefore appear to be an outstanding need to enhance the range and quality of leisure provision aimed at the leisure economy.

4.67 **Question 15** asked those respondents who indicated that they visited Redcar Town Centre for leisure purposes what they do during their visit.

Table 4.19 Leisure Purposes During Visit

Leisure Purpose	% of Respondents (2016)	% of Respondents (2005)
Visit beach /seafront	51%	13%
Walk about / look around	31%	18%
Pubs / bars	29%	62%
Restaurants	14%	36%
Sports / fitness facilities	7%	9%
Cinema	6%	4%
Services (e.g. cash tills)	5%	1%
Bingo	4%	4%
Takeaway food	3%	6%
Other community facilities (e.g. library, community centre)	3%	1%
Don't know	2%	1%
Nightclubs	1%	3%
Bowling alleys	1%	3%
Visit racecourse	1%	3%

Source: NEMS On-Street Survey August 2016

4.68 By far the most popular leisure activity in Redcar Town Centre is visiting the beach/seafront, followed by people having a 'walk about/look around'. The popularity of both of these activities appears to have increased since the previous survey, perhaps reflecting the recent investment which has been made along the seafront in Redcar.

4.69 However, neither of these activities results in any significant level of spending being made in businesses the town centre. In terms of activities which do have a direct economic impact, the proportion of respondents who indicated that they were visiting pubs/bars and restaurants were lower, at 29% and 14%, with both having declined significantly since the previous survey. There is, therefore, scope to increase the amount of money spent by visitors on eating and drinking in the centre.

4.70 **Question 16** asked what respondents liked about leisure facilities in the town centre. The results are summarised in table 4.20 below.

Table 4.20 Likes about Leisure Facilities

Issue	% of Respondents Liked
Nothing in particular	43%
Don’t know	18%
Close to home / easy to get to	17%
Good quality of pubs / bars / nightclubs	11%
Other	6%
Good choice of restaurants	8%
Good cinema	4%

Source: NEMS On-Street Survey August 2016

4.71 Around 43% of interviewees indicated that there was nothing in particular they liked about leisure facilities in the town centre. The most popular reason for people liking the centre for leisure purposes was its proximity to home/as of access, with only relatively small proportions citing the quality and choice of pubs / bars / nightclubs and restaurants. Again, this highlights the opportunity to enhance the existing range of food and beverage provision serving the centre and increase the amount of money spent there.

4.72 Respondents were also asked, in **Question 17**, what they disliked about the leisure facilities in Redcar Town Centre.

Table 4.21 Dislikes about Leisure Facilities

Issue	% of Respondents Disliked
Nothing in particular	53%
(Don’t know)	17%
Unsafe / poor security / dangerous	8%
Poor choice of facilities	7%
Late night drinking	5%
Too expensive	4%
Too busy	4%
People standing outside smoking	1%
Poor public transport	1%
Too quiet	0%
Other	0%

Source: NEMS On-Street Survey August 2016

4.73 As with Question 16, over half of those visiting for leisure purposes indicated that there was nothing in particular they disliked about such facilities in Redcar Town Centre. Of those that did express a view, poor security/safety, a poor choice of facilities were both mentioned. Despite pubs and bars being the most liked leisure option, late night drinking was also disliked by 5% of visitors – reflecting that pubs/bars can represent both a problem and opportunity for the centre.

Business Surveys

4.74 In addition to the household telephone and on-street shopper surveys, an online survey of existing businesses in Redcar Town Centre was undertaken. This was publicised by a mailshot of all businesses in the centre, as well as via the Council's own social media channels. Business occupiers were asked to provide information on, inter alia:

- The nature of the business;
- The length of trading;
- Their customer base;
- Business promotion and reasons for success (including any online presence);
- Future property requirements and plans to change their business;
- Trading performance;
- Any factors constraining the business;
- The centre's perceived market position and shopping/service mix;
- Strengths and weaknesses of the town; and
- Perceived planning issues for the future of the centre.

4.75 The survey resulted in 20 completed questionnaires (5% of the total number of businesses on the Council's database - 412). This is a low response rate and the weight which can be attached to the findings of the survey should be viewed in this context. It also impacts upon the extent to which key trends can be identified amongst the results.

4.76 Notwithstanding this, however, a summary of some of the trends and issues which were identified through those completed questionnaires is provided below:

- 16 of the 20 completed questionnaires (80%) were completed by independent businesses, and 14 (70%) had been in the centre, and indeed the same premises, for over 10 years;
- based on the survey, businesses obtain their trade from a range of sources, including not only local residents, but also those working in the town and tourists/day trippers from outside of the Redcar area;

- a range of methods are used to promote their businesses, with 13 (65%) using the internet for this purpose. Reasons given for why the businesses were successful or unique, including value for money (5 businesses/25%), personal service and quality of produce (both 3 businesses/15%);
- 15 businesses completing the survey (75%) had no plans for change their business premises, with only 3 (15%) intending to re-fit, extend or improve their property;
- businesses expressed mixed views on their current performance, with 6 (30%) saying it was good, 7 (35%) indicating it was poor and the remainder either saying it was satisfactory or not expressing an opinion. Views were similarly mixed on whether the businesses' performances had improved or declined over the last 12 months, and the likely performance over the next 12 months;
- the most significant issues considered to be constraining business performance included the availability/price of parking (12 businesses), lack of visitors/customers (10), the poor quality of the town centre environment (9) and the general economy (8);
- 90% of businesses completing the survey (18 no.) felt that Redcar's market position was too downmarket, and 65% (13 no.) felt that the centre would decline over the next 3 years, although there was no clear consensus on whether the current mix of national multiples and independent operators was about right; and
- the things most frequently mentioned by businesses are being important in planning for the future of the town centre included improving the appearance of the centre (80% of businesses), improving/providing cheaper parking (60%). Businesses also mentioned, inter alia, increasing the range of both national multiples and local/speciality retailers, improving the quality of shops/services and improving the quality of shop units.

4.77 Whilst, as set out above, the above results should be treated with a significant degree of caution, particularly given the small sample size, they nevertheless provide an indication as to some of the issues currently facing Redcar Town Centre.

Summary

4.78 The household telephone surveys, along with on-street surveys in Redcar Town Centre and online survey of businesses in the centre, provide a helpful indication as to current shopping and leisure patterns and preferences across the Borough. They also provide an overview of some of the key issues facing Redcar Town Centre in particular. The results of the household surveys have been used as part of the quantitative retail/leisure capacity assessments undertaken within this study, and all three surveys will inform the qualitative assessments of need and future planning policy recommendations.

4.79 On the basis of the analysis of the surveys, the key points arising are as follows:

- Whilst existing Asda and Morrisons stores in Redcar, South Bank and Guisborough are the most popular stores for main food shopping across the Borough, the popularity of the discount foodstore operators has increased significantly since 2005. New stores at Skelton (Asda) and Low Grange (Tesco Extra) have also emerged in their respective zones;
- Whilst remaining popular in the Redcar zone itself, Redcar Town Centre has declined in popularity across the Borough as a whole for non-food shopping, with significant proportions of residents bypassing or avoiding the centre to visit destinations such as Middlesbrough Town Centre, Cleveland Retail Park and, further afield, Teesside Park. The use of the internet for non-food shopping has also increased significantly since 2005;
- A significant proportion of residents are visiting leisure facilities in neighbouring authorities (including those at Teesside Park and elsewhere in Middlesbrough/Stockton) although the Regent Cinema attracts a good market share with Redcar zone itself and residents are generally using pubs/bars, restaurants and health clubs more closer to home;
- The food shopping and non-food shopping roles of Redcar Town Centre have increased and decreased since the 2005 survey, with the average amount spend by visitors on non-food goods in particular having declined by around a half;
- The majority of visitors to Redcar Town Centre visit at least once a week and significant proportions travel by bus/coach or walk in to the centre, indicating that the centre has a loyal local catchment area, although the vast majority of tourists in Redcar Town Centre are day visitors;
- Of those visiting for leisure purposes, the most popular activities were visiting the beach/seafront, having a walk/look around (both of which have increased in popularity, reflecting in part investment along the seafront);
- Whilst the proportions of respondents visiting the beach/seafront and having a walk/look around have actually increased, these visits have limited economic impact, highlighting an opportunity to increase spending in the town centre, particularly in pubs/bars and restaurants;
- The current performance of businesses in Redcar Town Centre appears to be mixed, although the majority felt that the centre would decline over the next three years, and the vast majority considered its market position to be too downmarket; and
- The areas identified as most need of improvement were the range/choice of shops, including both national multiples and independents, the environment/appearance of the centre and parking availability/price.

5.0 # Existing Retail and Leisure Hierarchy

Overview of Existing Centres

5.1 Policy CS18 of the Redcar & Cleveland Core Strategy (adopted 2007) defines the existing hierarchy of centres, as set out in Section 2.0 of this report. Draft Policy ED1 of the emerging Redcar & Cleveland Local Plan proposes to retain the existing hierarchy of centres in the Borough, including Redcar Town Centre, six District Centres and ten Local Centres.

5.2 The policy identifies Redcar Town Centre as 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.

5.3 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.

5.4 Due to the decline in the range of shops and services located within the former South Bank District Centre - which was focused on the northern end of Normanby Road and contained an Asda store to the north of the A66 – the Council identified the need for a new District Centre serving the area. The Core Strategy DPD therefore de-allocated this former centre from the retail hierarchy and allocated land for the development of a new District Centre located on land at Low Grange Farm, at the junction of Normanby Road with the A1085 Trunk Road. As part of this centre, a new Tesco Extra superstore has been developed, alongside a number of smaller units, a McDonalds drive-thru restaurant and a Marstons pub/restaurant.

5.5 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. A new replacement Local Centre has recently been developed at Roseberry Square, Redcar. 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.

5.6 Javelin's Venuescore database ranks the UK's top 2,500 plus retail destinations, including town centres, malls, retail warehouse parks and factory outlet centres. Each destination is given a weighted score for the number of multiple retailers present, and the score attached to each retailer is weighted depending on their overall impact on shopping patterns. The scores achieved by existing centres within the Borough, as well as other centres in the surrounding areas, are shown in Table 5.1.

Table 5.1 Venuescore Rankings of Main Centres in Redcar and Surrounding Area

Centre	UK Rank (2015)	Venuescore	Location Grade
Leeds	4	642	Major City
Newcastle Upon Tyne Centre	12	458	Major City
York	27	324	Major Regional
Middlesbrough	58	235	Major Regional
Darlington	60	233	Major Regional
Sunderland	88	201	Regional
Scarborough	123	175	Regional
Durham	150	156	Regional
Stockton–on-Tees	171	142	Sub-Regional
Hartlepool	219	116	Sub-Regional
Redcar	246	105	Sub-Regional
Northallerton	332	84	Sub-Regional
Guisborough	803	39	District
Whitby	1003	32	District

Source: Javelin Venuescore UK Shopping Index 2015/2016

5.7 Table 5.1, indicates that Redcar Town Centre is classed as a Sub-Regional Centre, below other Regional and Sub-Regional Centres in the Tees Valley, including not only Middlesbrough and Darlington, but also Stockton and Hartlepool. Guisborough District Centre is ranked as a District Centre, reflecting the more limited range of retailers it provides in comparison to these larger centres, although it is above Whitby.

5.8 A summary of existing levels of convenience and comparison retail floorspace in each of the main centres in the Borough is also provided in Table 5.2 below.

Table 5.2 Summary of Units and Retail Floorspace by Centre

Centre	Total Number of Convenience and Comparison Retail Uses	Convenience Goods Floorspace (sqm net)	Comparison Goods Floorspace (sqm net)	Total Retail Floorspace (sqm net)
Redcar	157	5,568	18,641	24,209
Guisborough	64	2,125	5,763	7,888
Low Grange	4	3,162	2,771	5,933
Saltburn	37	1,230	1,897	3,127
Marske	22	1,123	1,360	2,483
Loftus	20	868	638	1,506
Eston	16	477	544	1,021
Total	**320**	**14,553**	**31,614**	**46,167**

Source: RCBC Surveys (April 2016)

5.9 The above table helps to illustrate the significant difference between the quantum of retail floorspace provided in Redcar Town Centre and that within the six District Centres. Guisborough has the second highest (but a significantly lower) quantum of retail floorspace in the Borough, primarily as a result of the range comparison operators it contains.

5.10 Although it has the lowest number (four) of uses of all of the District Centres, the redeveloped Low Grange District Centre has the third highest amount of retail floorspace in the borough – reflecting the presence of a new Tesco Extra superstore there. Loftus and Eston District Centres contain around 1,500 – 1,000 sqm net floorspace. This reflects their more localised role in comparison to other centres, the generally smaller size of the units there and absence of any key anchor stores.

Centre Health Checks

Redcar Town Centre

Role and Function

5.11 As set out above, Redcar Town Centre is the main shopping Centre in Redcar and 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 – as evidenced by the on-street survey results - it contains the largest number and broadest range of commercial uses and 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 5.1 High Street, Redcar Town Centre

5.12 The centre is focused around the High Street which runs from east to west through the Town Centre, parallel to the coastline. The western half of the High Street is pedestrianised and comprises the Primary Shopping area (PSA), as defined in the adopted Local Plan. The Regent Walk outdoor shopping mall, which also forms part of the PSA, provides a link through from High Street to the existing Morrisons superstore at Lord Street. The PSA contains a range of national multiple retailers, although there is also a market held on High Street every Friday.

5.13 The eastern end of the High Street is open to vehicular traffic and is identified on the Local Plan Proposals Map as a Late Opening Zone – which also includes parts of Esplanade, West Terrace and Station Road. As such, whilst it also contains other retail and service uses, it comprises a significant number of food and drink uses. 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 5.2 Station Road, Redcar Town Centre

Mix of Uses

5.14 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 5.3 Use Summary Table - Redcar Town Centre

Use Type	Number of Units 2016	Percentage of Units 2016	Number of Units 2005	Percentage of Units 2005
Convenience Retail	25	7.8%	28	8.5%
Comparison Retail	127	39.6%	158	48.0%
Service[1]	119	37.1%	108	32.9%
Miscellaneous	1	0.3%	2	0.6%
Vacant	49	15.3%	33	10.0%
Total	**321**	**100.0%**	**329**	**100.0%**

Source: RCBC Surveys, April 2016

5.15 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 mentioned above, as well as Farmfoods, Iceland and Heron stores. There are also a range of smaller specialist uses, such as a butcher, greengrocer, bakery and fishmonger.

[1] Service uses include those within Class A1, Class A2, Class A3 and Class A5, as well as those classed as Sui Generis (e.g. beauty salons)

5.16 Whilst the proportion of comparison goods retailers (40%) has decreased since 2005, it remains above the national average (37%). In this context, Table 4.4 provides a breakdown of such uses in the centre by the different goods categories identified by Goad.

Table 5.4 Redcar Town Centre: Breakdown of Comparison Shop Units

Type of Use	Number of Units in Redcar Town Centre 2016	% of comparison uses in Redcar Town Centre 2016	% of comparison uses in Redcar Town Centre 2005	% of units in Great Britain
Clothing and footwear	21	16.5%	18.7	25.1
Furniture, carpets and textiles	17	13.4%	12.3	8.5
Booksellers, arts, crafts and stationers	6	4.7%	2.6	9.3
Electrical, gas, music and photography	13	10.2%	9.7	8.7
DIY, hardware & homewares	5	3.9%	3.2	6.5
China, glass, gifts and fancy goods	2	1.6%	0	4.9
Vehicle accessories	2	1.6%	4.5	0.5
Chemists, drug stores & opticians	9	7.1%	6.5	10.2
Variety, department & catalogue	8	6.3%	7.1	1.6
Florists, nurserymen & seedmen	2	1.6%	1.9	2.2
Toys, hobby, cycle & sporty	7	5.5%	7.7	6.1
Jewellers	5	3.9%	4.5	5
Charity/second-hand	19	15.0%	9.7	9.1
Other comparison retailers	11	8.7%	11.6	2.4
Total	**127**	**100.0**	**100.0**	**100.0**

5.17 This table indicates that the proportions of variety/department/catalogue stores and charity shops in Redcar Town Centre are both significantly higher than the national average. However, the proportions of clothing/footwear, china/glass/gift/fancy goods stores and booksellers/arts/crafts/stationers all appear to under-represented in the centre in comparison to the average. Indeed, the representation of clothing/footwear stores has seen a slight decrease in representation since 2005 (from 19% to 17%).

5.18 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;
- Vodafone;
- O2;
- New Look;
- Burton;
- Wilkos;
- Boots;
- Specsavers;
- Card Factory;
- Shoe Zone;
- B&M Household Goods; and
- Clintons.

5.19 Table 5.5, below, illustrates the range of service uses[2] provided in Redcar Town Centre and demonstrates that the centre provides a good range of service uses, with all categories represented reasonably well.

Table 5.5 Redcar Town Centre: Analysis of Selected Service Uses

Type of Use	Number of Units in Redcar Town Centre 2016	% of selected service uses in Redcar Town Centre 2016	% of selected service uses in Redcar Town Centre 2005	% of units in Great Britain
Restaurants/cafés	31	29.5%	23.2	22.8
Fast food/takeaways	25	23.8%	24.2	14.8

[2] Some service uses have been excluded from Table 5.5 as they do not fit into the categories identified by Goad for the purposes of this assessment.

Type of Use	Number of Units in Redcar Town Centre 2016	% of selected service uses in Redcar Town Centre 2016	% of selected service uses in Redcar Town Centre 2005	% of units in Great Britain
Banks/other financial services	14	13.3%	20.2	11.3
Estate agents/valuers	6	5.7%	8.1	9.2
Travel agents	4	3.8%	4.0	2.2
Hairdressers/beauty parlours	23	21.9%	19.2	23.2
Laundries/dry cleaners	2	1.9%	1.0	2.0
Total	**105**	**100.0**	**100.0**	**100.0**

5.20 The proportions of fast food takeaways and restaurants/cafes are significantly higher than the national average and, indeed, the latter has increased since 2005, up from 23%. This is likely to reflect, in part, Redcar's role as a seaside visitor destination, although also the growth of the food and beverage sector nationally. The proportions of estate agents/valuers and hairdressers/beauty parlours are slightly lower than the national average, and the proportion of banks/financial services has decreased significantly, albeit is remains above the national average.

Figure 5.3 Leisure and Community Heart, Redcar Town Centre

[3]

5.21 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

3

includes a leisure centre, Council chambers, registration office, business space and a cafe.

Vacancy Rate

5.22 Based on the April 2016 survey, the unit vacancy rate in the centre is currently around 15% (or 49 units). This has increased since 2005, when it was 10.0%, and is above the national average (12.0%).

5.23 A significant proportion of these vacant units are located along the eastern section of the High Street, where it is accessed by vehicles. However, they are also dispersed across the rest of the centre, including along the seafront (Esplanade), Station Road and the pedestrianised section of the High Street. In relation to the latter, the former Marks & Spencer variety store located opposite the northern end of Regent Walk closed in 2014 and, whilst the unit is currently occupied by an outlet store it lacks a permanent occupier. Based on the site visits, Yorkshire Trading Company (adjacent to Marks & Spencer) is currently holding a closing down sale and the Beales store in Regent Walk is also due to close shortly.

5.24 There is, therefore, potential for the unit vacancy rate to increase in the short term, leaving a number of large empty units at the heart of the PSA.

Figure 5.4 Yorkshire Trading Company and Former M&S Store, Redcar Town Centre

Environmental Quality

5.25 The quality of the built environment varies across Redcar Town Centre. At the heart of the centre, the Regent Walk shopping mall provides a modern shopping environment. Whilst some of the architecture in the pedestrianised section of the High Street is more functional, a range of street furniture is provided, including benches, bins, street lighting and public art. There are also a number of listed buildings including the Town Clock, No. 151 Clarendon

House, and No. 48-50 High Street West, which add visual interest to this section of the High Street.

5.26 However, although there has been investment in some properties by new food and drink uses, the built quality generally deteriorates towards the eastern end of the High Street. The condition and appearance of the buildings in this area are generally poorer than the pedestrianised section and, although there is some street furniture in evidence, the wide roadway and on-street parking impact upon the quality of the public realm.

5.27 The nature of the built environment along the southern side of Esplanade is varied. This reflects existence of a number of vacant units, as well as uses which present their rear elevations and/or service yards which to this road. However, the seafront side of the Esplanade has experienced significant recent investment in public realm works, including wide paved areas, co-ordinated hard landscaping, street lighting, picnic tables and public art. Such investment also includes the Beacon, a visitor attraction including a café, function room, viewing gallery and office space.

Figure 5.5 Esplanade, Redcar Town Centres

5.28 To the west of the High Street, the streets here host a range of ground floor and predominantly terraced commercial units. The quality of built environment in this area is generally good, although the pavements are relatively narrow and the area lacks any significant public realm or landscaping.

Accessibility

5.29 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. 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.

5.30 There are two railway stations in Redcar, including Redcar Central and Redcar East, with the former being situated within convenient walking distance (400m) of the Prime Shopping Area. Services are provided to here from various settlements within the Borough, including Marske, Saltburn, South Bank and Longbeck, as well as those beyond, including Middlesbrough, Stockton, Darlington, Sunderland and Newcastle.

5.31 The bus and rail links to Redcar will help to attract customers to the town centre from surrounding areas. However, these linkages, particularly to other larger shopping centres, such as Middlesbrough, Stockton and Darlington, also provide local residents with access to shopping facilities outside the town and, indeed, the Borough as a whole.

5.32 There are five main roads into the Town Centre, which include the A1085, the A1042 Kirkleatham Lane, Redcar Lane and West Dyke Road. These roads provide access to Redcar from the smaller settlements to the south and south-east of the town, including Markse, New Marske and Saltburn, as well as from areas to the west, including settlements in the Greater Eston area. There are 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.

5.33 The main shopping thoroughfare in Redcar Town Centre is the High Street, in particular the pedestrianised section between West Terrace to France Street/Moore Street, along with the Regent Walk shopping mall. In the western part of the centre, whilst roads - including West Terrace, Queen Street, Station Road and Millbank Terrace – are not pedestrianised, there are a number of crossing points which facilitate pedestrian movement.

5.34 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. This reflects the location of the majority of national multiples within the pedestrianised area, although also West Terrace/West Dyke Road which, as a busy vehicular route, acts as a barrier to movement between the High Street and western parts of the centre.

Figure 5.6 Regent Walk, Redcar Town Centre

Summary

5.35 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. The majority of the centre provides a generally pleasant shopping and visitor environment, although particularly the Regent Walk shopping mall and the Esplanade, the latter of which has experienced significant recent investment. Although less busy, the western part of the centre, focused on and around Station Road and Queen Street, also contains a range of independent operators.

5.36 However, the unit vacancy rate in the centre is abovethe national average, and there are a number of prominent units within the PSA which are likely to become empty in the near future. Although it has seen some investment in the form of new restaurants and pubs, High Street East experiences relatively low footfall and contains a number of vacant units.

Guisborough District Centre

5.37 Guisborough is an attractive District Centre located around 10 km from Redcar, in the southern part of the Borough. The centre comprises a range of commercial units along both sides of Westgate Road - which runs east/west and is the main thoroughfare in the centre – along with Church Road, Chaloner Street and various other side streets. The centre serves the retail and service needs of Guisborough itself, as well as other nearby settlements in the southern part of the Borough. Based on the household surveys undertaken as part of this study, it also attracts a significant element of its trade from parts of North Yorkshire, over the border from Redcar and Cleveland.

5.38 The current mix of uses in the centre are summarised in table 5.6 below.

Table 5.6 Use Summary Table – Guisborough District Centre

Use Type	Number of Units	Percentage of Units
Convenience Retail	12	8.3%
Comparison Retail	52	36.1%
Service	65	45.1%
Miscellaneous	2	1.4%
Vacant	13	9.0%
Total	**144**	**100.0%**

Source: RCBC Surveys, April 2016

5.39 The mix of uses in Guisborough is, in overall terms, broadly in line with the respective national averages. Convenience retail uses include a c. 1,600 sqm net Morrisons supermarket – accessed through a small arcade off Westgate - as well as a 130 sqm net (approx.) Heron store and a number of smaller, specialist operators. Although not within the centre, new Aldi and Iceland stores have been provided within the converted former Focus store, on Hill View Road (around 250m walking distance from the centre boundary).

Figure 5.7 Church Street, Guisborough District Centre

5.40 The centre also includes a wide range of comparison goods retail operators, including both independent traders and national multiples. The latter include Yorkshire Trading Company, Clarks Shoes, Boots, Dorothy Perkins, Superdrug and Card Factory. The most significant proportion of uses within the centre comprise services, which include, inter alia, restaurants/cafes, banks/building societies, hair/beauty salons and travel agents. National service chains include Costa, Café Nero, Subway, HSBC, Natwest and Johnsons.

5.41 At 9%, the unit vacancy rate in the centre is below the national average (12%), which reflects the current health of the centre and its popularity with both shoppers and commercial occupiers. Those units which are vacant are dispersed across the centre, with no obvious concentrations, and the majority of empty units are around 100 sqm net floorspace and below.

5.42 Westgate provides an attractive main thoroughfare for the centre, which opens out into a market place where it meets Church Street, and contains a range of street furniture. The quality of the built environment is good and this is reflected in its status as a conservation area. The buildings are generally well maintained with attractive shop-fronts and there are trees throughout the centre which helps to soften its overall appearance.

Figure 5.8 Westgate, Guisborough District Centre

5.43 The Centre is accessed by car primarily from Westgate (to the west) and Church Street/Church Road and Whitby Road (to the east), and there are several bus stops located along Westgate. On-street parking is also available on Westgate, and there is a dedicated car park serving Morrisons to the rear. Whilst there are various crossing points, vehicular traffic and this on-street parking, to an extent, represents a barrier to movement between the north and south sides of Westgate.

5.44 Overall, however, Guisborough District Centre is an attractive, busy centre which is performing well in its role in meeting the retail and service needs of the town and surrounding areas in the south of Redcar & Cleveland and parts of North Yorkshire. The unit vacancy rate is below the national average, there are a good range of both independent and national operators, including a Morrisons supermarket and a strong comparison goods sector.

Low Grange District Centre

5.45 Low Grange District Centre is located approximately 8 km to the south-west of Redcar Town Centre, at the junction of Normanby Road with the A1085 Trunk Road. The need for this new centre was identified in the adopted Core Strategy following a significant decline in the range of shops and services located within the former South Bank District Centre at the northern end of Normanby Road.

Figure 5.9 Tesco Extra, Low Grange District Centre

5.46 The new purpose-built centre opened in 2012 and is anchored by a Tesco Extra superstore of around 5,900 sqm net floorspace with associated petrol filling station. It also include smaller shop units developed alongside Tesco, including Subway, Greggs, Card Factory, Ladbrokes and Barnados, alongside a McDonalds drive-thru restaurant and a Marstons pub/restaurant. Other commercial and community facilities located in close proximity to this new development include a carpet shop, health centre, sports academy/leisure centre and library.

Table 5.7 Use Summary Table – Low Grange District Centre

Use Type	Number of Units	Percentage of Units
Convenience Retail	1	14.3%
Comparison Retail	3	42.9%
Service	3	42.9%
Miscellaneous	0	0.0%
Vacant	0	0.0%
Total	**7**	**100.0%**

Source: RCBC Surveys 2016

5.47 The scheme is modern in appearance, reflecting its purpose-built nature, and provides covered pedestrian walkways and a large quantum of customer parking, adjacent to Tesco store and adjacent smaller units. There are a number of bus stops located along both Normanby Road and the A1085 Trunk Road. Planned new housing in the area immediately surrounding the centre and will be important to ensure that such development has convenient pedestrian linkages to these new communities.

Figure 5.10 McDonalds, Low Grange District Centre

5.48 Based upon site visits in July 2016 the Centre appeared to be well used and there are no vacant units. Whilst the centre will clearly need to evolve over time to broaden-out the range of provision it contains – and bolster the role it plays in serving existing and future new communities across the Great Eston area - it is nevertheless now established as an important focal point for local shopping and service provision.

Eston District Centre

5.49 Eston District Centre is also located around 8km south-west of Redcar. It comprises a modern purpose-built precinct on the north side of the B1380 High Street, along with traditional terraced shops dispersed around Eston Square, on the south side of this road. The centre serves the day to day shopping and service needs of the surrounding residential areas in Eston.

Figure 5.11 Eston Square, Eston District Centre

5.50 The current mix of uses in the centre is summarised in Table 5.8 below.

Table 5.8 Use Summary Table – Eston District Centre

Use Type	Number of Units	Percentage of Units
Convenience Retail	4	7.7%
Comparison Retail	10	19.2%
Service	26	50.0%
Miscellaneous	2	3.8%
Vacant	10	19.2%
Total	**52**	**100.0%**

Source: RCBC Surveys, April 2016

5.51 There is an absence of any medium or large-sized supermarkets in the centre, with convenience retail being limited to a c. 300 sqm net Nisa Local store, a c. 200 sqm net Spar store, along with a butcher, bakery and general store. There was a Kwik Save store located within the centre until around 2007 and, whilst planning permission was granted for the redevelopment of the existing precinct to provide a new Aldi of 1,134 sqm gross floorspace, this scheme did not come forward.

5.52 Comparison retail includes a variety if operators aimed at meeting basic, day to day needs, such as a card shop, florist, pharmacy, opticians and a charity shop. The only national multiple retailer in the centre comprises the Spar store, although there is an additional Spar within the petrol filling station kiosk immediately to the east of the centre.

5.53 The table above illustrates that the most significant proportion of the units in Eston District Centre (50%) comprise service uses, which include a number of hot food takeaways, as well as bookmakers, hair salons and estate agents. National service chains located within the centre include Barclays, Yorkshire Bank, Ladbrokes, Coral and Betfred. There are also a number of public houses/social clubs, as well as a church and Jobcentre building.

5.54 However, the vacancy rate (19% or 10 units) is significantly above the national average (12%). This reflects, in part, the reduced role of the centre in meeting the needs of the surrounding area, although also the suitability of these units to meet modern retailer needs and, related to this, the need for investment which helps to attract new operators. Four of the vacant units are located within the precinct, with the others being dispersed around Eston Square.

Figure 5.12 Eston Precinct, Eston District Centre

5.55 In relation to environmental quality, most of the terraced properties on the south side of Eston Square are in reasonably good condition. The square itself includes a co-ordinated range of street furniture including lighting, planters and benches, focused around the central war memorial. However, the precinct on the north side of Eston Square is functional in appearance and in poor condition. It is inward facing, with relatively limited natural surveillance, and presents unattractive service elevations to the rear car park and the residential area beyond.

5.56 The centre is accessed via the B1380 (High Street) which runs east-west through the centre, and dedicated car parking is provided to the rear of the precinct, accessed from Winston Drive and Lodge Road. There are three bus stops in the centre, located to either side of the B1380, and a network of pedestrian footways connect the centre to the surrounding residential areas.

5.57 Overall, whilst the centre continues meet the day to day needs of the immediate surrounding areas, the range and scale of uses it contains has reduced (by 11 units since the 2006 study). Along with the absence of a medium or large sized supermarket to help anchor the centre, this means that the centre's role as a focal point for the community – and district centre-level retail/service provision - has declined in recent years. The unit vacancy rate is significantly above the national average, and the quality of the environment is poor, particularly in and around the precinct.

Saltburn District Centre

5.58 Saltburn District Centre is located around 7 km to the east of Redcar and contains a range of retail and service uses that serve both the town itself and the surrounding areas of East Cleveland. The centre – which also attracts trade from tourists and other visitors primarily by virtue of its coastal location – is focused upon a number of streets surrounding Saltburn station, including Station Square, Station Street and Dundas Street (to the south of the railway line) and Milton Street (to the north).

5.59 The current mix of uses in the centre is summarised in Table 5.9 below and shows that there is a good range of both convenience and comparison retail uses in the centre.

Table 5.9 Use Summary Table – Saltburn District Centre

Use Type	Number of Units	Percentage of Units
Convenience Retail	9	14.1%
Comparison Retail	28	43.8%
Service	22	34.4%
Miscellaneous	1	1.6%
Vacant	4	6.3%
Total	**64**	**100.0%**

Source: RCBC Surveys, April 2016

5.60 The former include a 1,000 sqm net (approx.) Sainsbury's supermarket, immediately adjacent to the station, as well as a number of smaller specialist uses. Comparison retail provision in the centre consists mainly of smaller, independent operators, a number of which are located on Milton Street, to the north of the station. Such uses include jewellers and opticians, as well as those selling clothing, gifts/cards, art, furniture/furnishings and books.

Figure 5.13 Station Street, Saltburn District Centre

5.61 There is a reasonable range of service uses including cafes, takeaways, banks and estate agents. There are also a number of other uses in close proximity to the centre to the south, such as a hotel, library and church, and a number of other local attractions, such as Saltburn Cliff Lift, Saltburn Pier and the Valley Gardens also help to generate spin-off trade for shops and services.

5.62 Whilst there is a thriving independent sector in Saltburn District Centre, only a limited number of national multiple retailers and service chains have representation - comprising Boots, Spar, Cooplands, Barclays and Ladbrokes. However, at 6%, the unit vacancy rate is around half of the national average, at the time of site visits in August 2016, reflecting its current attractiveness to both shoppers and retailers.

5.63 The character and appearance of the centre reflects Saltburn's history as a traditional Victorian seaside destination and, as such, the quality of the built environment is good. Reflecting its location within a Conservation Area, the centre itself provides an attractive environment for visitors and shoppers, with small traditional shop fronts and iron canopies found along both Station Street and Milton Street.

Figure 5.14 Saltburn Station, Saltburn District Centre

5.64 Saltburn is easily accessible by rail, with Saltburn Station sitting at the heart of the centre. Bus services stop at Station Street and there is also a public car park to the west of the station. The station has seen more than £110,000 of investment in improvements such as new shelters, signage, a real time information screen and CCTV. Although the station separates the north and south sides of the centre, pedestrian access between the two is facilitated by a pedestrianised precinct adjacent to Sainsbury's.

5.65 In summary, Saltburn is an attractive and healthy district centre which benefits from a dual role in both meeting the needs of local residents and visitors drawn to the town as a result of its seaside location. The vacancy rate is around half the national average and it contains a good range of retail and service uses, including a Sainsbury's supermarket and a significant proportion of independent operators.

Marske District Centre

5.66 Marske District Centre is located around 4 km to the east of Redcar Town Centre, in between Redcar and Saltburn. It includes a range of retail and service uses which primarily meet the day to day needs of the town itself. The defined centre is focused around the A1085 High Street which runs north to south, and its junction with Redcar Road and the Wynd.

Table 5.10 Use Summary Table – Marske District Centre

Use Type	Number of Units	Percentage of Units
Convenience Retail	5	10.6%
Comparison Retail	17	36.2%
Service	21	44.7%
Miscellaneous	1	2.1%
Vacant	3	6.4%
Total	**47**	**100.0%**

Source: RCBC Surveys, April 2016

5.67 Table 5.10 illustrates that Marske has just five convenience retail uses, although these include Co-op (1,500 sqm net approx) and Sainsbury's (c. 500 sqm net) supermarkets. There are also three smaller independent stores (a butcher, bakery, and fruitier). The proportion of comparison retail uses (36%) is broadly in line with the national average and comprises a range of smaller independent/specialist operators. Other uses located within the centre include a number of takeaways, estate agents, hair salons and public houses, and there is a medical centre and library just outwith the boundary.

Figure 5.15 High Street, Marske District Centre

5.68 Whilst there are two vacant units in the pedestrianised square at the High Street/The Wynd junction, as with Saltburn, the unit vacancy rate (6%) is around half the national average. The quality of the built environment is generally good, with the majority of the centre being located within a Conservation Area, and shopfronts generally being well maintained. There are also areas of public realm within and opposite the above square, including hard and soft landscaping, and a range of street furniture.

5.69 Marske is conveniently accessible by both public and private transport. There are bus stops located both within and just outside of the boundary, and Marske railway station is located around 350m walking distance to the south. Off-street public parking is provided on the eastern side of the centre adjacent to The Wynd and to the rear of the Co-op.

Figure 5.16 High Street, Marske District Centre

5.70 In summary, whilst it serves a relatively localised role, Marske District Centre offers a range of retail and services which serve the day to day needs of the town. Such uses include two food supermarkets which help to anchor the centre, along with a variety of smaller and primarily independent traders. It provides a reasonably attractive shopping environment and the unit vacancy rate is around half the national average, reflecting the current health of the centre.

Loftus District Centre

5.71 Loftus District Centre is located approximately 13 km to the south east of Redcar. Provision within the centre helps to serve the basic, day to day needs of the town itself as well, to a lesser extent, some of the surrounding settlements. Whilst defined as one centre, running on an east/west axis, it is elongated and, in practice, comprises two main groups of retail and service uses – dispersed along Zetland Road/West Road and High Street respectively.

Table 5.11 Use Summary Table – Loftus District Centre

Use Type	Number of Units	Percentage of Units
Convenience Retail	9	16.1%
Comparison Retail	11	19.6%
Service	15	26.8%
Miscellaneous	2	3.6%
Vacant	19	33.9%
Total	**56**	**100.0%**

Source: RCBC Surveys, April 2016

5.72 As illustrated in the Table 5.11, there is currently a relatively even spread of retail and service uses across the wider centre. There are nine convenience retail uses, including two small Co-op supermarkets (both around 300 sqm net), which are located in the eastern and western parts of the centre respectively, as well as other uses which meet top-up and specialist needs. Comparison retail uses include a number of smaller specialist operators, including two pharmacies, an opticians, and shops selling homewares and hardware.

Figure 5.17 High Street, Loftus District Centre

5.73 The unit vacancy rate in the centre (34%) is almost three times the national average reflecting, in part, the significant issues faced by the centre. In this context, there is a significant cluster of vacant units in the middle of the centre as currently defined, towards the eastern end of Zetland Road, which results in dead frontage and low pedestrian flows in this area. Along with the area around the junction with Hall Grounds, this means that Loftus functions, in practice, as two separate centres, with a relative lack of commercial activity in the middle.

5.74 Whilst the majority of the centre is located within a Conservation Area, the quality of the built environment is also significantly impacted upon by the cluster of vacant units towards the eastern end of Zetland Road – as illustrated below. The eastern end of the centre, focused upon High Street, provides a pleasant shopping environment, including a range of street furniture and some attractive stone-built properties. However, the condition and appearance of commercial premises, in general, deteriorates towards the more central and western parts.

Figure 5.18 Zetland Road, Loftus District Centre

5.75 Notwithstanding the above, the centre is easily accessed by car from the remainder of the settlement and surrounding areas, as a result of its location on the A174 – a key route linking Redcar with Whitby. There are also a number of bus stops located on either side of this thoroughfare, although on-street parking is only available on High Street and at the western end of the centre.

5.76 Although Loftus contains a range of uses that meet the day to day needs of local residents, its wider role and function is limited by the scale and range of facilities it provides. Whilst the eastern end of the centre provides a pleasant shopping environment, the condition of properties in the western and central has deteriorated, and the unit vacancy rate is very high. The western end, when considered in isolation, also lacks the critical mass of uses needed by a successful district centre. In practice, with large areas of dead frontages, Loftus functions as two separate centres, with the eastern part more healthy than the western part.

Other Centres

5.77 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.

5.78 These centres vary in scale, with Dormanstown, Normanby, Roseberry Square and Skelton being amongst the largest and Carlin How and New Markse the smallest. Notwithstanding this, however, they generally only meet the basic and day to day needs of residents in the immediate surrounding areas//settlements.

Other Existing Provision

Cleveland Retail Park

5.79 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 includes an M&S Foodhall, as well as Frankie and Benny's and Costa restaurant/cafe.

Figure 5.19 Cleveland Retail Park

Other Provision

5.80 There are also a number of freestanding foodstores located across the Borough. These include:

- Asda, at North Street, to the north of the A66 but formerly forming part of the previous South Bank District Centre, which comprises c. 3,700 sqm net floorspace;
- Tesco at West Dyke Road, to the south of Redcar Town Centre, comprising 2,800 sqm net floorspace;
- Asda at Pheasant Fields Lane, Skelton, which opened in 2013, and provides around 2,700 sqm net floorspace;
- Sainbury’s at Morgan Drive, in Guisborough, comprising 1,400 sqm net;
- Lidl, at Enfield Chase in Guisborough providing 1,000 sqm net;
- Aldi at Larkswood Road, in Redcar, which provides c. 1,400 sqm net floorspace; 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.

5.81 In addition, and adjacent to the existing Tesco store at West Dyke Road, there is a Franks flooring store and a McDonalds drive-thru restaurant.

Figure 5.20 Asda, Skelton

Committed and Proposed Developments

5.82 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 3,448 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;
- permission granted for 3,484 sqm gross new retail floorspace (including external sales area), 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.

5.83 In addition, an application has been made for the extension of the existing Lidl at Enfield Chase, in Guisborough (R/2016/0496/FF) to provide an additional 542 sqm gross floorspace.

Summary

5.84 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 there has been recent investment in both the public realm and new visitor attractions, particularly along the Esplanade, the unit vacancy rate is above the national average, and recent or impending store closures within the PSA present future challenges;
- Guisborough District Centre contains a range of uses, including a good selection of both national multiples and independents, 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 and an attractive shopping environment;
- although Eston District Centre continues to meet the basic needs of local residents, 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. The precinct on the north side of the centre is in poor condition and contains a number of empty shops, which contribute towards a unit vacancy rate across the wider centre of around 19%;
- the purpose-built new Low Grange (South Bank) District 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 new Tesco Extra superstore, along with other retail and food and beverage uses, help to provide a new focus for the community in the Greater Eston area;
- with vacancy rates around half the national average, Saltburn and Marske are both attractive centres which perform well at their level in the retail hierarchy, meeting the day to day needs of local residents in their respective towns. In addition to anchor supermarkets, both centres contain a range of independent operators which, in relation to Saltburn, also attract trade from tourist visitors by virtue of its seaside location;
- although Loftus contains a range of uses that meet the day to day needs of residents of the immediate surrounding areas, like Eston, it has limited influence over the wider area. Whilst the eastern end of the centre provides a pleasant shopping environment, the western and central parts have deteriorated, resulting in a very high vacancy rate and, in practice, it functions as two separate centres, with areas of dead frontage in between the two; and
- Cleveland Retail Park provides a range of large format comparison retail operators and an M&S Foodhall, which serve not only Redcar and Cleveland but also Middlesbrough. There are also a number of out-of-centre foodstores which serve the convenience needs of various parts of the Borough, including those occupied by Asda, Tesco, Sainsbury's, Lidl and Aldi.

6.0 # Retail Need

Study Area

6.1 The quantitative assessment of the need for additional retail floorspace is based on a defined Study Area comprising eight separate zones, both within and immediately beyond Redcar & Cleveland Borough. As explained in Section 4.0, a total of 800 (approx.) household surveys were undertaken across these zones in July and August 2016, which helped to establish existing shopping and leisure patterns across the area. The number of surveys undertaken in each zone was as follows:

- Zone 1 (Redcar) – 126 surveys
- Zone 2 (Eston) – 126 surveys
- Zone 3 (Guisborough) – 101 surveys
- Zone 4 (Marske/Saltburn) – 100 surveys
- Zone 5 (Rural East) – 100 surveys
- Zone 6 (East Middlesbrough) – 125 surveys
- Zone 7 (North Yorkshire Moors) – 75 surveys
- Zone 8 (Whitby Hinterland) – 50 surveys

6.2 The extent of these zones take into account local spending patterns and the distribution of existing centres and residential population in Redcar & Cleveland. They allow a finer-grained assessment of these areas, where shopping patterns are likely to be broadly similar. The definition of Zones 1 to 5 also allows comparison with surveys undertaken as part of the Strategic Retail, Leisure and Office Study (August 2006) previously prepared for the Council.

6.3 It is important to recognise that there will be retail expenditure leakage from these zones to stores and centres located outside the study and, conversely expenditure inflow from surrounding areas. Both of these factors have been taken into account in the assessment which follows.

6.4 The inclusion of Zones 6 to 8, in particular, has helped to establish the level of spending which is flowing to stores and centres within the Borough from areas outside of Redcar & Cleveland. Conversely, taking into account the close inter-relationship between this area and the Eston zone, the inclusion of Zone 6 has also allowed the study to model the quantum of spending which is flowing out of the Borough to facilities in the East Middlesbrough area (and vice versa).

Retail Capacity

Population and Expenditure

6.5 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%.

6.6 The estimation of the population of the Study Zones in 2011 has been 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.

6.7 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.

6.8 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 more significantly between 2016 and 2032 (by around 64%/£261.9m), from £407.6m in 2016 to £669.6m in 2032 (all in 2014 prices).

6.9 It should be noted that comparison goods spending is forecast to increase more than convenience spending as the amount spent on food and drink does not increase proportionately with disposable income, whereas spending on non-food goods is more closely linked to income. These figures relate to real growth and exclude the effects of inflation (i.e. they are in a constant price base).

Current Shopping Patterns

Convenience Goods

6.10 The results of the household shopping survey relating to main and top-up food and grocery shopping have been weighted and combined to estimate existing convenience goods shopping patterns across the study area. The estimates of market share or penetration within each zone are shown in Table 4 in **Appendix 2**, based on a 70/30 split between main and top up food shopping. A summary of the market shares achieved by the main stores across the Borough (by zone, in percentage terms) is also shown in Table 6.1 below.

Table 6.1 Convenience Goods Market Shares of Main Foodstores

Store	Zone 1 Redcar	Zone 2 Eston	Zone 3 Guisborough	Zone 4 Marske & Saltburn	Zone 5 Rural East
Morrisons, Redcar Town Centre	26.1%	4.7%	1.3%	21.6%	8.6%
Tesco, West Dyke Road	21.0%	0.4%	0.0%	10.5%	1.3%

Store	Zone 1 Redcar	Zone 2 Eston	Zone 3 Guisborough	Zone 4 Marske & Saltburn	Zone 5 Rural East
Aldi, Larkswood Road	14.3%	1.9%	0.0%	17.7%	3.8%
Tesco, Low Grange District Centre	0.8%	18.6%	0.7%	2.7%	0.5%
Asda, North Street, South Bank	2.7%	23.7%	3.5%	1.8%	1.1%
Marks & Spencer, Cleveland Retail Park	1.4%	3.0%	2.5%	0.7%	0.6%
Morrisons, Guisborough District Centre	0.0%	1.1%	32.0%	0.3%	4.6%
Sainsbury's, Morgan Drive	0.0%	0.2%	16.1%	0.3%	1.9%
Lid, Enfield Chase	1.1%	0.2%	9.8%	0.0%	3.4%
Aldi, Hill View Road	0.2%	0.4%	12.8%	1.0%	6.1%
Sainsbury's, Saltburn District Centre	0.2%	0.0%	0.3%	9.9%	4.1%
Asda, Pheasant Fields Lane, Skelton	2.4%	0.0%	3.8%	5.4%	37.5%

Source: NEMS Household Survey, 2016

6.11 Table 4 (**Appendix 2**) indicates the proportion of convenience goods expenditure within Zones 1 and 3-5 which is retained within the Borough is around 95%-97%, with Zone 2 (Eston) being lower, at around 73%. The majority of the Borough (and particularly central and eastern parts) is therefore relatively self-contained for food shopping purposes. However, a significant proportion of residents in the western part of the Borough still use facilities in east Middlesbrough. This is to be expected given the close inter-relationship between the two areas, and the proximity of Berwick Hills, in particular, to western parts of Redcar & Cleveland.

6.12 The level of convenience goods expenditure attracted to shops/stores in the Borough in 2016 is estimated to be around £291m, as shown in Table 5, **Appendix 2**. This includes estimates of inflow of expenditure from beyond both the Borough and the wider Study Area (£58m in total). This figure reflects the relative accessibility of some stores and centres (Guisborough for example) from areas further afield, as well as the scope for to attract trade from tourists and other visitors from outside of the local area by virtue of Redcar's seaside location.

6.13 The total benchmark (i.e. expected/company average) turnover of identified existing convenience sales floorspace within Redcar & Cleveland is £280m (Table 9, Appendix 2). This suggests that convenience goods retail sales floorspace in the Borough is collectively trading above average, by around £11m (4%).

Table 6.2 Performance of Main Foodstores

Store	Under/Over Trading (£m)	Under/Over Trading (%)
Morrisons, Redcar Town Centre	12.6	+48%
Tesco, West Dyke Road	0.0	0%
Aldi, Larkswood Road	8.3	+68%
Tesco, Low Grange District Centre	-10.3	-32%
Asda, North Street, South Bank	-0.4	-1%
Marks & Spencer, Cleveland Retail Park	2.2	+33%
Morrisons, Guisborough District Centre	6.9	+50%
Sainsbury's, Morgan Drive	-3.5	-29%
Lidl, Enfield Chase	3.7	+61%
Aldi, Hill View Road	3.8	+46%
Sainsbury's, Saltburn District Centre	-2.8	-32%
Asda, Pheasant Fields Lane, Skelton	-0.4	-1%

Source: NLP Capacity Assessment 2016

6.14 As illustrated in Table 6.2, above, the existing Aldi and Lidl foodstores in the Borough are all estimated to be performing very strongly, at between 46%-70% above their benchmark (i.e. company average) turnover levels. This reflects the national trends towards both the fragmentation of main food shopping trips – with a significant proportion of people either substituting or supplementing their first choice store – and the increase in popularity of the discount operators in particular.

6.15 Larger foodstore operators are experiencing more mixed fortunes. For example, the Morrisons stores in Redcar and & Guisborough continue to perform strongly (at around 50% above benchmark), with the Asda stores at South Bank and Skelton (which only opened in 2013) performing around the company average. However, the existing Sainsbury’s in Guisborough and Saltburn, as well as Tesco Extra at Low Grange District Centre (which opened in 2012), are performing at around 30% below benchmark.

Comparison Goods

6.16 A summary of existing comparison goods shopping patterns is shown in Table 6.3. These are again based on the results of the household telephone shopping surveys in respect of the different types of non-food goods, which have been weighted on the basis of the national average spending levels and then combined.

Table 6.3 Comparison Goods Expenditure Flows

Centre/Facility	Zone 1 Redcar	Zone 2 Eston	Zone 3 Guisborough	Zone 4 Marske & Saltburn	Zone 5 Rural East
Redcar Town Centre	40.3%	8.9%	7.1%	26.0%	17.0%
Low Grange District Centre	0.8%	5.7%	0.0%	0.0%	0.0%
Eston District Centre	0.0%	2.0%	0.2%	0.0%	0.0%
Guisborough District Centre	0.1%	1.1%	36.2%	0.8%	7.5%
Marske District Centre	0.2%	0.0%	0.2%	6.0%	0.1%
Saltburn District Centre	0.0%	0.2%	0.3%	5.7%	3.5%
Loftus District Centre	0.0%	0.0%	0.0%	0.0%	1.7%
Cleveland Retail Park	12.3%	22.3%	12.2%	12.6%	11.7%
Out of Centre Foodstores	3.6%	3.2%	3.0%	1.0%	15.0%
Other Stores/Centres	0.5%	1.7%	1.4%	0.5%	5.4%
Borough Total	**57.8%**	**45.1%**	**60.6%**	**52.6%**	**61.9%**
Outside Borough	**42.2%**	**54.9%**	**39.4%**	**47.4%**	**38.1%**
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

6.17 Table 4 (**Appendix 3**) indicates the proportion of comparison goods expenditure within each zone that is spent within the Borough ranges from around 45% (Eston) to 62% (Rural East). This is lower than for convenience goods, reflecting the propensity of customers to do food and grocery shopping locally, as opposed to non-food shopping - where customers are more likely to shop around and/or travel longer distances to visit larger centres that have more choice. This also reflects the proximity of western parts of the Borough to other destinations, such as Middlesbrough Town Centre and Teesside Park, as well as the range and choice of provision available within such centres, as compared to that available within the Borough.

6.18 The estimated comparison goods expenditure currently attracted by shopping facilities within the Borough is £295m in 2016, as shown in Table 5. This includes estimates of inflow from beyond the Borough, which are estimated to be around £71m. As with convenience goods, this level of inflow reflects relative accessibility of some stores and centres from areas further afield (including Cleveland Retail Park), as well as the scope to attract trade from tourists and other visitors by virtue of Redcar's seaside location.

6.19 Redcar Town Centre is currently estimated to be achieving a comparison goods turnover of just under £100m, which is around 25% above its benchmark/expected turnover (£79m). The proportion of spending it attracts from each of the different zones varies, ranging from 40% in the Redcar zone to just 7% in the Guisborough zone. Even when considered in terms of the Borough as a whole, the centre attracts only around 21% of all available comparison goods expenditure, which is low.

6.20 On the basis of the survey information, facilities in both Guisborough District Centre and Cleveland Retail Park are also achieving a level of comparison goods turnover (£42m and £96m), which are above their benchmark (£22m and £81m respectively). The above analysis is sensitive to assumptions made in relation to the quantum of floorspace provided by the centre, as well as its benchmark (i.e. expected/company average) level of turnover, and should therefore be treated with a degree of caution. However, they provide a helpful indication as to the relative performance of existing facilities in the Borough.

Convenience Retail Capacity

6.21 Based on current market shares of available expenditure being maintained, the level of convenience goods expenditure available to existing stores and centres at 2021, 2026 and 2032 is shown at Tables 6, 7 and 8 in **Appendix 2**. It is then summarised and compared to the benchmark turnover of existing stores/centres in Table 9.

6.22 Convenience expenditure available to shopping facilities in the Borough is expected to increase from £291m in 2016 to £296m in 2032, as compared to the total benchmark turnover of such facilities, which is estimated to be £280m. This indicates that there is currently around £11m residual expenditure capacity available to support committed and new convenience goods retail floorspace in the Borough.

6.23 Commitments in Redcar & Cleveland Borough are summarised in Table 10, and are forecast to have a total convenience goods retail turnover potential of £23.4m, 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 (£9.4m), 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).

6.24 As set out in Table 11 at **Appendix 2**, after subtracting the benchmark turnover of both existing and committed floorspace from available expenditure, there is not forecast to be any residual convenience goods expenditure capacity in the Borough over the Plan period. However, this assumes that the current market shares of available expenditure being achieved by facilities within each of the survey zones within the Borough – and therefore existing levels of expenditure leakage to stores/centres beyond the Borough - will be maintained.

6.25 It may be possible to increase the proportion of spending retained, through clawing-back some of the spending currently leaking out to facilities outwith the Borough. However, whilst the existing retention rate in the Eston zone (73%) is relatively low compared to the remainder of the Borough – even following the implementation of the new Tesco Extra at Low Grange - this reflects the close inter-relationship between this area and parts of Middlesbrough immediately to the west. Although it may be possible to increase this rate slightly, it is unlikely that this would help to generate significant expenditure capacity to support new development – either within this zone, or across the Borough as a whole.

Comparison Retail Capacity

6.26 The household survey indicates that Borough's retention of comparison goods expenditure is £224m (55% overall). This reflects the fact that, whilst there is a reasonable range of provision located within the Borough, this provision is more limited in comparison to that available at destinations outwith Redcar and Cleveland – for example, Middlesbrough Town Centre and Teesside Shopping Park – both in terms of scale and range/choice of facilities.

6.27 Based on the baseline population projections, available comparison goods expenditure has been projected forward to 2021, 2026 and 2032 in Tables 6, 7 and 8 in **Appendix 3**. As summarised in Table 11, comparison goods expenditure available to facilities within the Borough is expected to increase from around £295m in 2016 to £335m in 2021, £396m in 2026 and £486m in 2032.

6.28 Comparison goods retail commitments are summarised in Table 10 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 (£16.6m comparison goods turnover), a new Aldi at Pheasant Fields Lane, Skelton (£1.6m), and other retail floorspace, also at Pheasant Fields Lane (£13.4m).

6.29 Along with existing floorspace, it is assumed that the turnover of these commitments will increase in real terms in the future. A growth rate of 2.0% per annum has been adopted, as recommended by Experian, based on their own analysis of future trends. This is a function of spending growing at faster rates than new floorspace provision and retailers' ability to absorb real increases in their costs by increasing their turnover to floorspace ratio.

6.30 Table 11 in **Appendix 3** illustrates forecast comparison goods expenditure capacity between 2016 and 2032, after taking into growth in comparison goods expenditure, and allowing for growth in turnover efficiency as set out above. Assuming no increase in market share, it is forecast that there will be no capacity emerging until 2026 (£1.0m), with any significant capacity only emerging over the period to 2032, when there is forecast to be £41.4m expenditure capacity to support new comparison goods retail floorspace.

6.31 Table 12 illustrates that such capacity could potentially support floorspace of around 9,739sqm net/13,913 sqm gross in 2032.The most significant proportion of this forecast capacity is generated by facilities in/at Redcar Town Centre, Guisborough District Centre and Cleveland Retail Park.

Table 6.4 Comparison Goods Expenditure Capacity - Equilibrium Approach

Area	2016	2021	2026	2032
Redcar Town Centre	0.0	3.1	11.9	26.7
Low Grange District Centre	0.0	0.4	1.3	3.0
Eston District Centre	0.0	0.1	0.3	0.6
Guisborough District Centre	0.0	1.3	5.2	11.5
Marske District Centre	0.0	0.1	0.6	1.3
Saltburn District Centre	0.0	0.2	0.9	2.0
Loftus District Centre	0.0	0.0	0.2	0.3
Cleveland Retail Park	0.0	3.1	11.9	26.8
Out of Centre Foodstores	0.0	-0.9	0.8	3.8
Other Stores/Centres	0.0	-29.7	-32.0	-34.6
Total	0.0	-22.3	1.0	41.4

6.32 One objective, in the medium to long term, might be for the town centre to increase its market share of comparison goods spending. Whilst the potential to achieve this level of new floorspace could be impacted upon by major developments in neighbouring authorities, future improvements to provision in Redcar could help to claw back existing expenditure leakage. In this context, a scenario has been considered whereby the existing rate of comparison goods expenditure retention within the Borough (55%) can be increased to 60%.

6.33 Under this scenario, after allowing for commitments, there is forecast to be capacity to support new comparison goods retail floorspace of around £29m in 2026 and £76m in 2032. This could support in the order of 6,807 sqm net/9,724sqm gross new floorspace in 2026 and 17,795 sqm net/25,422 gross in 2032. Although the level of new floorspace which could be supported will ultimately depend upon the extent to which it enhances the existing range and choice in the Borough – and reduces the need for residents to travel to facilities further afield - this provides a helpful indication as to the potential benefits in seeking to claw-back expenditure leakage from locations outside of the Borough.

6.34 Forecasts of expenditure capacity and the levels of floorspace which this capacity could support should be treated with a degree of caution. This is not least given that different assumptions on population spending forecasts, as well as those in relation to SFT, can lead to wide variations in the end results in terms of future needs. Nevertheless, the study will need to have regard to the capacity figures set out above in taking a long term view for the plan period, recognising the cyclical nature of growth and the need to plan positively, as required by the NPPF.

Qualitative Need

6.35 Qualitative need can be assessed through consideration of the following factors:

- deficiencies or 'gaps' in existing provision;
- consumer choice and competition;
- overtrading, congestion and overcrowding of existing stores;
- location specific needs such as underserved markets; and
- the quality of existing provision.

6.36 All of these factors are taken into account in the qualitative need assessment of existing facilities in Redcar & Cleveland set out below.

Convenience Retail

6.37 The household survey results indicate that most residents in the study area undertake both a main shopping trip and top-up shopping trips. Main shopping trips are generally made once a week or less often, and the household survey identified that around 82% of respondents travel to do their main food shopping by car (either as a driver or passenger). The availability of a wide range of products and free car parking are important requirements for main or bulk food shopping trips. Large supermarkets or superstores are the usual destination for these types of shopping trip.

6.38 However, shopping habits have changed significantly in recent years. Against this background, research by NEMS Market Research has indicated that the expansion of consumer choice has led to over half of households using more than one store for their main food and grocery shopping. It also indicates that, of these households, around 77% supplemented their principal main food shopping destination with additional trips to other stores, with around 33% substituting it for another store (and 9% doing both).

6.39 Against this background, and as shown on Drg. No. GIS\23090\01-03 at **Appendix 4**, there are five large foodstores, comprising over 2,500 sqm net sales area in the Borough. These include:

- Tesco Extra, at Low Grange District Centre (5,268 sqm net);
- Asda at North Street, South Bank (3,658 sqm net);
- Morrisons on Lord Street, in Redcar Town Centre (3,252 sqm net);
- Tesco at West Dyke Road, in Redcar (2,787 sqm net); and
- Asda at Pheasant Fields Lane, Skelton (2,678 sqm net).

6.40 There are also a number of other supermarkets which help to meet both main and top-up food shopping needs. These include Sainsbury’s stores at Morgan Drive (Guisborough) and Milton Street (Saltburn), and Morrisons on Westgate

(Guisborough). They also include Aldi stores at Larkswood Road (Redcar) Hill View Road (Guisborough), a Lidl store at Enfield Chase (Guisborough), and a Marks & Spencer Foodhall at Cleveland Retail Park. These larger and medium sized stores are supported by a range of smaller supermarkets and convenience stores within the Borough, including Tesco Express, Sainsbury's Local, Asda, Co-op, Heron, Iceland and Farmfoods stores.

6.41 Overall, the Borough benefits from a good range and choice of foodstore provision, with all of the main operators represented (Waitrose excepted). Whilst there are no food superstores (i.e. over 2,500 sqm net) located within Zone 3 (Guisborough), the town benefits from a choice of four medium-sized supermarkets – comprising Morrisons, Sainsbury's, Lidl and Aldi. Furthermore, whilst there are also no superstores located within Zone 4 (Saltburn and Marske), there is a Sainsburys supermarket which anchors Saltburn District Centre and Co-op in Marske District Centre.

6.42 Zone 1 (Redcar) includes Morrisons and Tesco superstores, along with an Asda and Aldi supermarkets, and Zone 2 (Eston) includes large Tesco Extra and Asda superstores. The new Tesco store at Low Grange, in particular, helps to anchor this new District Centre and, by enhancing the range of provision serving this area, has reduced the need for residents of the Greater Eston area to travel to facilities further afield (including the Morrisons store at Berwick Hills District Centre in Middlesbrough).

6.43 As explained earlier in this section, on the basis that existing spending patterns are maintained, there is not forecast to be any capacity to support new convenience (food) retail floorspace across the Borough over the period to 2032. However, there could be benefits in qualitative terms in seeking to further enhance the range and choice of provision in the Rural East zone. The only store over 500 sqm net floorspace within this zone comprises the Asda store at Pheasant Fields Lane, and there are no stores of any significant size in Loftus. However, planning permission exists for a new Aldi in Skelton, adjacent to Asda and it is considered unlikely that operator interest could be attracted for a new store in Loftus, given its more localised catchment area and the absence of any sequentially preferable opportunities there.

6.44 Provision in Redcar Town Centre includes the Morrisons superstore set out above, along with a number of smaller supermarkets. The foodhall within the former Marks & Spencer variety store closed (along with the wider store) around two years ago. Subject to operator demand, and the identification of a suitable and available site, there could, therefore, be scope for additional foodstore development as part of the ongoing regeneration of this centre. Such a store could also potentially alleviate symptoms of overtrading in the existing Morrisons and Aldi stores in Redcar.

6.45 Guisborough, Saltburn, Marske and Loftus District Centres all include anchor supermarkets. Whilst the new Tesco Extra provides an important anchor role to Low Grange District Centre, there is no foodstore of any significant size within Eston District Centre. We would therefore recommend that the Council seeks to attract a new store which provides an effective anchor for this centre.

6.46 Against this background, in this context, planning permission was granted in 2008 for the redevelopment of the existing precinct in Eston District Centre to provide a new Aldi foodstore. This planning permission was not implemented, understood to be due to land ownership issues. However, such a store would not only enhance the range and choice of stores serving the Eston area but help to bolster the existing District Centre – increasing visitor numbers, generating linked trips with existing facilities and delivering other regeneration and economic benefits.

6.47 Changes in shopping patterns in Redcar & Cleveland – which reflect wider national trends – have seen an increase in popularity in the discount foodstore sector. As set out above, all of these existing stores in the Borough are performing strongly, at levels significantly above their company averages. Subject to the identification of suitable sites, therefore, there could be scope for additional store development in the discount sector, which would help to meet the qualitative needs identified above for Redcar (where the existing Aldi at Larkswood Road is the only discount foodstore operator) and Eston.

Comparison Retail

6.48 Higher order comparison goods tend to be higher value items bought occasionally, where customers window shop and compare prices and goods. Lower order comparison goods are items bought on a more regular basis, where customers are less likely to shop around or travel long distances to shop. Healthy town centres usually have a good mix of higher and lower order comparison goods uses.

6.49 Redcar Town Centre is the largest centre in the Borough and is a focal point within the local community for a range of retail, service and other commercial and community uses. Based on the latest available information from the Council, it contains approximately 18,600 sqm net comparison goods retail floorspace. However, the nature of such provision in the centre is such that the range and choice in some sub-sectors is more limited than would be expected in other centres of a similar scale.

6.50 For example, as set out in Section 5.0, the proportion of clothing and footwear retailers in the centre is lower than the national average and has decreased over the last ten years. This is also reflected in the Venuescore rankings also summarised in Section 5.0, which show that Redcar falls well below other comparable centres in the north-east such as Stockton and Hartlepool.

6.51 The range and choice of comparison goods retail provision contained within the various district centres in the Borough is variable. In summary:

- Guisborough has a good selection of comparison goods operators for a district centre, comprising a variety of national multiples (including Dorothy Perkins, Clarks, Superdrug, Boots and Specsavers) and a range of independents, providing around 5,800 sqm net floorspace in total (or 52 units);

- whilst there is a significant comparison goods element within the existing Tesco Extra store in Low Grange District Centre, the only other non-food retail uses within/on the edge of the centre comprise Card Factory, a Barnados charity shop (both adjacent to Tesco) and Cut Price Carpets (on Normanby Road) (providing 2,800 sqm net in total);
- although the total quantum of floorspace is much smaller than Redcar and Guisborough (1,900 sqm net in total/28 units), Saltburn also contains a range of primarily independent and smaller comparison retail uses (including interiors, books, clothes and gift shops), a significant proportion of which are located on Milton Street, to the north of the railway line (1,900 sqm net in total);
- there is a reasonable range of comparison goods retail provision in Marske District Centre (c. 1,400 sqm net floorspace in total/17 units), although such provision is focused on meeting more day to day needs; and
- the quantum of comparison retail floorspace and number of operators in Loftus (600 sqm net/11 units) and Eston (500 sqm net/10 units) District Centres is limited, again, primarily focused upon uses meeting more basic and day to day needs (e.g. chemists, opticians, florists, card and hardware stores).

6.52 In addition to the above, as illustrated on GIS\23090\01-03 at **Appendix 5**, there is also a range of out-of-centre provision in Redcar and Cleveland Borough. This includes:

- Cleveland Retail Park, at Skippers Lane, around 750m to the west of Low Grange District Centre. This includes 15 different operators within the bulky and non-bulky sectors, and comprises around 24,000 sqm net comparison goods retail floorspace in total; and
- a range of other units dispersed across the Borough, the most significant of which is Franks Factory Flooring at West Dyke Road, in Redcar.

6.53 Whilst the market share of available comparison goods spending generated in the Borough which is achieved by Redcar Town Centre has increased since the 2006 Study, the total quantum of floorspace has decreased slightly. Whilst it contains a range of independent operators, the choice of national multiples is relatively limited for a centre of its size. The former Marks & Spencer outlet store closed in 2014 and both the Yorkshire Trading Company and Beales Department store are currently in the process of closing down.

6.54 On this basis, it should be an aspiration of the Council in the medium to long term to enhance the range and choice of national comparison multiples in Redcar Town Centre. This will help to reduce the need for local residents to travel further afield for such shopping and increase its market share of available expenditure in the face of competition from destinations such as Middlesbrough Town Centre, Cleveland Retail Park and Teesside Park. Whilst the extent to which this can be achieved will depend upon the nature and extent of demand from potential occupiers, it should ideally include – although not be limited to - stores in the clothing and footwear sub-sector. In order to accommodate such stores, it is likely to be necessary to provide additional larger floorplate units which meet modern retailer requirements.

6.55 As set out above, the range and choice of comparison goods retail found within both Loftus and Eston District Centres is limited. Whilst the relatively localised catchment areas of these centres may impact upon the extent to which new operators can be attracted, it should nevertheless be an aspiration to enhance their range and choice of provision. In Eston in particular, this could include new non-food units alongside any new foodstore development which can be secured.

6.56 It will also be important broaden the range of uses found in Low Grange District Centre over time – including comparison retailing - in order to enhance its role in meeting the needs of existing population and planned new housing growth. The location of this centre, which benefits from good road links and visual prominence, means that it is well placed to attract interest from other retail operators with requirements for the area. It will be important, however, to ensure that any development there does not have a harmful effect upon Eston District Centre and any future proposals for its regeneration.

Summary

6.57 On the basis of existing shopping patterns, there is not forecast to be 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.

6.58 In qualitative terms, the Borough benefits from a good range of convenience retail provision overall. However, subject to operator demand, and the identification of a suitable opportunity, there may be scope to enhance the existing range of provision found within Redcar Town Centre. This would contribute towards the ongoing regeneration of this centre more generally. There would also be benefits arising from the provision of a new anchor foodstore in Eston District Centre, which 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.

6.59 In relation to comparison goods, there is forecast to be capacity emerging to support new floorspace in the medium to long term, after allowing for existing commitments £41m in 2032 on the basis of existing market shares). In qualitative terms, whilst this will again depend upon operator demand, the priority should be to enhance the existing range of provision in Redcar Town Centre, particularly in terms of national multiples. The Council should also seek to enhance the range and choice of uses within Loftus and Eston District Centres and, alongside future housing growth, Low Grange District Centre.

7.0 # Need for Other Town Centre Uses

7.1 This section of the study report provides an assessment of the need for new commercial leisure uses in the Borough, drawing on both local and national data/trends in each sector. In doing so, it takes into account the proximity of major leisure facilities in surrounding local authorities, which have the potential to limit the scope for major new facilities.

7.2 Based on NLP's experience and household surveys from across the country, commercial leisure facilities usually draw the main part of their trade from residents up to a 20 minutes travel time. Major leisure facilities such as multiplex cinemas, ten-pin bowling centres and family entertainment centres require a large catchment population, and often benefit from locating together or on large out of centre leisure parks. These factors and the other likely requirements of commercial operators have been taken into account in the analysis that follows.

Cinemas

7.3 There are no nationally-operated cinemas in Redcar & Cleveland Borough itself, with the only such facility being the Regent Cinema, on Newcomen Terrace, in Redcar Town Centre, which has approximately 250 seats. As shown in Table 7.1, below, it attracts around 41% and 25% of those visiting cinemas in the Redcar and Marske and Saltburn Zones, although much smaller proportions (less than 10%) from the other zones within the Borough.

Table 7.1 Cinema Market Shares

Centre/Facility	Zone 1 Redcar	Zone 2 Eston	Zone 3 Guisborough	Zone 4 Marske & Saltburn	Zone 5 Rural East
Regent Cinema, Redcar	40.7%	5.6%	4.8%	24.5%	8.0%
Cineworld, Marton Road, Middlesbrough	37.0%	72.2%	66.7%	47.2%	62.0%
Showcase, Teesside Leisure Park	21.0%	16.7%	26.2%	24.5%	28.0%
Whitby Pavilion	0.0%	0.0%	0.0%	0.0%	0.0%
Other Destinations	1.3%	5.5%	2.3%	3.8%	2.0%
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

7.4 As also shown in the above table, the Cineworld facility at Marton Road in Middlesbrough, attracts between 37% and 72% of visits from the different study area zones in the Borough, and is therefore the most popular cinema for residents of Redcar & Cleveland. The Showcase cinema at Tesside Park also attracts between 16% and 28% of cinema users, with much smaller proportions using other facilities in the surrounding areas.

7.5 **Appendix 6** to this report includes a quantitative assessment of the capacity to support additional cinema provision in the Borough. The national average visitation rate (2.8 trips per annum) has been applied to the Borough's estimated population in order to forecast the total number of cinema trips generated in the Borough. As set out in Table 2 of Appendix 5, it is forecast that that the Borough's population will generate in the order of 379,000 cinema trips in 2016, increasing to 383,000 in 2021, 387,000 in 2026 and 391,000 in 2032.

7.6 In contrast, the household survey results suggest that just c. 80,000 cinema trips in 2016 will be attracted to the Regent Cinema in Redcar (allowing for 10% inflow from beyond the Study Area), as illustrated by Table 4. On this basis, only 18% of all cinema visits by residents of Redcar and Cleveland are made to cinema facilities within the Borough.

7.7 Based on the national average population per cinema screen (47,000 people per screen) and per cinema seat (232 people per seat), the trips made to facilities in Redcar & Cleveland (i.e. the Regent Cinema) equate to around 2 screens or 350 seats. As the Regent facility has one screen, and assuming that existing market shares are maintained, then this assessment indicates that there is unlikely to be any significant scope for additional new provision in the Borough based on existing usage patterns.

7.8 However, it is also relevant to consider whether there is scope to increase the Borough's existing market share of cinema trips from its existing low level. Whilst the existing Cineworld and Showcase facilities will continue to attract trade from Redcar & Cleveland, there may be merit in seeking to attract new cinema provision to a site in/on the edge of Redcar Town Centre. This 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.

7.9 In this context, an additional assessment has been undertaken based upon the assumption that the proportion of cinema trips by residents of Redcar & Cleveland which are made to facilities in the Borough can be increased to 50%. Under this scenario, it is estimated that 222,000 trips would be made to cinemas in Redcar and Cleveland by 2032, which equates to four additional screens and 700 extra seats in 2016 respectively.

7.10 The scale of any additional provision which can be supported will ultimately depend upon the extent to which the market share of facilities within the Borough can be increased. This will, in turn, depend on whether any provision is sufficiently attractive to compete effectively with existing facilities outside of the Borough, including those mentioned above, and whether commercial demand for such provision exists. However, assuming that the existing low market share (18%) can be increased, there is theoretical capacity to support new cinema screens in Redcar & Cleveland.

Tenpin Bowling

7.11 There are no tenpin bowling facilities in Redcar & Cleveland at present, with Hollywood Bowl at Teesside Leisure Park, in Middlesbrough (around 15 km to the west of Redcar) being the closest one to the Borough. The household survey results suggest that the vast majority of residents within each of the defined study zones which go tenpin bowling (between 75% and 91%) visit this facility. No other tenpin bowling alleys attract any significant proportion of residents from within the Borough.

7.12 The national average provision of tenpin bowling facilities equates to one lane per 12,000 people. On this basis, the Borough's population (135,497 in 2016) can theoretically support 11 lanes, increasing with population growth in the Borough to 12 lanes by 2032.

7.13 Whilst it would be desirable to capture a proportion of the Borough's tenpin bowling trips through new facilities in Redcar & Cleveland, the extent to which this can be achieved is likely to be heavily influenced by operator demand. It is also likely to be influenced by existing facilities in surrounding areas, including Hollywood Bowl at Teesside Leisure Park, which are likely to continue to attract visitors from Redcar and Cleveland – particularly from the western parts of the Borough (including Eston), which are closely related to the Middlesbrough urban area.

7.14 On this basis, whilst it would be advisable to obtain the views of commercial agents, and there is theoretical capacity to support new provision, it may be challenging to attract a tenpin bowling operator to the Borough.

Bingo Halls

7.15 Gala and Mecca are the main bingo operators, controlling over half of the UK market. Marketing of the bingo sector has been more proactive in recent years and Gala and Mecca have invested in new/improved premises, moving out of dated accommodation (i.e. converted cinemas) into purpose built units. Bingo clubs have become increasingly sophisticated, and have actively sought to attract all age groups.

7.16 The bingo sector usually prefers central locations that are accessible by public transport and by foot. Major bingo operators require buildings of between 2,000 - 3,000 sqm, capable of seating up to 2,000 people, with a catchment population of 50,000 to 70,000 within freestanding towns (source: Business In Sport and Leisure BISL).

7.17 The household survey results indicated that 8% of respondents in the study area visit bingo facilities, which is above the national average bingo visitation rate of around 5%. Around 29% of these respondents indicated that they visit facilities in Middlesbrough (including Gala at Longlands Road), with 20% using facilities in Redcar (including Beacon Bingo on the Esplanade) and 15% travelling to Stockton (including Mecca at Chandlers Wharf).

7.18 It is estimated that the adult (over 18) population of Redcar & Cleveland Borough (estimated to be 107,000 in 2016) is likely to generate around 187,000 admissions based on the national participation rate (1.75 trips per adult) – increasing with population growth to around 193,000 in 2032. Based on national average figures (113,000 admissions per club), the Borough's population could in theory support 1.7 facilities, assuming all trips are retained within the Borough.

7.19 The existing Beacon Bingo facility in Redcar is relatively small, in comparison to other facilities in surrounding areas. In this context, and given the higher than average rate of participation in the study area, there could be scope for an additional bingo hall in the Borough to meet local needs. However, as with the other leisure uses covered above, the potential to bring forward a new bingo hall will depend upon the extent of operator demand for such a facility in the Borough, and whether any locations exists which are commercial attractive.

Health and Fitness Clubs

7.20 Around 20% of respondents to the household telephone survey indicated that they (or their families) visit health/fitness clubs. The survey also indicates that around 89% of trips to health and fitness facilities generated by residents of Redcar & Cleveland are retained within the Borough.

7.21 Looking at the range of provision across the Borough as a whole, Sport England/Active Places data indicates there are 15 health and fitness facilities overall in Redcar and Cleveland. These suites have 682 fitness stations in total, as shown in Table 7.2 below.

Table 7.2 Health and Fitness Clubs in Redcar and Cleveland

Name	Type	No. of Stations
Allama Health Studio	Pay and Play	57
Body Talk	Registered Membership use	50
Bydales School	Private Use	16
Eston Leisure Centre	Pay and Play	100
Grangetown Ycc	Sports Club / Community Association	10
Guisborough Leisure Centre	Pay and Play	20
Guisborough Swim & Fitness Centre	Pay and Play	30
Invictus Health Studio	Pay and Play	33
Loftus Leisure Centre	Pay and Play	34
Mas Body Gym	Registered Membership use	45
One Gym (Redcar)	Pay and Play	44
Redcar & Cleveland College	Private Use	18
Redcar & Cleveland Leisure & Community Heart	Pay and Play	120
Rye Hills School	Sports Club / Community Association	15
Saltburn Leisure Centre	Pay and Play	90
Total		**682**

Source: Sport England/Active Places Data

7.22 Redcar & Cleveland's population is estimated to be 135,497 in 2016, increasing to around 139,502 in 2032. The Borough currently has 5.0 fitness stations per 1,000 people (682 stations in total, including private use facilities). This level of provision is below the existing north-east average, which equates to 7.6 fitness stations per 1,000 persons.

7.23 The adult population of the Borough (106,907 in 2016) could generate demand for 12,829 public and private gym membership places, based on the national average membership rate (12%). Assuming 75% of members are retained, and based on the national average membership rate, it is estimated that around 9,600 members use facilities in Redcar & Cleveland. This estimate implies that the 15 facilities in the Borough have an average number of users of around 640 per facility.

7.24 In the context of the above, there is considered to be a need to enhance the existing provision of facilities over the study period. In particular, given the absence of any such operators at present, it would be appropriate seek to attract one or more of the large national gym operators, with preference given to sites within/on the edge of existing defined centres.

Food and Beverage Uses

7.25 Food and beverage is a fast moving and creative sector, with a steady flow of new concepts emerging. Within this sector there has been a significant increase in the number of national multiple chains, which have, in turn, sought to increase their geographical coverage. These types of food and drink operators (i.e. restaurants, bars and pubs) also support other major leisure uses, in particular cinema developments.

7.26 Demand has increased amongst food and beverage uses within town centres, and this has been manifested in a significant expansion in the number of coffee shops, such as Starbucks, Costa Coffee and Café Nero. National branded pub/restaurant chains have invested heavily, not exclusively in larger centres, and themed restaurants have also expanded rapidly.

7.27 The key categories for food and beverage offers are:

- **impulse:** characterised by their produce range that is typically highly visual and hand-held so that it can be eaten “on the go”;
- **speed eating/fast food:** food that can be purchased and consumed quickly, therefore price is low and ambience is less important. This sector is dominated by traditional high volume fast food offers, such as burgers and fried chicken;
- **refuel and relax:** a drink, snacks and/or a short break in a pleasant environment, rather than focusing on eating a main meal; and
- **casual dining/leisure dining:** incorporating a number of food styles, types and ethnic origins. The ambience and environment of casual dining is as important as the food, drink and service provided. The style is informal but is normally table service.

7.28 Food and beverage establishments (Class A3, A4 and A5), including restaurants, bars and pubs, have supported other major leisure uses on leisure and retail parks and are important services within town and local centres. National information available from Experian Goad indicates that the proportion of non-retail uses within town centres across the country has increased significantly.

Expenditure Capacity

7.29 Along with information on population provided by RCBC, Experian's latest (2014) local expenditure figures have been adopted in order to provide an assessment of the capacity for new food and beverage floorspace over the study period.

7.30 Forecasts of food and beverage expenditure per capita between 2016 and 2032 are shown in Table 2, **Appendix 7**, with total expenditure being shown in Table 3. These figures indicate that the expenditure in the Borough for food and beverages consumed away from the home (plus takeaways eaten at home) in the Borough is forecast to increase by around £40.3m (28%), from £143m in 2016 to £183m by 2032.

7.31 Existing food and beverage expenditure patterns have been modelled based on the household survey results within the study area zones. Base year (2016) penetration rates are shown in Table 4 and expenditure patterns are shown in Table 5. The estimated expenditure currently attracted to facilities within Redcar & Cleveland (also allowing for inflow from beyond the Borough) is £117m in 2016.

7.32 The rate of food and beverage expenditure retention in Redcar & Cleveland Borough is around 68% and it is recommended that this market share should, as a minimum, be maintained. The capacity forecasts set out in Appendix 6 are based on this approach, and make an allowance for existing facilities to increase their turnover by 1% per annum.

7.33 The level of food and beverage expenditure available to existing facilities has been projected forward to 2032 in Tables 5 to 8, and this available expenditure is compared with the projected turnover of existing facilities in Tables 10. This table indicates that there is forecast to be capacity in the order of £3.5m in 2021, increasing to £7.6m in 2026 and £13.0m in 2032.

7.34 Surplus expenditure has then been converted into floorspace projections in Table 11, using an average sales density of £5,000 per sqm in 2016, again increasing by 1% per annum. As summarised in Table 4.5 below, this indicates that the above levels of capacity could support around 663 sqm new food and beverage floorspace in 2021, increasing to 1,370 sqm by 2026 and 2,218 sqm by 2032. Whilst it will ultimately depend upon whether there are sufficient suitable and available sites, the Council should seek to direct as much of this new floorspace as possible to locations within/on the edge of existing centres, in Redcar Town Centre.

Table 7.3 Food and Beverage Floorspace Capacity 2016-2032 (sqm)

Area	2016	2021	2026	2032
Redcar Town Centre	0	185	386	624
Low Grange District Centre	0	0	0	0
Eston District Centre	0	46	95	155
Guisborough District Centre	0	173	354	575
Marske District Centre	0	39	81	131
Saltburn District Centre	0	127	263	425
Loftus District Centre	0	5	10	17
Other Destinations	0	88	180	292
Total	**0**	**663**	**1,370**	**2,218**

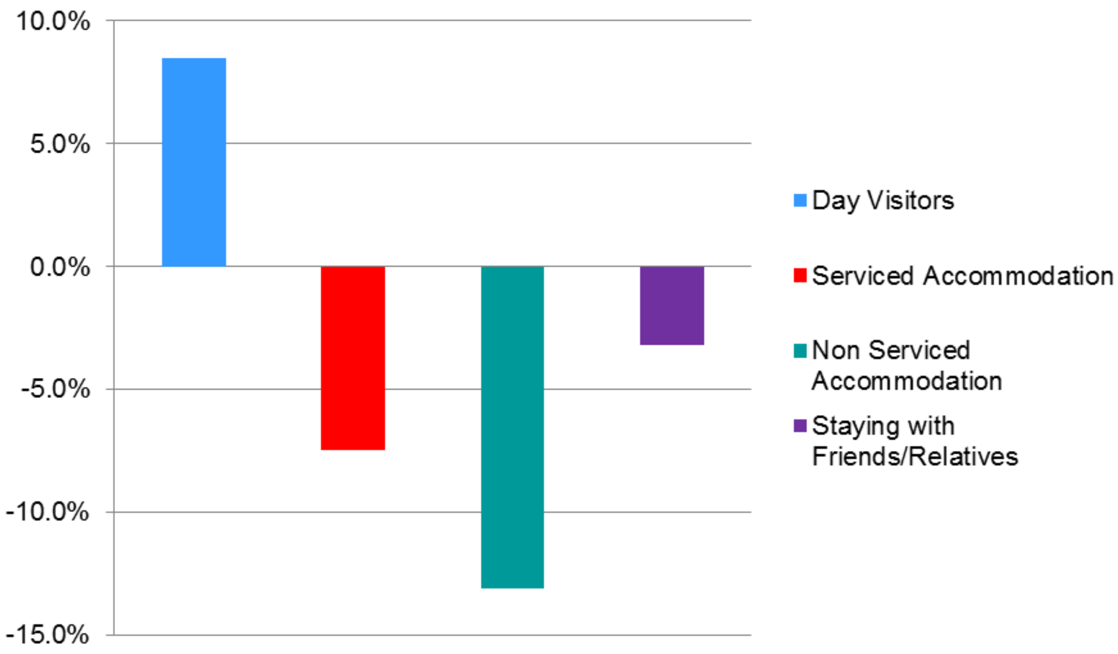
7.35 It would desirable, from a sustainability perspective, to seek to increase the proportion of food and beverage expenditure generated within the Borough which currently is spent in Redcar & Cleveland (68%) over time. The extent to which this can be achieved will depend upon the scale and nature of any new provision which comes forward in future, including whether this enhances the existing range of facilities in the Borough. Should this be possible, however, the levels of floorspace capacity identified would clearly be higher than set out above.

Hotels

7.36 In order to provide an assessment of the potential need for new hotel and other overnight accommodation in Redcar & Cleveland, information has been obtained from STEAM reports produced by Global Tourism Solutions UK Ltd (GTS). STEAM (Scarborough Tourism Economic Activity Model) provides a range of information on visitor numbers, overnight stays, expenditure/other related economic impact and accommodation.

7.37 Figure 7.1, below, illustrate changes in the number of visitor days spent in Redcar, as the main town in the Borough, over the period between 2009 and 2014. This includes both day visitors as well as those staying in different types of accommodation, including serviced, non-serviced and with friends and relatives (SFR).

Figure 7.1 Change in Visitor Days 2009-2014 (%)



Source: Steam Report 2014 (GTS Ltd)

7.38 As illustrated in Figure 7.1, and based on the STEAM information, the overall number of day visitors per annum increased over the period to 2014, by 8.5% (from around 850,000 to circa 930,000). However, the total number of visitor days for those staying overnight in Redcar, across all three categories of accommodation, has decreased slightly over the same period by around 5% in total (from around 470,000 to c. 445,000).

7.39 The number of nights stayed in serviced accommodation, in particular, has decreased from around 72,000 to 67,000 (again, around 11%). Related to this, and also based upon the STEAM report, the amount of money spent per annum on overnight accommodation in Redcar decreased from around £2.4m in 2009 to £2.1m in 2013 (i.e. by around 18%).

7.40 The increase in the number of day visitors is clearly positive and may reflect, in part, recent investment along the Esplanade, including the Beacon and other public realm enhancements. It is also consistent with the findings of the on-street survey. This highlighted an increase in the number of people visiting Redcar Town Centre in particular to go to the beach/seafront or for other tourism purposes. It also indicated that the beach/seafront was the third highest-scoring feature than respondents liked about the centre.

7.41 However, there is clearly scope to stem the recent decline in the number of people staying overnight in Redcar and, in the medium to long term, increase these numbers. This would result in a range of benefits, not least generating linked trips and indeed additional trade for existing facilities in the town centre. Such facilities could include not only shops and other services, but also food and beverage uses, such as pubs/bars and restaurants. This may in turn stimulate investment in new food and beverage uses which enhance the existing range and choice of provision in Redcar – increasing the overall quantum of spending retained within the town.

7.42 In considering the scope to increase overnight stays in Redcar, it is also important to review the existing range and choice of hotel provision in the town. In this context, the above STEAM report also provides information on the number of facilities providing overnight accommodation in Redcar.

Table 7.4 Summary of Serviced Accommodation in Redcar and Cleveland Borough

Size of Facility	Number of Facilities	Number of Bedspaces
11-50 Room	8	362
<10 Room	5	68
Serviced Accomodation Total	13	430

Source: STEAM Report for Redcar (April 2014), GTS

7.43 As illustrated in Table 7.4, above, there are a total of 14 facilities in Redcar which provide serviced accommodation (i.e. excluding self-catering facilities), incorporating a total of 437 bedspaces. Whilst it is difficult to make direct comparison with other towns, both the total number of facilities and the number of bedspaces appear low, particularly for a town of Redcar's scale and given its seaside location. In addition, and in qualitative terms, the vast majority of existing hotel provision in the town comprises independent operator and neither of the two main national budget operators (Travelodge and Premier Inn) are represented – either in Redcar or the wider Borough.

7.44 Overnight accommodation on offer in Redcar Town Centre is generally limited to smaller facilities - including bed and breakfasts, bedspaces above public houses (e.g. the Cleveland Hotel, the Station Hotel and the Clarendon Hotel) or converted residential units (for example Alpine House, Springdale House and the All Welcome Inn). There are some slightly larger 3-star hotels available such as the Park Hotel and Claxton House Hotel (both of which are located on the eastern edge of the Town Centre), but there is a lack of national chains or larger hotels more suited to business use, large group visits and/or families.

7.45 There would, therefore, appear to be scope to enhance the existing range of provision in Redcar in both quantitative and qualitative terms. In line with the sequential approach set out in the NPPF, sites within Redcar Town Centre should be considered as first preference, before looking at edge of centre or out of centre sites.

7.46 It will be important to bring forward other enhancements to the town's visitor offer alongside any new hotel provision, in order to ensure that Redcar remains sufficiently attractive a destination to potential new overnight visitors. However, subject to commercial demand, there could be scope for the development of one or more new hotels in the town operated by national chains. This conclusion is consistent with that made in the Borough's Regeneration Masterplan, which identifies the scope for private sector investment in new hotel accommodation in both Redcar and Saltburn.

Summary

7.47 In summary:

- whilst 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 - there would appear to 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;
- 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.

8.0 # Meeting the Need

8.1 This stage of the study provides recommendations on whether and where the identified qualitative and quantitative needs for new retail and other town centre uses can be accommodated within existing centres. It therefore considers the following:

- whether there is a need to allocate new sites which can accommodate new development for retail and/or commercial leisure uses;
- the criteria to be applied in deciding which sites should be allocated; and
- whether development in out of centre locations will be required.

8.2 In addition, it is important that any proposed allocations take into account the likely scale and nature of commercial demand for new floorspace. This will help to ensure that the development plan objectives are realistically deliverable, as required by the NPPF.

Summary of Identified Needs

8.3 In order to inform the assessment of potential development sites, the table below sets out the quantitative and qualitative needs which have been identified through Sections 6.0 and 7.0 of this report.

Table 8.1 Summary of Identified Needs

Use	Identified Needs
Convenience Retail	No quantitative capacity identified on the basis of existing market shares. Qualitative need to bring forward enhanced provision in/on edge of Redcar Town Centre, as well as a new medium-sized anchor foodstore in Eston District Centre.
Comparison Retail	Capacity of £42m over period to 2032 across the Borough, based on growth in expenditure and assuming existing Borough-wide retention rate maintained. Need to enhance range and quality of provision in Redcar Town Centre, including national multiples. Also need to enhance provision within Loftus and Eston District Centres and, over time, broaden range of provision in Low Grange District Centre (subject to impact upon Eston).
Cinema	No need for additional cinema provision on the basis of existing visitation patterns – but theoretical scope for four additional screens if possible to increase the Borough's existing market share of visits.
Tenpin Bowling	Theoretical capacity for 12 lanes over period to 2032, although scope to bring forward new facilities will be influenced by operator demand and existing facilities in surrounding local authority area (including Hollywood Bowl facility at Teesside Leisure Park).
Bingo Halls	Quantitative and qualitative need for an additional new bingo hall, taking into account national average admission rates.

Use	Identified Needs
Health and Fitness Clubs	Scope for one or more new facilities, potentially including national operators, based on national average participation rates.
Food and Beverage Uses	Capacity to support around 2,200 sqm new food and beverage floorspace over the period to 2032 (based on existing market shares), which should be directed to Redcar Town Centre in the first instance.
Hotels	Potential for one or more new hotels which enhance existing range of provision in quantitative and qualitative terms.

Site Selection Criteria

8.4 In considering the potential of any identified sites to meet the above needs, a review of these sites has been undertaken, taking into account the following factors:

- existing land uses and availability, categorised as follows:
  - short to medium term – up to 2026;
  - long term - likely to be completed after 2026;
- commercial potential for retail/leisure development and the most likely form of development, categorised as follows:
  - prime site - likely to attract a developer and occupiers;
  - secondary site – which may generate limited demand or only demand for a specific kind of use.
- potential scope to accommodate additional retail/leisure floorspace (net increase), categorised as follows:
  - small scale - under 1,000 sqm gross floorspace;
  - medium scale – 1,000 to 2,500 sqm gross floorspace;
  - large scale - over 2,500 sqm gross floorspace;
- potential development constraints; and
- potential to meet the identified needs.

8.5 The overall development prospects of each opportunity, taking on board all of the factors listed above, is categorised as follows:

- Good - development sites that have good prospects for providing additional retail/leisure floorspace, and should be considered for implementation in the short to medium term;
- Reasonable - development sites which are well located and may provide potential for additional floorspace, although obstacles to development will need to be overcome and/or implementation may only be achieved in the long term; and
- Poor - development sites that may be unattractive or unsuitable for retail or leisure development, and/or where their delivery is very uncertain.

8.6 An overall rating has been made, based on an initial evaluation for each site.

8.7 Whilst the above criteria include broad consideration as to the likely attractiveness of sites to developers and occupiers, it will also be important to obtain the views of commercial agents on these sites. This will help to provide a firmer indication as to likely levels of demand for new representation from operators in the Borough and which sites, if any, are considered suitable to meet this demand.

Review of Sites

Redcar Town Centre

Car Park, West Dyke Road/Lord Street

8.8 The only opportunity identified as part of this study with potential for medium or large scale development, within the existing Redcar Town Centre, is the existing public car park, adjacent to the junction of West Dyke Road with Lord Street. This site comprises around 0.2 ha and was previously occupied by a Kwiksave supermarket which has since been cleared.

Figure 8.1 Car Park, Lord Street/West Dyke Road, Redcar Town Centre

8.9 There are a number of existing terraced shop units adjacent to the site, facing onto West Dyke Road, which will impact upon the physical form of development which could come forward here. Despite its proximity to the High Street, it also has limited visual linkages with the existing Primary Shopping Area. However, subject to improving these linkages, and despite its limited size, there is potentially scope for the site to accommodate new retail and/or leisure development, which enhances the existing range of provision and helps to meet some of the needs identified above.

Former M&S and Yorkshire Trading Company Stores, High Street

8.10 As explained in Section 5.0, the existing Yorkshire Trading Company store on High Street is currently in the process of closing down and the former M&S unit (which lies immediately adjacent) appears to be occupied on a temporary basis. If these stores can be combined to form one single opportunity (comprising around 0.2 ha in total), it may offer potential to accommodate new retail development which helps attract national multiple occupiers. It could also provide a link through to the Esplanade and help to provide a more concentrated retail offer in the centre – moving away from the more dispersed pattern caused by the length of the High Street/High Street East.

Figure 8.2 Former M&S Unit, High Street, Redcar Town Centre

8.11 However, such a site would be relatively narrow, constrained by other commercial properties to the east and west. Given its size, it is also unclear whether it could accommodate sufficient critical mass of retail floorspace to provide an uplift in the existing offer of the centre – including national multiple retailers not currently found in Redcar. It may therefore be appropriate to undertake further work which reviews in more detail whether there is scope to incorporate other land and buildings in this part of the centre, in order to help deliver such a scheme.

Other Sites Within the Centre Boundary

8.12 Elsewhere in Redcar Town Centre, opportunities for new development are limited to smaller scale, infill sites. These include:

- former Bus Station, High Street East (0.1 ha);
- 5-8 Esplanade (0.1 ha);
- 35-38 Esplanade (0.1 ha);
- 12C West Terrace (former Wetherells furniture store) (0.1 ha); and
- other vacant units and small plots of land, dispersed across the centre.

8.13 None of these sites 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. However, they all have potential to accommodate new uses which contribute towards the vitality and viability of the wider town centre. Such uses could include new food and beverage uses which enhance the existing range of facilities in the centre – including those which are more family-orientated. Some of the sites may also be suited to residential development, particularly the bus station site, which is located at the far eastern end of High Street and is likely to be less attractive to commercial operators.

Coatham Enclosure

8.14 Consideration has also been given to whether land on the south side of Majuba Road, known as the Coatham Enclosure, has potential to accommodate a major new leisure attraction which enhances the existing offer available in Redcar. New uses could include a new multiplex cinema, as well as a hotel and food and beverage uses.

Figure 8.3 Coatham Enclosure, Redcar Town Centre

8.15 The site, which comprises around 7 ha in total, is currently allocated under Policy L6 of the adopted Local Plan for major leisure and housing development. However, it lies around 300m walking distance from the defined boundary of Redcar Town Centre and around 500m from the Primary Shopping Area. It should, therefore, be considered, at best, an edge of centre location (for leisure purposes) and out-of-centre for new retail development. On this basis, given that the adopted Local Plan is considerably out of date in the context of the NPPF, and depending on the scale of development proposed, any proposed allocation for retail and leisure facilities would need to address the sequential and impact tests.

8.16 Further work would be required in order to establish whether such tests, as well as wider planning policy aims and objectives, could be addressed. This should take into account the scale and nature of the new leisure/tourism uses proposed, the extent to which they could be accommodated on sites within the existing centre and the likely impact upon the prospects of attracting new operators to other opportunities within the centre. It should also take into account the extent to which any such new development would generate linked trips with existing facilities in the centre.

District Centres

8.17 There are only limited opportunities for redevelopment in existing district centres in Redcar & Cleveland. As set out in Table 8.1, there are also no clear needs identified to enhance the existing range of retail and/or leisure uses contained within many of these centres.

8.18 A need has been identified, however, to enhance the existing range of provision in Eston, in order to re-inforce its district centre status and provide a new anchor foodstore in particular. The planning permission previously granted for a new Aldi foodstore helps to confirm the principle of acceptability of such development and, whilst the market has evolved since then, there is still considered likely to be demand from one of the discount foodstore operators.

8.19 The most obvious opportunity within the centre is the existing Eston Precinct, which is located on the north side of Eston Square and the B1380 High Street. This precinct is in poor condition and contains a number of vacant units (four).

Figure 8.4 Eston Precinct, Eston District Centre

8.20 As with the Coatham Enclosure, further work will be required to establish whether a site could be assembled which is capable of accommodating a new foodstore and, potentially, other modern new retail units. As part of this, consideration should also be given to whether there is scope to include other adjacent land and buildings to the east within such a development. However, planning permission was previously granted for redevelopment of the precinct for, inter alia, a new Aldi foodstore, providing a helpful indication as to what could be achieved here.

Summary

8.21 Table 8.2 below provide a summary of the sites covered above. These sites have been assessed against a number of criteria, related to the suitability and availability to help meet the needs identified in Sections 6.0 and 7.0, as well as their likely attractiveness to commercial operators and developers.

Table 8.2 Review of Potential Development Sites

Site	Former M&S and Yorkshire Trading Company, High Street, Redcar	Car Park, West Dyke Road/Lord Street, Redcar	Former Bus Station, High Street East, Redcar	35-38, Esplanade, Redcar
Existing Uses/Availability	Outlet store in former M&S store and Yorkshire Trading Company currently closing down.	Currently a privately operated pay and display car park.	Vacant former bus station and associated buildings, currently being marketed.	Former bingo hall/amusement arcade and nightclub, currently being marketed.
Commercial Potential	Prime site – frontage to central part of Primary Shopping Area, opposite Regent Walk.	Prime site – with frontage to West Dyke Road.	Secondary – at far end of High Street East where footfall levels are significantly lower.	Secondary – no frontage to High Street.
Scope for New Floorspace	Medium Scale.	Medium Scale.	Small Scale.	Small Scale.
Potential Constraints	Relatively narrow site with retail uses on High Street to either site. Former M&S store still currently in use.	Public parking currently well-used. Shape of site and adjacent commercial uses on West Dyke Road may impact upon form of development achievable.	Small and relatively narrow site, with existing commercial uses to west, and residential to east.	Relatively small site, constrained by commercial properties to east and south.
Potential to Meet Needs	Scope for new comparison retail floorspace, providing circuit which links to Esplanade.	Potential for new retail and/or leisure uses, although size likely to impact upon commercial attractiveness and ability to accommodate larger scale development.	Smaller scale leisure uses (e.g. food and drink) and/or residential development.	Smaller scale retail or leisure uses (e.g. food and drink) and/or business accommodation.
Summary	Reasonable.	Good.	Poor.	Reasonable.

Table 8.2 Review of Potential Development Sites

Site	5-8 Esplanade, Redcar	12C West Terrace, Redcar	Coatham Enclosure, Majuba Road, Redcar	Eston Precinct, Redcar
Existing Uses/Availability	Previously a bar/nightclub and now a cleared site occupied by fairground rides.	Former Wetherells Furniture Store – now demolished.	Vacant site occupied by scrub grassland (part formerly occupied by leisure centre and music venue).	Pedestrianised shopping precinct, with a number of units unoccupied (four) and servicing to rear. Potentially scope to include adjacent land/buildings to east, including car parking, social club, and other small retail units within any site.
Commercial Potential	Secondary – no frontage to High Street.	Secondary – though adjacent to West Terrace, which links West Dyke Road to Esplanade.	Prime/Secondary – adjacent to Majuba Road but away from main routes into Redcar.	Prime/Secondary – potential frontage to B1380 though away from other key routes through Greater Eston area.
Scope for New Floorspace	Small Scale.	Small Scale.	Large Scale.	Large Scale.
Potential Constraints	Along with surrounding properties, the size and irregular shape of site likely to be significant constraint.	Small site surrounded by other commercial properties and relatively narrow streets.	Limited visual linkages within existing defined town centre – edge of centre site at best.	Shape of site and surrounding uses may impact upon form of development achievable. Servicing currently to rear of precinct.
Potential to Meet Needs	Smaller scale retail or food and drink uses.	Smaller scale retail/leisure uses, potentially with residential above.	Scope for major new leisure development, anchored by cinema and hotel, potentially also including food and drink, bingo, tenpin bowling, and/or health and fitness uses – subject to addressing sequential/impact tests and enhancing	Scope for discount foodstore-led redevelopment, also including other modern retail accommodation.

Site	5-8 Esplanade, Redcar	12C West Terrace, Redcar	Coatham Enclosure, Majuba Road, Redcar	Eston Precinct, Redcar
			linkages with existing town centre.	
Summary	Reasonable.	Reasonable.	Good.	Good.

8.22 Taking into account all of the above, it is considered that the following sites have potential for allocation within the emerging Local Plan, in order to accommodate new town centre uses:

- the existing car park at West Dyke Road/Lord Street, which has potential for redevelopment for new retail and/or leisure uses; and
- land and buildings at Eston Precinct, which could potentially accommodate a new anchor foodstore and other new retail units.

8.23 In addition, however, it is recommended that further work be undertaken, in order to:

- review options on the north side of High Street (potentially including the former M&S and Yorkshire Trading Company units), to determine whether they offer potential to accommodate significant new comparison goods retail development, which provides an uplift in the centre's exiting offer;
- consider whether there are any other potential sites which could be assembled within/on the edge of the centre, with good links to the Primary Shopping Area, and which offer potential to accommodate a new discount foodstore, with associated car parking (likely to require a site in excess of 1 ha); and
- establish whether new leisure and tourism uses developed on the Coatham Enclosure site would satisfy the NPPF sequential and impact tests, as well as whether pedestrian linkages could be enhanced, so as to generate linked trips with existing facilities in the town centre.

8.24 Whilst we would not recommend that any specific allocations be made, the Local Plan should also provide encouragement for the development and re-occupation of other, smaller sites/vacant units within the centre, including those identified further above.

9.0 Policy Recommendations

Retail Hierarchy

9.1 The existing hierarchy of centres in Redcar & Cleveland Borough is set out in Policy CS18 of the adopted Core Strategy and summarised in Table 2.1 in Section 2.0 to this report.

Redcar Town Centre

9.2 Redcar should retain its status as a Town Centre and the main focus for retail, service, leisure and community facilities within the Borough. Its influence varies across the different study zones, and it is less popular in southern and western parts of the Borough. However, whilst it faces a number of challenges – most notably in the face of competition from destinations such as Middlesbrough Town Centre, Teesside Shopping Park and Cleveland Retail Park, as well as and online shopping – it is by far the largest of the existing centres in the Borough, with over three times the amount of retail floorspace as the next largest centre (Guisborough).

9.3 The Council should plan to maintain and, in the medium to long term, increase the market share of Redcar Town Centre, through enhancements to the centre's retail and leisure offer and therefore its overall attractiveness. Should the Council wish to bring forward new retail or leisure development, then it will be important to identify sites which are capable of accommodating such development and are attractive to commercial operators/developers. Any new retail development in particular should have good pedestrian linkages with the existing PSA within the centre.

9.4 It will also be important to include a positive approach, which provides support for new food and drink and other leisure uses across the centre (including those not specifically covered as part of this study). As part of this strategy, we would recommend that the Council plan to meet some of the identified leisure needs through a new development which could be anchored by a cinema and/or hotel, potentially also including other uses, such as family-orientated cafes/restaurants.

9.5 In order to deal with planning applications which are made for non-retail uses within both the PSA and the wider centre (including late night opening food and beverage uses), it is recommended that a criteria-based approach be implemented, for both Redcar and Guisborough. This would require that applicants consider issues relating to:

- the potential impact upon the retail character of the centre and/or the PSA;
- the scope to maintain live frontages within the PSA and wider centre;
- the impact upon the vitality and viability of the centre more generally;

- any potential impact upon local amenity (in respect of food and beverage uses).

9.6 The approach would reflect the current health of Redcar Town Centre in particular, and the need to encourage the re-occupation of currently vacant units and attract new investment there. It also reflects recent changes to the General Permitted Development Order (GPDO), which have made it easier to change between A Class uses, as well as the contribution that non-retail uses make to the vitality and viability of these and other centres – in terms of generating footfall and linked trips, extending dwell time and enhancing the range of uses more generally.

District Centres

9.7 The role and function of the six district centres in the Borough, along with the scale and nature of retail and service provision they contain, varies significantly. Guisborough contains the most significant quantum of retail floorspace (7,900 sqm net) and, whilst there are just four retail uses at Low Grange, it still contains a reasonably high level of floorspace (5,900 sqm net), primarily within the Tesco Extra store. Whilst it will be important to guard against any potential harmful impacts upon Eston, it is envisaged that the range of provision there will broaden out over time, alongside planned new housing in the Greater Eston area.

9.8 Marske and Saltburn are smaller, at around 3,100 sqm net and 2,500 sqm net respectively, but both are healthy district centres which contain a good range of retail and service uses, including anchor supermarkets. However, as set out in Section 4.0, Loftus and Eston District Centres face challenges in terms of their future role and function – largely as a result of the declining range of provision they contain, the quality of the shopping environment and their high unit vacancy rates.

9.9 It is considered that they can both continue to perform important roles as district centres in future, serving their respective catchment areas. Despite these high vacancy rates, they contain a range of uses, including retail, services and community facilities. However, it is likely to be necessary to review the existing centre boundary in Loftus in particular, given the structural issues it is facing – and in particular the areas of dead frontages at the heart of the centre.

9.10 This would be consistent with the recommendation of the Regeneration Masterplan: East Cleveland Area Spatial Framework, which was produced by the Council in April 2010. The document promoted a broadening of the range of facilities in Loftus over time, as well as the consolidation of the retail core, in order to inject life and animation back into the centre.

Local Centres

9.11 As part of this study, we have not undertaken any detailed analysis of currently defined local centres, including the range and mix of uses they contain.

However, based on a review of the surveys undertaken by the Council in April 2016, whilst majority of local centres include a reasonable mix of uses, the number and range of commercial uses in both New Marske (Birkdale Road) and Carlin How (High Street) is limited.

9.12 By way of context, whilst nothing is included within the NPPF or the accompanying Planning Practice Guidance, the now superseded Planning Policy Statement (PPS) 4: Planning for Sustainable Economic Growth provided the following definition:

“Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette. In rural areas, large villages may perform the role of a local centre.”

9.13 Carlin How, in particular, contains just three active commercial uses according to the survey – comprising a post office/general store, hair salon and fish and chip shop. On this basis, whilst it clearly performs an important role for local residents, particularly those without access to a car, it does not represent a typical local centre based on the above definition.

9.14 Similarly, New Marske Local Centre as currently defined contains just six commercial uses. These comprise a general store, bakery, hair salon, tanning studio, and two hot food takeaways. This is a limited range of uses which, although meeting local residents’ day to day needs, is again not consistent with the definition of a local centre as set out above.

Policy Strategy

9.15 Any policy framework in respect of town centres and town centre uses should take into account the broad principles of sustainable development set out in the National Planning Policy Framework (NPPF) – including the economic, social and environmental roles incorporated at paragraph 7 of that document. The policy approach should also take into account the key principles set out within the NPPF in terms of ensuring the vitality and viability of town centres (at a para. 23).

9.16 This means ensuring that policies, inter alia:

- direct new development to town centres, in line with the sequential approach, in order to support their viability and vitality;
- help to ensure that the network and hierarchy of defined centres is resilient to current and anticipated changes in the retail and leisure sector;
- ensure that the approach taken to proposals within primary shopping areas is sufficiently flexible to allow the re-occupation of units which are no longer suitable for operator requirements;
- promote competitive town, district and local centres that provide consumer choice and a diverse retail offer;

- support existing markets and recognise the role that both they and potential new markets can perform in not only meeting local needs but attracting visitors and diversifying the centre's offer as a whole;
- provide sufficient opportunities to meet the scale and nature of the need identified for new retail and commercial leisure uses in the Borough, taking into account operator requirements;
- support proposals for new development which help to enhance the 'digital health' of existing centres (e.g. provision of free wifi, click and collect facilities etc);
- include policies for proposals outwith existing centres, are not in accordance with the plan, which are in line with the key sequential and impact tests, and help to ensure that needs are met in the most sustainable locations;
- recognise the relationship between existing/new residential development and the vitality and viability of centres; and
- take into account the benefits of individual policies and proposals in terms of the local economy and regeneration.

9.17 It also will clearly be important to monitor key indicators going forwards, in order to establish the extent to which future planning policy objectives are being met. Such indicators will include the vitality and viability of existing centres as well as the location and scale of new development. They could also include the digital health of centres, including the extent to which they are served by 4G coverage, free wifi hotspots, shopping centre apps and/or click and collect facilities. As set out above, centres and stores which perform well in respect of these digital capabilities will be better placed to be able to withstand competition from out-of-centre destinations.

Site Allocations

9.18 Section 8.0 of this study report provided a review of whether there is a need to allocate sites to meet any identified needs for new retail and commercial leisure uses in Redcar & Cleveland.

9.19 As set out in Table 8.1, there is a need to enhance the existing range of non-food retail provision in Redcar Town Centre. In our view, the most appropriate strategy for achieving this would be to an opportunity to accommodate modern new retail units, which provide an uplift in the centre's exiting offer. Such development should be well connected to both the existing Regent Walk shopping mall and the Esplanade. Whilst there is no quantitative capacity identified to accommodate new convenience retail floorspace across the Borough, there is also a need to enhance the foodstore offer both within Redcar Town Centre and Eston District Centre.

9.20 Based on national participation rates, theoretical capacity has also been identified to support new leisure facilities in Redcar, which could potentially include new a cinema, bingo hall, tenpin bowling and/or health and fitness clubs, as well as new food and beverage uses. Such facilities would also, more generally, help to deliver wider benefits for the vitality and viability of the town centre, providing additional reasons to visit and generating linked trips with existing uses.

9.21 Against the above background, and as set out in Section 8.0, it is considered that the following sites have potential for allocation within the emerging Local Plan, in order to accommodate new town centre uses:

- the existing car park at West Dyke Road/Lord Street, which has potential for redevelopment for new retail and/or leisure uses; and
- land and buildings at Eston Precinct, which could potentially accommodate a new anchor foodstore and other new retail units.

9.22 In addition, and as also set out in Section 8.0, it is recommended that further work be undertaken, in order to:

- review options on the north side of High Street (potentially including the former M&S and Yorkshire Trading Company units), to determine whether they offer potential to accommodate significant new comparison goods retail development;
- consider whether there are any other potential sites which could be assembled within/on the edge of the centre, with good links to the Primary Shopping Area, and which offer potential to accommodate a new discount foodstore, with associated car parking (likely to require a site in excess of 1 ha); and
- establish whether new leisure and tourism uses developed on the Coatham Enclosure site would satisfy the NPPF sequential and impact tests, as well as whether pedestrian linkages could be enhanced, so as to generate linked trips with existing facilities in the town centre.

9.23 The Local Plan should also provide encouragement for the development and re-occupation of other, smaller sites/vacant units within the centre, including those identified further above.

9.24 Any further work undertaken should have regard to the sequential test set out in the NPPF as well as the extent and nature of commercial demand for new retail and other town centre uses. Given the current nature of the foodstore market, any new demand in this sector is likely to arrive from discount foodstores – i.e. Aldi and Lidl.

Centre Boundaries and Frontages

9.25 In reviewing the extent of the above centres and any primary shopping areas defined therein, it is necessary to take into account the definitions set out in Annex 2 of the NPPF. These are set out below:

Town centre: *Area defined on the local authority's proposal map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area. References to town centres or centres apply to city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance. Unless they are identified as centres in Local Plans, existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres.*

Primary shopping area (PSA): *Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage).*

Primary and secondary frontages: *Primary frontages are likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods. Secondary frontages provide greater opportunities for a diversity of uses such as restaurants, cinemas and businesses.*

9.26 The different designations set out above have different policy objectives, as follows:

- town centre boundaries – defining the area subject to protection of their vitality and viability, as well as the application of the sequential approach in respect of non-retail town centre uses;
- primary shopping area – the application of the sequential approach in respect of retail uses;
- primary shopping frontages – helping to ensure that the centre has a strong core retail function; and
- secondary shopping frontages – helping to maintain an appropriate balance of retail and non-retail uses.

9.27 In relation to primary and secondary frontages in particular, the NPPF suggests that, in drawing up development plans, local authorities should define their extent and set policies that make clear which uses will be permitted in such locations. The NPPF provides limited guidance on the approach policies should adopt, although the glossary does state that:

- primary frontages are likely to include a high proportion of retail uses which may include food and drink, clothing and household goods; and
- secondary frontages provide greater opportunities for a diversity of uses such as restaurants, cinemas and businesses.

9.28 The NPPF (paragraph 23) also suggests competitive town centres should be promoted that provide customer choice and a diverse retail offer reflecting the individuality of town centres. This indicates that the most appropriate approach is likely to vary from centre to centre. In Redcar Town Centre in particular, there is a need to balance the importance of maintaining a strong Class A1 retail core with sufficient flexibility to allow other uses, which not only add to vitality and viability, but also help to reduce the number of vacant units in prime areas.

9.29 The NPPF provides limited guidance on how such areas, particularly shopping frontages, should be identified. However, key factors that can be adopted to identify the extent of the primary shopping area, and primary and secondary frontages, include:

- composition of uses: the proportion of retail uses within the frontage based upon surveys of the town centres. Primary shopping frontages would comprise higher proportions of A1 retail uses than secondary shopping frontages;
- prime rental levels: analysis of Zone A rental levels of units within the centres sourced from Valuation Office (VOA) website, with primary shopping frontages expected to achieve higher rental levels than the secondary frontages;
- pedestrian flows: level of pedestrian flows within particular areas/ frontages of the centre identified from visits to the centre, with the highest pedestrian flows in the primary shopping frontage;
- key anchor stores: the presence of key anchor stores such as department stores or food stores can also identify the extent of the Primary Shopping Area and key frontages.

Centre Recommendations

9.30 In seeking to provide recommendations in this study, we have undertaken a review of the proposed centre boundaries set out in the previous draft version of the Local Plan (May 2016). Whilst the broad extent of most of the defined centres appear to be appropriate, we would suggest a number of amendments, as set out below, in order to ensure that they fully reflect the extent and coverage of existing town centre uses.

Redcar Town Centre

9.31 The proposed centre boundary and PSA defined in the draft Plan are considered to be appropriate, subject to any allocations which are made to support new retail development. In our view, it is important to ensure that the centre and its core retail function (and therefore levels of footfall) do not become too dispersed and that the PSA is supported as much as possible. This should be achieved through new development and/or new town centre uses coming forward in the most central locations, with good pedestrian linkages to Regent Walk.

9.32 As set out above, it is recommended that proposals for non-Class A1 uses across the centre be determined taking into account a range of criteria. These should seek to achieve a healthy mix of complementary uses across the centre, whilst retaining a strong retail function within the PSA in particular. They should also seek to protect local amenity from any potentially harmful effects (including those generated by late night opening food and beverage uses).

District Centres

9.33 In relation to the various district centres, we would make the following recommendations:

- **Guisborough:** it is considered that the proposed boundary is an appropriate definition for the extent of town centre uses within this centre. At this stage, whilst they could reasonably be considered edge of centre, we would not recommend extending the boundary to include Aldi/Iceland, reflecting the separation of this site from the centre by a range of other uses, including residential;
- **Eston**: it is recommended that the proposed centre boundary be extended to the east, to include the row of three shops and the petrol filling station/Spar convenience store immediately to the east of Winston Drive. This is particularly important given the need to re-inforce its district centre function and the contribution that these uses make towards meeting local needs;
- **Low Grange Farm –** there are a number of other community uses located to the south and west of the currently defined centre, which include a leisure centre, health centre and care home, and help to create a focus for the community. Whilst the centre should evolve, over time, in order to incorporate such uses, the extension of the boundary at the current time could create sites for other new uses which could potentially have a significant adverse impact upon the nearby Eston District Centre – which itself requires new investment to help secure its future vitality and viability;
- **Saltburn**: whilst the broad extent of the centre appears appropriate, based on our site visits, we would propose the centre boundary be extended to the south, in order to include uses which lie in close proximity on Windsor Road, around its junction with Station Road. This should include the hotel, library and church on the eastern side of this junction, as well as any commercial uses immediately to the western;
- **Marske**: as with Saltburn, the extent of the proposed town centre boundary appears broadly appropriate. However, there are some community facilities on the eastern (including a medical centre and library) and western (two churches) edges of the centre which could also be included, reflecting their contribution in attracting visitors to the centre and its immediate surrounding area; and
- **Loftus** – as set out in Section 4.0, this centre contains areas of dead frontage, caused by either vacant units or residential properties, at both the western end and in the middle of the centre. The new boundary proposed by the Council takes some of these areas out and, whilst its reduced scale impacts upon the number and range of uses it contains, a number of the remaining uses have a more than local function (e.g. a clinic, library and town hall) and will assist in maintaining a district centre role in future.

Impact Threshold

9.34 The NPPG states that, if setting a locally appropriate threshold, it is important to consider:

- the scale of proposals relative to town centres;
- the existing viability and vitality of town centres;
- cumulative effects of recent developments;
- whether local town centres are vulnerable;
- likely effects of development on any town centre strategy; and
- the impact on any other planned investment.

9.35 In the context of the above, and taking into account the evidence presented elsewhere in this report, it is considered that a lower threshold than set out in the NPPF (2,500 sqm) would be appropriate for Redcar & Cleveland. This reflects a number of factors, including:

- the current health of Redcar Town Centre, and the need to secure investment which enhances – and indeed broadens out - the existing range of uses and re-occupation of currently/soon to become vacant units;
- the fact that no convenience goods retail expenditure capacity has been identified for the Borough over the plan period (after allowing for committed developments), on the basis of existing shopping patterns, and comparison goods capacity is only identified in the medium to long term (i.e. over the period from 2026);
- the current low market share of available comparison goods expenditure in the Borough achieved by Redcar Town Centre (21%); and
- the potential impact of new convenience and comparison goods retail floorspace proposed in edge/out-of-centre locations upon the ability to attract new operators to the above centres.

9.36 On this basis, it is considered that the following impact assessment thresholds should be set for all proposals across Redcar and Cleveland Borough:

- retail development - 750 sqm gross; and
- leisure development:
  - cinemas, health and fitness clubs, tenpin bowling, casinos, nightclubs and bingo halls: 1,000 sqm gross; and
  - cafes, restaurants, pubs and bars: 500 sqm gross.

9.37 Alongside convenience and comparison retailing, the Council should aim to attract the above leisure uses to Redcar Town Centre (subject to commercial demand). The proposed thresholds would help to ensure greater scrutiny of new proposals – particularly in terms of their impact on potential new investment in the centre.

9.38 Elsewhere within the Borough, the vitality and viability of existing centres is more varied. However, although such centres are generally a lot smaller than Redcar, this means that the impact of new proposals upon them could be more significant as a result, particularly where they contain a large proportion of service/leisure uses. The above thresholds would again, therefore, help to ensure that this impact is fully considered.

9.39 We would also recommend that the supporting text confirms that proportionate assessments should be undertaken to accompany new proposals, which reflect their scale and nature. Although consideration of the market trends (along with any available information on growth in spending/ usage/participation) in the relevant sectors should be required, a broad-based approach is likely to be appropriate in respect of most planning applications.

9.40 We would not propose any thresholds for Class D1 uses (e.g. theatres, concert halls, museums, concert halls etc). Whilst they are classed as main town centre uses in NPPF terms, they are not technically leisure uses (being referred to as arts/culture/tourism in the definition of Main Town Centres in Annex 2) which are subject to the impact test set out at para. 26.

9.41 The latest draft Local Plan proposes a requirement for impact assessments to be undertaken in association with proposals for main town centre uses which would increase the floorspace of a centre by 10%. However, this appears unnecessary and unduly onerous and could result in such assessments being undertaken for relatively smaller scale proposals within some of the smaller centres in the Borough. It could also represent a barrier to proposals coming forward within centres which have the potential to significantly enhance the vitality and viability of such centres. It is not recommended that this requirement be included in future versions of the draft Plan.

9.42 Notwithstanding the above, the Council should reserve the right to request such assessments in association with other proposals below the above threshold which, by virtue of their scale, nature, location and likely turnover, could have an adverse impact upon existing centres. This would help to ensure that proposals, which are below the above thresholds but could have a significant impact when considered cumulative with other recent developments, are properly tested.

Hot Food Takeaways

9.43 As set out above, it will be important to include a positive approach, which provides support for new food and drink and other leisure uses across the centre. This should take into account the need to facilitate new development and the re-occupation of existing vacant units, and not preclude such uses coming forward within the PSA, particularly as such uses can perform an important role supporting the main retail function of the area.

9.44 It is considered that proposals for new food and drink uses, including late night opening facilities, should be required to address various criteria. As explained earlier in this section, these should seek to minimise any potential impact upon the retail character of the centre and maintain live frontages as far as possible, as well as protect local amenity (having regard to potential impacts in terms of noise, fumes/odour and traffic).

Bookmakers/Payday Loan Shops

9.45 This study has also considered whether it would be appropriate to include a planning policy which specifically deals with planning application proposals for new bookmakers and/or payday loan shops.

9.46 Neither use falls within a specific use class, as they are both classed as Sui Generis. Local planning authorities therefore have the ability to determine such applications on a case by case basis, taking into account their specific circumstances and other relevant policies. Furthermore, and based on NLP research, only a limited number of authorities have adopted planning policy which deals with such uses, and this is usually found within Supplementary Planning Documents.

9.47 It is important that any planning policy approach adopted in Redcar and Cleveland should distinguish between the two uses, which have different characteristics, and avoids duplication between planning and other regulatory regimes. It will also be important to ensure that the presence of such uses does not have any harmful effect upon the wider mix of uses within centres, and therefore their overall vitality and viability.

9.48 In addition, however, planning policy should recognise the fact that both bookmakers and payday loan shops are town centre uses. Notwithstanding wider issues (e.g. concerns in relation to social impact), if directed to the most appropriate locations, then such uses can provide benefits for existing centres, in terms of increasing footfall and generating linked trips.

Implementation and Monitoring

9.49 There are a number of broad areas of possible action the Council could pursue in order to maintain and enhance the role of shopping centres within the Borough, as follows:

- firm application of guidance within the NPPF, particularly relating to the sequential approach and impact tests for locally set thresholds in determining proposals for new main town centre uses outside of existing centres;
- improving the range and choice of shops and services in all centres (where appropriate in terms of scale) by encouraging intensification, development and the re-occupation of vacant premises, and continuing to promote the centres;
- maintaining and enhancing the quality of the environment within each centre; and

- bringing forward development opportunities through the Local Plan process to improve the availability of modern premises suitable for new occupiers.

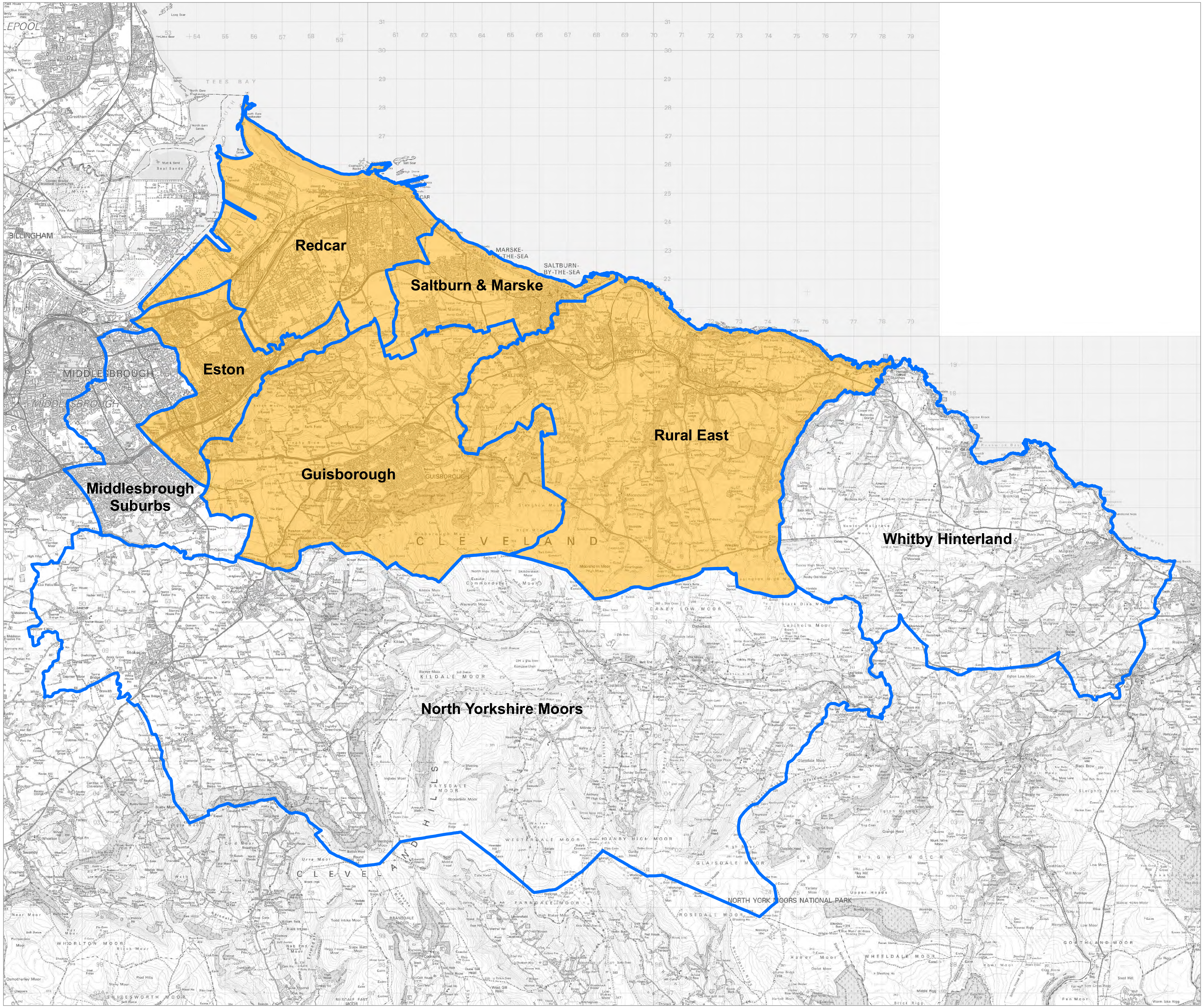
9.50 The recommendations and projections within this study should assist the Council in reviewing development plan policies over the coming years and to assist development control decisions during this period. The study provides a broad overview of the potential need for further retail development up to 2026, with longer term forecast up to 2032. Projections are, however, subject to uncertainty and forecasts may need to be amended to reflect emerging changes as and when new information becomes available, in particular longer-term projections up to 2032 should be treated with caution.

9.51 Projections should be monitored and the floorspace projections rolled forward. The following key assumptions should be updated as necessary:

- population projections;
- local expenditure estimates (information from Experian or other recognised data providers);
- growth rate assumptions for expenditure per capita (information from Experian or other recognised data providers);
- the impact of potential increases in home and internet shopping (Experian regularly provides projections for internet shopping and these projections will need to be updated at the same time as expenditure and population figures);
- existing retail floorspace and average turnover to floorspace densities; and
- implemented development within and around the study area.

9.52 These key inputs into the retail capacity assessment can be amended to provide revised capacity projections.

Appendix 1 Study Area and Household Survey Zones Plan



Key

Survey Zone Boundary

Redcar & Cleveland Local Authority Boundary

Nathaniel Lichfield & Partners
Planning. Design. Economics.

Project	Redcar & Cleveland Town Centre Study
Title	Household Survey Zones
Client	Redcar & Cleveland Borough Council
Date	07.07.2016
Scale	-
Drawn by	CSm
Drg. No	GIS\23090\01-01

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

Appendix 2 Convenience Retail Capacity Assessment

REDCAR AND CLEVELAND TOWN CENTRES STUDY

CONVENIENCE GOODS CAPACITY 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 (£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 (£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: 2026 Convenience Goods Expenditure (£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	**68.12**	**71.72**	**40.35**	**38.28**	**43.84**	**262.30**	**120.92**	**31.95**	**8.07**		
Zone 1 - Redcar											
Morrisons, Redcar Town Centre	17.78	3.37	0.52	8.27	3.77	33.71	0.85	0.35	0.62	3.95	**39.48**
Other Stores, Redcar Town Centre	5.18	1.65	0.00	1.34	0.44	8.60	1.69	0.00	0.09	0.55	**10.93**
Redcar Town Centre Sub-Total	***22.96***	***5.02***	***0.52***	***9.61***	***4.21***	***42.32***	***2.54***	***0.35***	***0.71***	***4.49***	***50.41***
Tesco, West Dyke Road	14.30	0.29	0.00	4.02	0.57	19.18	0.00	0.00	0.08	1.01	**20.28**
Aldi, Larkswood Road	9.74	1.36	0.00	6.78	1.67	19.54	0.48	0.13	0.05	0.52	**20.72**
Asda, Roseberry Road	5.72	0.36	0.20	0.00	0.00	6.28	0.00	0.00	0.00	0.16	**6.44**
Other Stores/Centres	5.11	0.36	0.00	0.84	0.00	6.31	0.00	0.00	0.00	0.16	**6.47**
Redcar Zone Total	**57.83**	**7.39**	**0.73**	**21.24**	**6.44**	**93.63**	**3.02**	**0.48**	**0.84**	**6.35**	**104.32**
Zone 2 - Eston											
Tesco, Low Grange District Centre	0.54	13.34	0.28	1.03	0.22	15.42	3.14	0.13	0.00	3.30	**21.99**
Eston District Centre	0.00	2.30	0.00	0.00	0.00	2.30	0.00	0.00	0.00	0.06	**2.35**
Asda, North Street, South Bank	1.84	17.00	1.41	0.69	0.48	21.42	6.77	0.22	0.00	5.01	**33.43**
Marks & Spencer, Cleveland Retail Park	0.95	2.15	1.01	0.27	0.26	4.64	2.54	0.22	0.09	1.32	**8.82**
Other Stores/Centres	0.00	8.53	0.00	0.19	0.13	8.86	1.45	0.35	0.00	0.27	**10.93**
Eston Zone Total	**3.34**	**43.32**	**2.70**	**2.18**	**1.10**	**52.64**	**13.91**	**0.93**	**0.09**	**9.97**	**77.53**
Zone 3 - Guisborough											
Morrisons, Guisborough District Centre	0.00	0.79	12.91	0.11	2.02	15.83	0.48	2.36	0.23	2.10	**21.02**
Other Stores, Guisborough District Centre	0.00	0.00	1.41	0.19	0.00	1.60	0.60	0.35	0.00	0.13	**2.69**
Guisborough District Centre Sub-Total	***0.00***	***0.79***	***14.32***	***0.31***	***2.02***	***17.44***	***1.09***	***2.72***	***0.23***	***2.24***	***23.71***
Sainsbury's, Morgan Drive	0.00	0.14	6.50	0.11	0.83	7.59	0.48	0.13	0.00	0.43	**8.63**
Lid, Enfield Chase	0.75	0.14	3.95	0.00	1.49	6.34	0.97	2.20	0.00	0.50	**10.01**
Aldi, Hill View Road	0.14	0.29	5.16	0.38	2.67	8.64	0.24	2.24	0.27	0.60	**11.99**
Other Stores/Centres	0.61	0.14	4.28	0.19	1.10	6.32	0.97	2.20	0.09	0.25	**9.83**
Guisborough Zone Total	**1.50**	**1.51**	**34.22**	**1.00**	**8.11**	**46.33**	**3.75**	**9.49**	**0.59**	**4.01**	**64.16**
Zone 4 - Marske/Saltburn											
Co-op, High Street, Marske	0.14	0.00	0.00	3.37	0.44	3.94	0.00	0.00	0.00	0.21	**4.15**
Other Stores, Marske District Centre	0.14	0.00	0.00	1.72	0.00	1.86	0.00	0.00	0.00	0.10	**1.96**
Sainsbury's, Saltburn District Centre	0.14	0.00	0.12	3.79	1.80	5.84	0.00	0.00	0.09	0.31	**6.25**
Other Stores, Saltburn District Centre	0.14	0.00	0.00	1.19	0.31	1.63	0.00	0.00	0.00	0.09	**1.72**
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**	**10.18**	**2.76**	**13.61**	**0.00**	**0.00**	**1.11**	**0.74**	**15.46**
Zone 5 - Rural East											
Co-op, High Street, Loftus	0.00	0.00	0.00	0.00	2.10	2.10	0.00	0.00	0.05	0.11	**2.27**
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	**0.51**
Skelton Local Centre	0.00	0.00	0.00	0.00	1.80	1.80	0.00	0.13	0.00	0.05	**1.97**
Brotton Local Centre	0.00	0.00	0.00	0.00	0.79	0.79	0.00	0.00	0.00	0.02	**0.81**
Asda, Pheasant Fields Lane, Skelton	1.63	0.00	1.53	2.07	16.44	21.67	0.00	0.13	0.87	2.52	**25.19**
Other Stores/Centres	0.00	0.00	0.12	0.00	1.71	1.83	0.00	0.00	0.00	0.05	**1.88**
Rural East Zone Total	**1.63**	**0.00**	**1.65**	**2.07**	**23.32**	**28.68**	**0.00**	**0.26**	**0.92**	**2.77**	**32.63**
Borough Total	**64.85**	**52.21**	**39.42**	**36.67**	**41.73**	**234.88**	**20.68**	**11.15**	**3.55**	**23.84**	**294.11**
Outside Borough	**3.27**	**19.51**	**0.93**	**1.61**	**2.10**	**27.42**	**100.24**	**20.80**	**4.52**		
TOTAL	**68.12**	**71.72**	**40.35**	**38.28**	**43.84**	**262.30**	**120.92**	**31.95**	**8.07**		

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

Table 8: 2032 Convenience Goods Expenditure (£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	**68.54**	**72.16**	**40.59**	**38.50**	**44.09**	**263.87**	**122.77**	**32.14**	**8.09**		
Zone 1 - Redcar											
Morrisons, Redcar Town Centre	17.89	3.39	0.53	8.32	3.79	33.92	0.86	0.35	0.62	3.97	**39.72**
Other Stores, Redcar Town Centre	5.21	1.66	0.00	1.35	0.44	8.66	1.72	0.00	0.09	0.55	**11.02**
Redcar Town Centre Sub-Total	***23.10***	***5.05***	***0.53***	***9.66***	***4.23***	***42.57***	***2.58***	***0.35***	***0.71***	***4.52***	***50.74***
Tesco, West Dyke Road	14.39	0.29	0.00	4.04	0.57	19.30	0.00	0.00	0.08	1.02	**20.40**
Aldi, Larkswood Road	9.80	1.37	0.00	6.81	1.68	19.66	0.49	0.13	0.05	0.52	**20.85**
Asda, Roseberry Road	5.76	0.36	0.20	0.00	0.00	6.32	0.00	0.00	0.00	0.16	**6.48**
Other Stores/Centres	5.14	0.36	0.00	0.85	0.00	6.35	0.00	0.00	0.00	0.16	**6.51**
Redcar Zone Total	**58.19**	**7.43**	**0.73**	**21.37**	**6.48**	**94.20**	**3.07**	**0.48**	**0.84**	**6.39**	**104.98**
Zone 2 - Eston											
Tesco, Low Grange District Centre	0.55	13.42	0.28	1.04	0.22	15.51	3.19	0.13	0.00	3.32	**22.16**
Eston District Centre	0.00	2.31	0.00	0.00	0.00	2.31	0.00	0.00	0.00	0.06	**2.37**
Asda, North Street, South Bank	1.85	17.10	1.42	0.69	0.48	21.55	6.88	0.22	0.00	5.06	**33.71**
Marks & Spencer, Cleveland Retail Park	0.96	2.16	1.01	0.27	0.26	4.67	2.58	0.22	0.09	1.34	**8.90**
Other Stores/Centres	0.00	8.59	0.00	0.19	0.13	8.91	1.47	0.35	0.00	0.28	**11.01**
Eston Zone Total	**3.36**	**43.58**	**2.72**	**2.19**	**1.10**	**52.96**	**14.12**	**0.93**	**0.09**	**10.05**	**78.15**
Zone 3 - Guisborough											
Morrisons, Guisborough District Centre	0.00	0.79	12.99	0.12	2.03	15.93	0.49	2.38	0.23	2.11	**21.14**
Other Stores, Guisborough District Centre	0.00	0.00	1.42	0.19	0.00	1.61	0.61	0.35	0.00	0.14	**2.72**
Guisborough District Centre Sub-Total	***0.00***	***0.79***	***14.41***	***0.31***	***2.03***	***17.54***	***1.10***	***2.73***	***0.23***	***2.25***	***23.86***
Sainsbury's, Morgan Drive	0.00	0.14	6.53	0.12	0.84	7.63	0.49	0.13	0.00	0.43	**8.69**
Lid, Enfield Chase	0.75	0.14	3.98	0.00	1.50	6.37	0.98	2.22	0.00	0.50	**10.08**
Aldi, Hill View Road	0.14	0.29	5.20	0.38	2.69	8.70	0.25	2.25	0.27	0.60	**12.06**
Other Stores/Centres	0.62	0.14	4.30	0.19	1.10	6.36	0.98	2.22	0.09	0.25	**9.89**
Guisborough Zone Total	**1.51**	**1.52**	**34.42**	**1.00**	**8.16**	**46.60**	**3.81**	**9.55**	**0.59**	**4.04**	**64.58**
Zone 4 - Marske/Saltburn											
Co-op, High Street, Marske	0.14	0.00	0.00	3.39	0.44	3.97	0.00	0.00	0.00	0.21	**4.17**
Other Stores, Marske District Centre	0.14	0.00	0.00	1.73	0.00	1.87	0.00	0.00	0.00	0.10	**1.97**
Sainsbury's, Saltburn District Centre	0.14	0.00	0.12	3.81	1.81	5.88	0.00	0.00	0.09	0.31	**6.28**
Other Stores, Saltburn District Centre	0.14	0.00	0.00	1.19	0.31	1.64	0.00	0.00	0.00	0.09	**1.73**
Other Stores/Centres	0.00	0.00	0.00	0.12	0.22	0.34	0.00	0.00	1.03	0.03	**1.40**
Marske/Saltburn Zone Total	**0.55**	**0.00**	**0.12**	**10.24**	**2.78**	**13.69**	**0.00**	**0.00**	**1.12**	**0.74**	**15.55**
Zone 5 - Rural East											
Co-op, High Street, Loftus	0.00	0.00	0.00	0.00	2.12	2.12	0.00	0.00	0.05	0.11	**2.28**
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	**0.51**
Skelton Local Centre	0.00	0.00	0.00	0.00	1.81	1.81	0.00	0.13	0.00	0.05	**1.99**
Brotton Local Centre	0.00	0.00	0.00	0.00	0.79	0.79	0.00	0.00	0.00	0.02	**0.81**
Asda, Pheasant Fields Lane, Skelton	1.64	0.00	1.54	2.08	16.53	21.80	0.00	0.13	0.87	2.53	**25.33**
Other Stores/Centres	0.00	0.00	0.12	0.00	1.72	1.84	0.00	0.00	0.00	0.05	**1.89**
Rural East Zone Total	**1.64**	**0.00**	**1.66**	**2.08**	**23.45**	**28.84**	**0.00**	**0.26**	**0.92**	**2.79**	**32.81**
Borough Total	**65.25**	**52.53**	**39.65**	**36.88**	**41.97**	**236.29**	**20.99**	**11.22**	**3.56**	**24.01**	**296.07**
Outside Borough	**3.29**	**19.63**	**0.93**	**1.62**	**2.12**	**27.58**	**101.78**	**20.92**	**4.53**		
TOTAL	**68.54**	**72.16**	**40.59**	**38.50**	**44.09**	**263.87**	**122.77**	**32.14**	**8.09**		

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

Table 9: Convenience Goods Floorspace and Benchmark Turnover 2016 (2014 Prices)

Store	Sales Floorspace (sq.m net)	Convenience Goods Floorspace (%)	Convenience Goods Floorspace (sq.m net)	Benchmark Turnover (£ per sq.m)	Total Turnover (Benchmark) (£m)	Total Turnover (Survey-Based) (£m)	Under/Over Trading (£m)
Zone 1 - Redcar							
Morrisons, Redcar Town Centre	3,252	75%	2,439	£10,849	£26.46	£39.09	£12.63
Other Stores, Redcar Town Centre	3,129	100%	3,129	£4,000	£12.52	£10.81	-£1.71
Redcar Town Centre Sub-Total	***6,381***		***5,568***		***£38.98***	***£49.90***	***£10.92***
Tesco, West Dyke Road	2,787	65%	1,812	£11,058	£20.03	£20.08	£0.05
Aldi, Larkswood Road	1,410	75%	1,057	£11,557	£12.22	£20.52	£8.30
Asda, Roseberry Road	656	85%	557	£15,213	£8.48	£6.38	-£2.10
Other Stores/Centres	n/a	n/a	n/a	n/a	£6.41	£6.41	£0.00
Redcar Zone Total	**11,234**		**8,994**		**£86.12**	**£103.29**	**£17.17**
Zone 2 - Eston							
Tesco, Low Grange District Centre	5,268	55%	2,897	£11,058	£32.04	£21.73	-£10.31
Eston District Centre	477	100%	477	£4,000	£1.91	£2.33	£0.42
Asda, North Street, South Bank	3,658	60%	2,195	£15,213	£33.39	£33.00	-£0.39
Marks & Spencer, Cleveland Retail Park	667	95%	634	£10,329	£6.54	£8.70	£2.15
Other Stores/Centres	n/a	n/a	n/a	n/a	£10.81	£10.81	£0.00
Eston Zone Total	***10,070***		***6,203***		***84.69***	***76.56***	***-8.12***
Zone 3 - Guisborough							
Morrisons, Guisborough District Centre	1,598	80%	1,278	£10,849	£13.87	£20.80	£6.93
Other Stores, Guisborough District Centre	846	100%	846	£4,000	£3.38	£2.66	-£0.72
Guisborough District Centre Sub-Total	***2,444***		***2,124***		***£17.25***	***£23.46***	***£6.21***
Sainsbury's, Morgan Drive	1,376	75%	1,032	£11,690	£12.06	£8.54	-£3.52
Lid, Enfield Chase	996	80%	796	£7,723	£6.15	£9.89	£3.74
Aldi, Hill View Road	877	80%	701	£11,557	£8.10	£11.86	£3.76
Other Stores/Centres	n/a	n/a	n/a	n/a	£9.71	£9.71	£0.00
Guisborough Zone Total	**5,692**		**4,654**		**£53.29**	**£63.47**	**£10.18**
Zone 4 - Marske/Saltburn							
Co-op, High Street, Marske	909	80%	727	£8,903	£6.47	£4.11	-£2.36
Other Stores, Marske District Centre	396	100%	396	£4,000	£1.58	£1.94	£0.35
Sainsbury's, Saltburn District Centre	966	80%	773	£11,690	£9.03	£6.19	-£2.85
Other Stores, Saltburn District Centre	458	100%	458	£3,500	£1.60	£1.70	£0.10
Other Stores/Centres	n/a	n/a	n/a	n/a	£1.39	£1.39	£0.00
Marske/Saltburn Zone Total	**2,729**		**2,354**		**£20.09**	**£15.33**	**-£4.76**
Zone 5 - Rural East							
Co-op, High Street, Loftus	325	85%	276	£8,903	£2.46	£2.24	-£0.22
Other Floorspace, Loftus District Centre	608	100%	608	£4,000	£2.43	£0.50	-£1.93
Skelton Local Centre	401	100%	401	£4,000	£1.60	£1.95	£0.35
Brotton Local Centre	298	100%	298	£4,000	£1.19	£0.80	-£0.39
Asda, Pheasant Fields Lane, Skelton	2,678	65%	1,740	£15,213	£26.48	£24.95	-£1.52
Other Stores/Centres	n/a	n/a	n/a	n/a	£1.86	£1.86	£0.00
Rural East Zone Total	**4,310**		**3,324**		**£36.02**	**£32.31**	**-£3.71**
Borough Total	**34,034**		**25,529**		**£280.20**	**£290.96**	**£10.76**

Source: RCBC Surveys April 2016, ORC StorePoint and Mintel (Please note some figures may not total precisely due to rounding)

Table 10: Convenience Goods Commitments, 2016 (2014 Prices)

Store	Sales Floorspace (sq.m net)	Convenience Goods Floorspace (%)	Convenience Goods Floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)	Zone
Former Esco Foundry, Rectory Lane, Guisborough	3448	26%	890	10594	9.43	Guisborough
Aldi, Pheasant Fields Lane, Skelton	1125	80%	900	11557	10.40	Rural East
Retail Development, Pheasant Fields Lane, Skelton	3031	18%	532	6736	3.58	Rurall East
Total	**7,604**		**2,322**		**£23.41**	

Table 11: Summary of Convenience Goods Expenditure 2016 to 2032 (2014 Prices)

Area	2021	2026	2032
Available Expenditure in Borough (£m)			
Zone 1 - Redcar	103.55	104.32	104.98
Zone 2 - Eston	76.85	77.53	78.15
Zone 3 - Guisborough	63.65	64.16	64.58
Zone 4 - Marske/Saltburn	15.35	15.46	15.55
Zone 5 - Rural East	32.39	32.63	32.81
Total	**291.79**	**294.11**	**296.07**
Turnover of Existing Facilities (£m)			
Zone 1 - Redcar	86.12	86.12	86.12
Zone 2 - Eston	84.69	84.69	84.69
Zone 3 - Guisborough	62.71	62.71	62.71
Zone 4 - Marske/Saltburn	20.09	20.09	20.09
Zone 5 - Rural East	50.01	50.01	50.01
Total	**303.61**	**303.61**	**303.61**
Surplus/Deficit Expenditure (£m)			
Zone 1 - Redcar	17.4	18.2	18.9
Zone 2 - Eston	-7.8	-7.2	-6.5
Zone 3 - Guisborough	0.9	1.5	1.9
Zone 4 - Marske/Saltburn	-4.7	-4.6	-4.5
Zone 5 - Rural East	-17.6	-17.4	-17.2
Total	**-11.8**	**-9.5**	**-7.5**

Source: Tables 5 to 10
Notes:
Commitments from Table 11 added to the turnover of Existing Facilities for each zone in 2021

Table 12: Convenience Goods Floorspace Expenditure Capacity 2016 to 2032 (2014 Prices)

Area	2016	2021	2026	2032
Turnover Density New Floorspace (£ per sq.m)	£11,000	£11,000	£11,000	£11,000
Floorspace Requirement (sq.m net)				
Zone 1 - Redcar	1,561	1,585	1,655	1,715
Zone 2 - Eston	-739	-712	-651	-594
Zone 3 - Guisborough	925	85	132	170
Zone 4 - Marske/Saltburn	-433	-430	-421	-413
Zone 5 - Rural East	-337	-1,602	-1,580	-1,563
Total	**978**	**-1,075**	**-864**	**-686**
Floorspace Requirement (sq.m gross)				
Zone 1 - Redcar	2,230	2,265	2,365	2,450
Zone 2 - Eston	-1,055	-1,018	-930	-849
Zone 3 - Guisborough	1,322	121	188	242
Zone 4 - Marske/Saltburn	-618	-615	-601	-590
Zone 5 - Rural East	-482	-2,289	-2,257	-2,233
Total	**1,397**	**-1,535**	**-1,235**	**-980**

(Please note some figures may not total precisely due to rounding)

Appendix 3 Comparison Retail Capacity Assessment

REDCAR AND CLEVELAND TOWN CENTRES STUDY

COMPARISON GOODS CAPACITY 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 (£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 (£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: 2026 Comparison Goods Expenditure (£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**		
Redcar Town Centre	56.06	12.19	6.47	23.43	15.03	**113.19**	3.39	1.17	1.12	13.21	**132.07**
Low Grange District Centre	1.11	7.81	0.00	0.00	0.00	**8.92**	4.36	0.34	0.00	0.72	**14.34**
Eston District Centre	0.00	2.74	0.18	0.00	0.00	**2.92**	0.00	0.00	0.00	0.15	**3.08**
Guisborough District Centre	0.14	1.51	33.01	0.72	6.63	**42.00**	0.24	8.59	0.56	5.71	**57.11**
Marske District Centre	0.28	0.00	0.18	5.41	0.09	**5.96**	0.00	0.00	0.00	0.31	**6.27**
Saltburn District Centre	0.00	0.27	0.27	5.14	3.09	**8.78**	0.00	0.14	0.06	1.00	**9.98**
Loftus District Centre	0.00	0.00	0.00	0.00	1.50	**1.50**	0.00	0.00	0.13	0.09	**1.72**
Cleveland Retail Park	17.11	30.55	11.12	11.35	10.34	**80.48**	25.18	3.78	0.48	19.40	**129.31**
Out of Centre Foodstores	5.01	4.38	2.74	0.90	13.26	**26.29**	0.48	0.00	0.08	1.41	**28.27**
Other Stores/Centres	0.70	2.33	1.28	0.45	4.77	**9.53**	2.42	0.34	0.16	1.01	**13.46**
Borough Total	**80.41**	**61.78**	**55.26**	**47.40**	**54.72**	**299.56**	**36.07**	**14.36**	**2.59**	**43.01**	**395.59**
Outside Borough	**58.71**	**75.20**	**35.93**	**42.71**	**33.68**	**246.23**	**206.03**	**54.36**	**13.38**		
TOTAL	**139.12**	**136.98**	**91.18**	**90.11**	**88.40**	**545.79**	**242.11**	**68.73**	**15.96**		

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

Table 8: 2032 Comparison Goods Expenditure (£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**		
Redcar Town Centre	68.78	14.95	7.94	28.74	18.43	**138.84**	4.20	1.43	1.37	16.20	**162.05**
Low Grange District Centre	1.37	9.58	0.00	0.00	0.00	**10.94**	5.40	0.42	0.00	0.88	**17.65**
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	1.85	40.49	0.88	8.13	**51.52**	0.30	10.54	0.68	7.01	**70.05**
Marske District Centre	0.34	0.00	0.22	6.63	0.11	**7.30**	0.00	0.00	0.00	0.38	**7.69**
Saltburn District Centre	0.00	0.34	0.34	6.30	3.80	**10.77**	0.00	0.17	0.08	1.22	**12.24**
Loftus District Centre	0.00	0.00	0.00	0.00	1.84	**1.84**	0.00	0.00	0.16	0.11	**2.10**
Cleveland Retail Park	20.99	37.47	13.64	13.93	12.69	**98.72**	31.19	4.64	0.59	23.85	**158.98**
Out of Centre Foodstores	6.14	5.38	3.36	1.11	16.27	**32.25**	0.60	0.00	0.10	1.73	**34.68**
Other Stores/Centres	0.85	2.86	1.57	0.55	5.86	**11.68**	3.00	0.42	0.20	1.24	**16.54**
Borough Total	**98.64**	**75.78**	**67.78**	**58.14**	**67.12**	**367.46**	**44.68**	**17.62**	**3.16**	**52.82**	**485.75**
Outside Borough	**72.02**	**92.25**	**44.07**	**52.39**	**41.31**	**302.04**	**255.21**	**66.70**	**16.36**		
TOTAL	**170.66**	**168.03**	**111.84**	**110.52**	**108.43**	**669.50**	**299.89**	**84.32**	**19.53**		

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

Table 9: Comparison Goods Floorspace and Benchmark Turnover 2016 (2014 Prices)

Store	Sales Floorspace (sq.m net)	Comparison Goods Floorspace (%)	Comparison Goods Floorspace (sq.m net)	Benchmark Turnover (£ per sq.m)	Total Turnover (Benchmark) (£m)	Total Turnover (Survey-Based) (£m)	Under/Over Trading (£m)
Redcar Town Centre	18,641	100%	18,641	£4,250	£79.22	£98.60	£19.38
Low Grange District Centre	2,771	100%	2,771	£3,750	£10.39	£10.67	£0.28
Eston District Centre	544	100%	544	£3,250	£1.77	£2.30	£0.53
Guisborough District Centre	5,763	100%	5,763	£3,750	£21.61	£42.62	£21.01
Marske District Centre	1,360	100%	1,360	£3,250	£4.42	£4.68	£0.26
Saltburn District Centre	1,897	100%	1,897	£3,250	£6.17	£7.45	£1.29
Loftus District Centre	638	100%	638	£3,250	£2.07	£1.28	-£0.79
Cleveland Retail Park	23,187	100%	23,187	£3,500	£81.15	£96.30	£15.15
Out of Centre Foodstores	3,889	100%	3,889	£7,000	£27.22	£21.11	-£6.12
Borough Total	**58,690**		**58,690**		**£234.03**	**£285.01**	**£50.98**

Source: RCBC Surveys April 2016, ORC StorePoint and Mintel (Please note some figures may not total precisely due to rounding)

Table 10: Comparison Goods Commitments, 2016 (2014 Prices)

Store	Sales Floorspace (sq.m net)	Comparison Goods Floorspace (%)	Comparison Goods Floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)	Destination
Former Esco Foundry, Rectory Lane, Guisborough	3448	74%	2558	6506	16.64	Other Retail Warehousing
Aldi, Pheasant Fields Lane, Skelton	1125	20%	225	6980	1.57	Out of Centre Foodstores
Retail Development, Pheasant Fields Lane, Skelton	3031	82%	2499	5368	13.41	Other Retail Warehousing
Total	**7,604**		**5,282**		**£31.63**	

Table 11: Summary of Comparison Goods Expenditure 2016 to 2032 (2014 Prices)

Area	2016	2021	2026	2032
Available Expenditure in Borough (£m)				
Redcar Town Centre	98.60	111.93	132.07	162.05
Low Grange District Centre	10.67	12.13	14.34	17.65
Eston District Centre	2.30	2.61	3.08	3.77
Guisborough District Centre	42.62	48.39	57.11	70.05
Marske District Centre	4.68	5.31	6.27	7.69
Saltburn District Centre	7.45	8.46	9.98	12.24
Loftus District Centre	1.28	1.46	1.72	2.10
Cleveland Retail Park	96.30	109.47	129.31	158.98
Out of Centre Foodstores	21.11	23.96	28.27	34.68
Other Stores/Centres	10.03	11.40	13.46	16.54
Total	**295.04**	**335.10**	**395.59**	**485.75**
Turnover of Existing Facilities (£m)				
Redcar Town Centre	98.60	108.86	120.19	135.36
Low Grange District Centre	10.67	11.78	13.00	14.64
Eston District Centre	2.30	2.54	2.80	3.15
Guisborough District Centre	42.62	47.06	51.96	58.51
Marske District Centre	4.68	5.17	5.71	6.43
Saltburn District Centre	7.45	8.23	9.08	10.23
Loftus District Centre	1.28	1.42	1.56	1.76
Cleveland Retail Park	96.30	106.33	117.39	132.20
Out of Centre Foodstores	21.11	24.87	27.46	30.93
Other Stores/Centres	10.03	41.13	45.41	51.14
Total	**295.04**	**357.38**	**394.57**	**444.36**
Surplus/Deficit Expenditure (£m)				
Redcar Town Centre	0.0	3.1	11.9	26.7
Low Grange District Centre	0.0	0.4	1.3	3.0
Eston District Centre	0.0	0.1	0.3	0.6
Guisborough District Centre	0.0	1.3	5.2	11.5
Marske District Centre	0.0	0.1	0.6	1.3
Saltburn District Centre	0.0	0.2	0.9	2.0
Loftus District Centre	0.0	0.0	0.2	0.3
Cleveland Retail Park	0.0	3.1	11.9	26.8
Out of Centre Foodstores	0.0	-0.9	0.8	3.8
Other Stores/Centres	0.0	-29.7	-32.0	-34.6
Total	**0.0**	**-22.3**	**1.0**	**41.4**

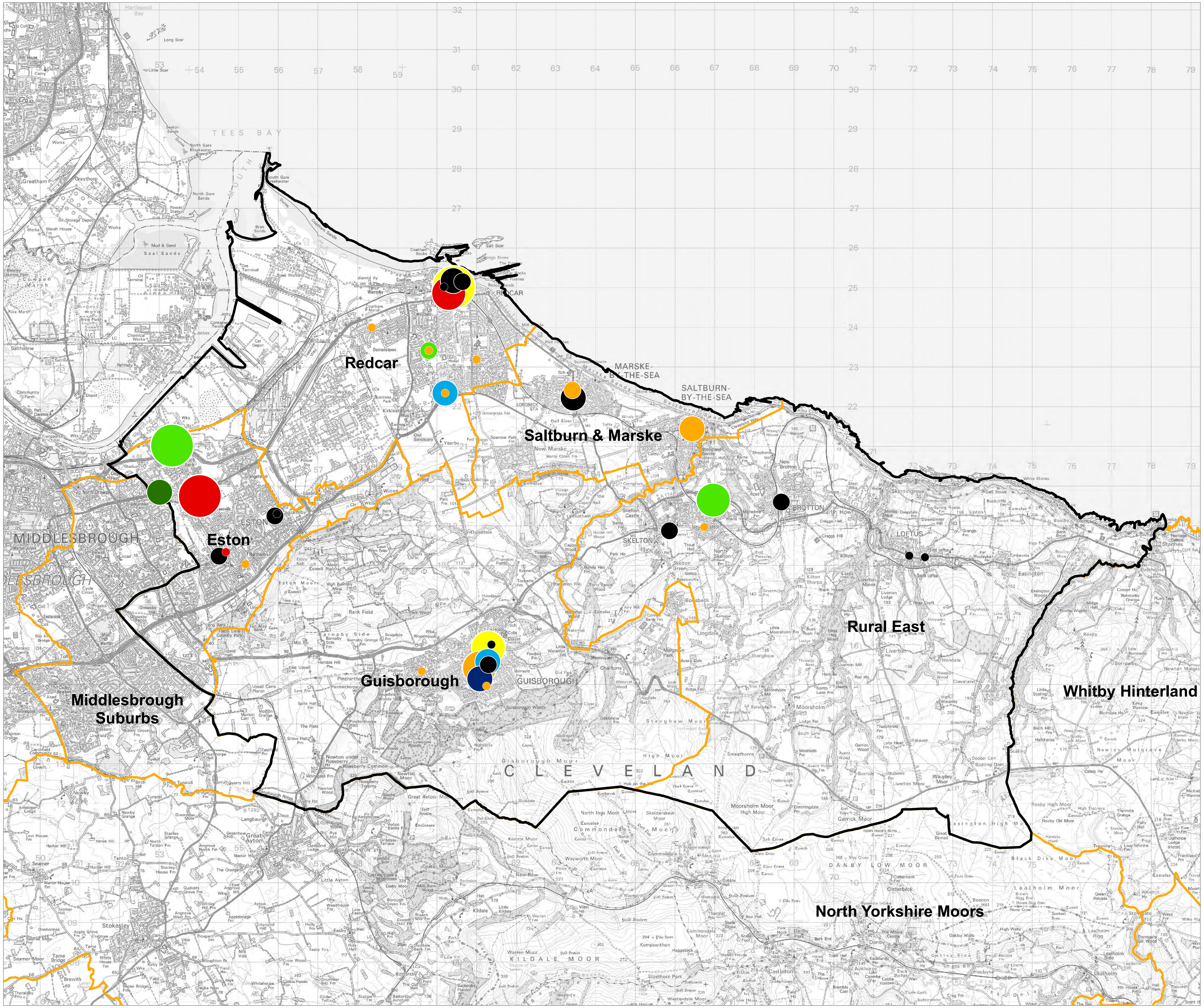
Source: Tables 5 to 10
Notes:
Commitments from Table 11 added to the turnover of Existing Facilities for each zone in 2021

Table 12: Comparison Goods Floorspace Expenditure Capacity 2016 to 2032 (2014 Prices)

Area	2016	2021	2026	2032
Turnover Density New Floorspace (£ per sq.m)	£4,250	£4,250	£4,250	£4,250
Floorspace Requirement (sq.m net)				
Redcar Town Centre	0	721	2,794	6,280
Low Grange District Centre	0	84	314	706
Eston District Centre	0	17	65	146
Guisborough District Centre	0	313	1,212	2,715
Marske District Centre	0	34	132	297
Saltburn District Centre	0	54	210	473
Loftus District Centre	0	9	36	81
Cleveland Retail Park	0	739	2,805	6,300
Out of Centre Foodstores	0	-216	189	882
Other Stores/Centres	0	-6,996	-7,518	-8,141
Total	**0**	**-5,242**	**239**	**9,739**
Floorspace Requirement (sq.m gross)				
Redcar Town Centre	0	1,030	3,992	8,972
Low Grange District Centre	0	120	449	1,009
Eston District Centre	0	24	93	208
Guisborough District Centre	0	447	1,731	3,879
Marske District Centre	0	49	189	424
Saltburn District Centre	0	77	300	675
Loftus District Centre	0	13	51	115
Cleveland Retail Park	0	1,056	4,007	9,000
Out of Centre Foodstores	0	-309	270	1,261
Other Stores/Centres	0	-9,995	-10,740	-11,630
Total	**0**	**-7,488**	**342**	**13,913**

(Please note some figures may not total precisely due to rounding)

Appendix 4 Existing Foodstores Plan



Key

Redcar & Cleveland Local Authority Boundary

Survey Zone Boundary

Operator:

- Asda
- Aldi
- Lidl
- Marks and Spencer
- Morrisons
- Sainsbury's
- Tesco
- Other

Net Sales Area (SQM):

- >5,000
- 2,501 - 5,000
- 1,001 - 2,500
- 500 - 1,000
- <500

Source: ORC Storepoint Database

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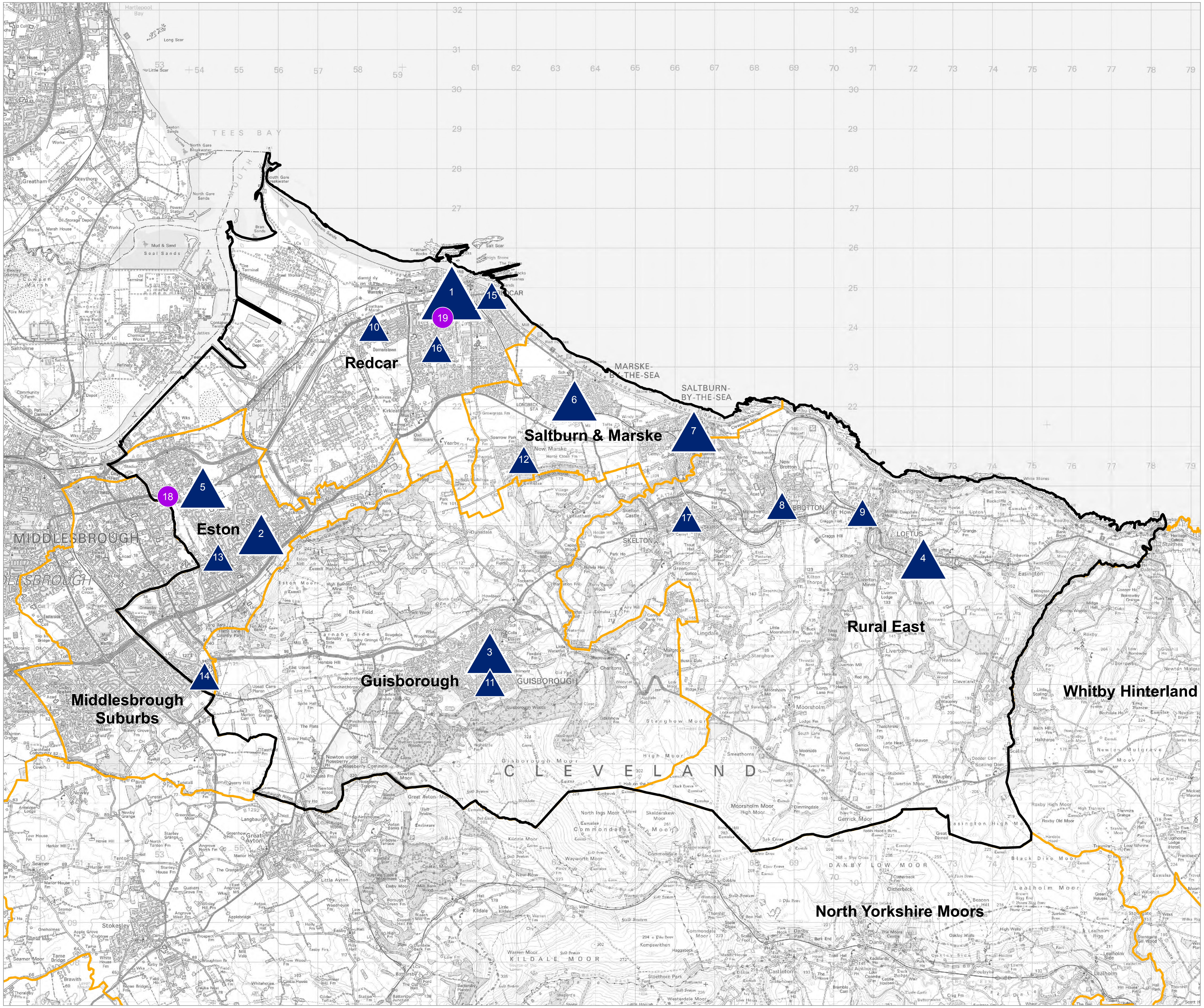
Planning. Design. Economics.

Project	Redcar & Cleveland Town Centres Study
Title	Existing Food Stores
Client	Redcar & Cleveland Borough Council
Date	25.10.2016
Scale	-
Drawn by	CS
Drg. No	GIS\23090\01-04

N

GIS Reference: S:\NE23090 - Redcar & Cleveland Town Centre Study\NE23090 - Redcar & Cleveland Town Centre Study - Food Stores - 05.08.2016.mxd

Appendix 5 Existing Centres and Other Provision Plan



Key

Redcar & Cleveland Local Authority Boundary

Survey Zone Boundary

Centres

Town Centre

1. Redcar

District Centre

2. Eston
3. Guisborough
4. Loftus
5. Low Grange Farm
6. Marske
7. Saltburn

Local Centre

8. Brotton
9. Carlin How
10. Ennis Square (Dormanstown)
11. Enfield Chase (Guisborough)
12. Birkdale Road (New Marske)
13. Normanby
14. Nunthorpe
15. Park Avenue (Redcar)
16. Roseberry Square (Redcar)
17. High Street (Skelton)

Other Provision

18. Cleveland Retail Park
19. Retail Warehousing West Dyke Road

Nathaniel Lichfield & Partners
Planning. Design. Economics.

Project	Redcar & Cleveland Town Centres Study
Title	Existing Centres Plan
Client	Redcar & Cleveland Borough Council
Date	25.10.2016
Scale	-
Drawn by	CS
Drg. No	GIS\23090\01-02

N

GIS Reference: S:\NE23090 - Redcar & Cleveland Town Centre Study\NE23090 - Redcar & Cleveland Town Centre Study - Centres - 21.07.2016.mxd

Appendix 6 Cinema Capacity Assessment

CINEMA CAPACITY 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: Total Number of Cinema Trips (per annum)

Zone	2016	2021	2026	2032
Zone 1 - Redcar	100160	101159	102158	103121
Zone 2 - Eston	106771	107836	108902	109928
Zone 3 - Guisborough	54618	55162	55707	56232
Zone 4 - Marske/Saltburn	53694	54230	54766	55282
Zone 5 - Rural East	64150	64790	65430	66047
Borough (Sub-Total)	***379393***	***383178***	***386964***	***390609***
Zone 6 - East Middlesbrough	183579	186587	189463	193124
Zone 5 - North Yorkshire Moors	40036	40525	41014	41414
Zone 8 - Whitby Hinterland	9547	9565	9609	9671
Total	**612555**	**619855**	**627050**	**634818**

Source:
Table 1; 2.8 Trips per annum per person (NLP CineScope Model)

Table 3: Base Year 2016 Cinema Market Shares (%)

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
Regent Cinema, Redcar	40.7%	5.6%	4.8%	24.5%	8.0%	2.3%	0.0%	0.0%	10.0%
Cineworld, Marton Road, Middlesbrough	37.0%	72.2%	66.7%	47.2%	62.0%	59.1%	42.9%	47.1%	
Showcase, Teessside Leisure Park	21.0%	16.7%	26.2%	24.5%	28.0%	38.6%	46.4%	23.5%	
Whitby Pavilion	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.6%	23.5%	
Other Destinations	1.3%	5.5%	2.3%	3.8%	2.0%	0.0%	7.1%	5.9%	
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 4: Base Year 2016 Total Cinema Trips per Annum

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
Trips 2016	**100160**	**106771**	**54618**	**53694**	**64150**	**379393**	**183579**	**40036**	**9547**		
Regent Cinema, Redcar	40765	5979	2622	13155	5132	**67653**	4222	0	0	7986	**79861**
Cineworld, Marton Road, Middlesbrough	37059	77089	36430	25344	39773	**215695**	108495	17175	4497		
Showcase, Teessside Leisure Park	21034	17831	14310	13155	17962	**84291**	70862	18577	2244		
Whitby Pavilion	0	0	0	0	0	**0**	0	1441	2244		
Other Destinations	1302	5872	1256	2040	1283	**11754**	0	2843	563		
TOTAL	**100160**	**106771**	**54618**	**53694**	**64150**	**379393**	**183579**	**40036**	**9547**		

Source: Tables 2 and 3
(Please note some figures may not total precisely due to rounding)

Table 5: Total Trips per Annum 2021

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
Trips 2021	**101159**	**107836**	**55162**	**54230**	**64790**	**383178**	**186587**	**40525**	**9565**		
Regent Cinema, Redcar	41172	6039	2648	13286	5183	**68328**	4291	0	0	8069	**80688**
Cineworld, Marton Road, Middlesbrough	37429	77858	36793	25597	40170	**217847**	110273	17385	4505		
Showcase, Teessside Leisure Park	21243	18009	14453	13286	18141	**85132**	72022	18804	2248		
Whitby Pavilion	0	0	0	0	0	**0**	0	1459	2248		
Other Destinations	1315	5931	1269	2061	1296	**11871**	0	2877	564		
TOTAL	**101159**	**107836**	**55162**	**54230**	**64790**	**383178**	**186587**	**40525**	**9565**		

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

Table 6: Total Cinema Trips per Annum 2026

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
Trips 2026	**102158**	**108902**	**55707**	**54766**	**65430**	**386964**	**189463**	**41014**	**9609**		
Regent Cinema, Redcar	41578	6099	2674	13418	5234	**69003**	4358	0	0	8151	**81512**
Cineworld, Marton Road, Middlesbrough	37799	78627	37157	25849	40567	**219999**	111973	17595	4526		
Showcase, Teessside Leisure Park	21453	18187	14595	13418	18321	**85973**	73133	19030	2258		
Whitby Pavilion	0	0	0	0	0	**0**	0	1476	2258		
Other Destinations	1328	5990	1281	2081	1309	**11989**	0	2912	567		
TOTAL	**102158**	**108902**	**55707**	**54766**	**65430**	**386964**	**189463**	**41014**	**9609**		

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

Table 7: Total Cinema Trips per Annum 2032

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
Trips 2032	**103121**	**109928**	**56232**	**55282**	**66047**	**390609**	**193124**	**41414**	**9671**		
Regent Cinema, Redcar	41970	6156	2699	13544	5284	**69653**	4442	0	0	8233	**82328**
Cineworld, Marton Road, Middlesbrough	38155	79368	37507	26093	40949	**222071**	114137	17766	4555		
Showcase, Teessside Leisure Park	21655	18358	14733	13544	18493	**86783**	74546	19216	2273		
Whitby Pavilion	0	0	0	0	0	**0**	0	1491	2273		
Other Destinations	1341	6046	1293	2101	1321	**12102**	0	2940	571		
TOTAL	**103121**	**109928**	**56232**	**55282**	**66047**	**390609**	**193124**	**41414**	**9671**		

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

Table 8: Cinema Screen Capacity 2016 to 2032

	2016	2021	2026	2032
Total Cinema Trips attracted to Redcar and Cleveland Borough (per annum)	79,861	80,688	81,512	82,328
Number of Trips per Screen (per annum)	47,000	47,000	47,000	47,000
Cinema Screen Potential	1.7	1.7	1.7	1.8
Existing Screens in Redcar and Cleveland Borough	1	1	1	1
Borough Screen Capacity	1	1	1	1

Table 9: Cinema Seat Capacity 2016 to 2032

	2016	2021	2026	2032
Total Cinema Trips attracted to Redcar and Cleveland Borough (per annum)	79,861	80,688	81,512	82,328
Number of Trips per Seat (per annum)	232	232	232	232
Cinema Seat Potential	344	348	351	355
Existing Seats in Redcar and Cleveland Borough	250	250	250	250
Borough Seat Capacity	94	98	101	105

Appendix 7 Food and Beverage Capacity Assessment

FOOD AND BEVERAGE CAPACITY 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: Food and Beverage Expenditure per person (£) (2014 Prices)

Zone	2016	2021	2026	2032
Zone 1 - Redcar	1,024	1,095	1,173	1,275
Zone 2 - Eston	934	999	1,070	1,163
Zone 3 - Guisborough	1,256	1,344	1,439	1,565
Zone 4 - Marske/Saltburn	1,232	1,318	1,412	1,535
Zone 5 - Rural East	983	1,052	1,126	1,224
Zone 6 - East Middlesbrough	914	978	1,047	1,138
Zone 5 - North Yorkshire Moors	1,397	1,495	1,601	1,740
Zone 8 - Whitby Hinterland	1,355	1,450	1,553	1,688

Sources:

Experian Local Expenditure 2014 (2014 prices)

Experian Retail Planner Briefing Note (October 2015)

Excludes Special Forms of Trading

Table 3: Total Food and Beverage Expenditure (£m) (2014 Prices)

Zone	2016	2021	2026	2032
Zone 1 - Redcar	36.63	39.56	42.80	46.96
Zone 2 - Eston	35.62	38.47	41.62	45.66
Zone 3 - Guisborough	24.50	26.48	28.63	31.43
Zone 4 - Marske/Saltburn	23.63	25.53	27.62	30.31
Zone 5 - Rural East	22.52	24.34	26.31	28.87
Borough (Sub-Total)	***142.89***	***154.38***	***166.97***	***183.22***
Zone 6 - East Middlesbrough	59.93	65.17	70.85	78.49
Zone 5 - North Yorkshire Moors	19.98	21.64	23.45	25.74
Zone 8 - Whitby Hinterland	4.62	4.95	5.33	5.83
Total	**227.41**	**246.15**	**266.60**	**293.28**

Source: Tables 1 and 2

Table 4: Base Year 2016 Food and Beverage 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	54.9%	2.8%	1.0%	21.6%	9.3%	1.8%	0.7%	0.0%	10.0%
Low Grange District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%
Eston District Centre	0.0%	15.6%	0.0%	0.0%	0.0%	3.1%	0.0%	0.0%	5.0%
Guisborough District Centre	2.8%	7.1%	68.0%	2.8%	17.7%	1.8%	5.7%	4.2%	10.0%
Marske District Centre	0.8%	2.4%	1.0%	21.4%	0.8%	0.0%	0.0%	0.0%	5.0%
Saltburn District Centre	14.2%	1.2%	7.3%	35.9%	17.7%	0.0%	2.0%	3.4%	10.0%
Loftus District Centre	0.0%	0.0%	0.0%	0.0%	3.8%	0.0%	0.0%	0.0%	5.0%
Other Destinations	2.8%	13.9%	2.1%	0.0%	21.5%	3.1%	5.2%	2.1%	5.0%
Borough Total	**75.5%**	**43.0%**	**79.4%**	**81.7%**	**70.8%**	**9.8%**	**13.6%**	**9.7%**	
Outside Borough	**24.5%**	**57.0%**	**20.6%**	**18.3%**	**29.2%**	**90.2%**	**86.5%**	**90.3%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.1%**	**100.0%**	

Source: NEMS Household Survey July/August 2016

Table 5: Base Year 2016 Food and Beverage Expenditure (£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	**36.63**	**35.62**	**24.50**	**23.63**	**22.52**	**142.89**	**59.93**	**19.98**	**4.62**		
Redcar Town Centre	20.11	1.00	0.24	5.10	2.09	**28.55**	1.08	0.14	0.00	3.31	**33.08**
Low Grange District Centre	0.00	0.00	0.00	0.00	0.00	**0.00**	0.00	0.00	0.00	0.00	**0.00**
Eston District Centre	0.00	5.56	0.00	0.00	0.00	**5.56**	1.86	0.00	0.00	0.39	**7.80**
Guisborough District Centre	1.03	2.53	16.66	0.66	3.99	**24.86**	1.08	1.14	0.19	3.03	**30.30**
Marske District Centre	0.29	0.85	0.24	5.06	0.18	**6.63**	0.00	0.00	0.00	0.35	**6.98**
Saltburn District Centre	5.20	0.43	1.79	8.48	3.99	**19.89**	0.00	0.40	0.16	2.27	**22.71**
Loftus District Centre	0.00	0.00	0.00	0.00	0.86	**0.86**	0.00	0.00	0.00	0.05	**0.90**
Other Destinations	1.03	4.95	0.51	0.00	4.84	**11.33**	1.86	1.04	0.10	0.75	**15.08**
Borough Total	**27.66**	**15.31**	**19.45**	**19.30**	**15.95**	**97.67**	**5.87**	**2.72**	**0.45**	**10.15**	**116.86**
Outside Borough	**8.97**	**20.30**	**5.05**	**4.32**	**6.58**	**45.22**	**54.05**	**17.28**	**4.17**		
TOTAL	**36.63**	**35.62**	**24.50**	**23.63**	**22.52**	**142.89**	**59.93**	**20.00**	**4.62**		

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

Table 6: 2021 Food and Beverage Expenditure (£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	**39.56**	**38.47**	**26.48**	**25.53**	**24.34**	**154.38**	**65.17**	**21.64**	**4.95**		
Redcar Town Centre	21.72	1.08	0.26	5.51	2.26	**30.84**	1.17	0.15	0.00	3.57	**35.74**
Low Grange District Centre	0.00	0.00	0.00	0.00	0.00	**0.00**	0.00	0.00	0.00	0.00	**0.00**
Eston District Centre	0.00	6.00	0.00	0.00	0.00	**6.00**	2.02	0.00	0.00	0.42	**8.44**
Guisborough District Centre	1.11	2.73	18.01	0.71	4.31	**26.87**	1.17	1.23	0.21	3.28	**32.76**
Marske District Centre	0.32	0.92	0.26	5.46	0.19	**7.16**	0.00	0.00	0.00	0.38	**7.54**
Saltburn District Centre	5.62	0.46	1.93	9.16	4.31	**21.48**	0.00	0.43	0.17	2.45	**24.54**
Loftus District Centre	0.00	0.00	0.00	0.00	0.93	**0.93**	0.00	0.00	0.00	0.05	**0.97**
Other Destinations	1.11	5.35	0.56	0.00	5.23	**12.25**	2.02	1.13	0.10	0.82	**16.31**
Borough Total	**29.87**	**16.54**	**21.02**	**20.86**	**17.23**	**105.53**	**6.39**	**2.94**	**0.48**	**10.97**	**126.30**
Outside Borough	**9.69**	**21.93**	**5.45**	**4.67**	**7.11**	**48.86**	**58.79**	**18.72**	**4.47**		
TOTAL	**39.56**	**38.47**	**26.48**	**25.53**	**24.34**	**154.38**	**65.17**	**21.66**	**4.95**		

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

Table 7: 2026 Food and Beverage Expenditure (£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	**42.80**	**41.62**	**28.63**	**27.62**	**26.31**	**166.97**	**70.85**	**23.45**	**5.33**		
Redcar Town Centre	23.50	1.17	0.29	5.97	2.45	**33.36**	1.28	0.16	0.00	3.87	**38.67**
Low Grange District Centre	0.00	0.00	0.00	0.00	0.00	**0.00**	0.00	0.00	0.00	0.00	**0.00**
Eston District Centre	0.00	6.49	0.00	0.00	0.00	**6.49**	2.20	0.00	0.00	0.46	**9.15**
Guisborough District Centre	1.20	2.95	19.47	0.77	4.66	**29.05**	1.28	1.34	0.22	3.54	**35.43**
Marske District Centre	0.34	1.00	0.29	5.91	0.21	**7.75**	0.00	0.00	0.00	0.41	**8.16**
Saltburn District Centre	6.08	0.50	2.09	9.91	4.66	**23.24**	0.00	0.47	0.18	2.65	**26.54**
Loftus District Centre	0.00	0.00	0.00	0.00	1.00	**1.00**	0.00	0.00	0.00	0.05	**1.05**
Other Destinations	1.20	5.78	0.60	0.00	5.66	**13.24**	2.20	1.22	0.11	0.88	**17.65**
Borough Total	**32.31**	**17.89**	**22.73**	**22.56**	**18.63**	**114.13**	**6.94**	**3.19**	**0.52**	**11.86**	**136.64**
Outside Borough	**10.49**	**23.72**	**5.90**	**5.05**	**7.68**	**52.84**	**63.90**	**20.29**	**4.81**		
TOTAL	**42.80**	**41.62**	**28.63**	**27.62**	**26.31**	**166.97**	**70.85**	**23.47**	**5.33**		

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

Table 8: 2032 Food and Beverage Expenditure (£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	**46.96**	**45.66**	**31.43**	**30.31**	**28.87**	**183.22**	**78.49**	**25.74**	**5.83**		
Redcar Town Centre	25.78	1.28	0.31	6.55	2.69	**36.60**	1.41	0.18	0.00	4.24	**42.44**
Low Grange District Centre	0.00	0.00	0.00	0.00	0.00	**0.00**	0.00	0.00	0.00	0.00	**0.00**
Eston District Centre	0.00	7.12	0.00	0.00	0.00	**7.12**	2.43	0.00	0.00	0.50	**10.06**
Guisborough District Centre	1.31	3.24	21.37	0.85	5.11	**31.89**	1.41	1.47	0.24	3.89	**38.90**
Marske District Centre	0.38	1.10	0.31	6.49	0.23	**8.50**	0.00	0.00	0.00	0.45	**8.95**
Saltburn District Centre	6.67	0.55	2.29	10.88	5.11	**25.50**	0.00	0.51	0.20	2.91	**29.13**
Loftus District Centre	0.00	0.00	0.00	0.00	1.10	**1.10**	0.00	0.00	0.00	0.06	**1.15**
Other Destinations	1.31	6.35	0.66	0.00	6.21	**14.53**	2.43	1.34	0.12	0.97	**19.39**
Borough Total	**35.45**	**19.63**	**24.96**	**24.76**	**20.44**	**125.24**	**7.69**	**3.50**	**0.57**	**13.02**	**150.02**
Outside Borough	**11.50**	**26.03**	**6.47**	**5.55**	**8.43**	**57.98**	**70.80**	**22.26**	**5.26**		
TOTAL	**46.96**	**45.66**	**31.43**	**30.31**	**28.87**	**183.22**	**78.49**	**25.76**	**5.83**		

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

Table 9 Summary of Food and Beverage Expenditure 2016 to 2032 (2014 Prices)

Area	2016	2021	2026	2032
Available Expenditure in Borough (£m)				
Redcar Town Centre	33.08	35.74	38.67	42.44
Low Grange District Centre	0.00	0.00	0.00	0.00
Eston District Centre	7.80	8.44	9.15	10.06
Guisborough District Centre	30.30	32.76	35.43	38.90
Marske District Centre	6.98	7.54	8.16	8.95
Saltburn District Centre	22.71	24.54	26.54	29.13
Loftus District Centre	0.90	0.97	1.05	1.15
Other Destinations	15.08	16.31	17.65	19.39
Total	**116.86**	**126.30**	**136.64**	**150.02**
Turnover of Existing Facilities (£m)				
Redcar Town Centre	33.08	34.76	36.54	38.78
Low Grange District Centre	0.00	0.00	0.00	0.00
Eston District Centre	7.80	8.20	8.62	9.15
Guisborough District Centre	30.30	31.85	33.47	35.53
Marske District Centre	6.98	7.33	7.71	8.18
Saltburn District Centre	22.71	23.87	25.09	26.63
Loftus District Centre	0.90	0.95	1.00	1.06
Other Destinations	15.08	15.85	16.66	17.68
Total	**116.86**	**122.82**	**129.08**	**137.02**
Surplus/Deficit Expenditure (£m)				
Redcar Town Centre	0.0	1.0	2.1	3.7
Low Grange District Centre	0.0	0.0	0.0	0.0
Eston District Centre	0.0	0.2	0.5	0.9
Guisborough District Centre	0.0	0.9	2.0	3.4
Marske District Centre	0.0	0.2	0.4	0.8
Saltburn District Centre	0.0	0.7	1.5	2.5
Loftus District Centre	0.0	0.0	0.1	0.1
Other Destinations	0.0	0.5	1.0	1.7
Total	**0.0**	**3.5**	**7.6**	**13.0**

Source: Tables 5 to 9

Table 10: Food and Beverage Expenditure Capacity 2016 to 2032 (2014 Prices)

Area	2016	2021	2026	2032
Turnover Density New Floorspace (£ per sq.m)	£5,000	£5,255	£5,523	£5,863
Floorspace Requirement (sq.m gross)				
Redcar Town Centre	0	185	386	624
Low Grange District Centre	0	0	0	0
Eston District Centre	0	46	95	155
Guisborough District Centre	0	173	354	575
Marske District Centre	0	39	81	131
Saltburn District Centre	0	127	263	425
Loftus District Centre	0	5	10	17
Other Destinations	0	88	180	292
Total	**0**	**663**	**1,370**	**2,218**

(Please note some figures may not total precisely due to rounding)