Redcar & Cleveland Borough Council

REDCAR AND CLEVELAND STRATEGIC RETAIL, LEISURE AND OFFICE STUDY UPDATE

AUGUST 2011 - VOLUME 2 (APPENDICES)

PREPARED BY

COLLIERS INTERNATIONAL

Accelerating success.

APPENDICES (VOLUME 2)

APPENDIX 1

PPS 4 Definitions Relating to Hierarchy of Centres and Types of Retail Location and Development

ANNEX B: Definitions

City centres are the highest level of centre identified in development plans. In terms of hierarchies, they will often be a regional centre and will serve a wide catchment. The centre may be very large, embracing a wide range of activities and may be distinguished by areas which may perform different main functions. Planning for the future of such areas can be achieved successfully through the use of area action plans, with masterplans or development briefs for particular sites. In London the 'international' and 'metropolitan' centres identified in the Mayor's *Spatial Development Strategy* typically perform the role of city centres.

Town centres will usually be the second level of centres after city centres and, in many cases, they will be the principal centre or centres in a local authority's area. In rural areas they are likely to be market towns and other centres of similar size and role which function as important service centres, providing a range of facilities and services for extensive rural catchment areas. In planning the future of town centres, local planning authorities should consider the function of different parts of the centre and how these contribute to its overall vitality and viability. In London the 'major' and many of the 'district' centres identified in the Mayor's *Spatial Development Strategy* typically perform the role of town centres.

District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library.

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.

Small parades of shops of purely neighbourhood significance are not regarded as centres for the purposes of this policy statement.

TYPES OF LOCATION

TOWN CENTRE

Defined area, including the primary shopping area and areas of predominantly leisure, business and other main town centre uses within or adjacent to the primary shopping area. The extent of the town centre should be defined on the proposals map.

PRIMARY SHOPPING AREA

Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are contiguous and closely related to the primary shopping frontage). The extent of the primary shopping area should be defined on the proposals map. Smaller centres may not have areas of predominantly leisure, business and other main town centre uses adjacent to the primary shopping area, therefore the town centre may not extend beyond the primary shopping area.

PRIMARY FRONTAGE

Primary frontages are likely to include a high proportion of retail uses.

SECONDARY FRONTAGE

Secondary frontages provide greater opportunities for a diversity of uses.

EDGE-OF-CENTRE

For retail purposes, a location that is well connected to and within easy walking distance (ie. up to 300 metres) of the primary shopping area. For all other main town centre uses, this is likely to be within 300 metres of a town centre boundary[16].

In determining whether a site falls within the definition of edge-of-centre, account should be taken of local circumstances. For example, local topography will affect pedestrians' perceptions of easy walking distance from the centre. Other considerations include barriers, such as crossing major roads and car parks, the attractiveness and perceived safety of the route and the strength of attraction and size of the town centre. A site will not be well connected to a centre where it is physically separated from it by a barrier such as a major road, railway line or river and there is no existing or proposed pedestrian route which provides safe and convenient access to the centre.

OUT-OF-CENTRE

A location which is not in or on the edge of a centre but not necessarily outside the urban area.

OUT-OF-TOWN

An out-of-centre development outside the existing urban area.

---

[16] For office development, locations outside the town centre but within 500 metres of a public transport interchange, including railway and bus stations, within the urban area should be considered as edge-of-centre locations for purposes of the sequential approach.

DESCRIPTIONS OF TYPES OF DEVELOPMENT

RETAIL

Convenience shopping: Convenience retailing is the provision of everyday essential items, including food, drinks, newspapers/magazines and confectionery.

Supermarkets: Self-service stores selling mainly food, with a trading floorspace less than 2,500 square metres, often with car parking.

Superstores: Self-service stores selling mainly food, or food and non-food goods, usually with more than 2,500 square metres trading floorspace, with supporting car parking.

Comparison shopping: Comparison retailing is the provision of items not obtained on a frequent basis. These include clothing, footwear, household and recreational goods.

Retail warehouses: Large stores specialising in the sale of household goods (such as carpets, furniture and electrical goods), DIY items and other ranges of goods, catering mainly for car-borne customers.

Retail parks: An agglomeration of at least three retail warehouses.

Warehouse clubs: Large businesses specialising in volume sales of reduced priced goods.

The operator may limit access to businesses, organisations or classes of individual.

Factory outlet centres: Groups of shops specialising in selling seconds and end-of-line goods at discounted prices.

Regional and sub-regional shopping centres: Out-of-centre shopping centres which are generally over 50,000 square metres gross retail area, typically comprising a wide variety of comparison goods stores.

LEISURE

Leisure parks: Leisure parks often feature a mix of leisure facilities, such as a multiscreen cinema, indoor bowling centres, night club, restaurants, bars and fast-food outlets, with car parking.

BUSINESS

Business parks: A grouping of purpose-built office accommodation and other business uses with some shared facilities and car parking.

APPENDIX 2

The Household Telephone Survey

(A) Survey Methodology and Sampling

BEACON RESEARCH (SERVICES) LTD

The Resource Centre, Bridge Street,
Garstang, Lancs PR3 1YB
Tel: 01995 606330
Fax: 01995 605336
E-mail: enquiries@beaconresearchltd.co.uk

REDCAR & CLEVELAND BOROUGH COUNCIL HOUSEHOLD SHOPPING SURVEY

TECHNICAL APPENDIX

Presented to:	Richard Doidge Colliers International 9 Marylebone Lane London W1U 1HL
Date:	April 2011

CONTENTS

1. BACKGROUND & METHODOLOGY

The client, Colliers International, wished to conduct a telephone shopping survey in Redcar & Cleveland Borough and surrounding areas. This was to establish the following: -

- Where respondents go for their non bulky comparison goods shopping, such as clothing and footwear
- How frequently they visit their main and secondary centres
- How their expenditure on such goods is divided between main and secondary centres
- Why they choose their main centres, how they travel and the length of their journey from home
- Similar information regarding bulky comparison goods shopping
- Similar information regarding convenience goods shopping
- Information on linked trips connected to convenience goods shopping

A total of 1000 interviews were targeted, in ten different zones, each zone defined by electoral wards. Interviews were conducted over a period of three weeks, between February 11th and March 5th 2011.

In order to provide meaningful and reliable data in each of the zones 100 interviews were allocated to each of the zones. The results were then weighted, at the analysis stage, to take account of the differing populations in each zone and their importance to the overall survey area.

2. SAMPLE BREAKDOWN

ZONE	Population	%	Achieved Sample	Weighted Sample	Weight
1	35,900	16.24	100	162	1.624
2	13,241	5.99	100	60	0.599
3	20,339	9.20	100	92	0.920
4	8,736	3.95	100	40	0.395
5	19,655	8.89	100	89	0.889
6	26,753	12.10	100	121	1.210
7	11,876	5.37	100	54	0.537
8	3,468	1.57	100	16	0.157
9	14,420	6.52	100	65	0.652
10	66,641	30.15	100	302	3.015
TOTAL	221,029	100.00	1000	1000	1.000

The sample used for making telephone calls was obtained by Beacon Research (Services) Ltd from Marketing Lists, who supplied names, addresses and telephone numbers, as defined by electoral ward.

Full details of the samples achieved in each zone and the weightings subsequently applied within the analysis, are shown in the preceding table.

The following table summarises the details of calls made and interview outcome.

	Quantity	%
Initial Sample	2,300	100.0
Completed interviews	1,000	43.5
Refusals	143	6.2
Wrong numbers / Unobtainable / Answer phone	107	4.6
No reply (after 4 calls)	368	16.0
Not used	682	29.7

3. STATEMENT OF RELIABILITY

Assessment of the standard error:

1. The Household Shopping Survey has been undertaken as a series of individual sample surveys, over a number of defined zones.
2. The results are subject to the following sampling error, of which there follows an analysis.
3. The following analysis indicates the methodology used to calculate the standard error, with the standard 95% probability of being correct. The formulae for these calculations are as follows:

$$SE\% = \frac{p\% * q\%}{n}$$

Where: p% = sample value recorded

q% = 100% - p%

n = sample size

And where:

±1.96 x (SE %) = 95% probability that the correct answer lies in the range calculated.

4. Using the above formulae, one can predict the variation between the sample results and the 'true' values from knowledge of the size of sample on which the results are based and the number of times that a particular answer is given. The table below illustrates the predicted ranges for the total sample and percentage results at the 95% confidence level.

Approximate sampling tolerances applicable to percentages at or near these levels.

Size of sample on which survey result is based	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
1,000 interviews	1.86	2.48	2.84	3.04	3.10

For example, with a sample of 1000, where 30% give a particular answer, the chances are 19 in 20 that the 'true' value (which would have been obtained if the whole population had been interviewed) will fall within the range of ±2.84 percentage points from the sample results.

APPENDIX 2

The Household Telephone Survey

(B) Survey Questionnaire

Job No: BRSL/11/487

ZONE / AREA

STRICTLY CONFIDENTIAL
BEACON RESEARCH (SERVICES) LTD
The Resource Centre, Bridge Street, Garstang, Lancs PR3 1YB
Tel: 01995 606330 Fax: 01995 605336

REDCAR & CLEVELAND RETAIL, LEISURE & OFFICE STUDY

HOUSEHOLD TELEPHONE SURVEY ON BEHALF OF COLLIERS INTERNATIONAL (FEBRUARY 2011)

Name: ______________________________

Address: ______________________________

____

Postcode: ______________________________

C1.	**Age:**	16 – 24	☐1	45 – 54	☐4
		25 – 34	☐2	55 – 64	☐5
		35 – 44	☐3	65+	☐6
C2.	**Gender:**	Male	☐1	Female	☐2
C3.	**Ethnicity:**	**White**		**Black or Black British**	
		British	☐1	Caribbean	☐10
		Irish	☐2	African	☐11
		Any other White background	☐3	Any other Black background	☐12
		Mixed		**Asian or Asian British**	
		White and Black Caribbean	☐4	Indian	☐13
		White and Black African	☐5	Pakistani	☐14
		White and Asian	☐6	Bangladeshi	☐15
		Any other mixed background	☐7	Any other Asian background	☐16
		Chinese	☐8		
		Any other ethnic group	☐9		
C4.	**What is the occupation of the chief wage earner in your household?**	Student	☐1	Retired	☐4
		Full-time employed	☐2	Unemployed	☐5
		Part-time employed	☐3		
C5.	How many adults (aged 18 or over), including yourself, live in your household? *(write in box)*				
C6.	How many children live in your household? *(write in box)*				

Interviewer Name: ______________________________

Interviewer Signature: ______________ Date: ______________ ______________

Good morning / afternoon, my name is------------- We are doing some research on behalf of **Redcar and Cleveland Borough Council** to improve shopping and leisure facilities in this area and I'd like to ask you a few questions.

QUALIFIER QUESTIONS:

1. Are you / May I speak to the person responsible for the majority of your household shopping?

YES	☐1	(Continue)
NO	☐2	(CLOSE INTERVIEW)

2. As we need to speak to people across a number of areas, could you please tell me your full postcode?

WRITE IN POST CODE HERE ______________________

Refer to quota and check that respondent is eligible for interview:

YES	☐1	(Continue)
NO	☐2	(CLOSE INTERVIEW)

Q1a. Can I ask you first of all, excluding Mail Order and shopping over the Internet, at which town/city centre or shopping centre or retail park do you do <u>most</u> of your shopping for non-bulky non-food goods such as clothing & footwear, books, gifts and jewellery?

Q1b. And how often do you visit..................... town/city centre or shopping centre or retail park, for this type of non-food shopping?

Q1c. And excluding Mail Order and shopping over the Internet, what percentage or proportion of your total expenditure on non-bulky, non-food shopping such as clothing & footwear, books, gifts and jewellery would you say that you do in .... town /city centre or shopping centre or retail park?

Q2a. Excluding Mail Order and shopping over the Internet, what is your <u>second most important</u> town/city centre or shopping centre or retail park for non-bulky non-food goods such as clothing & footwear, books, gifts and jewellery? (SINGLE CODE)

Q2b. And how often do you visit..................... town/city centre or shopping centre or retail park for this type of non-food shopping?

Q2c. And excluding Mail Order and shopping over the Internet, what percentage or proportion of your total expenditure on non-bulky, non-food shopping such as clothing & footwear, books, gifts and jewellery would you say that you do in .... town /city centre or shopping centre or retail park? *(Write In %)*

RECORD ANSWERS BELOW– CHECK PERCENTAGES ADD TO 100% AT Q1c/Q2c

	TOWN / CENTRE	**Q1a.**	**Q2a.**
A.	**CODE FROM LIST 'A'** *(write code number in box)*		
	LOCAL SHOPS – N.B. Centre is <u>essential</u>. See CODE LIST and write number in box. *(For any 'other' Local Shops, write in below)*		
	Other (Write in – N.B. <u>Town</u> & <u>Centre / Retail Park</u> name essential)		
	Varies / No particular centre	**46**	**46**
	None / Don't shop for these goods	**47**	**47**
	None / Don't shop / Disabled	**48**	**48**
	None / Don't shop / Internet or mail order only	**49**	**49**
	No Second Centre		**50**
	DK / Can't remember	**51**	**51**
B.	**FREQUENCY OF SHOPPING**	**Q1b.**	**Q2b.**
	More than once a week	1	1
	Once a week	2	2
	Once a fortnight	3	3
	Once a month	4	4
	Once every 2-3 months	5	5
	Once every 4-6 months	6	6
	Less often	7	7
	DK / Can't remember / Varies	8	8
C.	**% In Location (Write in)**	**Q1c.** %	**Q2c.** %

Q3a. You said that .... is the Centre/Retail Park where you do most of your non-bulky non-food shopping? What is your main reason for choosing that Centre?

Close to home/convenient	1	Good/cheap public transport	7
Close to work	2	Ease of parking	8
Wide choice of shops/range of stores	3	Free/cheap parking	9
Market	4	Good quality goods/products	10
Pedestrianised streets/attractive environment	5	Part of joint trip to other facility/centre	11
Cheap prices/good value for money	6	Other *(Write in)*	

Q3b. How do you normally travel to / from this Centre / Retail Park? (If more than one mode of transport used, code transport used for longest part of journey)

Car (Driver)	1	Walk	6
Car (Passenger)	2	Cycle	7
Car (Park & Ride)	3	Motor Cycle	8
Bus / Coach	4	Taxi	9
Train	5	Other	10

Q3c. Where does your journey usually start from?

Home *(Go to Q3d)*	1	Other *(Go to Q4)* Write in:
Work *(Go to Q4)*	2	

ASK ALL SAYING HOME AT Q3c - OTHERS GO TO Q4:

Q3d. On average, how long does it take you to travel to this Town / Centre / Retail Park from home?

5 minutes or less	1	31 – 45 minutes	4
6 – 15 minutes	2	46 - 60 minutes	5
16 – 30 minutes	3	Over 1 hour	6

ASK ALL:

Q4. At which Town / City Centre or Retail Park do you normally undertake most of your Christmas or other special occasion non-food shopping?

CODE FROM LIST 'A' *(write code number in box)*	
LOCAL SHOPS – N.B. Centre is essential. See CODE LIST *(For any 'other' Local Shops, write code number in box)*	
Other (Write In)	
Varies / No particular centre	**46**
None / Don't shop for these goods	**47**
None / Don't shop / Disabled	**48**
None / Don't shop / Internet or mail order only	**49**
DK / Can't remember	**51**

Q5a. **Excluding Mail Order and shopping over the Internet, at which town/city centre or shopping centre or retail park do you do most of your shopping for bulky non-food goods such as DIY, large electrical goods, furniture and carpets (SINGLE CODE)**

Q5b. **And how often do you visit ………. town/city centre or shopping centre or retail park for this type of non-food shopping?**

Q5c. **And excluding Mail Order and shopping over the Internet, what percentage or proportion of your total expenditure on bulky non food shopping would you say that you do in ....town /city centre or shopping centre or retail park?**

Q6a. **Excluding Mail Order and shopping over the Internet, which is your second most important town/city centre or shopping centre or retail park for bulky non-food goods such as DIY, large electrical goods, furniture and carpets? (SINGLE CODE)**

Q6b. **And how often do you visit ………. town/city centre or shopping centre or retail park for this type of non-food shopping?**

Q6c. **And Excluding Mail Order and shopping over the Internet, what percentage or proportion of your total expenditure on bulky non food shopping would you say that you do in .... town/city centre or shopping centre or retail park?**

RECORD ANSWERS BELOW– CHECK PERCENTAGES ADD TO 100% AT Q5c / Q6c

	TOWN / CENTRE	**Q5a.**	**Q6a.**
A.	**CODE FROM LIST 'A'** *(write code number in box)*		
	LOCAL SHOPS – N.B. Centre is essential. See CODE LIST and write number in box. *(For any 'other' Local Shops, write in below)*		
	Other (Write in – N.B. Town & Centre / Retail Park name essential)		
	Varies / No particular centre	**46**	**46**
	None / Don't shop for these goods	**47**	**47**
	None / Don't shop / Disabled	**48**	**48**
	None / Don't shop / Internet or mail order only	**49**	**49**
	No Second Centre		**50**
	DK / Can't remember	**51**	**51**
B.	**FREQUENCY OF SHOPPING**	**Q5b.**	**Q6b.**
	More than once a week	1	1
	Once a week	2	2
	Once a fortnight	3	3
	Once a month	4	4
	Once every 2-3 months	5	5
	Once every 4-6 months	6	6
	Less often	7	7
	DK / Can't remember / Varies	8	8
C.	**% In Location (Write in)**	**Q5c.** %	**Q6c.** %

Q7a. You said that .... is the Centre/Retail Park where you do <u>most</u> of your bulky non-food shopping? What is your <u>main</u> reason for choosing that Centre?

Close to home/convenient	1	Good/cheap public transport	7
Close to work	2	Ease of parking	8
Wide choice of shops/range of stores	3	Free/cheap parking	9
Market	4	Good quality goods/products	10
Pedestrianised streets/attractive environment	5	Part of joint trip to other facility/centre	11
Cheap prices/good value for money	6	Other *(Write in)*	

Q7b. How do you normally travel to / from this Centre / Retail Park? (If more than one mode of transport used, code transport used for longest part of journey)

Car (Driver)	1	Walk	6
Car (Passenger)	2	Cycle	7
Car (Park & Ride)	3	Motor Cycle	8
Bus / Coach	4	Taxi	9
Train	5	Other	10

Q7c. Where does your journey usually start from?

Home *(<u>Go to Q7d</u>)*	1	Other *(<u>Go to Q8</u>)* Write in:
Work *(<u>Go to Q8</u>)*	2	

ASK ALL SAYING HOME AT Q7c - OTHERS GO TO Q8a:

Q7d. On average, how long does it take you to travel to this Town / Centre / Retail Park from home?

5 minutes or less	1	31 – 45 minutes	4
6 – 15 minutes	2	46 - 60 minutes	5
16 – 30 minutes	3	Over 1 hour	6

ASK ALL:

Q8a. **At which <u>store and location</u> do you usually do <u>most</u> or all of your main food and grocery shopping? (Store and location code needed from separate list – SINGLE CODE)**

Q8b. **And when during the week would you normally shop at your <u>main</u> food store?**

Q9. **At which <u>store and location</u> do you usually do your remaining <u>top-up</u> food and grocery shopping? (Store and Centre needed)**

RECORD ANSWERS BELOW:

	TOWN / CENTRE	**Q8a.**	**Q9a.**
A.	**CODE FROM LIST 'B'** *(write code number in box)*		
	LOCAL SHOPS – N.B. Centre is <u>essential</u>. See CODE LIST and write number in box. *(For any 'other' Local Shops, write in below)*		
	Other (Write in – N.B. <u>Town</u> & <u>Store</u> name essential) Town/Centre:		
	Store:		
	Varies / No particular centre	105	105
	Disabled / Someone else does my shopping	106	106
	Internet / Mail Order only	107	107
	No Second Centre	N/A	108
	DK / Can't remember	109	109
B.	**FREQUENCY OF SHOPPING**	**Q8b.**	**Q9b.**
	Weekdays (Mon- Fri) Daytime	1	N/A
	Weekdays (Mon – Fri) Evening	2	N/A
	Saturday	3	N/A
	Sunday	4	N/A
	Varies / No particular time	5	N/A

Q10a. **On average, how much do you and your household spend <u>IN TOTAL</u> on food and groceries each week? (INCLUDE <u>MAIN</u> & <u>TOP-UP</u> SHOPPING)**

Q10b. **And of this total weekly amount, how much is spent at the <u>Store</u> where you normally do your <u>main</u> food and grocery shopping?**

Q10a.	TOTAL weekly expenditure on food & groceries	£
Q10b.	MAIN store weekly total expenditure	£
Q10c.	Top-up weekly food expenditure (*calculate*) ***Note: Q10c is calculated as (Q10a – Q10b)***	£

Q11a. You said that................ is your main store for food/grocery shopping. How often do you visit that store for food and grocery shopping?

Daily	1	Once a month	5
2 – 3 times a week	2	Once every two months	6
Once a week	3	Less often	7
Once a fortnight	4		

Q11b. What is the main reason why you and your household choose to shop at the store where you do your main food / grocery shopping? (SINGLE CODE)

Close to home / convenient	1	Wide choice of goods / products	6
Close to work	2	Close to other shops	7
Ease of parking	3	Cheap prices/value for money	8
Free / cheap parking	4	Good quality goods / products	9
Good / cheap public transport	5	Other *(write in)*	

Q11c. How do you normally travel to / from your main food/grocery this store? (If more than one mode of transport used, code transport used for longest part of journey)

Car (Driver)	1	Walk	6
Car (Passenger)	2	Cycle	7
Bus	3	Motor Cycle	8
Train	4	Taxi	9
Park & Ride	5	Other *(write in)*	

Q11d. Where does your journey usually start from?

Home *(Go to Q11e)*	1	Other *(Go to Q12a)* Write in:
Work *(Go to Q12a)*	2	

ASK ALL SAYING HOME AT Q11d - OTHERS GO TO Q12a:

Q11e. On average, how long does it take you to travel to your main food / grocery store from home?

5 minutes or less	1	31 – 45 minutes	4
6 – 15 minutes	2	46 - 60 minutes	5
16 – 30 minutes	3	Over 1 hour	6

ASK ALL:

Q12a. When you do your <u>main</u> food and grocery shopping at………do you or your household usually visit any <u>other</u> shops/service outlets in the <u>same</u> area as part of that trip?

Yes *(Go to Q12b)*	1
No *(Go to Q13)*	2

ONLY ASK Q12b IF Q12a = Yes (1):

Q12b. And what other shops/services do you normally visit (MULTI-CODE)

Clothing	**1**
Footwear	**2**
Leisure Goods (e.g. Books, CDs, DVDs, Toys etc)	3
Jewellery	4
Carpets / Furniture	5
Electrical Goods (e.g. TV, Stereo etc)	6
Household Textiles / Soft Furnishings	7
DIY / Hardware / Garden Products	8
Chemists Goods	9
Health & Beauty Services	10
Catering Services (e.g. Cafes, Takeaways, Pubs, Restaurants etc)	11
Leisure Services (e.g. Travel Agent, Betting Shop, DVD Rental etc)	12
Financial outlets (e.g. Banks, Building Societies)	13
Professional Services (e.g. Solicitor, Accountant)	14
Post Office	15
Specialist food shops (eg Baker, Greengrocer, Butcher, Deli)	16
Newsagent/ Confectioner/ Tobacconist	17
Charity Shop	18
Department/ Variety Store	19
Other type of shop *(WRITE IN)*	

Q13a. How often do you visit market halls or street markets for your general shopping?

Daily	1	Once a month	5
2 – 3 times a week	2	Once every two months	6
Once a week	3	Less often	7
Once a fortnight	4	Don't visit markets	8

Q13b. What type of goods do you buy when visiting market halls or street markets?

Mainly food goods	1	Equal mix of food and non-food goods	3
Mainly non-food goods	2	Don't visit markets	4

"I would now like to ask you a few questions on your household's leisure activities."

Q14a. How often, if at all, do you or any member of your household participate in the following leisure activities? (READ OUT and code for each activity)

FOR EACH ACTIVITY WHERE ANSWER IS CODED (1-4) ASK Q14b – IF NONE MENTIONED GO TO Q15a.

Q14b. Which town or local centre do members of your household visit most often for ……………………………?

ACTIVITY	**Q14a.**						**Q14b.**
	Weekly / more often	**2-3 times a month**	**Once a month**	**Once every 2 or 3 months**	**Less often**	**Never**	**Main Centre Visited (Write in)**
Cinema	1	2	3	4	5	6	
Theatre/Concert Halls	1	2	3	4	5	6	
Museums/Libraries	1	2	3	4	5	6	
Bingo	1	2	3	4	5	6	
Casinos	1	2	3	4	5	6	
Ten Pin Bowling	1	2	3	4	5	6	
Restaurants	1	2	3	4	5	6	
Pubs/Bars	1	2	3	4	5	6	
Night Club/Disco	1	2	3	4	5	6	
Swimming	1	2	3	4	5	6	
Health Centre/Gym	1	2	3	4	5	6	
Ice Rink	1	2	3	4	5	6	

Q15a. Which particular type of new leisure facility, if any, do you think your local area (i.e. the area within a few miles of your home) is most in need of?
(WRITE IN – SINGLE ANSWER)

____

Q15b. And if this facility were built, how often would you or your household use it?

More than once a week	1	Once every 2-3 months	5
Once a week	2	Once every 4-6 months	6
2-3 times a month	3	Less often	7
Once a month	4		

COMPLETE CLASSIFICATION - THANK RESPONDENT

APPENDIX 3

Survey Area Population Projections: Methodology and Outputs

Survey Area Population Projections:

Methodology and Outputs

Background

1. Redcar & Cleveland Borough Council requested that we use the latest available Office for National Statistics (ONS) population projections for the study. These are as follows:-

   - ONS 2008-based sub-national population projections for local authority areas; and
   - ONS 2009 mid-year estimates by ward.

Methodology

2. The 10 zones that comprise the survey area are located within the following boroughs and districts:

   - Zones 1 to 7 inclusive – Redcar & Cleveland Borough
   - Zone 8 – Scarborough District
   - Zone 9 – Hambleton District
   - Zone 10 – Middlesbrough Borough

   (Fig. 4.2 in the main report shows the configuration and locations of the survey zones).

3. Accordingly, the following local authority ONS population projections are relevant:

Local Authority	2011 (base year)	2016	2021	2026
Redcar & Cleveland	137,600	137,800	138,500	139,100
Scarborough	109,700	112,200	115,300	118,500
Middlesbrough	141,200	142,900	144,700	146,600
Hambleton	87,800	89,700	92,100	94,400

Source: ONS 2008-based sub-national projections.

4. The next stage is to distribute this population growth at the local authority level to the individual zones that make up the survey area. This is carried out in three stages:-

   (i) Use the ONS 2009 mid-year populations by <u>ward</u> to calculate the population of each zone – each zone comprises of one or more wards;

   (ii) Determine the percentage of the total 2009 local authority population that is accounted for by each zone;

   (iii) Apply these percentages to the ONS local authority population totals at 2011 (the base year), 2016, 2021 and 2026, to derive the individual zone population estimates at each year. This assumes the population of each zone increases pro rata over the study period.

5. The calculations are as follows:-

	Zone	*Ward*	*2009 Mid Year Estimate*	*Col (%)*
Redcar & Cleveland Borough	**1. Redcar**	Coatham	5,325	
		Dormanstown	6,900	
		Kirkleatham	6,785	
		Newcomen	4,745	
		West Dyke	7,690	
		Zetland	4,565	
		Sub Total	**36,010**	**26.2**
	2. Marske	Longbeck	7,120	
		St. Germain’s	6,235	
		Sub Total	**13,355**	**9.7**
	3. Saltburn	Brotton	7,085	
		Saltburn	5,930	
		Skelton	7,450	
		Sub Total	**20,465**	**14.9**
	4. Loftus	Lockwood	2,045	
		Loftus	6,860	
		Sub Total	**8,905**	**6.4**
	5. Guisborough	Guisborough	7,910	
		Hutton	7,290	
		Westworth	4,530	
		Sub Total	**19,730**	**14.4**
	6. Eston	Eston	7,230	
		Normanby	7,100	
		Ormesby	6,080	
		Teesville	6,580	
		Sub Total	**26,990**	**19.6**
	7. South Bank	Grangetown	5,055	
		South Bank	6,980	
		Sub Total	**12,035**	**8.8**
		TOTAL	**137,490**	**100.0**
*	**8. Whitby Hinterland**	Mulgrave	3,440	
		Sub Total	**3,440**	**3.2 (of Scarborough District total)**
Hambleton District	**9. North York Moors**	Broughton & Greenhow	1,670	
		Danby	2,090	
		Great Ayton	4,940	
		Stokesley	5,600	
		Sub Total	**14,300**	**16.4 (of Hambleton District total)**
Middlesbrough Borough	**10. Middlesbrough Suburbs**	Beckfield	4,865	
		Beechwood	5,710	
		Coulby Newham	9,475	
		Ladgate	5,580	
		Marton	4,905	
		Marton West	5,460	
		North Ormesby & Bramley	6,365	
		Nunthorpe	5,025	
		Pallister	6,335	
		Park End	6,670	
		Thorntree	6,235	
			66,625	**47.4% (of Middlesbrough Borough total)**

*Scarborough District

6. Applying these percentages by zone to the appropriate ONS local authority population totals set out at paragraph 3 above, gives the following base year (2011) and projected populations for each of the 10 survey zones.

Zone	2011	2016	2021	2026
1. Redcar	36,055	36,105	36,285	36,450
2. Marske	13,345	13,365	13,435	13,490
3. Saltburn	20,500	20,530	20,635	20,725
4. Loftus	8,805	8,820	8,865	8,900
5. Guisborough	19,815	19,845	19,945	20,030
6. Eston	26,970	27,010	27,145	27,265
7. South Bank	12,110	12,125	12,190	12,240
Sub Total (Redcar & Cleveland Borough)	**137,600**	**137,800**	**138,500**	**139,100**
8. Whitby Hinterland	3,510	3,590	3,690	3,790
9. North York Moors	14,400	14,710	15,105	15,480
10. Middlesbrough Suburbs	66,930	67,735	68,590	69,490
Total (Survey Area)	**222,440**	**223,835**	**225,885**	**227,860**

APPENDIX 4

Experian Data

(A) Definition of Convenience Goods, Non-Bulky Comparison Goods and Bulky Comparison Goods Expenditure Categories (Extract)

Classification of retail spending

Convenience	Comparison	Bulky / Non-bulky C

COICOP	Item	Category
02.2	Tobacco	Convenience
02.1.3	Beer	Convenience
01.1	Food & non-alcohol	Convenience
02.1.2	Wine	Convenience
02.1.1	Spirits	Convenience
09.5.2	Newspapers & mags	Convenience
05.6.1	Household cleaning materials and misc items	Convenience
05.5.1	Major tools	Comparison – Bulky
09.1.1/4	Audio-visuals	Comparison – Bulky
04.3.1	Materials for repair & maintenance of homes	Comparison – Bulky
05.5.2	Small tools	Comparison – Bulky
05.1.1;05.1.2	Furniture & floor coverings	Comparison – Bulky
05.3.1	Major appliances	Comparison – Bulky
07.1.3	Bicycles	Comparison – Bulky
03.1.1/3	Clothing	Comparison – Non-bulky C
05.3.2	Small appliances	Comparison – Non-bulky C
09.5.1;09.5.3/4	Books, stationery etc	Comparison – Non-bulky C
05.4	Utensils	Comparison – Non-bulky C
03.2.1	Footwear	Comparison – Non-bulky C
06.1.3	Therapeutics	Comparison – Non-bulky C
12.3.1	Jewellery	Comparison – Non-bulky C
09.1.4	Recording media	Comparison – Non-bulky C
12.1.2/3	Personal care goods	Comparison – Non-bulky C
05.2	Textiles	Comparison – Non-bulky C
06.1	Medical goods	Comparison – Non-bulky C
12.3.2	Other personal effects	Comparison – Non-bulky C
09.3.1/4	Other recreational goods	Comparison – Non-bulky C

Source: Experian

Estimating consumer spending on retail goods and leisure

Sources

Total household spending on goods and leisure is derived from the ONS' (Office for National Statistics) publication *Consumer Trends* (latest issue July 2010). We use the chained volume measure which shows expenditure at 2006 prices. *Consumer Trends* provides data breaking down total household spending according to the internationally recognised COICOP (Classification of Individual Consumption by Purpose) categories. This is consistent with the definitions used in the ONS' National Accounts *(Blue Book)* and therefore includes spending in the UK by foreign households. Leisure spending is aggregated from COICOP categories as shown below.

The *Consumer Trends* data are based on surveys of consumers. In last year's *Retail Planner* we used data from the ONS' *Retail Sales Business Monitor SDM 28* which are based on surveys of shops and businesses. There is a small but ***generally insignificant*** difference between the two measures. However, on this occasion the *Retail Sales Business Monitor* (RSBM) approach shows an increase in volumes of 1.8% in 2009, while the *Consumer Trends* (CT) approach shows a decrease of 0.6%. It is difficult to identify the reason for this discrepancy as the categories used in the two sources differ. For example, in RSBM the 'predominantly food stores' category includes an element of most categories used in CT (food & drink, alcohol & tobacco, clothing & footwear, health, household goods, recreation & culture). Despite this difference, the key point remains, namely that during the downturn of 2009, retail sales were more resilient than consumer spending as whole which declined by 2.4%.

Aggregations

Retail Planner contains a number of special aggregations of retail goods and services:

1. **Convenience goods** – low-cost, everyday items that consumers are unlikely to travel far to purchase. Defined as food and non-alcoholic drinks, tobacco, alcohol, newspapers and 90% of non-durable household goods.[3]
2. **Comparison goods** – all other retail goods.

Bulky goods – defined as:

- DIY goods
- Furniture and floor coverings.
- Major household appliances whether electric or not.
- Audio-visual equipment
- Remaining 10% of non-durable household goods
- Bicycles.

Non-bulky goods – all other comparison goods

3. **Leisure**

Recreational and sporting services (COICOP 9.4.1)
Cultural services (COICOP 9.4.2)
Games of chance (COICOP 9.4.3)
Restaurants, cafes etc (COICOP 11.1.1)
Accommodation services (COICOP 11.2)
Hairdressing salons & personal grooming (COICOP 12.1.1)

---

3 Non-durable household goods comprise cleaning materials, kitchen disposables, household hardware and appliances, kitchen gloves, cloths etc and pins, needles, tape measures and nuts and bolts. We have assumed, based on Expenditure and Food Survey (EFS) data, that 10% of non-durable household goods are DIY-type goods and, therefore, are properly classified as comparison goods while the remaining 90% have the characteristics of convenience goods.

APPENDIX 4

Experian Data

(B) Expenditure Per Head Estimates (by Zone)

Appendix 4B: Consumer Retail Expenditure Per Head (for 2009 at 2009 prices)

Convenience Goods

	Zone	Average Spend Per Head (£)	Index UK = 100
Redcar & Cleveland District	1	1,659	90
	2	1,796	97
	3	1,678	91
	4	1,647	89
	5	1,750	94
	6	1,716	93
	7	1,529	83
Hinterland	8	2,129	115
	9	1,943	105
	10	1,657	89
	UK Average	**1,853**	**100.0**

Source: Experian.

Non-Bulky Comparison Goods

	Zone	Average Spend Per Head (£)	Index UK = 100
Redcar & Cleveland District	1	1,786	91
	2	1,995	101
	3	1,843	93
	4	1,730	88
	5	1,946	99
	6	1,832	93
	7	1,546	79
Hinterland	8	2,309	117
	9	2,171	110
	10	1,786	91
	UK Average	**1,969**	**100.0**

Source: Experian.

Bulky Comparison Goods

	Zone	*Average Spend Per Head (£)*	*Index UK = 100*
Redcar & Cleveland District	1	722	83
	2	830	96
	3	743	86
	4	690	80
	5	816	94
	6	730	84
	7	574	66
Hinterland	8	1,062	122
	9	1,001	115
	10	702	81
	UK Average	**867**	**100.0**

Source: Experian.

APPENDIX 4

Experian Data

(C) Expenditure Per Head Forecasts (Extract)

Retail Planner Briefing Note 8.1

August 2010

Economic context

Recent trends and near-term outlook

The UK economy is recovering from the severe recession of 2008/09, but growth is patchy and risks of a relapse persist. Domestic demand is constrained by high unemployment and rising under-employment, a lacklustre outlook for investment, pressure on public finances and the weight of household debt. The impact of deep cuts in spending and tax rises is weighing on sentiment. Growth in the three quarters since recovery began has been strongest in manufacturing, helped by the weak pound and global recovery, the service sector has also expanded. Construction rebounded in 2010q2 with its strongest quarterly gain in 50 years.

Household spending, after falling for six consecutive quarters with a cumulative decline of 5.2%, stabilised in 2009q3 and grew by 0.6% in the final quarter of the year. However, a combination of icy weather, higher unemployment and slow growth in real disposable incomes hit spending in the first three months of 2010, resulting in a marginal contraction of 0.1%. We believe this was a temporary relapse, with growth resuming in 2010q2.

Expenditure on **retail goods** has been more resilient than total consumer spending. Latest data (for 2010q1) show household spending 0.2% lower in real terms than a year earlier, while official retail sales data show spending volumes (excluding automotive fuel) up 2.3% in the same period. We believe this divergence between total consumer spending and retail expenditure reflects three major factors:

- consumers have cut back on big ticket items such as expensive holidays, and on expenditure on transport, recreation and culture, but continue to spend on other items;
- discounting has kept retail spending volumes up; and
- there has been a transfer of spending from services (hospitality, personal care and entertainment) to retail spending on similar items for use in the home.

Pressure on retailers' margins from discounting and weak sales for some high street names have resulted in a further rise over the past year in the number of vacant shops. However, the increase to a vacancy rate of 13.5% in July 2010 according to Experian data was much less sharp than the surge from a vacancy rate of 7% to 12% in the year to mid-2009. During that period, the bulky goods sector suffered from the downturn in the housing market and lack of working capital as a result of the credit crunch also played a key role.

The revised official estimate of the economy's performance in 2010q2 showed an acceleration of quarterly growth to 1.2%. This encouraging outcome was boosted by a rebound in construction, manufacturing's response to the weak pound and healthy global growth, and robust expansion in financial & business services. However, it occurred before any major impact was felt from the tax increases and public spending cuts announced in the March and June budgets. These measures are bound to affect growth in the next few quarters and intensify fears about the recovery's sustainability.

Despite the acceleration in the second quarter therefore, we expect GDP growth to revert to a slower path in the next few quarters. Consumer spending will be constrained by subdued incomes and a weak labour market featuring high unemployment and under-employment. At the same time, export growth is likely to be modest in the face of lacklustre eurozone growth and a stronger pound, especially against the US$. However, persistently low interest rates and a revival in fixed investment should provide some support. On balance, we expect GDP growth of 0.5% in 2010q3 and 0.4% in q4, producing year-on-year growth for 2010 of 1.5%.

Further out, as tax increases and spending cuts become a reality, pressure on household spending will intensify. But with fixed investment picking up and international demand remaining solid, underpinning exports, GDP growth should rebalance, depending more on these factors than on consumer sending. We forecast GDP growth at 1.6% in 2011 and 1.8% in 2012.

The implication of these forecasts for households is that **consumer spending will increase very modestly over the remainder of this year (0.2% q-on-q in q3 and 0.3% in q4) and rise by little over 1% in 2011. This will be followed by stronger though still moderate growth of 1.7% in 2012.**

Medium-term outlook

The medium-term outlook is for much slower economic growth than was seen during the 12 years prior to the recession of 2008/09. We expect GDP growth to average near 2.2% a year in the five years 2013-17 and consumer spending to average 2.3%. These rates compare with an annual average of near 3% in 1995-2007 for GDP and 3.2% for consumer spending.

The key reasons for this marked deceleration are:

- **Government finances are tightening.** Public finances deteriorated sharply during the 2008/09 crisis and require urgent and massive correction. Pressure is exacerbated as an increasing number move into retirement, raising government payments and reducing tax and National Insurance receipts. Fiscal stringency will be a feature of economic policy throughout the medium term and maybe beyond. The June 2010 budget addressed the deficit reduction issue, announcing (in addition to the £73bn consolidation by 2014/15 inherited from the previous administration) £40bn of spending cuts and higher taxes. In combination, the proposed consolidation amounts to £83bn of spending cuts by 2014/15 and £29bn of tax increases. This will subdue consumer spending throughout the medium term. In addition, public sector cuts involving considerable redundancies will boost unemployment numbers.
- **Sharp reduction in investment** (down 15% in 2009) and cancellation or postponement of plans will inevitably depress medium-term growth prospects in many parts of the UK economy.
- **Weight of household debt**: There will be no boost as in the past decade from consumer credit. The banking sector will be more cautious and households' appetite for credit will be reduced as they seek to control debts which are at historically high levels in relation to incomes. Moreover, savings are likely to be higher than in the past decade as job insecurity continues against a backdrop of high unemployment and weak growth.
- **The main engines of growth in the past decade – financial and business services and the housing market - will be less buoyant.** London's financial services sector will be more tightly regulated; it may come under increasing pressure from emerging centres in the Middle and Far East; a more subdued housing market than in the 12 years to 2007 when house price rises averaged 10% a year will curb lending and real estate activity; and the now mature business services sector will not be able to repeat its 7.9% annual rate of expansion of 1995-2007.

Retail Planner Briefing Note 8.1

August 2010

Long-term outlook

While the economy is likely to improve on the 2.2% annual average growth rate forecast for 2013-17 in the second half of the coming decade, we believe that the exceptional performance of the period 1995-2007 will not be regained.

Pressures from an ageing population will reinforce the need for ongoing fiscal restraint, precluding the large-scale public sector job creation that boosted economic growth in the first few years of the present century. Environmental factors including much higher energy costs will also constrain growth. We forecast GDP growth between 2017 and 2027 to average 2.4% a year.

In conjunction with our medium-term projection for growth at 2.2% a year in 2013-17, this implies an annual average growth rate in the period to 2027 of 2.3%. This will be rather slower than the UK's previous long-term trend growth, but slightly faster than the rate forecast for the eurozone.

Alternative long-term scenarios

We attach a 65% probability to the central scenario projection of annual growth in GDP averaging 2.4% to 2027. We present one upside and two downside scenarios, with our projections of annual expansion on retail spending under each alternative case.

Optimistic scenario (20% probability)
UK GDP growth to 2027 matches the previous long-term trend of 2.5% a year as the fiscal problems which depress consumer spending in the medium term are offset by buoyant exports and reviving fixed investment. This rebalancing towards exports and investment underpins annual average growth of 2.4% in the period 2013-17, and supports growth at 2.5% a year from 2018-27. Key features of this scenario are:

- Global trade maintains a vigorous growth path and the UK largely retains its market share
- Service sector growth approaches the 1995-2007 rate for most of the period to 2027.

Pessimistic scenario (15% probability)

1. **Deflation scenario (5% probability**). In this worst case scenario, the UK economic recovery is derailed by a combination of depressed household spending and faltering global growth, notably in the key EU market. Weak consumer and business sentiment weigh on investment and household spending. Deflation resurfaces and takes a firm hold from which it is difficult to escape. GDP growth in the period to 2017 averages a meagre 1%, followed by 2% a year to 2027, giving a long-term average of 1.7%, with annual retail sales growth per head averaging just 1.6%.
2. **Inflation scenario (10% probability).** In this case, inflationary pressures mount as a result of international commodity price movements and a weak pound. The effects of the monetary measures taken to stimulate growth during the recession are difficult to reverse and the UK suffers a prolonged period of inflation. High interest rates are required for an extended period to drive inflation out of the system. GDP growth, already depressed by the factors noted in the central scenario, averages 1.5% a year to 2017, followed by growth at 2.4% a year to 2027, an annual average for 2013-27 of little over 2%.

Retail sales per head under alternative scenarios

% per annum	2013-17	2018-27	2013-27
Central case	2.1	2.3	2.2
Optimistic case	2.2	2.5 2.4	
Deflation scenario	0.8	2.0	1.6
Inflation scenario	1.2	2.0	1.7

Retail sales volumes

The following table (figure 1) shows projected growth rates per head to 2027 for the main categories of consumer spending on various categories of retail goods, using our central forecast.

The table also contains historic growth rates for comparison over three time periods: 1969-2009 (the ultra long-term trend); 1979-2009 (the long-term trend) and 1989-2009 (the medium-term trend).

Figure 1: UK retail and leisure spend per head 2007-27

Vol growth per head (%)	2007	2008	2009	2010	2011	2012	2013-17	2018-27	1969-2009	1979-2009	1989-2009
Retail spend	1.9	1.9	-1.4	0.3	0.8	1.8	2.1	2.3	2.8	3.3	3.5
Convenience goods	0.4	-1.6	-2.9	0.3	0.0	0.4	0.8	0.9	0.5	0.7	0.7
Comparison goods	2.7	3.7	-0.6	0.4	1.2	2.4	2.7	2.9	4.7	5.3	5.5
of which bulky	5.0	6.9	0.5	-0.5	1.3	2.4	2.8	3.0	5.6	6.2	6.3
non- bulky	1.4	1.9	-1.2	0.9	1.1	2.5	2.6	2.8	4.3	4.8	5.1
Leisure	1.2	-0.3	-4.5	-1.5	0.7	1.3	1.5	1.9	2.1	1.5	1.4
Consumer spending	1.4	-0.1	-3.1	-0.3	0.2	0.8	1.5	2.0	2.4	2.5	2.5
Retail spend ex non-store	1.0	0.2	-3.1	-1.3	-0.2	1.2	1.8	2.3	2.8	3.3	3.5

Figure 1 includes in the final row an estimate of retail spending excluding non-store retailing[1] to provide an idea of growth from purely physical outlets that is the major concern of clients of this service. Non-store retailing ie e-tailing and mail order (repair of household goods was removed from retailing in February 2010) has grown rapidly in recent years, outpacing store-based trading, and we expect a continuation of this pattern over the next few years. The differences between retail sales growth rates with and without non-store sales are quite considerable in the short to medium term.

However, the initial phase of e-tailing, boosted by the take-up of new technology, is likely to be followed by a more mature phase. From 2018, we forecast that non-store retailing will grow in line with traditional shopping. Consequently, and bearing in mind that non-store retailing accounts for under 10% of total sales, it is valid in producing the long-term forecasts of growth for the various components of retail spending shown in figures 1 to 4, to focus on retail sales as a whole.

Key features of the forecast are:

[1] Non-store retailing is considered in detail in Appendix 3, which contains a section on internet sales and our view on their treatment in retail capacity assessments.

- **During the period 2010/11,** growth in retail spending will be much slower than in many previous recovery phases given the constraints on economic performance, notably the squeeze on public finances.
- In the **medium term (to 2017)**, growth in retail sales volumes will be much slower than during the past decade and slower than in the long and ultra long term. This reflects the constraints on overall economic growth outlined in the **Economic Context** above, a relatively high tax burden and much more modest growth in consumer lending than in the past decade.
- While growth in household spending is forecast to pick up in the **longer term** (2018-27)**,** it will grow broadly in line with GDP expansion, in contrast to exceeding GDP growth by about 0.3 percentage points in the ultra-long term, (the period 1969-2009). This reflects the increasing maturity of the UK economy, less expansionary consumer credit, greater emphasis on green issues, including higher energy costs and an ageing population. Moreover, according to the latest official forecasts, population growth to 2026 is expected to be faster than in the period 1969-2009, averaging 0.7% per annum against 0.2% in the past four decades. This depresses the *per capita* growth rate used in the tables. All categories of retail spending, except convenience goods, lag the ultra long-term trend in our forecast to 2027, and the gap is substantially greater than that seen in the past two decades, which encompassed the credit-fuelled booms of the late 1980s and 1995-2007.

Summary of long-term growth prospects and a recommendation

In figure 2, the long-term growth projections are summarized. See pages 4 and 5 for the reasons underlying the long-term forecasts.

- Our projections of future spending covering the periods, 2012, 2013-17 and 2018-27 have been merged to provide a long-term forecast covering expected growth from 2011 to 2027.

Figure 2: UK retail spending (including non-store) and leisure spending

Volume growth per head (%) Annual averages	2012-27	1969-2009	1979-2009	1989-2009
Retail spending	2.2	2.8	3.3	3.5
Convenience goods	0.9	0.5	0.7	0.7
Comparison goods	2.8	4.7	5.3	5.5
of which bulky	2.9	5.6	6.2	6.3
non- bulky	2.7	4.3	4.8	5.1
Leisure	1.7	2.1	1.5	1.4
Consumer spending	1.8	2.4	2.5	2.5

This table specifically excludes recent trends and individual years. It focuses on long-term trends which are key to development projects. Even so, critical choices have to be made, between on the one hand historic medium, long and ultra-long term trends and on the other the forecasts produced by Experian.

We believe that because of the significant constraints on economic activity over the next few years, outlined in the **Economic Context**, and the slower growth forecast for consumer spending in the longer term, it is appropriate to use the forecast growth rates shown in column 1 of figure 2 rather than either the long-term, medium term or ultra long-term trends.

APPENDIX 4

Experian Data

(D) Forecasts of Special Forms of Trading (Extract)

Non-store retail sales (special forms of trading)

As reported in our March 2010 *Note on non-store retailing* the Office for National Statistics (ONS) announced in February changes to the methodology for calculating the value of internet sales. This resulted in a large increase in estimated internet retail sales and their share of the total retail market, which is now shown at 7.3% at end-2009, against 4.9% previously. The upward revision reflects the inclusion in the new methodology of all sales made over the internet by individual businesses using information derived from the monthly ONS Retail Sales Inquiry (RSI). This includes a specific question for all businesses, asking the proportion of sales made over the internet. Some 5,000 businesses in Great Britain are included, covering 95% of the retail sector in terms of turnover. Previously, the series used a sample of responses from businesses to produce the ONS' best estimate of internet sales.

Internet retail sales are collected as part of the RSI. Each business within the RSI is asked to provide retail turnover, including sales from stores, via the internet, mail order, stalls and markets, door-to-door and telephone sales. On-line sales by supermarkets, department stores and catalogue companies are all included. The ONS figure of internet sales plus their estimate of mail order and market/stalls sales is therefore a comprehensive estimate of special forms of trading (SFT) in retailing. Services are excluded as businesses are asked to separate out non-goods elements of their sales.

Recent strong growth in SFT is evidenced by the rising share of internet sales in total retail transactions. This stood at 7.9% in June 2010 against 5.6% in September 2008.

Internet retail sales

Not seasonally adjusted	Average weekly value for all retailing (£ million)	Average weekly value for internet retail sales (£million)	Internet sales as % of total retail sales
2008 Sep	5200	289.8	5.6
Dec	6800	435.1	6.4
2009 Mar	5100	336.8	6.6
Jun	5400	307.4	5.7
Sep	5300	337.7	6.4
Dec	7000	511.7	7.3
2010 Mar	5300	362.1	6.9
Jun	5500	397.7	7.2

Source: ONS, Retail Sales Statistical Bulletin July 2010

The following table based on ONS data shows Experian's estimate of growth since 2005 in all retailing compared with non-store retailing. No official breakdown is available between convenience and comparison goods – the market shares are Experian estimates.

Important points to note from the table are:

- Since the non-store retailing figures include supermarkets and other retailers that source internet goods sales from store space, the share of non-store retailing is over-stated from the point of view of those interested in physical retail outlets, particularly for convenience goods.
- There is a high degree of uncertainty about future trends in internet usage and non-store shopping in general and the assumption that market share holds constant after 2016 could under-estimate the threat to shops. However, even if non-store retailing outpaces store-based shopping for longer than we assume, **store-based shopping** is still expected to continue to expand annually at over 2% *per capita* to 2027 (see figure 1 of the main report).

Our previous forecast contained in *Retail Planner 7.1* showed non-store retailing increasing steadily and at a faster pace than total retail sales until 2016, reaching 8.1% of the total, before stabilising at that level for the rest of the forecast period. The new forecast, based on a higher starting point for non-store retailing, (£21.5bn in 2008 against £16.0bn) coupled with' evidence of stronger growth in recent years, has non-store retailing reaching 12.6% of the total by 2016 and stabilising at that level as the market becomes mature and grows in line with total retail sales.

Estimated and projected market share of non-store retail sales

Volumes at 2006 prices	All retailing* £bn	Non-store** £bn	Growth in all retailing %	Growth in non-store %	Non-store retailing market share (%) Total	Comparison	Convenience
2006	284.1	13.7	2.5	14.2	4.8		
2007	291.3	16.3	2.5	19.0	5.6		
2008	298.9	21.3	2.6	30.7	7.1	8.2	5.0
2009	297.0	26.1	-0.6	22.5	8.8	10.0	6.4
Forecast							
2010	300.2	30.8	1.1	18.0	10.3	11.7	7.4
2011	304.8	33.9	1.5	10.0	11.1	12.6	8.1
2012	312.4	36.3	2.5	7.0	11.6	13.1	8.5
2013	320.6	38.4	2.6	6.0	12.0	13.5	8.8
2014	329.3	40.3	2.7	5.0	12.3	13.7	9.1
2015	338.4	42.2	2.8	4.5	12.5	13.9	9.4
2016	348.0	43.9	2.8	4.0	12.6	13.9	9.6
2017	358.1	45.2	2.9	3.0	12.6	13.9	9.7
2018	368.5	46.5	2.9	2.9	12.6	13.8	9.8
2019	379.2	47.8	2.9	2.9	12.6	13.8	9.9
2020	390.3	49.2	2.9	2.9	12.6	13.7	10.0
2021	401.7	50.6	2.9	2.9	12.6	13.6	10.1
2022	413.4	52.1	2.9	2.9	12.6	13.6	10.2
2023	425.5	53.6	2.9	2.9	12.6	13.5	10.3
2024	437.9	55.2	2.9	2.9	12.6	13.4	10.4
2025	450.7	56.8	2.9	2.9	12.6	13.3	10.6
2026	463.9	58.4	2.9	2.9	12.6	13.3	10.7
2027	477.5	60.1	2.9	2.9	12.6	13.2	10.8

* Exc. automotive fuel,

**Internet plus mail order plus stalls and markets

Special Forms of Trading and demand for retail floorspace

The rise of internet sales has boosted SFT significantly in recent years. This was highlighted in Figure 1 on page 7, as the following extract from the table shows. In each of the years 2007-2009 retail sales growth per head excluding SFT was appreciably slower than the rate including SFT. This difference is expected to persist, but to narrow as we approach 2017, after which our projections assume that total retail sales and non-store sales grow at the same rate.

Vol growth per head (%)	2007	2008	2009	2010	2011	2012	2013-17	2018-27
Retail sales	1.9	1.9	-1.4	0.3	0.8	1.8	2.1	2.3
Retail sales ex non-store	1.0	0.2	-3.1	-1.3	-0.2	1.2	1.8	2.3

Calculations of how demand for retail floorspace will be affected by SFT remains an issue for the medium term as the volume growth in total retail sales projected in this report (averaging 2.6% per annum in absolute terms between 2010 and 2017) overstates the required rate of floorspace expansion (ignoring sales density changes) as SFT continues to eat into store-based sales growth. **Excluding SFT, retail sales volume growth over the period is forecast at 2.2% a year**.

However, it would not be appropriate to assume a growth rate in floorspace of 2.2% per annum as some stores notably large convenience stores sell on line but source sales from regular stores rather than warehouses. It is difficult to gauge the adjustment needed to take account of this and the position is changing quite rapidly. A recent move was Asda's announcement in August 2010 that it is to open a warehouse dedicated to internet orders in Enfield, following the Ocado approach of distributing goods from warehouses rather than stores. If this trend continues, demand for retail floorspace as a result of internet shopping is likely to ease as supermarkets move to a centralised system to ease pressure on stores.

In providing estimates to aid planners on this issue, we consider the position for convenience and comparison sales trends separately. The following table provides indicative growth rates for sales on different assumptions for comparison and convenience goods. For comparison goods, we exclude from the deduction from total sales 25% of SFT sales to provide our best estimate of growth relating to required floorspace (column 4) and for convenience goods 50% of sales are excluded (column 7) as a higher proportion of internet convenience sales are effected through stores.

Growth in sales 2010-2107 (% per annum)

	Comparison			Convenience		
	Total sales	Exc. all SFT	Exc. 25% of SFT	Total	Exc.all SFT	Exc.50% of SFT
2011	1.9	0.8	1.1	0.7	0.0	0.4
2012	3.2	2.6	2.8	1.1	0.7	1.0
2013	3.2	2.8	2.9	1.5	1.0	1.3
2014	3.3	3.0	3.1	1.5	1.1	1.4
2015	3.3	3.2	3.2	1.5	1.2	1.5
2016	3.5	3.4	3.4	1.5	1.2	1.5
2017	3.5	3.6	3.6	1.5	1.4	1.5
Average	3.1	2.8	2.9	1.3	1.0	1.2

Percentage of UK Internet visits to retail websites	Catalogue retailers	High street retailers	Online only retailers
Jul-07	4.3	50.3	45.4
Dec-07	3.2	58.7	38.1
Jul-08	3.6	56.3	40.1
Dec-08	2.8	58.0	39.2
Jul-09	3.9	57.3	38.9
Dec-09	3.8	58.7	37.5
Jul-10	3.5	57.8	38.7

Internet visits for **store-based transactions** account for almost 60% of the total, against 50% three years ago. But as noted above, the non-store retailing figures include supermarkets and other retailers that source internet goods sales from store space.

Source:Experian (Hitwise)

Percentage of UK Internet visits to retail websites

	Jul-07	Jul-08	Jul-10
Apparel and Accessories	10.4	14.8	18.9
Appliances and Electronics	9.6	10.4	8.3
Automotive	3.7	3.4	3.1
Books	12.2	1.5	1.2
Computers	7.1	7.7	4.4
Department Stores	21.1	20.9	24.8
Flowers and Gifts	1.3	1.6	1.7
Grocery and Alcohol	2.8	2.5	2.6
Health and Beauty	2.1	2.5	2.6
House and Garden	7.0	8.7	9.5
Intimate Apparel and Accessories	1.1	1.1	0.9
Music	5.6	6.0	5.2
Office Supplies	1.2	1.5	0.9
Sport and Fitness	4.6	6.2	6.7
Ticketing	2.2	2.0	1.9
Toys and Hobbies	3.0	3.3	2.7
Video and Games	5.2	5.8	4.7

The table alongside tracks how the percentage share of UK Internet visits to retail websites have evolved in the last three years. There has been a marked shift toward visits to apparel and accessories websites with the share of hits to such websites rising from 10% in July 2007 to almost 20% in June 2010. The sudden shift down in retail sites selling book is down to a change in classification of Amazon as a 'department' store. The shares of most other categories have seen marginal changes.

Source:Experian (Hitwise)

APPENDIX 4

Experian Data

(E) Changing Store Productivities (Extract)

Retail Planner Briefing Note 8.1

August 2010

Experian™
A world of insight

Retail sales density

The following tables provide Experian's forecasts of retail sales density under two broad assumptions: constant floorspace to obtain a pure measure of changing efficiency, and including additions to floorspace.

1. Constant floorspace from 2010

Figure 3: Retail sales density - constant floorspace

Total retail	2009	2010	2011	2012	2013-17*	2018-27*
Total retail floorspace (millions of sq ft)**	613	620	620	620	620	620
Retail sales £bn (2006 prices)	297.0	300.2	304.8	312.4	338.9	420.9
Sales density £/sq ft	484.5	484.2	491.5	503.8	546.6	601.8
Density growth rate (%)	-1.4	-0.1	1.5	2.5	2.8	2.6

*Annual average; **Source: GOAD.

Figure 3a: Retail sales density convenience goods - constant floorspace

Convenience goods	2009	2010	2011	2012	2013-17*	2018-27*
Total floorspace (millions of sq ft)**	170	174	174	174	174	174
Convenience sales £bn (2006 prices)	98.6	99.6	100.3	101.5	106.1	119.0
Sales density £/sq ft	580.1	572.7	576.6	583.2	609.6	683.9
Density growth rate (%)	-3.4	-1.3	0.7	1.1	1.5	1.5

*Annual average; **Source: GOAD

Figure 3b: Retail sales density comparison goods - constant floorspace

Comparison goods	2009	2010	2011	2012	2013-17*	2018-27*
Total floorspace (millions of sq ft)**	443	446	446	446	446	446
Comparison sales £bn (2006 prices)	198.4	200.5	204.4	210.9	236.9	302.2
Sales density £/sq ft	447.7	449.6	458.4	472.9	522.0	677.5
Density growth rate (%)	-0.5	0.4	1.9	3.2	3.4	3.5

*Annual average ;**Source: GOAD

2. Changing floorspace

Figure 4: Retail sales density- including changes to floorspace*

Total retail	2009	2010	2011	2012	2013-17*	2018-27*
Total retail floorspace (millions of sq ft)**	613	620	624	630	651	704
Retail sales £bn (2006 prices)	297.0	300.2	304.8	312.4	338.9	420.9
Sales density £/sq ft	484.5	484.2	488.4	495.9	520.2	596.6
Density growth rate (%)	-1.4	-0.1	0.9	1.5	1.6	1.8

*Annual average; **Source: GOAD

Figure 4a: Retail sales density sales convenience goods - including changes to floorspace

Convenience goods	2009	2010	2011	2012	2013-17*	2018-27*
Total floorspace (millions of sq ft)**	170	174	176	178	184	199
Convenience sales £bn (2006 prices)	98.6	99.6	100.3	101.5	106.1	119.0
Sales density £/sq ft	580.1	572.7	570.0	570.1	576.4	597.7
Density growth rate (%)	-3.4	-1.3	-0.5	0.0	0.4	0.5

*Annual average; **Source: GOAD

Figure 4b: Retail sales density- comparison goods including changes to floorspace

Comparison goods	2009	2010	2011	2012	2013-17*	2018-27*
Total floorspace (millions of sq ft)**	443	446	448	452	467	505
Comparison sales £bn (2006 prices)	198.4	200.5	204.4	210.9	236.9	302.2
Sales density £/sq ft	447.7	449.6	456.3	466.6	498.0	596.6
Density growth rate (%)	-0.5	0.4	1.5	2.3	2.2	2.3

*Annual average; **Source: GOAD

The future for retail sales densities

The rapid increase in comparison goods sales densities in the first six years of this century[1] was a product of the retail spending boom and growth rates of well over 3% a year are unlikely to be repeated. This is especially true of the period during which retail sales are depressed by the aftermath of recession. Projected sales densities growth on the changing floorspace assumption are negative for convenience goods in 2010 and 2011, and modest for comparison goods in 2010. Thereafter, growth resumes at a faster pace, 0.4% a year for convenience goods between 2013 and 2017, and 2.6% for comparison goods.

Scope for density increases is much more limited for convenience goods than for comparison goods. Continuing trends towards more modern, higher density, stores and the demolition of older inefficient space means that the expected comparison rate is likely to be close to 2.6% a year over the next 15 years, against 0.5% for convenience goods, where a high proportion of sales are through well-established inner city sites.

[1] See Appendix 4

APPENDIX 5

Retail Floorspace Data and Benchmark Turnovers

(A) Schedule of Occupied Out of Centre Retail Floorspace in Redcar and Cleveland Borough, 2011 (the Base Year)

APPENDIX 5A

Schedule of Occupied Out of Centre Retail Floorspace in Redcar and Cleveland Borough, 2011 (the Base Year)

Zone		Occupier/Location	Non Bulky Comparison Goods		Bulky Comparison Goods		Convenience Goods		All Retail Goods	
No.	Name		Sq M Gross	Sq M Net	Sq M Gross	Sq M Net	Sq M Gross	Sq M Net	Sq M Gross	Sq M Net
1	Redcar	Aldi, West Dyke Road	0	0	0	0	1,002	651	1,002	651
		Sainsburys Local, Embleton Court	0	0	0	0	385	250	385	250
		Sainsburys Local, Larkswood Road	0	0	0	0	283	184	283	184
		Tesco, West Dyke Road	0	0	0	0	4,511	2,488	4,511	2,488
		Poundstretcher, West Dyke Road	0	0	2,000	1,800	0	0	2,000	1,800
		Carpet right, West Dyke Road	0	0	2,000	1,800	0	0	2,000	1,800
		Franks Carpets, West Dyke Road	0	0	2,000	1,800	0	0	2,000	1,800
		Sub Total	**0**	**0**	**6,000**	**5,400**	**6,181**	**3,573**	**12,181**	**8,973**
2	Marske	-	-	-	-	-	-	-	-	-
		Sub Total	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**
3	Saltburn	Co-op, Marske Road	0	0	0	0	214	139	214	139
		Sainsburys Local, Byland Road	0	0	0	0	429	279	429	279
		Sub Total	**0**	**0**	**0**	**0**	**643**	**418**	**643**	**418**

Cont'd overleaf

Zone		Occupier/Location	Non Bulky Comparison Goods		Bulky Comparison Goods		Convenience Goods		All Retail Goods	
No.	Name		Sq M Gross	Sq M Net	Sq M Gross	Sq M Net	Sq M Gross	Sq M Net	Sq M Gross	Sq M Net
4	Loftus	Co-op, Cliff Crescent	0	0	0	0	97	63	97	63
		Sub Total	**0**	**0**	**0**	**0**	**97**	**63**	**97**	**63**
5	Guisborough	Co-op, Middlesbrough Road	0	0	0	0	300	195	300	195
		Lidl, Enfield Chase	0	0	0	0	900	585	900	585
		Sainsburys Local, The Avenue	0	0	0	0	323	210	323	210
		Sainsburys, Morgan Drive	0	0	0	0	2,433	1,881	2,433	1,881
		Focus DIY	0	0	2,000	1,900	0	0	2,000	1,900
		Sub Total	**0**	**0**	**2,000**	**1,900**	**3,956**	**2,871**	**5,956**	**4,771**
6	Eston	Netto, Whale Hill	0	0	0	0	1,143	743	1,143	743
		Sainsburys Local, Bankfields Road	0	0	0	0	350	228	350	228
		Sub Total	**0**	**0**	**0**	**0**	**1,493**	**971**	**1,493**	**971**

Cont'd overleaf

Zone		Occupier/Location	Non Bulky Comparison Goods		Bulky Comparison Goods		Convenience Goods		All Retail Goods	
No.	Name		Sq M Gross	Sq M Net	Sq M Gross	Sq M Net	Sq M Gross	Sq M Net	Sq M Gross	Sq M Net
7	South Bank	Asda	1,452	892	0	0	4,355	2,675	5,807	3,567
		Costcutter, Fabian Road	0	0	0	0	350	228	350	228
		B&Q*	0	0	9,530	8,577	0	0	9,530	8,577
		Matalan*	2,900	2,610	0	0	0	0	2,900	2,610
		Argos*	1,243	1,119	0	0	0	0	1,243	1,119
		Pets at Home*	752	677	0	0	0	0	752	677
		Boots*	1,012	911	0	0	0	0	1,012	911
		Next*	1,008	907	0	0	0	0	1,008	907
		Outfit*	924	832	0	0	0	0	924	832
		Peacocks*	697	627	0	0	0	0	697	627
		Brantano*	697	627	0	0	0	0	697	627
		ScS*	0	0	925	833	0	0	925	833
		Storey Carpets*	0	0	925	833	0	0	925	833

Cont'd overleaf

Zone		Occupier/Location	Non Bulky Comparison Goods		Bulky Comparison Goods		Convenience Goods		All Retail Goods	
No.	Name		Sq M Gross	Sq M Net	Sq M Gross	Sq M Net	Sq M Gross	Sq M Net	Sq M Gross	Sq M Net
7	**South Bank**	Halfords*	0	0	740	666	0	0	740	666
		Carpetright*	0	0	925	833	0	0	925	833
		Currys*	0	0	1,110	999	0	0	1,110	999
		Sub Total	**10,685**	**9,202**	**14,155**	**12,741**	**4,705**	**2,903**	**29,545**	**24,846**
Total (borough as a whole)			**10,685**	**9,202**	**22,155**	**20,041**	**17,075**	**10,799**	**49,915**	**40,042**

NOTES:

(1) All out of centre retail floorspace figures estimated by Colliers International from a range of sources, including the Institute of Grocery Distribution (food stores) and agents particulars/our in-house retail database (retail warehouses).

(2) Net (sales) floorspace estimated from gross floorspace by applying appropriate net to gross ratios (see Section 4 in the main report).

(3) All stores marked (*) are located at the Cleveland Retail Park (Skippers Lane).

(4) Focus DIY, Guisborough – since the household telephone survey was carried out, this store has closed down and is now vacant. Focus DIY went into administration on 5 May 2011.

APPENDIX 5

Retail Floorspace Data and Benchmark Turnovers

(B) Location and Distribution of All Occupied Retail Floorspace in Redcar and Cleveland Borough, 2011 (the Base Year)

APPENDIX 5B

Location and Distribution of All Occupied Retail Floorspace in Redcar and Cleveland Borough, 2011 (the base year)

Zone		Position in Retail Hierarchy	Location of Retail Floorspace	Non Bulky Comparison Goods		Bulky Comparison Goods		Convenience Goods		All Retail Goods	
No.	Name			Sq M Gross	Sq M Net	Sq M Gross	Sq M Net	Sq M Gross	Sq M Net	Sq M Gross	Sq M Net
1	**Redcar**	Town Centre	Redcar	19,200	12,480	7,503	4,877	11,292	7,340	37,955	24,697
		Local Centre	Dormanstown, Ennis Square	74	48	93	60	471	306	638	414
		Local Centre	Park Avenue, Redcar	83	54	0	0	98	64	181	118
		Local Centre	Roseberry Square, Redcar	148	96	0	0	1,472	957	1,620	1,053
			Out of Centre	0	0	6,000	5,400	6,181	3,573	12,181	8,973
		Sub Total		**19,505**	**12,678**	**13,596**	**10,337**	**19,514**	**12,240**	**52,615**	**35,255**
2	**Marske**	District Centre	Marske	924	601	552	359	2,411	1,567	3,887	2,527
		Local Centre	New Marske, Birkdale Road	0	0	0	0	401	261	401	261
			Out of Centre	0	0	0	0	0	0	0	0
		Sub Total		**924**	**601**	**552**	**359**	**2,812**	**1,828**	**4,288**	**2,788**
3	**Saltburn**	District Centre	Saltburn	1,456	946	619	402	2,485	1,615	4,560	2,963
		Local Centre	Skelton, High Street	418	272	153	99	778	506	1,349	877
		Local Centre	Brotton, High Street	50	33	0	0	498	324	548	357
		Local Centre	Carlin How, Front Street	0	0	0	0	77	50	77	50
			Out of Centre	0	0	0	0	643	418	643	418
		Sub Total		**1,924**	**1,251**	**772**	**501**	**4,481**	**2,913**	**7,177**	**4,665**

Cont'd overleaf

Zone		Position in Retail Hierarchy	Location of Retail Floorspace	Non Bulky Comparison Goods		Bulky Comparison Goods		Convenience Goods		All Retail Goods	
No.	Name			Sq M Gross	Sq M Net	Sq M Gross	Sq M Net	Sq M Gross	Sq M Net	Sq M Gross	Sq M Net
4	**Loftus**	District Centre	Loftus	704	458	146	95	1,560	1,014	2,410	1,567
			Out of Centre	0	0	0	0	97	63	97	63
		Sub Total		**704**	**458**	**146**	**95**	**1,657**	**1,077**	**2,507**	**1,630**
5	**Guisborough**	District Centre	Guisborough	8,656	5,626	1,733	1,126	3,985	2,590	14,374	9,343
		Local Centre	Guisborough, Enfield Chase	0	0	84	55	434	282	518	337
			Out of Centre	0	0	2,000	1,900	3,956	2,871	5,956	4,771
		Sub Total		**8,656**	**5,626**	**3,817**	**3,081**	**8,375**	**5,743**	**20,848**	**14,451**
6	**Eston**	District Centre	Eston	673	437	136	88	558	363	1,367	888
		Local Centre	Nunthorpe	123	80	118	77	337	219	578	376
		Local Centre	Normanby	221	144	1,053	684	1,046	680	2,320	1,508
			Out of Centre	0	0	0	0	1,493	971	1,493	971
		Sub Total		**1,017**	**661**	**1,307**	**849**	**3,434**	**2,233**	**5,758**	**3,743**
7	**South Bank**		Out of Centre	10,685	9,202	14,155	12,741	4,705	2,903	29,545	24,846
		Sub Total		**10,685**	**9,202**	**14,155**	**12,741**	**4,705**	**2,903**	**29,545**	**24,846**
Total (borough as a whole)				**43,415**	**30,477**	**34,345**	**27,963**	**44,978**	**28,937**	**122,738**	**87,377**

Cont'd. overleaf

NOTES:-

(1) All in-centre gross retail floorspace figures sourced from the Council's 2010 (Town and District Centres) and 2011 (Local Centres) monitoring surveys.

(2) All out of centre retail floorspace figures estimated by Colliers International from a range of sources, including the Institute of Grocery Distribution (food stores) and agents particulars/our in-house retail database (retail warehouses). A more detailed breakdown of stores located out of centre is provided at Appendix 5A.

(3) Net (sales) floorspace estimated from gross floorspace by applying appropriate net to gross ratios (see Section 4 in the main report).

APPENDIX 5

Retail Floorspace Data and Benchmark Turnovers

(C) Estimation of Base Year (2011) Benchmark Turnovers by Category of Goods and Zone

Appendix 5C: Estimation of Base Year (2011) Benchmark Turnover by Category of Goods and Zone

(i) Non-Bulky Comparison Goods Turnover Estimates (2009 Prices)

	Sq M Gross	Sq M Net	Estimated Sales Density at 2011 £ psm net	Estimated Benchmark Turnover at 2011 (£m)
Zone 1 Redcar				
Redcar Town Centre	19,200	12,480	4,000	49.9
Local Centres				
- Ennis Square	673	437	3,000	1.3
- Park Avenue	83	54	3,000	0.2
- Roseberry Square	148	96	3,000	0.3
Out of Centre	0	0	0	0
Total	**20,104**	**13,067**	**3,955**	**51.7**
Zone 2 Marske				
Marske District Centre	924	601	3,500	2.1
Local Centre				
- New Marske	0	0	0	0
Out of Centre	0	0	0	0
Total	**924**	**601**	**3,500**	**2.1**
Zone 3 Saltburn				
Saltburn District Centre	1,456	946	3,500	3.3
Local Centres				
- Skelton	418	272	3,000	0.8
- Brotton	50	33	3,000	0.1
- Carlin How	0	0	0	0
Out of Centre	0	0	0	0
Total	**1,924**	**1,251**	**3,355**	**4.2**
Zone 4 Loftus				
Loftus District Centre	704	458	3,500	1.6
Out of Centre	0	0	0	0
Total	**704**	**458**	**3,500**	**1.6**

Cont'd overleaf

	Sq M Gross	Sq M Net	Estimated Sales Density at 2011 £ psm net	Estimated Benchmark Turnover at 2011 (£m)
Zone 5 Guisborough				
Guisborough District Centre	8,656	5,626	3,500	19.7
Local Centres				
- Enfield Chase	0	0	0	0
Out of Centre	0	0	0	0
Total	**8,656**	**5,626**	**3,500**	**19.7**
Zone 6 Eston				
Eston District Centre	673	437	3,500	1.5
Local Centre				
- Nunthorpe	123	80	3,000	0.2
- Normanby	221	144	3,000	0.4
Out of Centre	0	0	0	0
Total	**1,017**	**661**	**3,180**	**2.1**
Zone 7 South Bank				
Out of Centre				
- Asda	1,452	892	6,000	5.3
- Matalan	2,900	2,610	2,000	5.2
- Argos	1,243	1,119	2,750	3.1
- Pets at Home	752	677	2,000	1.4
- Boots	1,012	911	5,000	4.5
- Next	1,008	907	5,500	5.0
- Outfit	924	832	5,000	4.2
- Peacocks	697	627	2,000	1.2
- Brantano	697	627	5,000	3.1
Total	**10,685**	**9,202**	**3,585**	**33.0**
Borough Total	**44,014**	**30,866**	**3,705**	**114.4**

Source: *Colliers International*

Appendix 5C: Estimation of Base Year (2011) Benchmark Turnover by Category of Goods and Zone

(ii) Bulky Comparison Goods Turnover Estimates (2009 Prices)

	Sq M Gross	Sq M Net	Estimated Sales Density at 2011 £ psm net	Estimated Benchmark Turnover at 2011 (£m)
Zone 1 Redcar				
Redcar Town Centre	7,503	4,877	3,000	14.6
Local Centres				
- Ennis Square	136	88	2,250	0.2
- Park Avenue	0	0	0	0
- Roseberry Square	0	0	0	0
Out of Centre				
- Poundstretcher, West Dyke Road	2,000	1,800	2,500	4.5
- Carpetright, West Dyke Road	2,000	1,800	1,100	2.0
- Franks Carpets, West Dyke Road	2,000	1,800	1,100	2.0
Total	**13,639**	**10,365**	**2,250**	**23.3**
Zone 2 Marske				
Marske District Centre	552	359	2,750	1.0
Local Centre				
- New Marske	0	0	0	0
Out of Centre	0	0	0	0
Total	**552**	**359**	**2,750**	**1.0**
Zone 3 Saltburn				
Saltburn District Centre	619	402	2,750	1.1
Local Centres				
- Skelton	153	99	2,250	0.2
- Brotton	0	0	0	0
- Carlin How	0	0	0	0
Out of Centre	0	0	0	0
Total	**772**	**501**	**2,595**	**1.3**
Zone 4 Loftus				
Loftus District Centre	146	95	2,750	0.3
	0	0	0	0
Out of Centre				
Total	**146**	**95**	**2,750**	**0.3**

Cont'd overleaf

	Sq M Gross	Sq M Net	Estimated Sales Density at 2011 £ psm net	Estimated Benchmark Turnover at 2011 (£m)
Zone 5 Guisborough				
Guisborough District Centre	1,733	1,126	2,750	3.1
Local Centres				
- Enfield Chase	84	55	2,250	1.2
Out of Centre				
- Focus DIY	2,000	1,900	1,175	2.2
Total	**3,817**	**3,081**	**2,110**	**6.5**
Zone 6 Eston				
Eston District Centre	136	88	2,750	0.2
Local Centre				
- Nunthorpe	118	77	2,250	0.2
- Normanby	1,053	684	2,250	1.5
Out of Centre	0	0	0	0
Total	**1,307**	**849**	**2,240**	**1.9**
Zone 7 South Bank				
Out of Centre				
- B&Q	9,530	8,577	1,750	5.0
- ScS	925	833	2,000	1.7
- Storey Carpets	925	833	1,250	1.0
- Halfords	740	666	2,500	1.7
- Carpetright	925	833	1,100	0.9
- Currys	1,110	999	6,500	6.5
Total	**14,155**	**12,741**	**2,105**	**26.8**
Borough Total	**34,388**	**27,991**	**2,180**	**61.1**

Source: *Colliers International*

Appendix 5C: Estimation of Base Year (2011) Benchmark Turnover by Category of Goods and Zone

(iii) Convenience Goods Turnover Estimates (2009 Prices)

	Sq M Gross	Sq M Net	Estimated Sales Density at 2011 £ psm net	Estimated Benchmark Turnover at 2011 (£m)
Zone 1 Redcar				
Redcar Town Centre				
- Morrisons	6,361	4,135	13,000	53.8
- Farm Foods	669	435	5,000	2.2
- Iceland	603	392	5,000	2.0
- Other	63	2,378	4,000	9.5
Local Centres				
- Ennis Square[1]	558	363	5,230	1.9
- Park Avenue	98	64	4,000	0.3
- Roseberry Square[2]	1,472	957	6,170	5.9
Out of Centre				
- Aldi, Dyke Road	1,002	651	5,000	3.3
- Sainsburys Local, Embleton Court	385	250	7,000	1.7
- Sainsburys Local, Larkswood Road	283	184	7,000	1.3
- Tesco, West Dyke Road	4,511	2,488	12,250	30.5
Total	**19,601**	**12,297**	**9,140**	**112.4**
Zone 2 Marske				
Marske District Centre				
- Co-op	1,518	987	5,000	4.9
- Sainsburys Local	532	346	7,000	2.4
- Other	361	234	4,000	0.9
Local Centre				
- New Marske	401	261	4,000	1.0
Total	**2,812**	**1,828**	**5,035**	**9.2**
Zone 3 Saltburn				
Saltburn District Centre				
- Sainsburys Local	209	136	7,000	0.9
- Sainsburys	1,364	887	11,250	10.0
- Other	912	593	4,000	2.4
Local Centres				
- Skelton[3]	778	506	4,700	2.4
- Brotton[4]	498	324	4,630	1.5
- Carlin How	77	50	4,000	0.2
Out of Centre				
- Co-op, Marske Road	214	139	5,000	0.7
- Sainsburys Local, Byland Road	429	279	7,000	1.9
Total	**4,481**	**2,913**	**6,865**	**20.0**

Cont'd overleaf

	Sq M Gross	Sq M Net	Estimated Sales Density at 2011 £ psm net	Estimated Benchmark Turnover at 2011 (£m)
Zone 4 Loftus				
Loftus District Centre				
- Co-op, Zetland Road	341	222	5,000	1.1
- Co-op, High Street	470	306	5,000	1.5
- Other	749	486	4,000	1.9
Total	**1,560**	**1,014**	**4,438**	**4.5**
Zone 5 Guisborough				
Guisborough District Centre				
- Morrisons	2,443	1,588	13,000	20.6
- Other	1,542	1,002	4,000	4.0
Local Centres				
- Enfield Chase[5]	434	282	6,030	1.7
Out of Centre				
- Co-op, Middlesbrough Road	300	195	5,000	1.0
- Lidl, Enfield Chase	900	585	5,000	2.9
- Sainsburys Local, The Avenue	323	210	7,000	1.5
- Sainsburys, Morgan Drive	2,433	1,881	11,250	21.2
Total	**8,375**	**5,743**	**9,210**	**52.9**
Zone 6 Eston				
Eston District Centre	558	363	4,000	1.5
Local Centre				
- Nunthorpe	337	219	4,000	0.9
- Normanby	1,046	680	4,000	2.7
Out of Centre				
- Netto, Whale Hill	1,143	743	6,000	4.5
- Sainsburys Local, Bankfields Road	350	228	7,000	1.6
Total	**3,434**	**2,233**	**5,015**	**11.2**
Zone 7 South Bank				
Out of Centre				
- Asda	4,355	2,675	11,400	30.5
- Costcutters, Fabian Road	350	228	5,000	1.1
Total	**4,705**	**2,903**	**10,885**	**31.6**
Borough Total	**44,968**	**28,931**	**8,360**	**241.8**

Source: *Colliers International*

Notes:

(1) Includes 247 sq m gross Sainsburys Local.
(2) Comprises of 1,086 sq m gross Netto and 386 sq m gross Sainsburys Local.
(3) Includes 521 sq m gross Co-op.
(4) Includes 394 sq m gross Co-op.
(5) Includes Sainsburys Local of 279 sq m gross.

APPENDIX 5

Retail Floorspace Data and Benchmark Turnovers

(D) Floorspace and Estimated Turnover of Retail Commitments within Redcar and Cleveland Borough

Appendix 5D: Floorspace and Estimated Turnover of Retail Commitments within Redcar and Cleveland Borough

(A) Convenience Goods Floorspace

Zone	Location	Details	Date of Planning Consent	Retail Floorspace[1]		Assumed Sales Density at 2011[2]	Assumed Turnover at 2011[3]	Estimated Turnover[4] at 2016	Estimated Turnover[4] at 2021	Estimated Turnover[4] at 2026
				Sq M Gross	Sq M Net	£ psm Net	£m	£m	£m	£m
6	Eston Shopping Precinct, Eston District Centre	Partial demolition of existing retail units, refurbishment of 7 remaining retail units and erection of single storey **Aldi** supermarket	3/9/2008	n/a	1,006[5]	5,000	5.0	5.1	5.2	5.3
7	Low Grange Farm Trunk Road, South Bank (The Proposed District Centre)	Retail store **(Tesco)** petrol filling station and retail units. Also includes outline application for public house/restaurant	28/1/2011	8,724	3,194[6]	12,250	39.1	39.7	40.7	41.7
6	The Sun Centre, Ormesby Bank (Out of Centre)	Demolition of existing tanning salon and erection of two units	24/6/2011	355	231[7]	7,000	1.6	1.6	1.7	1.7

Source: *Redcar and Cleveland Borough Council/Colliers International.*

Notes:

(1) Floorspace information provided by the Council.
(2) Estimated by Colliers International. Based on current company averages, excluding petrol sales, where applicable.
(3) Calculated by multiplying net floorspace by the sales density.
(4) Base year (2011) turnover projected forwards by assuming real growth in store productivities as advised by PPS 4. (See Section 4).
(5) Although development of the new Aldi includes the demolition of existing floorspace, we assume the store represents all 'net additional' floorspace. This is because the current floorspace includes a number of vacant and service uses and very little occupied retail floorspace.
(6) We assume 3,194 sq m net for convenience goods, because this is the maximum sales area permitted for convenience shopping by condition. The scheme will also comprise 726 sq m gross of additional A1, A2 and A5 units. The retail goods element of this 'parade' is unknown but is unlikely to be material. We have therefore excluded any retail floorspace in these units from the retail floorspace needs assessment.
(7) One of the units is to be a replacement tanning salon. The remaining retail unit of 335 sq m gross is likely to be a convenience (food) store.

Appendix 5D: Floorspace and Estimated Turnover of Retail Commitments within Redcar and Cleveland Borough

(B) Non-Bulky Goods Floorspace

Zone	Location	Details	Date of Planning Consent	Retail Floorspace[1]		Assumed Sales Density at 2011[2]	Assumed Turnover at 2011[3]	Estimated Turnover[4] at 2016	Estimated Turnover[4] at 2021	Estimated Turnover[4] at 2026
				Sq M Gross	Sq M Net	£ psm Net	£m	£m	£m	£m
7	Low Grange Farm Trunk Road, South Bank (The Proposed District Centre)	Retail store (Tesco) petrol filling station and retail units. Also includes outline application for public house/restaurant	28/1/2011	8,724	2,074[5]	6,000	12.4	13.8	15.5	17.3

Source: *Redcar and Cleveland Borough Council/Colliers International*

Notes:

(1) Floorspace information provided by the Council.
(2) Estimated by Colliers International. Based on current company averages, excluding petrol sales, where applicable.
(3) Calculated by multiplying net floorspace by the sales density.
(4) Base year (2011) turnover projected forwards by assuming real growth in store productivities as advised by PPS 4. (See Section X).
(5) We assume 2,074 sq m net for non-bulky comparison goods, because this is the net sales area remaining following a deduction of 3,194 sq m net for convenience goods from the total sales floorspace of 5,268 sq m.

Appendix 5D: Floorspace and Estimated Turnover of Retail Commitments within Redcar and Cleveland Borough

(C) Bulky Goods Floorspace

Zone	Location	Details	Date of Planning Consent	Retail Floorspace[1]		Assumed Sales Density at 2011[2]	Assumed Turnover at 2011[3]	Estimated Turnover[4] at 2016	Estimated Turnover[4] at 2021	Estimated Turnover[4] at 2026
				Sq M Gross	Sq M Net	£ psm Net	£m	£m	£m	£m
4	Arriva Bus Depot, Whitby Road, Loftus (Out of Centre)	Change of use including alterations from vacant bus depot to two retail units	11/4/2011	1,400	1,260	2,500	3.2	3.6	4.0	4.5

Source: *Redcar and Cleveland Borough Council/Colliers International*

Notes:

(1) Floorspace information provided by the Council.
(2) Estimated by Colliers International. Based on current company averages, excluding petrol sales, where applicable.
(3) Calculated by multiplying net floorspace by the sales density.
(4) Base year (2011) turnover projected forwards by assuming real growth in store productivities as advised by PPS 4. (See Section 4).

APPENDIX 6

Methodology for Estimating Inflow Expenditure from Visitors to Redcar and Cleveland Borough

Redcar and Cleveland Borough: Retail Capacity Study

Quantitative Retail Floorspace Need Assessment

Methodology for Estimating Inflow Expenditure from Visitors to Redcar and Cleveland Borough

1. The main purpose of the household telephone survey is to quantify the distribution of available consumer expenditure on convenience goods and non-bulky and bulky comparison goods amongst existing centres/retail parks/stores. This allocation of spend relates to only the **residentia**l population within the survey area, which consists of Redcar and Cleveland Borough and its shopping hinterland.

2. The extensive survey area has been designed to capture the vast majority of **daily** shopping trips made to Red car Town Centre and all other centres/retail parks/stores within the Borough. As such, there will be relatively few additional daily shopping trips made into the Borough from outside our survey area. These will relate only to co mparison goods shopping, which is carried out over longer distances than shopping for convenience goods. In o ur report, we assume only minimal expenditure inflows of daily shopping for com parison goods to Cleveland Retail Park/Skippers Lane, which is located close to the edge of the Borough.

3. In addition to the in-flow spend of residents, however, Redcar and Cleveland Borough also attracts material amounts of in-flow expenditure from **visitors/tourists**. In order to estimate the scale of this monetary inflow, we have made use of 'STEAM'[1] statistics published by the Arts and Tourism Team of Redcar and Cleveland Borough Council (the Team).

4. STEAM defines two groups of visitors to the Borough:-

   - tourist day visitors – those whose stay is three hours or more for a non-routine purpose originating from outside the Borough;

   - staying visitors – those staying within Redcar and Cleveland Borough.

5. The Team has provided the following STEAM statistics relating to spen ding on **shopping**[2] by tourist day and staying visitors within Redcar and Cleveland Borough as a whole and its th ree principal 'visitor' destinations.

[1] The Scarborough Tourism Economic Activity Monitor.
[2] The STEAM statistics also give visitor expenditure on accommodation, food and drink, recreation and transport. Although important to the Borough's economy, these categories of spending are not relevant to this study. In 2009, expenditure (excl. VAT) on shopping accounted for only 17% of total visitor spending in the Borough.

Visitor Category	Annual Shopping Spend (£m, 2009 excl. VAT)			
	Redcar	Guisborough	Saltburn	Borough Total
Day Visitors	3.76	0.56	1.86	6.18
Staying Visitors	2.02	0.78	0.67	3.47
All Visitors	**5.78**	**1.34**	**2.53**	**9.65**

Source: STEAM, 2009

6. We therefore assume that in 2009 (at 2009 prices) Redcar & Cleveland Borough benefitted from £9.65 million of visitor spending on shopping, with 60% of this expenditure flowing to Redcar, 26% to Saltburn and 14% to Guisborough. We also assume that no tourist/visitor spend flows to other centres in the Borough. We are confident that this visitor/tourist spending on shopping is additional to the routine spending of residents picked-up by our household survey.

7. Although this spending is for 2009, we assume no increase in real terms through to the base year of 2011. Our judgment is that the economic recession and continuing economic downturn will have halted real growth in visitor/tourist expenditure in the Borough over the past couple of years. Accordingly, we assume that visitor/tourist spend on shopping in the Borough is £9.65 million (at 2009 prices) excluding VAT at 2011.

8. STEAM nor the Team have published projections or forecasts of visitor/tourist shopping expenditure in Redcar and Cleveland Borough, although we understand that a target has been set to achieve a 2.5% increase in visitor numbers over the next five years (0.5% per annum). In addition, of course, the amount of spend per trip should rise in real terms just like the shopping expenditure of residents.

9. The forecast for resident based (real) expenditure growth on comparison goods is c.2.5 to 3% per annum over the period to 2026[1]. However, given the expectation of rising visitor numbers and the considerable investment being made to improve the attractiveness of Redcar as a visitor destination, we assume that visitor/tourist spending on shopping in Redcar and Cleveland Borough (and its main centres) will increase by 3.5% per annum from 2011 to 2026. For convenience goods, the real increase in resident spend is forecast to be just under 1% per annum through to 2026. For the same reasons, we assume a real growth of visitor spend on convenience goods of 1.5% per annum over the same period.

10. The statistics produced by STEAM do not disaggregate visitor/tourist expenditure on shopping by category of goods. We therefore have had to make assumptions regarding this disaggregation. To

[1] Source: Experian Retail Planner Briefing Note 8.1 (see **Appendix 4C**)

inform our decision, we have had regard to the relative contributions of spending from day and staying visitors and the type of accommodation staying visitors use.

11. The STEAM expenditure data (summarised at paragraph 5 above), indicates that roughly two-thirds of tourist spend on shopping in the Borough is carried out by day visitors and only one third by staying visitors. Moreover, for those staying, 65% of tourist days are generated by visitors staying with family or friends, 23% by those staying at hotels/B&B's (serviced accommodation) and the balance (12%) staying in self-catering accommodation or camping.

12. We assume that neither day or staying visitors will purchase bulky comparison goods, since this category of shopping is unlikely to be undertaken on holiday or on a leisure day trip. For day trippers, we believe that most of their retail spending will be on non-bulky comparison goods (gifts, fashion, accessories etc) and a much smaller amount on convenience goods. The reason is that day trippers will return home to eat and the spending on food and groceries for these meals will not have been undertaken in Redcar & Cleveland Borough. Alternatively, if they ate out at a café or restaurant in the Borough this expenditure would not be classified as shopping, but food and drink. Nevertheless, we accept that some visitors will buy food and drinks as gifts. Overall, therefore, we assume that 90% of spend associated with day visitors is on non- bulky comparison goods and 10% on convenience goods.

13. Turning to staying visitors, we consider that there will be little spending on convenience goods by people staying in serviced accommodation, since they will have their meals provided and/or eat at cafes/restaurants. In contrast, visitors staying in non-serviced accommodation or with family and friends will be likely to generate far higher levels of spending on food and groceries (either directly or indirectly by their family and friends). We therefore assume that visitor spending on convenience goods and non-bulky comparison goods will be disaggregated as follows:

Type of Accommodation	Convenience Goods (%)	Non-Bulky Comparison Goods (%)	Bulky Comparison Goods (%)
Serviced Accommodation	10	90	0
Non-Serviced Accommodation	50	50	0
Staying with Family & Friends	40	60	0
Day Visitors	10	90	0

14. These percentage disaggregations are applied to the estimated levels of spend by visitor category in each town as follows:

Redcar

Visitor Category	Annual Spend, 2009 (£m)			
	Convenience Goods	Non-Bulky Comparison Goods	Bulky Comparison Goods	All Retail Goods
Day Visitors	3.38	3.38	0	3.76
Staying (Serviced)	0.03	0.25	0	0.28
Staying (Non-Serviced)	0.10	0.10	0	0.20
Staying (Family & Friends)	0.62	0.92	0	1.54
Total (Excl. VAT)	**1.13**	**4.65**	**0**	**5.78**
Add VAT	0	0.93	0	0.93
Total (Incl. VAT)	**1.13**	**5.58**	**0**	**6.71**

Note:

Assumptions: VAT on convenience goods (0%); VAT on comparison goods (20%)

Saltburn

Visitor Category	Annual Spend, 2009 (£m)			
	Convenience Goods	Non-Bulky Comparison Goods	Bulky Comparison Goods	All Retail Goods
Day Visitors	0.19	1.67	0	1.86
Staying (Serviced)	0.02	0.22	0	0.24
Staying (Non-Serviced)	0.07	0.07	0	0.14
Staying (Family & Friends)	0.12	0.17	0	0.29
Total (Excl. VAT)	**0.40**	**2.13**	**0**	**2.53**
Add VAT	0	0.43	0	0.43
Total (Incl. VAT)	**0.40**	**2.56**	**0**	**2.96**

Note:

Assumptions: VAT on convenience goods (0%); VAT on comparison goods (20%)

Guisborough

Visitor Category	Annual Spend, 2009 (£m)			
	Convenience Goods	Non-Bulky Comparison Goods	Bulky Comparison Goods	All Retail Goods
Day Visitors	0.06	0.50	0	0.56
Staying (Serviced)	0.02	0.16	0	0.18
Staying (Non-Serviced)	0.12	0.12	0	0.24
Staying (Family & Friends)	0.14	0.22	0	0.36
Total (Excl. VAT)	**0.34**	**1.00**	**0**	**1.34**
Add VAT	0	0.20	0	0.20
Total (Incl. VAT)	**0.34**	**1.20**	**0**	**1.54**

Note:

Assumptions: VAT on convenience goods (0%); VAT on comparison goods (20%)

15. To project the visitor/tourist spend totals forward from our base year of 2011 through to th e forecast years of 2016, 2021 and 2026, we apply the annual growth rates set out in paragraph 9 above - 3.5% per annum for comparison goods and 1.5% per annum for convenience goods. The estimated visitor spend totals for the three main vis itor destinations in Redcar & Cleveland Borough are as follows.

Redcar (£m at 2009 Prices)

Category of Goods	***Base Year 2011***	***2016***	***2021***	***2026***
Convenience Goods	1.1	1.2	1.3	1.4
Non-Bulky Comparison Goods	5.6	6.6	7.9	9.3
Bulky Comparison Goods	0	0	0	0
Total	**6.7**	**7.8**	**9.2**	**10.7**

Saltburn (£m at 2009 Prices)

Category of Goods	Base Year 2011	2016	2021	2026
Convenience Goods	0.4	0.4	0.5	0.5
Non-Bulky Comparison Goods	2.6	3.0	3.6	4.3
Bulky Comparison Goods	0	0	0	0
Total	**3.0**	**3.4**	**4.1**	**4.8**

Guisborough (£m at 2009 Prices)

Category of Goods	Base Year 2011	2016	2021	2026
Convenience Goods	0.3	0.4	0.4	0.4
Non-Bulky Comparison Goods	1.2	1.4	1.7	2.0
Bulky Comparison Goods	0	0	0	0
Total	**1.5**	**1.8**	**2.1**	**2.4**

Note: *Prepared by Colliers International*

APPENDIX 7

Retail Floorspace Need Assessment

(A) Methodology for Assessing Retail Floorspace Need

<u>Methodology for Assessing Quantitative Retail Need</u>

Step 1 **Catchment Area Definition and Study Time Frame**

Step 1A The catchment (or survey) area should be defined with regard to the study objective.

Step 1B The catchment should then be subdivided into zones (or sub-areas) to reflect the number and location of retail centres and the accessibility between them.

The number of zones will depend on the size of the sample for the household survey. Ideally a minimum of around 100 interviews should be carried out within each zone.

Zone boundaries are normally defined in terms of administrative boundaries or postal geography.

Step 1C An assessment will normally adopt the current year as its starting point or "base year". The end year, or "forecast year", will normally be determined by the end date of the Plan.

In preparing quantitative need studies it is normally helpful to also produce need estimates for selected intermediate years, since this will show how floorspace need (if any) changes or grows over time.

Step 1D A constant price base must be adopted for the quantitative need assessment. Thus all monetary figures are given in real values and discounted for the affects of price inflation.

Step 2 **Analyse Consumer Demand**

Step 2A Population estimates for each zone at the base year are required. Each of the zone populations must then be projected forwards to the forecast year(s).

Step 2B Estimates of retail expenditure per head are required for either the catchment area as a whole or ideally for each zone.

Estimates are also likely to be required for different categories of goods; the most common are: convenience goods and comparison goods.

All expenditure data providers produce estimates for user defined areas which reflect the socio-demographics and affluence of the localities.

It is essential that the expenditure per head estimates are adjusted to the correct price base (see Step 1D) and also that spending on special forms of trading is excluded (i.e. this is expenditure that does not take place in shops e.g. that through mail order, through vending machines and also over the internet).

Step 2C **Projection of Expenditure Per Head Estimates Through to the Forecast Year(s)**

National expenditure growth forecasts are published by a number of organisations (e.g. Experian).

Step 2D Total available retail expenditure (for each goods category) should be calculated for the survey area and the constituent zones at both the base year and the forecast year(s). Thus the "growth" in available expenditure can be identified.

Total available expenditure at any particular year will normally originate from two sources:- inside the survey area and from outside the survey area.

Within the survey area – generated expenditure is calculated by multiplying the resident population by the estimate of average spend per head. This calculation can also be undertaken for each zone.

Outside the survey area – it is likely that there will be an in-flow of retail expenditure from people living outside the survey area. This is likely to be particularly significant if the survey area contains higher order centres and/or is a popular tourist area. The main types of in-flow are as follows:-

- Long distance shopping trips made by residents – the amount of spending from this source can be determined from household surveys carried out in adjoining areas or should be estimated by reference to the best available sources.

- Workers – a large daily working population will generate retail expenditure. For major commuter areas the spending produced by workers who live outside the survey area should be estimated and included.

- Tourists – visitors from the rest of the UK and overseas may for certain locations be an important generator of retail expenditure. Using survey data where available the spending from this source must also be estimated and included.

Estimates must be made of the extent to which the scale of in-flow retail expenditure will change through to the forecast year(s) in real terms.

Account should also be taken of whether special forms of trading is likely to increase as a proportion of consumer retail expenditure per head.

Step 3 **Analyse Retail Supply**

Step 3A The existing stock of retail floorspace in the Plan area must be determined by the main goods categories analysed at Step 2B. This is essential since it is virtually impossible to provide a robust estimate of future quantitative need if the current floorspace supply is unknown.

All retail floorspace must be included – in centre, edge of centre and out-of-centre.

If existing stock figures are unavailable, it will normally be necessary to undertake or commission a thorough retail audit of the current retail provision.

As well as estimates of floorspace quantity, a survey of retail occupiers or a health check should ideally be carried out. This will ascertain information on the quality of the retail offer, the physical condition of the floorspace stock (e.g. size and configuration of units) and the trading performance of the shops.

Comprehensive information on the quantity and quality of the existing retail offer / floorspace stock, combined with the results of a household survey, will inform the assessment of whether the retail economy is currently trading at equilibrium or not (see Step 4A below).

Step 3B A household survey should be commissioned to establish the existing pattern of shopper behaviour and retail consumer expenditure flows within the Plan area and between the Plan area and adjoining areas.

This survey as a minimum should cover the whole of the Plan area. However, there are important benefits if the survey can be extended to cover other adjoining and nearby areas (i.e. it can then inform on the extent of in-flow expenditure from beyond the Plan area – see step 2D above).

The most cost-effective form of household survey is by telephone. As stated at Step 1B, a minimum of 100 completed interviews per zone is recommended.

The survey should quantify shopper behaviour separately for the main goods categories.

Step 3C The household survey results can then be applied to the totals of available expenditure by zone (from Step 2D) in order to estimate the existing retail turnovers of centres and stores within the Plan area.

For centres which attract long distance shopping trips and/or which benefit from commuter and tourist expenditure (see Step 2D), allowances must be made for turnover contributions from these sources.

The actual centre and store turnovers derived from the household survey should, wherever possible, be cross-checked against actual turnover figures from other sources (e.g. the retailers themselves) where these are available.

The household survey will determine the actual levels of available retail expenditure retained by individual centres and the Plan area as a whole. These are the base year market shares and can be calculated for each main category of goods.

Step 3D A “benchmark” turnover for each of the main goods categories must be derived for the Plan area as a whole and for each centre. When compared to the actual turnovers calculated at Step 3C, this allows one to determine whether the existing floorspace is under or over-trading.

The best way to identify whether the existing floorspace is over or under-trading is to carry out a survey of the retailers themselves.

If this is not possible, then published company average sales densities for leading retailers may be used. In any event, consideration should be given as to whether company averages are weighted up or down as appropriate to reflect local circumstances (e.g. the affluence of the area, the type and size of stores and the costs of the location to retailers).

Step 4 **Retail Demand vs. Retail Supply in the Base Year**

Step 4A It is necessary to test the adequacy of existing retail provision in the Plan area. If actual turnovers (from Step 3C) exceed the benchmark turnovers (from Step 3D) then it can be said that the current floorspace stock is over-trading, and that there is an existing need for additional floorspace. Conversely, if actual turnovers are less than the benchmark turnovers then there is an existing over-supply of floorspace. Lastly, if actual and benchmark turnovers are the same (or close) then the Plan area’s retail economy for that category of goods can be said to be in equilibrium.

The extent of the existing retail floorspace over or under-supply can be estimated by converting the existing turnover surplus or deficit into floorspace by applying an appropriate average sales density.

Step 5 **Changes in Retail Demand and Retail Supply through to the Forecast Year(s)**

Step 5A Step 2D estimated the total available retail expenditure within the Plan area at the forecast year(s) for each of the main goods categories. The base year market shares (from Step 3C) may then be applied in order to obtain estimates of the levels of retained available expenditure at the forecast year(s).

It should be considered whether the application of the base year market shares are appropriate at the forecast year(s) in relation to the Plan area as a whole and/or individual centres. If it is considered that expenditure outflow (or leakage) is too high, or a centre is not achieving its true retailing potential, then a case could be made for increasing the market share(s). Alternatively, if it is thought that the proportion of expenditure being retained is too high, then the market share(s) could be reduced.

In either situation, the adjustment of the market shares should be the result of an interactive process, which focuses on realistic expectations of trade retention within individual zones within the Plan area.

It should also be borne in mind that adjusting the market share of a centre will have direct implications for the market shares of other centres. Similarly, increasing the market share for the Plan area as a whole will mean adjoining areas will lose their share of available expenditure. This may require collaboration and agreement with nearby Planning Authorities otherwise double counting of available expenditure may occur.

Step 5B Step 3D estimated the benchmark retail turnovers generated within the Plan area in the base year for the main categories of goods. These turnovers must then be projected to the forecast (year(s)) by taking into account any expected improvements in store efficiency (i.e. sales densities). In addition, the turnovers of any retail commitments (normally taken as comprising floorspace under construction or with planning consent) within the Plan area, must be added. It may also be appropriate to take into account the turnover associated with retail proposals and / or the re-use of vacant space.

Step 5C The monetary difference between the total potential retained expenditure at 5A and the forecast retail turnover at 5B gives a measure of the quantitative need for additional retail floorspace within the Plan area since the base year. If there is an expenditure surplus this is converted into a floorspace total by dividing through by an appropriate average sales density. Similarly, if there is an expenditure deficit, a floorspace over-supply can be calculated in the same way.

Step 5D To arrive at a final estimate of overall quantitative need the floorspace outputs from Step 5C must be combined with the existing floorspace over / under supply figures derived at Step 4A.

APPENDIX 7

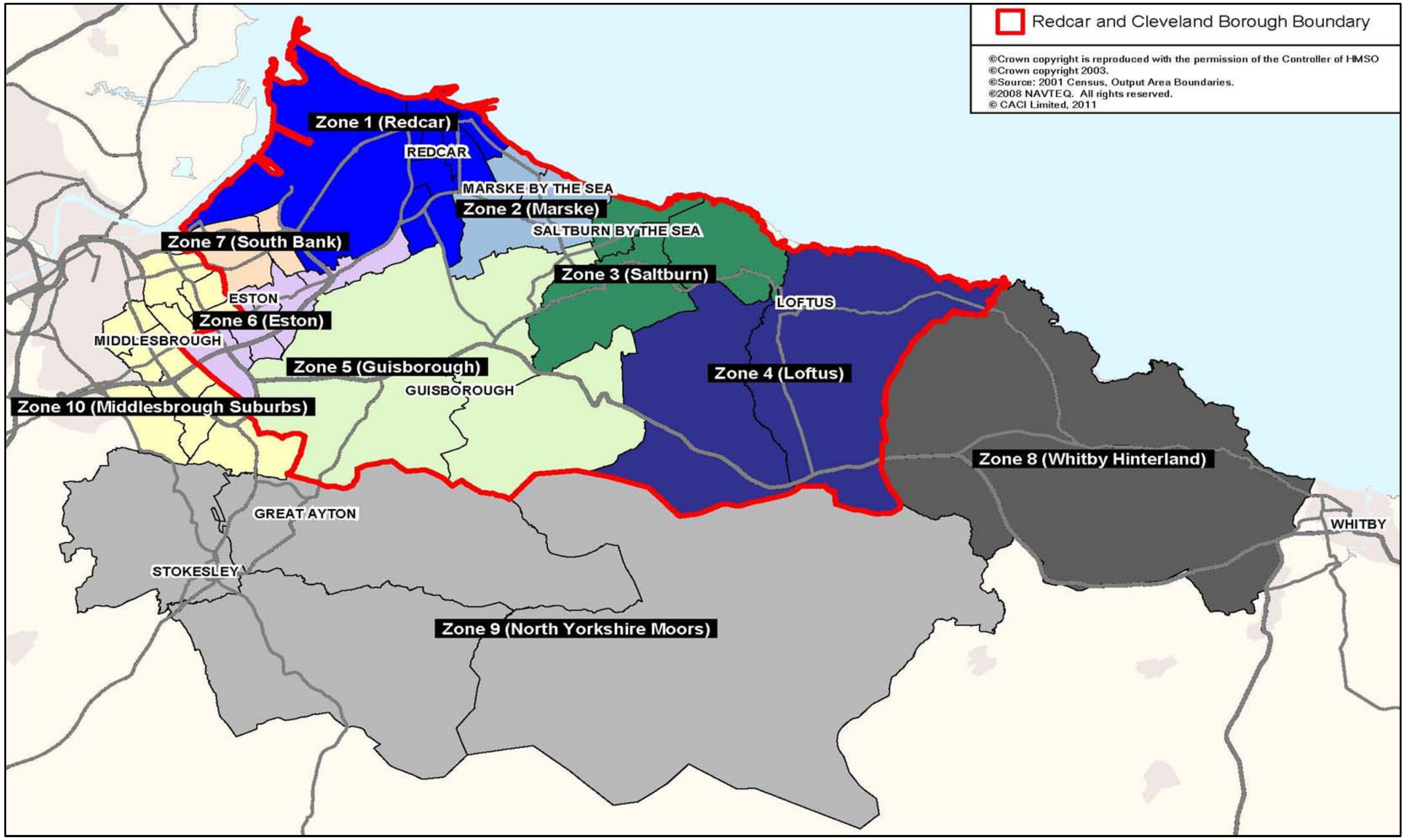
Retail Floorspace Need Assessment

(B) The Need for Additional Non-Bulky Comparison Goods Floorspace

Colliers International: Retail Floorspace Need Assessment

Client: Redcar & Cleveland Borough Council
Project: Redcar & Cleveland Retail Study

Household Survey Area and Constituent Zones



<u>Non-Bulky Comparison Goods</u>

Date of Preparation: 25/08/2011

Table 1 - Population Change by Zone

Zone	Area	2011 Population (Base Year)	Projected 2016 Population	Projection 2021 Population	Projected 2026 Population	Total Increase (2011-2026)	Percentage Increase (2011-2026)
Redcar & Cleveland Borough	**Zone 1**	36,055	36,105	36,285	36,450	395	1.1%
	Zone 2	13,345	13,365	13,435	13,490	145	1.1%
	Zone 3	20,500	20,530	20,635	20,725	225	1.1%
	Zone 4	8,805	8,820	8,865	8,900	95	1.1%
	Zone 5	19,815	19,845	19,945	20,030	215	1.1%
	Zone 6	26,970	27,010	27,145	27,265	295	1.1%
	Zone 7	12,110	12,125	12,190	12,240	130	1.1%
SUB TOTAL		**137,600**	**137,800**	**138,500**	**139,100**	**1,500**	**1.1%**
Hinterland	**Zone 8**	3,510	3,590	3,690	3,790	280	8.0%
	Zone 9	14,400	14,710	15,105	15,480	1,080	7.5%
	Zone 10	66,930	67,735	68,590	69,490	2,560	3.8%
SUB TOTAL		**84,840**	**86,035**	**87,385**	**88,760**	**3,920**	**4.6%**
TOTAL		**222,440**	**223,835**	**225,885**	**227,860**	**5,420**	**2.4%**

Notes:

Projections are ONS 2008-based sub-national population projections for local authority area applied to zones. The projection for Zone 2 (Marske) also takes into account substantial new housing planned over the period to 2026. The methodology is described at Appendix 3.

Sources:

Office for National Statistics and Redcar & Cleveland Borough Council.

Date of Preparation: 25/08/2011

Table 2 - Average Residents Expenditure Per Head on Non-Bulky Comparison Goods by Zone (Including Expenditure By Special Forms of Trading)

Zone	Area	Expenditure Per Head (£)						
		2009	2011 (Base Year)	2016	2021	2026	Total Increase (2011-2026)	Percentage Increase (2011-2026)
Redcar & Cleveland Borough	**Zone 1**	1,659	1,692	1,922	2,203	2,529	836	49.4%
	Zone 2	1,796	1,832	2,081	2,384	2,737	905	49.4%
	Zone 3	1,678	1,712	1,944	2,228	2,558	846	49.4%
	Zone 4	1,647	1,680	1,908	2,187	2,510	830	49.4%
	Zone 5	1,750	1,785	2,028	2,323	2,667	882	49.4%
	Zone 6	1,716	1,750	1,988	2,278	2,616	865	49.4%
	Zone 7	1,529	1,560	1,772	2,030	2,330	771	49.4%
Hinterland	**Zone 8**	2,129	2,172	2,467	2,827	3,245	1,073	49.4%
	Zone 9	1,943	1,982	2,251	2,580	2,962	979	49.4%
	Zone 10	1,657	1,690	1,920	2,200	2,526	835	49.4%

Notes:

Average consumer expenditure per head on non-bulky comparison goods for 2009 has been estimated by Experian for each zone. The 2009 expenditure per head figures in each zone have been projected forwards to 2011 (the base year) and the forecast years of 2016, 2021 and 2026 by using the latest available UK expenditure per head growth forecasts published by Experian (see Appendix 4C).

Sources:

Experian - bespoke data purchase and Retail Planner Briefing Note 8.1. (August 2010).

Date of Preparation: 25/08/2011

Table 3 - Average Residents Expenditure Per Head on Non-Bulky Comparison Goods by Zone (Excluding Expenditure By Special Forms of Trading)

Zone	Area	Expenditure Per Head (£)					
		2011 (Base Year)	2016	2021	2026	Total Increase (2011-2026)	Percentage Increase (2011-2026)
Redcar & Cleveland Borough	**Zone 1**	1,532	1,722	1,978	2,276	744	48.6%
	Zone 2	1,658	1,865	2,141	2,464	806	48.6%
	Zone 3	1,549	1,742	2,001	2,302	753	48.6%
	Zone 4	1,520	1,710	1,964	2,259	739	48.6%
	Zone 5	1,616	1,817	2,086	2,401	785	48.6%
	Zone 6	1,584	1,781	2,046	2,354	770	48.6%
	Zone 7	1,412	1,587	1,823	2,097	686	48.6%
Hinterland	**Zone 8**	1,965	2,210	2,538	2,921	955	48.6%
	Zone 9	1,794	2,017	2,316	2,665	872	48.6%
	Zone 10	1,530	1,720	1,975	2,273	743	48.6%

Notes:

The expenditure per head figures in Table 2 have been discounted by 9.5% at the base year of 2011, to exclude non-store retail sales,which includes e-tailing. At 2016, 2021 and 2026, discounts of 10.4%, 10.2% and 10.0% have been assumed. (See Appendix 4D).

Sources:

Experian - Retail Planner Briefing Note 8.1 (August 2010).

Date of Preparation: 25/08/2011

Table 4 - Total Available Residents Expenditure on Non-Bulky Comparison Goods By Zone (Excluding Expenditure By Special Forms of Trading)

Zone	Area	Total Available Expenditure (£m)					
		2011 (Base Year)	2016	2021	2026	Total Increase (2011-2026)	Percentage Increase (2011-2026)
Redcar & Cleveland Borough	**Zone 1**	55.2	62.2	71.8	83.0	27.7	50.2%
	Zone 2	22.1	24.9	28.8	33.2	11.1	50.2%
	Zone 3	31.8	35.8	41.3	47.7	15.9	50.2%
	Zone 4	13.4	15.1	17.4	20.1	6.7	50.2%
	Zone 5	32.0	36.1	41.6	48.1	16.1	50.2%
	Zone 6	42.7	48.1	55.5	64.2	21.5	50.2%
	Zone 7	17.1	19.2	22.2	25.7	8.6	50.2%
SUB TOTAL		**214.3**	**241.4**	**278.6**	**321.9**	**107.6**	**50.2%**
Hinterland	**Zone 8**	6.9	7.9	9.4	11.1	4.2	60.4%
	Zone 9	25.8	29.7	35.0	41.3	15.4	59.7%
	Zone 10	102.4	116.5	135.5	158.0	55.6	54.3%
SUB TOTAL		**135.1**	**154.1**	**179.9**	**210.3**	**75.2**	**55.6%**
TOTAL		**349.4**	**395.5**	**458.4**	**532.2**	**182.8**	**52.3%**

Notes:

Total available expenditure totals for non-bulky comparison goods are calculated as follows: Population (Table 1) multiplied by consumer expenditure per head after making appropriate reductions for SFT (Table 3).

Sources:

Colliers International.

Date of Preparation: 25/08/2011

Table 5 - Non-Bulky Comparison Goods Market Shares By Zone at the Base Year, 2011 (Column Percent)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)									
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10
WITHIN RECAR & CLEVELAND BOROUGH										
Zone 1 (Redcar area)	33.2	9.3	19.4	32.1	10.9	6.6	10.4	31.4	2.5	0.0
Zone 2 (Marske by the Sea area)	0.5	13.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Zone 3 (Saltburn by the Sea area)	0.3	0.8	2.4	0.8	0.0	0.0	0.0	1.1	0.7	0.0
Zone 4 (Loftus area)	0.0	0.0	0.0	17.3	0.0	0.0	0.0	0.0	0.0	0.0
Zone 5 (Guisborough area)	0.0	0.0	2.7	33.1	20.8	0.0	0.0	4.8	1.3	0.0
Zone 6 (Eston area)	0.0	0.0	0.0	0.5	1.2	2.0	0.0	0.0	0.0	0.0
Zone 7 (South Bank area)	20.4	16.0	9.9	10.2	2.4	3.2	7.2	0.8	1.1	1.0
SUB TOTAL	**54.4**	**39.5**	**34.4**	**94.0**	**35.3**	**11.8**	**17.6**	**38.1**	**5.6**	**1.0**
OUTSIDE OF BOROUGH										
Middlesbrough Town Centre	29.8	36.5	19.1	1.8	46.9	78.2	77.6	32.9	50.6	84.1
Teeside Retail Park	10.5	23.2	44.7	2.7	8.8	6.6	4.2	3.7	10.9	9.2
Stokesley	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	9.3	2.1
Northallerton	0.0	0.0	0.0	0.0	1.8	1.3	0.0	0.0	5.1	0.5
Stockton-on-Tees Town Centre	3.9	0.5	0.0	0.0	0.0	0.0	0.6	0.0	0.0	0.0
Whitby	0.0	0.0	0.2	0.0	0.0	0.0	0.0	14.9	0.6	0.0
All Other Centres/Stores	1.4	0.3	1.6	1.5	7.2	2.1	0.0	10.4	17.9	3.1
SUB TOTAL	**45.6**	**60.5**	**65.6**	**6.0**	**64.7**	**88.2**	**82.4**	**61.9**	**94.4**	**99.0**
TOTAL	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Notes:

The market share percentages are derived from a household telephone survey carried out in February/March, 2011. (See Appendix 2).

Sources:

Colliers International.

Date of Preparation: 25/08/2011

Table 6 - Estimated Non-Bulky Comparison Goods Expenditure Pattern and Centre Turnover Estimates at the Base Year, 2011 (£ Million)

Retail Supply: Where the Money is Spent	Study Area										Total Expenditure Drawn from Survey Area	Estimated Inflow Expenditure from Residents[1]	Estiamted Inflow Expenditure from Tourists[1]	Total Turnover	Available Floorspace (sq.m. net)[2]	Derived Sales Density (£ per sq.m. net)	Benchmark Sales Density (£ per sq. m net)[3]	Benchmark Turnover (£m)	Estimated Extent of Any Over/Under Trading (£m)
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	A	B	C	D=A+B+C	E	F=D/E	G	H=GxE	I=D-H
WITHIN REDCAR AND CLEVELALND BOROUGH																			
Zone 1 (Redcar area)	18.3	2.1	6.2	4.3	3.5	2.8	1.8	2.2	0.6	0.0	41.7	0.0	5.6	47.3	12,678	3,735	3,955	50.1	-2.8
Zone 2 (Marske by the Sea area)	0.3	3.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.2	0.0	0.0	3.2	601	5,393	3,500	2.1	1.1
Zone 3 (Saltburn by the Sea area)	0.2	0.2	0.8	0.1	0.0	0.0	0.0	0.1	0.2	0.0	1.5	0.0	2.6	4.1	1,251	3,252	3,355	4.2	-0.1
Zone 4 (Loftus area)	0.0	0.0	0.0	2.3	0.0	0.0	0.0	0.0	0.0	0.0	2.3	0.0	0.0	2.3	458	5,057	3,500	1.6	0.7
Zone 5 (Guisborough area)	0.0	0.0	0.9	4.4	6.7	0.0	0.0	0.3	0.3	0.0	12.6	0.0	1.2	13.8	5,626	2,455	3,500	19.7	-5.9
Zone 6 (Eston area)	0.0	0.0	0.0	0.1	0.4	0.9	0.0	0.0	0.0	0.0	1.3	0.0	0.0	1.3	661	1,975	3,180	2.1	-0.8
Zone 7 (South Bank area)	11.3	3.5	3.1	1.4	0.8	1.4	1.2	0.1	0.3	1.0	24.0	2.4	0.0	26.4	9,202	2,874	3,585	33.0	-6.5
SUB TOTAL	**30.0**	**8.7**	**10.9**	**12.6**	**11.3**	**5.0**	**3.0**	**2.6**	**1.4**	**1.0**	**86.7**	**2.4**	**9.4**	**98.5**	**30,477**	**-**	**-**	**112.8**	**-14.3**
OUTSIDE OF BOROUGH																			
Middlesbrough Town Centre	16.5	8.1	6.1	0.2	15.0	33.4	13.3	2.3	13.1	86.1	194.0								
Teeside Retail Park	5.8	5.1	14.2	0.4	2.8	2.8	0.7	0.3	2.8	9.4	44.3								
Stokesley	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.4	2.2	4.6								
Northallerton	0.0	0.0	0.0	0.0	0.6	0.6	0.0	0.0	1.3	0.5	3.0								
Stockton-on-Tees Town Centre	2.2	0.1	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	2.4								
Whitby	0.0	0.0	0.1	0.0	0.0	0.0	0.0	1.0	0.2	0.0	1.2								
All Other Centres/Stores	0.8	0.1	0.5	0.2	2.3	0.9	0.0	0.7	4.6	3.2	13.3								
SUB TOTAL	**25.2**	**13.4**	**20.8**	**0.8**	**20.7**	**37.7**	**14.1**	**4.3**	**24.4**	**101.4**	**262.7**								
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	**55.2**	**22.1**	**31.8**	**13.4**	**32.0**	**42.7**	**17.1**	**6.9**	**25.8**	**102.4**	**349.4**								

Notes:

For each cell the monetory figure is dervied by multiplying the 2011 available non-bulky comparison expenditure in the zone (excl SFT) (Table 4), by the survey-based convenience goods market share of that specific centre in that zone (Table 5).
(1) Estimated by Colliers International (see Appendix 6).
(2) Floorpsace estimated from a range of sources (see Appendix 5B for full details).
(3) Benchmark sales density estimated by Colliers International (see Appendix 5C for full details).

Sources:

Colliers International.

Date of Preparation: 25/08/2011

Table 7 - Unadjusted Non-Bulky Comparison Goods Centre Market Shares By Zone (Column Percent)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)									
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10
WITHIN RECAR & CLEVELAND BOROUGH										
Zone 1 (Redcar area)	33.2	9.3	19.4	32.1	10.9	6.6	10.4	31.4	2.5	0.0
Zone 2 (Marske by the Sea area)	0.5	13.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Zone 3 (Saltburn by the Sea area)	0.3	0.8	2.4	0.8	0.0	0.0	0.0	1.1	0.7	0.0
Zone 4 (Loftus area)	0.0	0.0	0.0	17.3	0.0	0.0	0.0	0.0	0.0	0.0
Zone 5 (Guisborough area)	0.0	0.0	2.7	33.1	20.8	0.0	0.0	4.8	1.3	0.0
Zone 6 (Eston area)	0.0	0.0	0.0	0.5	1.2	2.0	0.0	0.0	0.0	0.0
Zone 7 (South Bank area)	20.4	16.0	9.9	10.2	2.4	3.2	7.2	0.8	1.1	1.0
SUB TOTAL	**54.4**	**39.5**	**34.4**	**94.0**	**35.3**	**11.8**	**17.6**	**38.1**	**5.6**	**1.0**
OUTSIDE OF BOROUGH										
Middlesbrough Town Centre	29.8	36.5	19.1	1.8	46.9	78.2	77.6	32.9	50.6	84.1
Teeside Retail Park	10.5	23.2	44.7	2.7	8.8	6.6	4.2	3.7	10.9	9.2
Stokesley	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	9.3	2.1
Northallerton	0.0	0.0	0.0	0.0	1.8	1.3	0.0	0.0	5.1	0.5
Stockton-on-Tees Town Centre	3.9	0.5	0.0	0.0	0.0	0.0	0.6	0.0	0.0	0.0
Whitby	0.0	0.0	0.2	0.0	0.0	0.0	0.0	14.9	0.6	0.0
All Other Centres/Stores	1.4	0.3	1.6	1.5	7.2	2.1	0.0	0.4	17.9	3.1
SUB TOTAL	**45.6**	**60.5**	**65.6**	**6.0**	**64.7**	**88.2**	**82.4**	**51.9**	**94.4**	**99.0**
TOTAL	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**90.0**	**100.0**	**100.0**

Notes:

The market share percentages are the same as those set out in Table 5. Adopting the 'constant market shares' approach, we do not make any adjustments to the base year market shares determined by the household survey.

Sources:

Colliers International.

Date of Preparation: 25/08/2011

Table 8 - Non-Bulky Comparison Goods Expenditure Pattern and Centre Turnover Estimates, 2016 (£ Million)

Retail Supply: Where the Money is Spent	Study Area										Total Expenditure Drawn from Survey Area	Estimated Inflow Expenditure from Residents	Estiamted Inflow Expenditure from Tourists(1)	Total Turnover
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	A	B	C	D=A+B+C
WITHIN REDCAR AND CLEVELALND BOROUGH														
Zone 1 (Redcar area)	20.6	2.3	6.9	4.8	3.9	3.2	2.0	2.5	0.7	0.0	47.1	0.0	6.6	53.7
Zone 2 (Marske by the Sea area)	0.3	3.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.7	0.0	0.0	3.7
Zone 3 (Saltburn by the Sea area)	0.2	0.2	0.9	0.1	0.0	0.0	0.0	0.1	0.2	0.0	1.7	0.0	3.0	4.7
Zone 4 (Loftus area)	0.0	0.0	0.0	2.6	0.0	0.0	0.0	0.0	0.0	0.0	2.6	0.0	0.0	2.6
Zone 5 (Guisborough area)	0.0	0.0	1.0	5.0	7.5	0.0	0.0	0.4	0.4	0.0	14.2	0.0	1.4	15.6
Zone 6 (Eston area)	0.0	0.0	0.0	0.1	0.4	1.0	0.0	0.0	0.0	0.0	1.5	0.0	0.0	1.5
Zone 7 (South Bank area)	12.7	4.0	3.5	1.5	0.9	1.5	1.4	0.1	0.3	1.2	27.1	2.8	0.0	29.9
SUB TOTAL	**33.8**	**9.8**	**12.3**	**14.2**	**12.7**	**5.7**	**3.4**	**3.0**	**1.7**	**1.2**	**97.8**	**2.8**	**11.0**	**111.6**
OUTSIDE OF BOROUGH														
Middlesbrough Town Centre	18.5	9.1	6.8	0.3	16.9	37.6	14.9	2.6	15.0	98.0	219.8			
Teeside Retail Park	6.5	5.8	16.0	0.4	3.2	3.2	0.8	0.3	3.2	10.7	50.1			
Stokesley	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.8	2.4	5.2			
Northallerton	0.0	0.0	0.0	0.0	0.6	0.6	0.0	0.0	1.5	0.0	2.8			
Stockton-on-Tees Town Centre	2.4	0.1	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	2.7			
Whitby	0.0	0.0	0.1	0.0	0.0	0.0	0.0	1.2	0.2	0.0	1.4			
All Other Centres/Stores	0.9	0.1	0.6	0.2	2.6	1.0	0.0	0.0	5.3	3.6	14.3			
SUB TOTAL	**28.4**	**15.1**	**23.5**	**0.9**	**23.3**	**42.4**	**15.9**	**4.1**	**28.0**	**114.8**	**296.3**			
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	**62.2**	**24.9**	**35.8**	**15.1**	**36.1**	**48.1**	**19.2**	**7.9**	**29.7**	**116.5**	**395.5**			

Notes:

For each cell, the monetry figure is derived by multiplying the 2016 available non-bulky comparison goods expenditure in the zone (excl. SFT) (Table 4) by the unadjusted non-bulky comparison goods market share of the specific centre in that zone (Table 7).

(1) Estimated by Colliers International (see Appendix 6).

Sources:

Colliers International.

Date of Preparation: 25/08/2011

Table 9 - Calculation of Potential Non-Bulky Comparison Goods Headroom Expenditure, 2016 (£ Million)

Zone/Town Area	2011 Turnover (Base Year)	2016 Turnover Potential	Turnover Allocation for Existing Retailers 2011-2016(1)	Residual Turnover Potential at 2016	Headroom Expenditure at 2016
	A	B	C	D=B-C	E=D-A
	(Table 6, D)	(Table 8, D)			
WITHIN RECAR & CLEVELAND BOROUGH					
Zone 1 (Redcar area)	47.3	53.7	5.8	47.9	0.5
Zone 2 (Marske by the Sea area)	3.2	3.7	0.2	3.4	0.2
Zone 3 (Saltburn by the Sea area)	4.1	4.7	0.5	4.2	0.1
Zone 4 (Loftus area)	2.3	2.6	0.2	2.4	0.1
Zone 5 (Guisborough area)	13.8	15.6	2.3	13.3	-0.5
Zone 6 (Eston area)	1.3	1.5	0.2	1.2	-0.1
Zone 7 (South Bank area)	26.4	29.9	3.8	26.1	-0.4
TOTAL	**98.5**	**111.6**	**13.1**	**98.5**	**0.0**

Notes:

(1) We assume that all existing non-bulky comparison goods floorspace at the base year (2011) will achieve a real gain in sales productivity. The estimated turnover allocation is based on research by Experian (see Appendix 4E). The sales productivity gain is applied to the estimated 2011 (base year) benchmark non-bulky of the town as set out in Table 6 (Column H).

Sources:

Colliers International and Experian - Retail Planner Briefing Note 8.1 (August 2010).

Date of Preparation: 25/08/2011

Table 10 - Calculation of Non-Bulky Comparison Goods Floorspace Need, 2016

Zone/Town Area	Headroom Expenditure at 2016 Before Commitments (£m)	Forecast Turnover at 2016 of Commitments (£m)(1)	Headroom Expenditure at 2016 After Commitments (£m)	Adjustment for Over/Under Trading at the Base Year (£m)	Residual Headroom Expenditure at 2016 (£m)	Assumed Average Sales Density at 2016 (£ Per Sq M Net)(2)	Estimated Retail Floorspace Need (Sq M Net)	Estimated Retail Floorspace Need (Sq M Gross)(3)
	A	B	C=A-B	D	E=C+D	F	G=E/F	H=Gx100/65
	(Table 9, E)			(Table 6, I)				
WITHIN RECAR & CLEVELAND BOROUGH								
Zone 1 (Redcar area)	0.5	0.0	0.5	-2.8	-2.3	4,465	-510	-785
Zone 2 (Marske by the Sea area)	0.2	0.0	0.2	1.1	1.3	4,465	292	449
Zone 3 (Saltburn by the Sea area)	0.1	0.0	0.1	-0.1	0.0	4,465	-5	-8
Zone 4 (Loftus area)	0.1	0.0	0.1	0.7	0.8	4,465	184	283
Zone 5 (Guisborough area)	-0.5	0.0	-0.5	-5.9	-6.4	4,465	-1,423	-2,189
Zone 6 (Eston area)	-0.1	0.0	-0.1	-0.8	-0.9	4,465	-196	-302
Zone 7 (South Bank area)	-0.4	13.8	-14.2	-6.5	-20.7	4,465	-4,640	-7,139
TOTAL	**0.0**	**13.8**	**-13.8**	**-14.3**	**-28.1**	**-**	**-6,300**	**-9,692**

Notes:

(1) Schedule of commitments is set out at Appendix 5D. Sales floorspace and estimated turnover are given for each commitment.
(2) The deviation of the average sales density for converting expenditure into floorspace is set out in Section 4 in the main report.
(3) Gross floorspace is estimated from sales floorspace by applying a net to gross ratio of 65:100.

Sources:

Colliers International.

Table 11 - Non-Bulky Comparison Goods Expenditure Pattern and Centre Turnover Estimates, 2021 (£ Million)

Retail Supply: Where the Money is Spent	Study Area										Total Expenditure Drawn from Survey Area	Estimated Inflow Expenditure from Residents	Estiamted Inflow Expenditure from Tourists(1)	Total Turnover
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	A	B	C	D=A+B+C
WITHIN RECAR & CLEVELAND BOROUGH														
Zone 1 (Redcar area)	23.8	2.7	8.0	5.6	4.5	3.7	2.3	2.9	0.9	0.0	54.4	0.0	7.9	62.3
Zone 2 (Marske by the Sea area)	0.4	3.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.2	0.0	0.0	4.2
Zone 3 (Saltburn by the Sea area)	0.2	0.2	1.0	0.1	0.0	0.0	0.0	0.1	0.2	0.0	1.9	0.0	3.6	5.5
Zone 4 (Loftus area)	0.0	0.0	0.0	3.0	0.0	0.0	0.0	0.0	0.0	0.0	3.0	0.0	0.0	3.0
Zone 5 (Guisborough area)	0.0	0.0	1.1	5.8	8.7	0.0	0.0	0.4	0.5	0.0	16.4	0.0	1.7	18.1
Zone 6 (Eston area)	0.0	0.0	0.0	0.1	0.5	1.1	0.0	0.0	0.0	0.0	1.7	0.0	0.0	1.7
Zone 7 (South Bank area)	14.6	4.6	4.1	1.8	1.0	1.8	1.6	0.1	0.4	1.4	31.3	3.1	0.0	34.4
	39.0	**11.4**	**14.2**	**16.4**	**14.7**	**6.6**	**3.9**	**3.6**	**2.0**	**1.4**	**113.0**	**3.1**	**13.2**	**129.3**
OUTSIDE OF BOROUGH														
Middlesbrough Town Centre	21.4	10.5	7.9	0.3	19.5	43.4	17.2	3.1	17.7	114.0	255.0			
Teeside Retail Park	7.5	6.7	18.5	0.5	3.7	3.7	0.9	0.3	3.8	12.5	58.0			
Stokesley	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.3	2.8	6.1			
Northallerton	0.0	0.0	0.0	0.0	0.7	0.7	0.0	0.0	1.8	0.7	3.9			
Stockton-on-Tees Town Centre	2.8	0.1	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	3.1			
Whitby	0.0	0.0	0.1	0.0	0.0	0.0	0.0	1.4	0.2	0.0	1.7			
All Other Centres/Stores	1.0	0.1	0.7	0.3	3.0	1.2	0.0	0.0	6.3	4.2	16.7			
	32.7	**17.4**	**27.1**	**1.0**	**26.9**	**49.0**	**18.3**	**4.9**	**33.0**	**134.1**	**344.5**			
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	**71.8**	**28.8**	**41.3**	**17.4**	**41.6**	**55.5**	**22.2**	**9.4**	**35.0**	**135.5**	**458.4**			

Notes:

For each cell, the monetry figure is derived by multiplying the 2021 available non-bulky comparison goods expenditure in the zone (excl. SFT) (Table 4) by the unadjusted non-bulky comparison goods market share of the specific centre in that zone (Table 7).

(1) Estimated by Colliers International (see Appendix 6).

Sources:

Colliers International.

Date of Preparation: 25/08/2011

Table 12 - Calculation of Potential Non-Bulky Comparison Goods Headroom Expenditure, 2021 (£ Million)

Colliers INTERNATIONAL

Zone/Town Area	2011 Turnover (Base Year)	2021 Turnover Potential	Turnover Allocation for Existing Retailers 2011-2021 (1)	Residual Turnover Potential at 2021	Headroom Expenditure at 2021
	A	B	C	D=B-C	E=D-A
	(Table 6, D)	(Table 11, D)			
WITHIN REDCAR AND CLEVELALND BOROUGH					
Zone 1 (Redcar area)	47.3	62.3	12.5	49.8	2.5
Zone 2 (Marske by the Sea area)	3.2	4.2	0.5	3.7	0.4
Zone 3 (Saltburn by the Sea area)	4.1	5.5	1.0	4.5	0.4
Zone 4 (Loftus area)	2.3	3.0	0.4	2.6	0.3
Zone 5 (Guisborough area)	13.8	18.1	4.9	13.2	-0.6
Zone 6 (Eston area)	1.3	1.7	0.5	1.2	-0.1
Zone 7 (South Bank area)	26.4	34.4	8.2	26.2	-0.3
TOTAL	**98.5**	**129.3**	**28.1**	**101.2**	**2.6**

Notes:

(1) We assume that all existing non-bulky comparison goods floorspace at the base year (2011) will achieve a real gain in sales productivity. The estimated turnover allocation is based on research by Experian (see Appendix 4E). The sales productivity gain is applied to the estimated 2011 (base year) benchmark non-bulky comparison of the town as set out in Table 6 (Column H).

Sources:

Colliers International and Experian - Retail Planner Briefing Note 8.1 (August 2010)

Date of Preparation: 25/08/2011

Table 13 - Calculation of Non-Bulky Comparison Goods Floorspace Need, 2021

Zone/Town Area	Headroom Expenditure at 2021 Before Commitments (£m)	Forecast Turnover at 2021 of Commitments (£m)(1)	Headroom Expenditure at 2021 After Commitments (£m)	Adjustment for Over/Under Trading at the Base Year (£m)	Residual Headroom Expenditure at 2021 (£m)	Assumed Average Sales Density at 2021 (£ Per Sq M Net)(2)	Estimated Retail Floorspace Need (Sq M Net)	Estimated Retail Floorspace Need (Sq M Gross)(3)
	A	B	C=A-B	D	E=C+D	F	G=E/F	H=Gx100/65
	(Table 12, E)			(Table 6, I)				
WITHIN RECAR & CLEVELAND BOROUGH								
Zone 1 (Redcar area)	2.5	0.0	2.5	-2.8	-0.3	4,990	-62	-96
Zone 2 (Marske by the Sea area)	0.4	0.0	0.4	1.1	1.6	4,990	318	489
Zone 3 (Saltburn by the Sea area)	0.4	0.0	0.4	-0.1	0.3	4,990	56	86
Zone 4 (Loftus area)	0.3	0.0	0.3	0.7	1.0	4,990	202	311
Zone 5 (Guisborough area)	-0.6	0.0	-0.6	-5.9	-6.5	4,990	-1,295	-1,992
Zone 6 (Eston area)	-0.1	0.0	-0.1	-0.8	-0.9	4,990	-186	-286
Zone 7 (South Bank area)	-0.3	15.5	-15.8	-6.5	-22.3	4,990	-4,472	-6,880
TOTAL	**2.6**	**15.5**	**-12.9**	**-14.3**	**-27.1**	**-**	**-5,439**	**-8,368**

Notes:

(1) Schedule of commitments is set out at Appendix 5D. Sales floorspace and estimated turnover are given for each commitment.

(2) The deviation of the average sales density for converting expenditure into floorspace is set out in Section 4 in the main report.

(3) Gross floorspace is estimated from sales floorspace by applying a net to gross ratio of 65:100.

Sources:

Colliers International.

Table 14 - Non-Bulky Comparison Goods Expenditure Pattern and Centre Turnover Estimates, 2026 (£ Million)

Retail Supply: Where the Money is Spent	Study Area										Total Expenditure Drawn from Survey Area	Estimated Inflow Expenditure from Residents(1)	Estiamted Inflow Expenditure from Tourists(1)	Total Turnover
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	A	B	C	D=A+B+C
WITHIN RECAR & CLEVELAND BOROUGH														
Zone 1 (Redcar area)	27.5	3.1	9.3	6.5	5.2	4.2	2.7	3.5	1.0	0.0	63.0	0.0	9.3	72.3
Zone 2 (Marske by the Sea area)	0.4	4.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.9	0.0	0.0	4.9
Zone 3 (Saltburn by the Sea area)	0.2	0.3	1.1	0.2	0.0	0.0	0.0	0.1	0.3	0.0	2.2	0.0	4.3	6.5
Zone 4 (Loftus area)	0.0	0.0	0.0	3.5	0.0	0.0	0.0	0.0	0.0	0.0	3.5	0.0	0.0	3.5
Zone 5 (Guisborough area)	0.0	0.0	1.3	6.7	10.0	0.0	0.0	0.5	0.5	0.0	19.0	0.0	2.0	21.0
Zone 6 (Eston area)	0.0	0.0	0.0	0.1	0.6	1.3	0.0	0.0	0.0	0.0	2.0	0.0	0.0	2.0
Zone 7 (South Bank area)	16.9	5.3	4.7	2.1	1.2	2.1	1.8	0.1	0.5	1.6	36.2	3.6	0.0	39.8
	45.1	**13.1**	**16.4**	**18.9**	**17.0**	**7.6**	**4.5**	**4.2**	**2.3**	**1.6**	**130.7**	**3.6**	**15.6**	**149.9**
OUTSIDE OF BOROUGH														
Middlesbrough Town Centre	24.7	12.1	9.1	0.4	22.6	50.2	19.9	3.6	20.9	132.8	296.3			
Teeside Retail Park	8.7	7.7	21.3	0.5	4.2	4.2	1.1	0.4	4.5	14.5	67.3			
Stokesley	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.8	3.3	7.2			
Northallerton	0.0	0.0	0.0	0.0	0.9	0.8	0.0	0.0	2.1	0.8	4.6			
Stockton-on-Tees Town Centre	3.2	0.2	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	3.6			
Whitby	0.0	0.0	0.1	0.0	0.0	0.0	0.0	1.6	0.2	0.0	2.0			
All Other Centres/Stores	1.2	0.1	0.8	0.3	3.5	1.3	0.0	0.0	7.4	4.9	19.5			
	37.8	**20.1**	**31.3**	**1.2**	**31.1**	**56.6**	**21.2**	**5.7**	**38.9**	**156.4**	**400.4**			
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	**83.0**	**33.2**	**47.7**	**20.1**	**48.1**	**64.2**	**25.7**	**11.1**	**41.3**	**158.0**	**532.2**			

Notes:

For each cell, the monetry figure is derived by multiplying the 2026 available non-bulky comparison goods expenditure in the zone (excl. SFT) (Table 4) by the unadjusted non-bulky comparison goods market share of the specific centre in that zone (Table 7).

(1) Estimated by Colliers International (see Appendix 6).

Sources:

Colliers International.

Date of Preparation: 25/08/2011

Table 15 - Calculation of Potential Non-Bulky Comparison Goods Headroom Expenditure, 2026 (£ Million)

Centre	2011 Turnover (Base Year)	2026 Turnover Potential	Turnover Allocation for Existing Retailers 2011-2026	Residual Turnover Potential at 2026	Headroom Expenditure at 2026
	A	B	C	D=B-C	E=D-A
	(Table 6, D)	(Table 14, D)			
WITHIN REDCAR AND CLEVELALND BOROUGH					
Zone 1 (Redcar area)	47.3	72.3	20.0	52.3	4.9
Zone 2 (Marske by the Sea area)	3.2	4.9	0.8	4.0	0.8
Zone 3 (Saltburn by the Sea area)	4.1	6.5	1.7	4.9	0.8
Zone 4 (Loftus area)	2.3	3.5	0.6	2.8	0.5
Zone 5 (Guisborough area)	13.8	21.0	7.9	13.1	-0.7
Zone 6 (Eston area)	1.3	2.0	0.8	1.1	-0.2
Zone 7 (South Bank area)	26.4	39.8	13.2	26.6	0.2
TOTAL	**98.5**	**149.9**	**45.1**	**104.9**	**6.3**

Notes:

(1) We assume that all existing non-bulky comparison goods floorspace at the base year (2011) will achieve a real gain in sales productivity. The assumed turnover allocation is based on research by Experian (see Appendix 4E). The sales productivity gain is applied to the estimated 2011 (base year) benchmark convenience of the town goods turnover as set out in Table 6 (Column H).

Sources:

Colliers International and Experian - Retail Planner Briefing Note 8.1 (August 2010).

Date of Preparation: 25/08/2011

Table 16 - Calculation of Non-Bulky Comparison Goods Floorspace Need, 2026

Centre	Headroom Expenditure at 2026 Before Commitments (£m)	Forecast Turnover at 2026 of Commitments (£m)(1)	Headroom Expenditure at 2026 After Commitments (£m)	Adjustment for Over/Under Trading at the Base Year (£m)	Residual Headroom Expenditure at 2026 (£m)	Assumed Average Sales Density at 2026 (£ Per Sq M Net)(2)	Estimated Retail Floorspace Need (Sq M Net)	Estimated Retail Floorspace Need (Sq M Gross)(3)
	A	B	C=A-B	D	E=C+D	F	G=E/F	H=Gx100/65
	(Table 15, E)			(Table 6, I)				
WITHIN RECAR & CLEVELAND BOROUGH								
Zone 1 (Redcar area)	4.9	0.0	4.9	-2.8	2.1	5,595	378	582
Zone 2 (Marske by the Sea area)	0.8	0.0	0.8	1.1	1.9	5,595	344	529
Zone 3 (Saltburn by the Sea area)	0.8	0.0	0.8	-0.1	0.7	5,595	117	181
Zone 4 (Loftus area)	0.5	0.0	0.5	0.7	1.2	5,595	221	340
Zone 5 (Guisborough area)	-0.7	0.0	-0.7	-5.9	-6.5	5,595	-1,170	-1,800
Zone 6 (Eston area)	-0.2	0.0	-0.2	-0.8	-1.0	5,595	-175	-270
Zone 7 (South Bank area)	0.2	17.3	-17.1	-6.5	-23.7	5,595	-4,232	-6,511
TOTAL	**6.3**	**17.3**	**-11.0**	**-14.3**	**-25.3**	**-**	**-4,518**	**-6,950**

Notes:

(1) Schedule of commitments is set out at Appendix 5D. Sales floorspace and estimated turnover is given for each commitment.

(2) The deviation of the average sales density for converting expenditure into floorspace is set out in Section 4 in the main report.

(3) Gross floorspace is estimated from sales floorspace by applying a net to gross ratio of 65:100.

Sources:

Colliers International.

APPENDIX 7

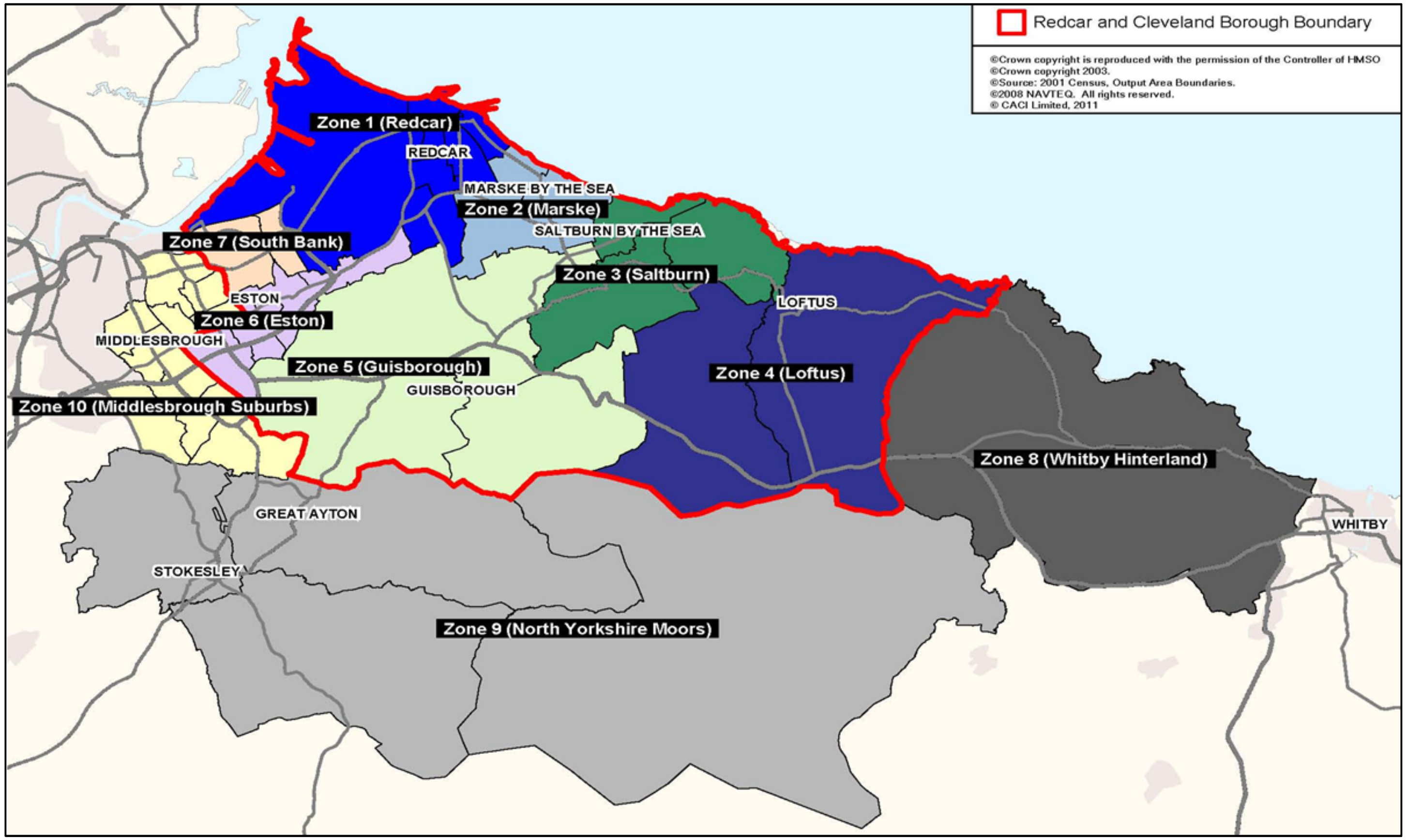
Retail Floorspace Need Assessment

(C)The Need for Additional Bulky Comparison Goods Floorspace

Colliers International: Retail Floorspace Need Assessment

Client: Redcar & Cleveland Borough Council
Project: Redcar & Cleveland Retail Study

Household Survey Area and Constituent Zones



Bulky Comparison Goods

Date of Preparation: 25/08/2011

Table 1 - Population Change by Zone

Zone	Area	2011 Population (Base Year)	Projected 2016 Population	Projection 2021 Population	Projected 2026 Population	Total Increase (2011-2026)	Percentage Increase (2011-2026)
Redcar & Cleveland Borough	**Zone 1**	36,055	36,105	36,285	36,450	395	1.1%
	Zone 2	13,345	13,365	13,435	13,490	145	1.1%
	Zone 3	20,500	20,530	20,635	20,725	225	1.1%
	Zone 4	8,805	8,820	8,865	8,900	95	1.1%
	Zone 5	19,815	19,845	19,945	20,030	215	1.1%
	Zone 6	26,970	27,010	27,145	27,265	295	1.1%
	Zone 7	12,110	12,125	12,190	12,240	130	1.1%
SUB TOTAL		**137,600**	**137,800**	**138,500**	**139,100**	**1,500**	**1.1%**
Hinterland	**Zone 8**	3,510	3,590	3,690	3,790	280	8.0%
	Zone 9	14,400	14,710	15,105	15,480	1,080	7.5%
	Zone 10	66,930	67,735	68,590	69,490	2,560	3.8%
SUB TOTAL		**84,840**	**86,035**	**87,385**	**88,760**	**3,920**	**4.6%**
TOTAL		**222,440**	**223,835**	**225,885**	**227,860**	**5,420**	**2.4%**

Notes:

Projections are ONS 2008-based sub-national population projections for local authority area applied to zones. The projection for Zone 2 (Marske) also takes into account substantial new housing planned over the period to 2026. The methodology is described at Appendix 3.

Sources:

Office for National Statistics and Redcar & Cleveland Borough Council.

Date of Preparation: 25/08/2011

Table 2 - Average Residents Expenditure Per Head on Bulky Comparison Goods by Zone (Including Expenditure By Special Forms of Trading)

Zone	Area	Expenditure Per Head (£)						
		2009	2011 (Base Year)	2016	2021	2026	Total Increase (2011-2026)	Percentage Increase (2011-2026)
Redcar & Cleveland Borough	**Zone 1**	722	728	832	963	1,116	389	53.4%
	Zone 2	830	837	957	1,107	1,283	447	53.4%
	Zone 3	743	749	856	991	1,149	400	53.4%
	Zone 4	690	695	795	920	1,067	371	53.4%
	Zone 5	816	822	941	1,088	1,262	439	53.4%
	Zone 6	730	736	841	974	1,129	393	53.4%
	Zone 7	574	579	662	766	887	309	53.4%
Hinterland	**Zone 8**	1,062	1,070	1,224	1,416	1,642	572	53.4%
	Zone 9	1,001	1,009	1,154	1,335	1,548	539	53.4%
	Zone 10	702	708	809	936	1,085	378	53.4%

Notes:

Average consumer expenditure per head on bulky comparison goods for 2009 has been estimated by Experian for each zone. The 2009 expenditure per head figures in each zone have been projected forwards to 2011 (the base year) and the forecast years of 2016, 2021 and 2026 by using the latest available UK expenditure per head growth forecasts published by Experian (see Appendix 4C).

Sources:

Experian - bespoke data purchase and Retail Planner Briefing Note 8.1. (August 2010).

Table 3 - Average Residents Expenditure Per Head on Bulky Comparison Goods by Zone (Excluding Expenditure By Special Forms of Trading)

Zone	Area	Expenditure Per Head (£)					
		2011 (Base Year)	2016	2021	2026	Total Increase (2011-2026)	Percentage Increase (2011-2026)
Redcar & Cleveland Borough	**Zone 1**	659	746	865	1,005	346	52.5%
	Zone 2	757	857	994	1,155	398	52.5%
	Zone 3	678	767	890	1,034	356	52.5%
	Zone 4	629	713	826	960	331	52.5%
	Zone 5	744	843	977	1,135	391	52.5%
	Zone 6	666	754	874	1,016	350	52.5%
	Zone 7	524	593	687	799	275	52.5%
Hinterland	**Zone 8**	969	1,097	1,272	1,478	509	52.5%
	Zone 9	913	1,034	1,199	1,393	480	52.5%
	Zone 10	640	725	841	977	336	52.5%

Notes:

The expenditure per head figures in Table 2 have been discounted by 9.5% at the base year of 2011, to exclude non-store retail sales,which includes e-tailing. At 2016, 2021 and 2026, discounts of 10.4%, 10.2% and 10.0% have been assumed. (See Appendix 4D).

Sources:

Experian - Retail Planner Briefing Note 8.1 (August 2010).

Date of Preparation: 25/08/2011

Table 4 - Total Available Residents Expenditure on Bulky Comparison Goods By Zone (Excluding Expenditure By Special Forms of Trading)

Zone	Area	Total Available Expenditure (£m)					
		2011 (Base Year)	2016	2021	2026	Total Increase (2011-2026)	Percentage Increase (2011-2026)
Redcar & Cleveland Borough	**Zone 1**	23.7	26.9	31.4	36.6	12.9	54.2%
	Zone 2	10.1	11.5	13.4	15.6	5.5	54.2%
	Zone 3	13.9	15.8	18.4	21.4	7.5	54.2%
	Zone 4	5.5	6.3	7.3	8.5	3.0	54.2%
	Zone 5	14.7	16.7	19.5	22.7	8.0	54.2%
	Zone 6	18.0	20.4	23.7	27.7	9.7	54.2%
	Zone 7	6.3	7.2	8.4	9.8	3.4	54.2%
SUB TOTAL		**92.3**	**104.7**	**122.0**	**142.4**	**50.1**	**54.2%**
Hinterland	**Zone 8**	3.4	3.9	4.7	5.6	2.2	64.7%
	Zone 9	13.1	15.2	18.1	21.6	8.4	64.0%
	Zone 10	42.9	49.1	57.7	67.9	25.0	58.4%
SUB TOTAL		**59.4**	**68.3**	**80.5**	**95.0**	**35.6**	**60.0%**
TOTAL		**151.7**	**172.9**	**202.5**	**237.4**	**85.7**	**56.5%**

Notes:

Total available expenditure totals for convenience goods are calculated as follows: Population (Table 1) multiplied by consumer expenditure per head after making appropriate reductions for SFT (Table 3).

Sources:

Colliers International.

Date of Preparation: 25/08/2011

Table 5 - Bulky Comparison Goods Market Shares By Zone at the Base Year, 2011 (Column Percent)

Colliers INTERNATIONAL

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)									
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10
WITHIN RECAR & CLEVELAND BOROUGH										
Zone 1 (Redcar area)	30.6	13.3	25.1	47.1	0.0	2.0	0.0	5.8	2.2	0.0
Zone 2 (Marske by the Sea area)	0.5	13.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Zone 3 (Saltburn by the Sea area)	0.9	1.0	2.0	1.2	0.0	0.0	0.0	0.0	0.0	0.0
Zone 4 (Loftus area)	0.0	0.0	1.0	5.6	1.6	0.0	0.0	1.1	0.0	0.0
Zone 5 (Guisborough area)	0.0	0.0	2.8	12.5	17.7	2.0	0.0	7.8	1.5	0.0
Zone 6 (Eston area)	0.6	0.0	0.0	0.9	0.0	2.0	0.0	0.0	0.0	0.0
Zone 7 (South Bank area)	10.7	6.5	27.2	3.2	8.1	6.0	21.5	30.2	8.0	11.4
SUB TOTAL	**43.3**	**34.4**	**58.1**	**70.5**	**27.4**	**12.0**	**21.5**	**44.9**	**11.7**	**11.4**
OUTSIDE OF BOROUGH										
Teeside Retail Park	10.4	26.3	12.6	24.2	25.8	29.0	12.3	6.9	34.2	60.2
Middlesbrough Town Centre	40.1	33.9	14.7	5.3	23.4	40.0	44.6	1.3	6.7	27.3
Portrack Lane, Stockton-on-Tees	1.2	4.4	12.4	0.0	17.7	17.0	18.4	6.1	12.7	0.0
Coulby Newham	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.6	9.0	1.1
Stockton-on-Tees Town Centre	3.9	0.5	0.0	0.0	1.6	0.0	0.0	0.0	0.2	0.0
Whitby	0.0	0.0	0.7	0.0	0.0	0.0	0.0	33.9	0.0	0.0
All Other Centres/Stores	1.1	0.5	1.5	0.0	4.1	2.0	3.2	6.3	25.5	0.0
SUB TOTAL	**56.7**	**65.6**	**41.9**	**29.5**	**72.6**	**88.0**	**78.5**	**55.1**	**88.3**	**88.6**
TOTAL	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Notes:

The market share percentages are derived from a household telephone survey carried out in February/March, 2011. (See Appendix 2).

Sources:

Colliers International.

Date of Preparation: 25/08/2011

Table 6 - Estimated Bulky Comparison Goods Expenditure Pattern and Centre Turnover Estimates at the Base Year, 2011 (£ Million)

Retail Supply: Where the Money is Spent	Study Area										Total Expenditure Drawn from Survey Area	Estimated Inflow Expenditure from Residents(1)	Estiamted Inflow Expenditure from Tourists(1)	Total Turnover	Available Floorspace (sq.m. net)(2)	Derived Sales Density (£ per sq.m. net)	Benchmark Sales Density (£ per sq. m net)(3)	Benchmark Turnover (£m)	Estimated Extent of Any Over/Under Trading (£m)
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	A	B	C	D=A+B+C	E	F=D/E	G	H=GxE	I=D-H
WITHIN REDCAR AND CLEVELALND BOROUGH																			
Zone 1 (Redcar area)	7.3	1.3	3.5	2.6	0.0	0.4	0.0	0.2	0.3	0.0	15.6	0.0	0.0	15.6	10,337	1,505	2,250	23.3	-7.7
Zone 2 (Marske by the Sea area)	0.1	1.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.5	0.0	0.0	1.5	359	4,158	2,750	1.0	0.5
Zone 3 (Saltburn by the Sea area)	0.2	0.1	0.3	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.7	0.0	0.0	0.7	501	1,316	2,595	1.3	-0.6
Zone 4 (Loftus area)	0.0	0.0	0.1	0.3	0.2	0.0	0.0	0.0	0.0	0.0	0.7	0.0	0.0	0.7	95	7,607	2,750	0.3	0.5
Zone 5 (Guisborough area)	0.0	0.0	0.4	0.7	2.6	0.4	0.0	0.3	0.2	0.0	4.5	0.0	0.0	4.5	3,081	1,465	2,110	6.5	-2.0
Zone 6 (Eston area)	0.1	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.6	0.0	0.0	0.6	849	650	2,240	1.9	-1.4
Zone 7 (South Bank area)	2.5	0.7	3.8	0.2	1.2	1.1	1.4	1.0	1.1	4.9	17.8	1.8	0.0	19.5	12,741	1,533	2,105	26.8	-7.3
SUB TOTAL	**10.3**	**3.5**	**8.1**	**3.9**	**4.0**	**2.2**	**1.4**	**1.5**	**1.5**	**4.9**	**41.2**	**1.8**	**0.0**	**43.0**	**27,963**	**-**	**-**	**61.0**	**-18.0**
OUTSIDE OF BOROUGH																			
Teeside Retail Park	2.5	2.7	1.8	1.3	3.8	5.2	0.8	0.2	4.5	25.8	48.5								
Middlesbrough Town Centre	9.5	3.4	2.0	0.3	3.5	7.2	2.8	0.0	0.9	11.7	41.4								
Portrack Lane, Stockton-on-Tees	0.3	0.4	1.7	0.0	2.6	3.1	1.2	0.2	1.7	0.0	11.2								
Coulby Newham	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.2	0.5	1.7								
Stockton-on-Tees Town Centre	0.9	0.1	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	1.2								
Whitby	0.0	0.0	0.1	0.0	0.0	0.0	0.0	1.2	0.0	0.0	1.2								
All Other Centres/Stores	0.3	0.1	0.2	0.0	0.6	0.4	0.2	0.2	3.4	0.0	5.3								
SUB TOTAL	**13.5**	**6.6**	**5.8**	**1.6**	**10.7**	**15.8**	**5.0**	**1.9**	**11.6**	**38.0**	**110.5**								
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	**23.7**	**10.1**	**13.9**	**5.5**	**14.7**	**18.0**	**6.3**	**3.4**	**13.1**	**42.9**	**151.7**								

Notes:

For each cell the monetory figure is dervied by multiplying the 2011 available bulky comparison expenditure in the zone (excl SFT) (Table 4), by the survey-based bulky comparison goods market share of that specific centre in that zone (Table 5).
(1) Estimated by Colliers International (see Appendix 6).
(2) Floorpsace estimated from a range of sources (see Appendix 5B for full details).
(3) Benchmark sales density estimated by Colliers International (see Appendix 5C for full details).

Sources:

Colliers International.

Table 7 - Unadjusted Bulky Comparison Goods Centre Market Shares By Zone (Column Percent)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)									
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10
WITHIN RECAR & CLEVELAND BOROUGH										
Zone 1 (Redcar area)	30.6	13.3	25.1	47.1	0.0	2.0	0.0	5.8	2.2	0.0
Zone 2 (Marske by the Sea area)	0.5	13.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Zone 3 (Saltburn by the Sea area)	0.9	1.0	2.0	1.2	0.0	0.0	0.0	0.0	0.0	0.0
Zone 4 (Loftus area)	0.0	0.0	1.0	5.6	1.6	0.0	0.0	1.1	0.0	0.0
Zone 5 (Guisborough area)	0.0	0.0	2.8	12.5	17.7	2.0	0.0	7.8	1.5	0.0
Zone 6 (Eston area)	0.6	0.0	0.0	0.9	0.0	2.0	0.0	0.0	0.0	0.0
Zone 7 (South Bank area)	10.7	6.5	27.2	3.2	8.1	6.0	21.5	30.2	8.0	11.4
SUB TOTAL	**43.3**	**34.4**	**58.1**	**70.5**	**27.4**	**12.0**	**21.5**	**44.9**	**11.7**	**11.4**
OUTSIDE OF BOROUGH										
Teeside Retail Park	10.4	26.3	12.6	24.2	25.8	29.0	12.3	6.9	34.2	60.2
Middlesbrough Town Centre	40.1	33.9	14.7	5.3	23.4	40.0	44.6	1.3	6.7	27.3
Portrack Lane, Stockton-on-Tees	1.2	4.4	12.4	0.0	17.7	17.0	18.4	6.1	12.7	0.0
Coulby Newham	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.6	9.0	1.1
Stockton-on-Tees Town Centre	3.9	0.5	0.0	0.0	1.6	0.0	0.0	0.0	0.2	0.0
Whitby	0.0	0.0	0.7	0.0	0.0	0.0	0.0	33.9	0.0	0.0
All Other Centres/Stores	1.1	0.5	1.5	0.0	4.1	2.0	3.2	6.3	25.5	0.0
SUB TOTAL	**56.7**	**65.6**	**41.9**	**29.5**	**72.6**	**88.0**	**78.5**	**55.1**	**88.3**	**88.6**
TOTAL	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Notes:

The market share percentages are the same as those set out in Table 5. Adapting the 'constant market shares' approach, we do not make any adjustments to the base year market shares determined by the household survey.

Sources:

Colliers International.

Date of Preparation: 25/08/2011

Table 8 - Bulky Comparison Goods Expenditure Pattern and Centre Turnover Estimates, 2016 (£ Million)

Retail Supply: Where the Money is Spent	Study Area										Total Expenditure Drawn from Survey Area	Estimated Inflow Expenditure from Residents(1)	Estiamted Inflow Expenditure from Tourists(1)	Total Turnover
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	A	B	C	D=A+B+C
WITHIN REDCAR AND CLEVELALND BOROUGH														
Zone 1 (Redcar area)	8.2	1.5	4.0	3.0	0.0	0.4	0.0	0.2	0.3	0.0	17.6	0.0	0.0	17.6
Zone 2 (Marske by the Sea area)	0.1	1.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.7	0.0	0.0	1.7
Zone 3 (Saltburn by the Sea area)	0.2	0.1	0.3	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.7	0.0	0.0	0.7
Zone 4 (Loftus area)	0.0	0.0	0.2	0.4	0.3	0.0	0.0	0.0	0.0	0.0	0.8	0.0	0.0	0.8
Zone 5 (Guisborough area)	0.0	0.0	0.4	0.8	3.0	0.4	0.0	0.3	0.2	0.0	5.1	0.0	0.0	5.1
Zone 6 (Eston area)	0.2	0.0	0.0	0.1	0.0	0.4	0.0	0.0	0.0	0.0	0.6	0.0	0.0	0.6
Zone 7 (South Bank area)	2.9	0.7	4.3	0.2	1.4	1.2	1.5	1.2	1.2	5.6	20.2	2.0	0.0	22.2
SUB TOTAL	**11.7**	**3.9**	**9.2**	**4.4**	**4.6**	**2.4**	**1.5**	**1.8**	**1.8**	**5.6**	**46.9**	**2.0**	**0.0**	**48.9**
OUTSIDE OF BOROUGH														
Teeside Retail Park	2.8	3.0	2.0	1.5	4.3	5.9	0.9	0.3	5.2	29.6	55.5			
Middlesbrough Town Centre	10.8	3.9	2.3	0.3	3.9	8.1	3.2	0.1	1.0	13.4	47.1			
Portrack Lane, Stockton-on-Tees	0.3	0.5	2.0	0.0	3.0	3.5	1.3	0.2	1.9	0.0	12.7			
Coulby Newham	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.4	0.0	1.4			
Stockton-on-Tees Town Centre	1.0	0.1	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	1.4			
Whitby	0.0	0.0	0.1	0.0	0.0	0.0	0.0	1.3	0.0	0.0	1.4			
All Other Centres/Stores	0.3	0.1	0.2	0.0	0.7	0.4	0.2	0.2	3.9	0.0	6.0			
SUB TOTAL	**15.3**	**7.5**	**6.6**	**1.9**	**12.1**	**17.9**	**5.6**	**2.2**	**13.4**	**43.0**	**125.5**			
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	**26.9**	**11.5**	**15.8**	**6.3**	**16.7**	**20.4**	**7.2**	**3.9**	**15.2**	**49.1**	**172.9**			

Notes:

For each cell, the monetry figure is derived by multiplying the 2016 available bulky comparison goods expenditure in the zone (excl. SFT) (Table 4) by the unadjusted bulky comparison goods market share of the specific centre in that zone (Table 7).

(1) Estimated by Colliers International (see Appendix 6).

Sources:

Colliers International.

Date of Preparation: 25/08/2011

Table 9 - Calculation of Potential Bulky Comparison Goods Headroom Expenditure, 2016 (£ Million)

Zone/Town Area	2011 Turnover (Base Year)	2016 Turnover Potential	Turnover Allocation for Existing Retailers 2011-2016(1)	Residual Turnover Potential at 2016	Headroom Expenditure at 2016
	A	B	C	D=B-C	E=D-A
	(Table 6, D)	(Table 8, D)			
WITHIN RECAR & CLEVELAND BOROUGH					
Zone 1 (Redcar area)	15.6	17.6	2.7	14.9	-0.6
Zone 2 (Marske by the Sea area)	1.5	1.7	0.1	1.6	0.1
Zone 3 (Saltburn by the Sea area)	0.7	0.7	0.2	0.6	-0.1
Zone 4 (Loftus area)	0.7	0.8	0.0	0.8	0.1
Zone 5 (Guisborough area)	4.5	5.1	0.8	4.4	-0.1
Zone 6 (Eston area)	0.6	0.6	0.2	0.4	-0.1
Zone 7 (South Bank area)	19.5	22.2	3.1	19.1	-0.4
TOTAL	**43.0**	**48.9**	**7.1**	**41.8**	**-1.2**

Notes:

(1) We assume that all existing bulky comparison goods floorspace at the base year (2011) will achieve a real gain in sales productivity. The estimated turnover allocation is based on research by Experian (see Appendix 4E). The sales productivity gain is applied to the estimated 2011 (base year) benchmark bulky comparison of the town as set out in Table 6 (Column H).

Sources:

Colliers International and Experian - Retail Planner Briefing Note 8.1 (August 2010).

Date of Preparation: 25/08/2011

Table 10 - Calculation of Bulky Comparison Goods Floorspace Need, 2016

Zone/Town Area	Headroom Expenditure at 2016 Before Commitments (£m)	Forecast Turnover at 2016 of Commitments (£m)(1)	Headroom Expenditure at 2016 After Commitments (£m)	Adjustment for Over/Under Trading at the Base Year (£m)	Residual Headroom Expenditure at 2016 (£m)	Assumed Average Sales Density at 2016 (£ Per Sq M Net)(2)	Estimated Retail Floorspace Need (Sq M Net)	Estimated Retail Floorspace Need (Sq M Gross)(3)
	A	B	C=A-B	D	E=C+D	F	G=E/F	H=Gx100/65
	(Table 9, E)			(Table 6, I)				
WITHIN RECAR & CLEVELAND BOROUGH								
Zone 1 (Redcar area)	-0.6	0.0	-0.6	-7.7	-8.3	2,790	-2,979	-4,582
Zone 2 (Marske by the Sea area)	0.1	0.0	0.1	0.5	0.6	2,790	212	326
Zone 3 (Saltburn by the Sea area)	-0.1	0.0	-0.1	-0.6	-0.7	2,790	-252	-388
Zone 4 (Loftus area)	0.1	3.6	-3.5	0.5	-3.1	2,790	-1,101	-1,693
Zone 5 (Guisborough area)	-0.1	0.0	-0.1	-2.0	-2.1	2,790	-762	-1,172
Zone 6 (Eston area)	-0.1	0.0	-0.1	-1.4	-1.5	2,790	-537	-826
Zone 7 (South Bank area)	-0.4	0.0	-0.4	-7.3	-7.7	2,790	-2,758	-4,243
TOTAL	**-1.2**	**3.6**	**-4.8**	**-18.0**	**-22.8**	**-**	**-8,176**	**-12,578**

Notes:

(1) Schedule of commitments is set out at Appendix 5D. Sales floorspace and estimated turnover are given for each commitment.
(2) The deviation of the average sales density for converting expenditure into floorspace is set out in Section 4 in the main report.
(3) Gross floorspace is estimated from sales floorspace by applying a net to gross ratio of 65:100.

Sources:

Colliers International.

Date of Preparation: 25/08/2011

Table 11 - Bulky Comparison Goods Expenditure Pattern and Centre Turnover Estimates, 2021 (£ Million)

Retail Supply: Where the Money is Spent	Study Area										Total Expenditure Drawn from Survey Area	Estimated Inflow Expenditure from Residents(1)	Estiamted Inflow Expenditure from Tourists(1)	Total Turnover
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	A	B	C	D=A+B+C
WITHIN RECAR & CLEVELAND BOROUGH														
Zone 1 (Redcar area)	9.6	1.8	4.6	3.5	0.0	0.5	0.0	0.3	0.4	0.0	20.6	0.0	0.0	20.6
Zone 2 (Marske by the Sea area)	0.2	1.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.0	0.0	0.0	2.0
Zone 3 (Saltburn by the Sea area)	0.3	0.1	0.4	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.9	0.0	0.0	0.9
Zone 4 (Loftus area)	0.0	0.0	0.2	0.4	0.3	0.0	0.0	0.1	0.0	0.0	1.0	0.0	0.0	1.0
Zone 5 (Guisborough area)	0.0	0.0	0.5	0.9	3.5	0.5	0.0	0.4	0.3	0.0	6.0	0.0	0.0	6.0
Zone 6 (Eston area)	0.2	0.0	0.0	0.1	0.0	0.5	0.0	0.0	0.0	0.0	0.7	0.0	0.0	0.7
Zone 7 (South Bank area)	3.4	0.9	5.0	0.2	1.6	1.4	1.8	1.4	1.4	6.6	23.7	2.4	0.0	26.1
	13.6	**4.6**	**10.7**	**5.2**	**5.3**	**2.8**	**1.8**	**2.1**	**2.1**	**6.6**	**54.8**	**2.4**	**0.0**	**57.2**
OUTSIDE OF BOROUGH														
Teeside Retail Park	3.3	3.5	2.3	1.8	5.0	6.9	1.0	0.3	6.2	34.7	65.0			
Middlesbrough Town Centre	12.6	4.5	2.7	0.4	4.6	9.5	3.7	0.1	1.2	15.7	55.0			
Portrack Lane, Stockton-on-Tees	0.4	0.6	2.3	0.0	3.5	4.0	1.5	0.3	2.3	0.0	14.9			
Coulby Newham	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.6	0.6	2.3			
Stockton-on-Tees Town Centre	1.2	0.1	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	1.6			
Whitby	0.0	0.0	0.1	0.0	0.0	0.0	0.0	1.6	0.0	0.0	1.7			
All Other Centres/Stores	0.3	0.1	0.3	0.0	0.8	0.5	0.3	0.3	4.6	0.0	7.1			
	17.8	**8.8**	**7.7**	**2.2**	**14.2**	**20.9**	**6.6**	**2.6**	**16.0**	**51.1**	**147.7**			
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	**31.4**	**13.4**	**18.4**	**7.3**	**19.5**	**23.7**	**8.4**	**4.7**	**18.1**	**57.7**	**202.5**			

Notes:

For each cell, the monetry figure is derived by multiplying the 2021 available bulky comparison goods expenditure in the zone (excl. SFT) (Table 4) by the unadjusted bulky comparison goods market share of the specific centre in that zone (Table 7).

(1) Estimated by Colliers International (see Appendix 6).

Sources:

Colliers International.

Date of Preparation: 25/08/2011

Table 12 - Calculation of Potential Bulky Comparison Goods Headroom Expenditure, 2021 (£ Million)

Zone/Town Area	2011 Turnover (Base Year)	2021 Turnover Potential	Turnover Allocation for Existing Retailers 2011-2021(1)	Residual Turnover Potential at 2021	Headroom Expenditure at 2021
	A	B	C	D=B-C	E=D-A
	(Table 6, D)	(Table 11, D)			
WITHIN REDCAR AND CLEVELALND BOROUGH					
Zone 1 (Redcar area)	15.6	20.6	5.8	14.8	-0.8
Zone 2 (Marske by the Sea area)	1.5	2.0	0.2	1.7	0.2
Zone 3 (Saltburn by the Sea area)	0.7	0.9	0.3	0.5	-0.1
Zone 4 (Loftus area)	0.7	1.0	0.1	0.9	0.2
Zone 5 (Guisborough area)	4.5	6.0	1.6	4.4	-0.1
Zone 6 (Eston area)	0.6	0.7	0.5	0.3	-0.3
Zone 7 (South Bank area)	19.5	26.1	6.7	19.4	-0.1
TOTAL	**43.0**	**57.2**	**15.2**	**42.0**	**-1.0**

Notes:

(1) We assume that all existing bulky comparison goods floorspace at the base year (2011) will achieve a real gain in sales productivity. The estimated turnover allocation is based on research by Experian (see Appendix 4E). The sales productivity gain is applied to the estimated 2011 (base year) benchmark bulky comparison of the town as set out in Table 6 (Column H).

Sources:

Colliers International and Experian - Retail Planner Briefing Note 8.1 (August 2010)

Date of Preparation: 25/08/2011

Table 13 - Calculation of Bulky Comparison Goods Floorspace Need, 2021

Zone/Town Area	Headroom Expenditure at 2021 Before Commitments (£m)	Forecast Turnover at 2021 of Commitments (£m)(1)	Headroom Expenditure at 2021 After Commitments (£m)	Adjustment for Over/Under Trading at the Base Year (£m)	Residual Headroom Expenditure at 2021 (£m)	Assumed Average Sales Density at 2021 (£ Per Sq M Net)(2)	Estimated Retail Floorspace Need (Sq M Net)	Estimated Retail Floorspace Need (Sq M Gross)(3)
	A	B	C=A-B	D	E=C+D	F	G=E/F	H=Gx100/65
	(Table 12, E)			(Table 6, I)				
WITHIN RECAR & CLEVELAND BOROUGH								
Zone 1 (Redcar area)	-0.8	0.0	-0.8	-7.7	-8.5	3,120	-2,716	-4,178
Zone 2 (Marske by the Sea area)	0.2	0.0	0.2	0.5	0.7	3,120	237	365
Zone 3 (Saltburn by the Sea area)	-0.1	0.0	-0.1	-0.6	-0.8	3,120	-241	-371
Zone 4 (Loftus area)	0.2	4.0	-3.8	0.5	-3.4	3,120	-1,080	-1,661
Zone 5 (Guisborough area)	-0.1	0.0	-0.1	-2.0	-2.1	3,120	-682	-1,050
Zone 6 (Eston area)	-0.3	0.0	-0.3	-1.4	-1.6	3,120	-528	-812
Zone 7 (South Bank area)	-0.1	0.0	-0.1	-7.3	-7.4	3,120	-2,373	-3,651
TOTAL	**-1.0**	**4.0**	**-5.0**	**-18.0**	**-23.0**	**-**	**-7,383**	**-11,359**

Notes:

(1) Schedule of commitments is set out at Appendix 5D. Sales floorspace and estimated turnover are given for each commitment.
(2) The deviation of the average sales density for converting expenditure into floorspace is set out in Section 4 in the main report.
(3) Gross floorspace is estimated from sales floorspace by applying a net to gross ratio of 65:100.

Sources:

Colliers International.

Table 14 - Bulky Comparison Goods Expenditure Pattern and Centre Turnover Estimates, 2026 (£ Million)

Retail Supply: Where the Money is Spent	Study Area										Total Expenditure Drawn from Survey Area	Estimated Inflow Expenditure from Residents(1)	Estiamted Inflow Expenditure from Tourists(1)	Total Turnover
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	A	B	C	D=A+B+C
WITHIN RECAR & CLEVELAND BOROUGH														
Zone 1 (Redcar area)	11.2	2.1	5.4	4.0	0.0	0.6	0.0	0.3	0.5	0.0	24.0	0.0	0.0	24.0
Zone 2 (Marske by the Sea area)	0.2	2.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.3	0.0	0.0	2.3
Zone 3 (Saltburn by the Sea area)	0.3	0.2	0.4	0.1	0.0	0.0	0.0	0.0	0.0	0.0	1.0	0.0	0.0	1.0
Zone 4 (Loftus area)	0.0	0.0	0.2	0.5	0.4	0.0	0.0	0.1	0.0	0.0	1.1	0.0	0.0	1.1
Zone 5 (Guisborough area)	0.0	0.0	0.6	1.1	4.0	0.6	0.0	0.4	0.3	0.0	7.0	0.0	0.0	7.0
Zone 6 (Eston area)	0.2	0.0	0.0	0.1	0.0	0.6	0.0	0.0	0.0	0.0	0.9	0.0	0.0	0.9
Zone 7 (South Bank area)	3.9	1.0	5.8	0.3	1.8	1.7	2.1	1.7	1.7	7.7	27.8	2.8	0.0	30.6
	15.9	**5.4**	**12.4**	**6.0**	**6.2**	**3.3**	**2.1**	**2.5**	**2.5**	**7.7**	**64.1**	**2.8**	**0.0**	**66.9**
OUTSIDE OF BOROUGH														
Teeside Retail Park	3.8	4.1	2.7	2.1	5.9	8.0	1.2	0.4	7.4	40.9	76.4			
Middlesbrough Town Centre	14.7	5.3	3.1	0.5	5.3	11.1	4.4	0.1	1.4	18.5	64.4			
Portrack Lane, Stockton-on-Tees	0.4	0.7	2.7	0.0	4.0	4.7	1.8	0.3	2.7	0.0	17.4			
Coulby Newham	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.9	0.7	2.7			
Stockton-on-Tees Town Centre	1.4	0.1	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	1.9			
Whitby	0.0	0.0	0.1	0.0	0.0	0.0	0.0	1.9	0.0	0.0	2.0			
All Other Centres/Stores	0.4	0.1	0.3	0.0	0.9	0.6	0.3	0.4	5.5	0.0	8.5			
	20.8	**10.2**	**9.0**	**2.5**	**16.5**	**24.4**	**7.7**	**3.1**	**19.0**	**60.1**	**173.3**			
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	**36.6**	**15.6**	**21.4**	**8.5**	**22.7**	**27.7**	**9.8**	**5.6**	**21.6**	**67.9**	**237.4**			

Notes:

For each cell, the monetry figure is derived by multiplying the 2026 available bulky comparison goods expenditure in the zone (excl. SFT) (Table 4) by the unadjusted bulky comparison goods market share of the specific centre in that zone (Table 7).

(1) Estimated by Colliers International (see Appendix 6).

Sources:

Colliers International.

Date of Preparation: 25/08/2011

Table 15 - Calculation of Potential Bulky Comparison Goods Headroom Expenditure, 2026 (£ Million)

Centre	2011 Turnover (Base Year)	2026 Turnover Potential	Turnover Allocation for Existing Retailers 2011-2026	Residual Turnover Potential at 2026	Headroom Expenditure at 2026
	A	B	C	D=B-C	E=D-A
	(Table 6, D)	(Table 14, D)			
WITHIN REDCAR AND CLEVELALND BOROUGH					
Zone 1 (Redcar area)	15.6	24.0	9.3	14.7	-0.8
Zone 2 (Marske by the Sea area)	1.5	2.3	0.4	1.9	0.4
Zone 3 (Saltburn by the Sea area)	0.7	1.0	0.5	0.5	-0.2
Zone 4 (Loftus area)	0.7	1.1	0.1	1.0	0.3
Zone 5 (Guisborough area)	4.5	7.0	2.6	4.4	-0.1
Zone 6 (Eston area)	0.6	0.9	0.8	0.1	-0.5
Zone 7 (South Bank area)	19.5	30.6	10.7	19.9	0.3
TOTAL	**43.0**	**66.9**	**24.4**	**42.5**	**-0.5**

Notes:

(1) We assume that all existing bulky comparison goods floorspace at the base year (2011) will achieve a real gain in sales productivity. The assumed turnover allocation is based on research by Experian (see Appendix 4E). The sales productivity gain is applied to the estimated 2011 (base year) benchmark bulky comparison of the town goods turnover as set out in Table 6 (Column H).

Sources:

Colliers International and Experian - Retail Planner Briefing Note 8.1 (August 2010).

Date of Preparation: 25/08/2011

Table 16 - Calculation of Bulky Comparison Goods Floorspace Need, 2026

Centre	Headroom Expenditure at 2026 Before Commitments (£m)	Forecast Turnover at 2026 of Commitments (£m)(1)	Headroom Expenditure at 2026 After Commitments (£m)	Adjustment for Over/Under Trading at the Base Year (£m)	Residual Headroom Expenditure at 2026 (£m)	Assumed Average Sales Density at 2026 (£ Per Sq M Net)(2)	Estimated Retail Floorspace Need (Sq M Net)	Estimated Retail Floorspace Need (Sq M Gross)(3)
	A	B	C=A-B	D	E=C+D	F	G=E/F	H=Gx100/90
	(Table 15, E)			(Table 6, I)				
WITHIN RECAR & CLEVELAND BOROUGH								
Zone 1 (Redcar area)	-0.8	0.0	-0.8	-7.7	-8.5	3,495	-2,438	-2,708
Zone 2 (Marske by the Sea area)	0.4	0.0	0.4	0.5	0.9	3,495	263	293
Zone 3 (Saltburn by the Sea area)	-0.2	0.0	-0.2	-0.6	-0.8	3,495	-230	-255
Zone 4 (Loftus area)	0.3	4.5	-4.2	0.5	-3.7	3,495	-1,072	-1,191
Zone 5 (Guisborough area)	-0.1	0.0	-0.1	-2.0	-2.1	3,495	-598	-665
Zone 6 (Eston area)	-0.5	0.0	-0.5	-1.4	-1.8	3,495	-518	-576
Zone 7 (South Bank area)	0.3	0.0	0.3	-7.3	-6.9	3,495	-1,987	-2,208
TOTAL	**-0.5**	**4.5**	**-5.0**	**-18.0**	**-23.0**	**-**	**-6,580**	**-7,311**

Notes:

(1) Schedule of commitments is set out at Appendix 5D. Sales floorspace and estimated turnover is given for each commitment.

(2) The deviation of the average sales density for converting expenditure into floorspace is set out in Section 4 in the main report.

(3) Gross floorspace is estimated from sales floorspace by applying a net to gross ratio of 90:100.

Sources:

Colliers International.

Date of Preparation: 25/08/2011

APPENDIX 7

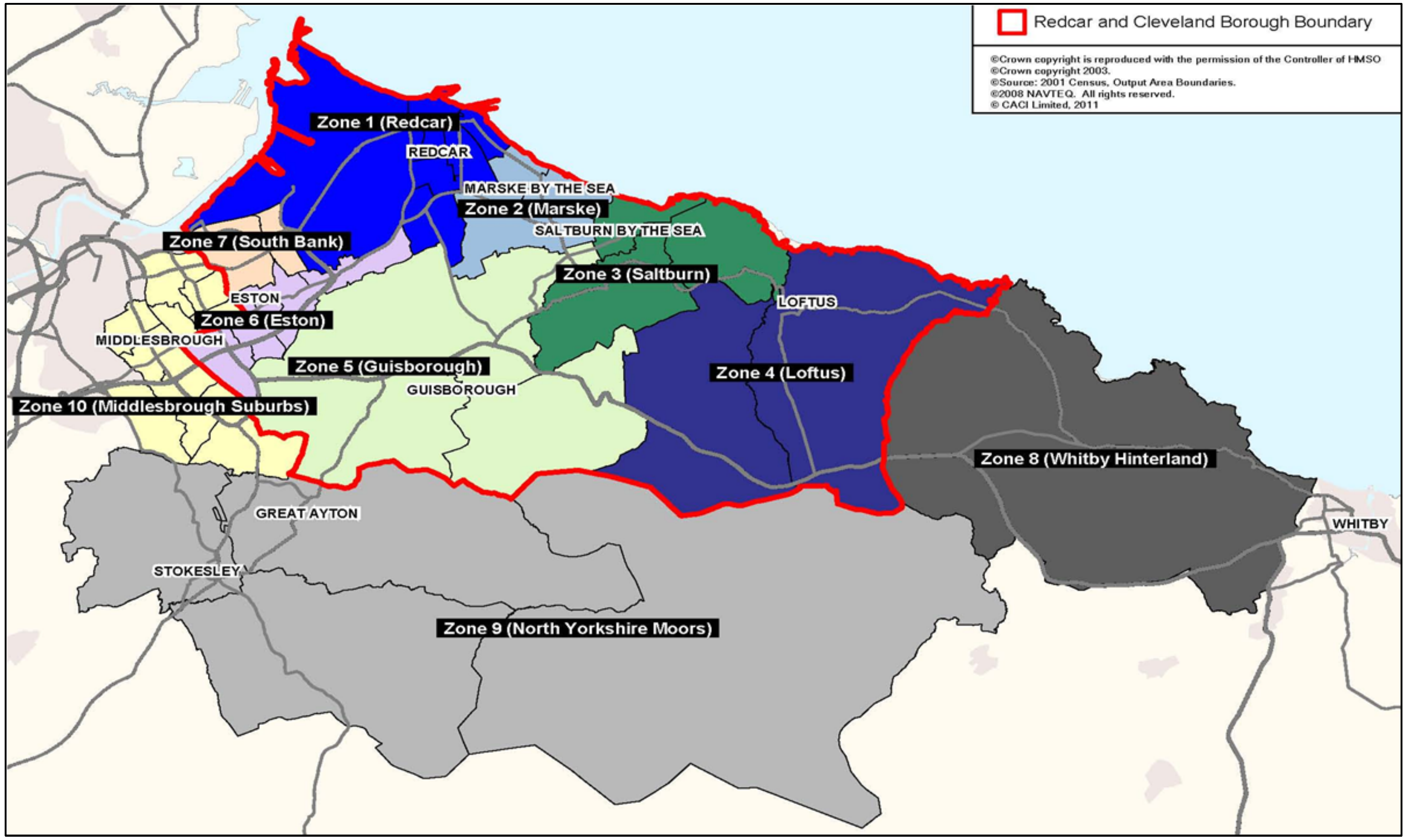
Retail Floorspace Need Assessment

(D)The Need for Additional Convenience Goods Floorspace

Colliers International: Retail Floorspace Need Assessment

Client: Redcar & Cleveland Borough Council
Project: Redcar & Cleveland Retail Study

Household Survey Area and Constituent Zones



Convenience Goods

Date of Preparation: 25/08/2011

Table 1 - Population Change by Zone

Zone	Area	2011 Population (Base Year)	Projected 2016 Population	Projection 2021 Population	Projected 2026 Population	Total Increase (2011-2026)	Percentage Increase (2011-2026)
Redcar & Cleveland Borough	**Zone 1**	36,055	36,105	36,285	36,450	395	1.1%
	Zone 2	13,345	13,365	13,435	13,490	145	1.1%
	Zone 3	20,500	20,530	20,635	20,725	225	1.1%
	Zone 4	8,805	8,820	8,865	8,900	95	1.1%
	Zone 5	19,815	19,845	19,945	20,030	215	1.1%
	Zone 6	26,970	27,010	27,145	27,265	295	1.1%
	Zone 7	12,110	12,125	12,190	12,240	130	1.1%
SUB TOTAL		**137,600**	**137,800**	**138,500**	**139,100**	**1,500**	**1.1%**
Hinterland	**Zone 8**	3,510	3,590	3,690	3,790	280	8.0%
	Zone 9	14,400	14,710	15,105	15,480	1,080	7.5%
	Zone 10	66,930	67,735	68,590	69,490	2,560	3.8%
SUB TOTAL		**84,840**	**86,035**	**87,385**	**88,760**	**3,920**	**4.6%**
TOTAL		**222,440**	**223,835**	**225,885**	**227,860**	**5,420**	**2.4%**

Notes:

Projections are ONS 2008-based sub-national population projections for local authority area applied to zones. The projection for Zone 2 (Marske) also takes into account substantial new housing planned over the period to 2026. The methodology is described at Appendix 3.

Sources:

Office for National Statistics and Redcar & Cleveland Borough Council.

Date of Preparation: 25/08/2011

Table 2 - Average Residents Expenditure Per Head on Convenience Goods by Zone (Including Expenditure By Special Forms of Trading)

Colliers INTERNATIONAL

Zone	Area	Expenditure Per Head (£)						
		2009	2011 (Base Year)	2016	2021	2026	Total Increase (2011-2026)	Percentage Increase (2011-2026)
Redcar & Cleveland Borough	**Zone 1**	1,659	1,664	1,725	1,802	1,885	221	13.3%
	Zone 2	1,796	1,801	1,867	1,951	2,040	239	13.3%
	Zone 3	1,678	1,683	1,744	1,823	1,906	223	13.3%
	Zone 4	1,647	1,652	1,712	1,789	1,871	219	13.3%
	Zone 5	1,750	1,755	1,819	1,901	1,988	233	13.3%
	Zone 6	1,716	1,721	1,784	1,864	1,949	228	13.3%
	Zone 7	1,529	1,534	1,590	1,661	1,737	203	13.3%
Hinterland	**Zone 8**	2,129	2,135	2,213	2,312	2,418	283	13.3%
	Zone 9	1,943	1,949	2,020	2,110	2,207	258	13.3%
	Zone 10	1,657	1,662	1,723	1,800	1,882	220	13.3%

Notes:

Average consumer expenditure per head on convenience goods for 2009 has been estimated by Experian for each zone. The 2009 expenditure per head figures in each zone have been projected forwards to 2011 (the base year) and the forecast years of 2016, 2021 and 2026 by using the latest available UK expenditure per head growth forecasts published by Experian (see Appendix 4C).

Sources:

Experian - bespoke data purchase and Retail Planner Briefing Note 8.1. (August 2010).

Date of Preparation: 25/08/2011

Table 3 - Average Residents Expenditure Per Head on Convenience Goods by Zone (Excluding Expenditure By Special Forms of Trading)

Zone	Area	Expenditure Per Head (£)					
		2011 (Base Year)	2016	2021	2026	Total Increase (2011-2026)	Percentage Increase (2011-2026)
Redcar & Cleveland Borough	**Zone 1**	1,597	1,642	1,712	1,785	187	11.7%
	Zone 2	1,729	1,778	1,853	1,932	203	11.7%
	Zone 3	1,616	1,661	1,731	1,805	189	11.7%
	Zone 4	1,586	1,630	1,699	1,772	186	11.7%
	Zone 5	1,685	1,732	1,806	1,883	198	11.7%
	Zone 6	1,652	1,698	1,771	1,846	194	11.7%
	Zone 7	1,472	1,513	1,578	1,645	173	11.7%
Hinterland	**Zone 8**	2,050	2,107	2,197	2,290	240	11.7%
	Zone 9	1,871	1,923	2,005	2,090	219	11.7%
	Zone 10	1,595	1,640	1,710	1,783	187	11.7%

Notes:

The expenditure per head figures in Table 2 have been discounted by 4.0% at the base year of 2011, to exclude non-store retail sales,which includes e-tailing. At 2016, 2021 and 2026, discounts of 4.8%, 5.0% and 5.3% have been assumed. (See Appendix 4D).

Sources:

Experian - Retail Planner Briefing Note 8.1 (August 2010).

Date of Preparation: 25/08/2011

Table 4 - Total Available Residents Expenditure on Convenience Goods By Zone (Excluding Expenditure By Special Forms of Trading)

Zone	Area	Total Available Expenditure (£m)					
		2011 (Base Year)	2016	2021	2026	Total Increase (2011-2026)	Percentage Increase (2011-2026)
Redcar & Cleveland Borough	**Zone 1**	57.6	59.3	62.1	65.1	7.5	12.9%
	Zone 2	23.1	23.8	24.9	26.1	3.0	12.9%
	Zone 3	33.1	34.1	35.7	37.4	4.3	12.9%
	Zone 4	14.0	14.4	15.1	15.8	1.8	12.9%
	Zone 5	33.4	34.4	36.0	37.7	4.3	12.9%
	Zone 6	44.6	45.9	48.1	50.3	5.8	12.9%
	Zone 7	17.8	18.3	19.2	20.1	2.3	12.9%
SUB TOTAL		**223.5**	**230.1**	**241.1**	**252.5**	**28.9**	**12.9%**
Hinterland	**Zone 8**	7.2	7.6	8.1	8.7	1.5	20.6%
	Zone 9	26.9	28.3	30.3	32.4	5.4	20.1%
	Zone 10	106.8	111.1	117.3	123.9	17.1	16.0%
SUB TOTAL		**140.9**	**146.9**	**155.7**	**164.9**	**24.0**	**17.0%**
TOTAL		**364.5**	**377.0**	**396.8**	**417.4**	**52.9**	**14.5%**

Notes:

Total available expenditure totals for convenience goods are calculated as follows: Population (Table 1) multiplied by consumer expenditure per head after making appropriate reductions for SFT (Table 3).

Sources:

Colliers International.

Date of Preparation: 25/08/2011

Table 5 - Convenience Goods Market Shares By Zone at the Base Year, 2011 (Column Percent)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)									
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10
WITHIN RECAR & CLEVELAND BOROUGH										
Zone 1 (Redcar area)	99.4	81.7	51.8	34.4	4.4	6.9	8.1	33.6	1.7	0.0
Zone 2 (Marske by the Sea area)	0.0	15.1	0.0	0.0	0.6	0.0	0.0	0.0	0.0	0.0
Zone 3 (Saltburn by the Sea area)	0.0	0.4	33.0	1.8	2.0	0.0	1.5	1.8	0.0	0.0
Zone 4 (Loftus area)	0.0	1.5	2.1	17.5	0.0	0.0	0.0	0.2	0.0	0.0
Zone 5 (Guisborough area)	0.6	0.2	8.8	29.1	84.8	2.5	0.4	15.3	20.9	2.5
Zone 6 (Eston area)	0.0	0.0	0.0	10.8	0.0	2.5	1.5	0.0	0.0	3.8
Zone 7 (South Bank area)	0.0	1.1	3.6	0.8	2.2	48.7	72.1	3.8	1.1	1.3
SUB TOTAL	**100.0**	**100.0**	**99.3**	**94.4**	**94.0**	**60.6**	**83.6**	**54.7**	**23.7**	**7.6**
OUTSIDE OF BOROUGH										
Morrisons, Berwick Hills Centre, Ormesby	0.0	0.0	0.7	1.1	0.7	20.9	12.3	1.3	0.0	47.7
Tesco Extra, Parkway Shoping Centre	0.0	0.0	0.0	0.8	1.8	4.4	0.8	2.1	25.5	35.7
Stokeley - Co-op	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	20.8	0.0
Morrisons, Teeside Retail Park	0.0	0.0	0.0	2.2	0.7	2.3	0.0	0.0	3.6	2.1
Asda, Portrack Lane, Stockton-on-Tees	0.0	0.0	0.0	0.9	0.0	3.1	0.5	0.0	2.9	1.0
Co-op, Whitby	0.0	0.0	0.0	0.6	0.0	2.8	0.0	18.2	0.4	1.3
All Other Centres/Stores	0.0	0.0	0.0	0.0	2.8	5.9	2.8	23.7	23.1	4.6
SUB TOTAL	**0.0**	**0.0**	**0.7**	**5.6**	**6.0**	**39.4**	**16.4**	**45.3**	**76.3**	**92.4**
TOTAL	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Notes:

The market share percentages are derived from a household telephone survey carried out in February/March, 2011. (See Appendix 2).

Sources:

Colliers International.

Date of Preparation: 25/08/2011

Table 6 - Estimated Convenience Goods Expenditure Pattern and Centre Turnover Estimates at the Base Year, 2011 (£ Million)

Retail Supply: Where the Money is Spent	Study Area										Total Expenditure Drawn from Survey Area	Estimated Inflow Expenditure from Residents(1)	Estiamted Inflow Expenditure from Tourists(1)	Total Turnover	Available Floorspace (sq.m. net)(2)	Derived Sales Density (£ per sq.m. net)	Benchmark Sales Density (£ per sq. m net)(3)	Benchmark Turnover (£m)	Estimated Extent of Any Over/Under Trading (£m)
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	A	B	C	D=A+B+C	E	F=D/E	G	H=GxE	I=D-H
WITHIN REDCAR AND CLEVELALND BOROUGH																			
Zone 1 (Redcar area)	57.2	18.9	17.2	4.8	1.5	3.1	1.4	2.4	0.5	0.0	106.9	0.0	1.1	108.0	12,240	8,826	9,140	111.9	-3.8
Zone 2 (Marske by the Sea area)	0.0	3.5	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	3.7	0.0	0.0	3.7	1,828	2,016	5,035	9.2	-5.5
Zone 3 (Saltburn by the Sea area)	0.0	0.1	10.9	0.3	0.7	0.0	0.3	0.1	0.0	0.0	12.3	0.0	0.4	12.7	2,913	4,373	6,865	20.0	-7.3
Zone 4 (Loftus area)	0.0	0.3	0.7	2.4	0.0	0.0	0.0	0.0	0.0	0.0	3.5	0.0	0.0	3.5	1,077	3,250	4,438	4.8	-1.3
Zone 5 (Guisborough area)	0.3	0.0	2.9	4.1	28.3	1.1	0.1	1.1	5.6	2.7	46.3	0.0	0.3	46.6	5,743	8,109	9,210	52.9	-6.3
Zone 6 (Eston area)	0.0	0.0	0.0	1.5	0.0	1.1	0.3	0.0	0.0	4.1	6.9	0.0	0.0	6.9	2,233	3,111	5,015	11.2	-4.3
Zone 7 (South Bank area)	0.0	0.3	1.2	0.1	0.7	21.7	12.9	0.3	0.3	1.4	38.8	0.0	0.0	38.8	2,903	13,368	10,885	31.6	7.2
SUB TOTAL	**57.6**	**23.1**	**32.9**	**13.2**	**31.4**	**27.0**	**14.9**	**3.9**	**6.4**	**8.1**	**218.5**	**0.0**	**1.8**	**220.3**	**28,937**	**-**	**-**	**241.5**	**-21.3**
OUTSIDE OF BOROUGH																			
Morrisons, Berwick Hills Centre, Ormesby	0.0	0.0	0.2	0.2	0.2	9.3	2.2	0.1	0.0	50.9	63.2								
Tesco Extra, Parkway Shoping Centre	0.0	0.0	0.0	0.1	0.6	2.0	0.1	0.2	6.9	38.1	48.0								
Stokeley - Co-op	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.6	0.0	5.6								
Morrisons, Teeside Retail Park	0.0	0.0	0.0	0.3	0.2	1.0	0.0	0.0	1.0	2.2	4.8								
Asda, Portrack Lane, Stockton-on-Tees	0.0	0.0	0.0	0.1	0.0	1.4	0.1	0.0	0.8	1.1	3.4								
Co-op, Whitby	0.0	0.0	0.0	0.1	0.0	1.2	0.0	1.3	0.1	1.4	4.1								
All Other Centres/Stores	0.0	0.0	0.0	0.0	0.9	2.6	0.5	1.7	6.2	4.9	16.9								
SUB TOTAL	**0.0**	**0.0**	**0.2**	**0.8**	**2.0**	**17.6**	**2.9**	**3.3**	**20.6**	**98.7**	**146.0**								
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	**57.6**	**23.1**	**33.1**	**14.0**	**33.4**	**44.6**	**17.8**	**7.2**	**26.9**	**106.8**	**364.5**								

Notes:

For each cell the monetory figure is dervied by multiplying the 2011 available convenience expenditure in the zone (excl SFT) (Table 4), by the survey-based convenience goods market share of that specific centre in that zone (Table 5).

(1) Estimated by Colliers International (see Appendix 6).

(2) Floorpsace estimated from a range of sources (see Appendix 5B for full details).

(3) Benchmark sales density estimated by Colliers International (see Appendix 5C for full details).

Sources:

Colliers International.

Table 7 - Unadjusted Convenience Goods Centre Market Shares By Zone (Column Percent)

Colliers INTERNATIONAL

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)									
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10
WITHIN RECAR & CLEVELAND BOROUGH										
Zone 1 (Redcar area)	99.4	81.7	51.8	34.4	4.4	6.9	8.1	33.6	1.7	0.0
Zone 2 (Marske by the Sea area)	0.0	15.1	0.0	0.0	0.6	0.0	0.0	0.0	0.0	0.0
Zone 3 (Saltburn by the Sea area)	0.0	0.4	33.0	1.8	2.0	0.0	1.5	1.8	0.0	0.0
Zone 4 (Loftus area)	0.0	1.5	2.1	17.5	0.0	0.0	0.0	0.2	0.0	0.0
Zone 5 (Guisborough area)	0.6	0.2	8.8	29.1	84.8	2.5	0.4	15.3	20.9	2.5
Zone 6 (Eston area)	0.0	0.0	0.0	10.8	0.0	2.5	1.5	0.0	0.0	3.8
Zone 7 (South Bank area)	0.0	1.1	3.6	0.8	2.2	48.7	72.1	3.8	1.1	1.3
SUB TOTAL	**100.0**	**100.0**	**99.3**	**94.4**	**94.0**	**60.6**	**83.6**	**54.7**	**23.7**	**7.6**
OUTSIDE OF BOROUGH										
Morrisons, Berwick Hills Centre, Ormesby	0.0	0.0	0.7	1.1	0.7	20.9	12.3	1.3	0.0	47.7
Tesco Extra, Parkway Shoping Centre	0.0	0.0	0.0	0.8	1.8	4.4	0.8	2.1	25.5	35.7
Stokeley - Co-op	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	20.8	0.0
Morrisons, Teeside Retail Park	0.0	0.0	0.0	2.2	0.7	2.3	0.0	0.0	3.6	2.1
Asda, Portrack Lane, Stockton-on-Tees	0.0	0.0	0.0	0.9	0.0	3.1	0.5	0.0	2.9	1.0
Co-op, Whitby	0.0	0.0	0.0	0.6	0.0	2.8	0.0	18.2	0.4	1.3
All Other Centres/Stores	0.0	0.0	0.0	0.0	2.8	5.9	2.8	23.7	23.1	4.6
SUB TOTAL	**0.0**	**0.0**	**0.7**	**5.6**	**6.0**	**39.4**	**16.4**	**45.3**	**76.3**	**92.4**
TOTAL	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Notes:

The market share percentages are the same as those set out in Table 5. Adopting the 'constant market shares' approach, we do not make any adjustments to the base year market shares determined by the household survey.

Sources:

Colliers International.

Date of Preparation: 25/08/2011

Table 8 - Convenience Goods Expenditure Pattern and Centre Turnover Estimates, 2016 (£ Million)

Retail Supply: Where the Money is Spent	Study Area										Total Expenditure Drawn from Survey Area	Estimated Inflow Expenditure from Residents(1)	Estiamted Inflow Expenditure from Tourists(1)	Total Turnover
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	A	B	C	D=A+B+C
WITHIN REDCAR AND CLEVELALND BOROUGH														
Zone 1 (Redcar area)	58.9	19.4	17.7	4.9	1.5	3.2	1.5	2.5	0.5	0.0	110.1	0.0	1.2	111.3
Zone 2 (Marske by the Sea area)	0.0	3.6	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	3.8	0.0	0.0	3.8
Zone 3 (Saltburn by the Sea area)	0.0	0.1	11.3	0.3	0.7	0.0	0.3	0.1	0.0	0.0	12.7	0.0	0.4	13.1
Zone 4 (Loftus area)	0.0	0.4	0.7	2.5	0.0	0.0	0.0	0.0	0.0	0.0	3.6	0.0	0.0	3.6
Zone 5 (Guisborough area)	0.4	0.0	3.0	4.2	29.1	1.1	0.1	1.2	5.9	2.8	47.8	0.0	0.4	48.2
Zone 6 (Eston area)	0.0	0.0	0.0	1.6	0.0	1.1	0.3	0.0	0.0	4.2	7.2	0.0	0.0	7.2
Zone 7 (South Bank area)	0.0	0.3	1.2	0.1	0.8	22.3	13.2	0.3	0.3	1.4	40.0	0.0	0.0	40.0
SUB TOTAL	**59.3**	**23.8**	**33.9**	**13.6**	**32.3**	**27.8**	**15.3**	**4.1**	**6.7**	**8.4**	**225.2**	**0.0**	**2.0**	**227.2**
OUTSIDE OF BOROUGH														
Morrisons, Berwick Hills Centre, Ormesby	0.0	0.0	0.2	0.2	0.2	9.6	2.3	0.1	0.0	53.0	65.6			
Tesco Extra, Parkway Shoping Centre	0.0	0.0	0.0	0.1	0.6	2.0	0.1	0.2	7.2	39.7	49.9			
Stokeley - Co-op	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.9	0.0	5.9			
Morrisons, Teeside Retail Park	0.0	0.0	0.0	0.3	0.2	1.1	0.0	0.0	1.0	0.0	2.6			
Asda, Portrack Lane, Stockton-on-Tees	0.0	0.0	0.0	0.1	0.0	1.4	0.1	0.0	0.8	1.1	3.6			
Co-op, Whitby	0.0	0.0	0.0	0.1	0.0	1.3	0.0	1.4	0.1	1.4	4.3			
All Other Centres/Stores	0.0	0.0	0.0	0.0	1.0	2.7	0.5	1.8	6.5	5.1	17.6			
SUB TOTAL	**0.0**	**0.0**	**0.2**	**0.8**	**2.1**	**18.1**	**3.0**	**3.4**	**21.6**	**100.3**	**149.5**			
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	**59.3**	**23.8**	**34.1**	**14.4**	**34.4**	**45.9**	**18.3**	**7.6**	**28.3**	**111.1**	**377.0**			

Notes:

For each cell, the monetry figure is derived by multiplying the 2016 available convenience goods expenditure in the zone (excl. SFT) (Table 4) by the unadjusted convenience goods market share of the specific centre in that zone (Table 7).

(1) Estimated by Colliers International (see Appendix 6).

Sources:

Colliers International.

Date of Preparation: 25/08/2011

Table 9 - Calculation of Potential Convenience Goods Headroom Expenditure, 2016 (£ Million)

Zone/Town Area	2011 Turnover (Base Year)	2016 Turnover Potential	Turnover Allocation for Existing Retailers 2011-2016 (1)	Residual Turnover Potential at 2016	Headroom Expenditure at 2016
	A	B	C	D=B-C	E=D-A
	(Table 6, D)	(Table 8, D)			
WITHIN RECAR & CLEVELAND BOROUGH					
Zone 1 (Redcar area)	108.0	111.3	1.8	109.5	1.5
Zone 2 (Marske by the Sea area)	3.7	3.8	0.1	3.6	0.0
Zone 3 (Saltburn by the Sea area)	12.7	13.1	0.3	12.8	0.0
Zone 4 (Loftus area)	3.5	3.6	0.1	3.5	0.0
Zone 5 (Guisborough area)	46.6	48.2	0.9	47.4	0.8
Zone 6 (Eston area)	6.9	7.2	0.2	7.0	0.1
Zone 7 (South Bank area)	38.8	40.0	0.5	39.5	0.7
TOTAL	**220.3**	**227.2**	**3.9**	**223.3**	**3.0**

Notes:

(1) We assume that all existing convenience goods floorspace at the base year (2011) will achieve a real gain in sales productivity. The estimated turnover allocation is based on research by Experian (see Appendix 4E). The sales productivity gain is applied to the estimated 2011 (base year) benchmark convenience of the town as set out in Table 6 (Column H).

Sources:

Colliers International and Experian - Retail Planner Briefing Note 8.1 (August 2010).

Date of Preparation: 25/08/2011

Table 10 - Calculation of Convenience Goods Floorspace Need, 2016

Zone/Town Area	Headroom Expenditure at 2016 Before Commitments (£m)	Forecast Turnover at 2016 of Commitments (£m)(1)	Headroom Expenditure at 2016 After Commitments (£m)	Adjustment for Over/Under Trading at the Base Year (£m)	Residual Headroom Expenditure at 2016 (£m)	Assumed Average Sales Density at 2016 (£ Per Sq M Net)(2)	Estimated Retail Floorspace Need (Sq M Net)	Estimated Retail Floorspace Need (Sq M Gross)(3)
	A	B	C=A-B	D	E=C+D	F	G=E/F	H=Gx100/65
	(Table 9, E)			(Table 6, I)				
WITHIN RECAR & CLEVELAND BOROUGH								
Zone 1 (Redcar area)	1.5	0.0	1.5	-3.8	-2.3	8,130	-288	-444
Zone 2 (Marske by the Sea area)	0.0	0.0	0.0	-5.5	-5.6	8,130	-684	-1,052
Zone 3 (Saltburn by the Sea area)	0.0	0.0	0.0	-7.3	-7.2	8,130	-888	-1,365
Zone 4 (Loftus area)	0.0	0.0	0.0	-1.3	-1.3	8,130	-154	-237
Zone 5 (Guisborough area)	0.8	0.0	0.8	-6.3	-5.5	8,130	-682	-1,049
Zone 6 (Eston area)	0.1	6.6	-6.5	-4.3	-10.8	8,130	-1,326	-2,040
Zone 7 (South Bank area)	0.7	39.7	-39.0	7.2	-31.8	8,130	-3,916	-6,024
TOTAL	3.0	46.3	-43.3	-21.3	-64.5	-	-7,938	-12,212

Notes:

(1) Schedule of commitments is set out at Appendix 5D. Sales floorspace and estimated turnover are given for each commitment.

(2) The deviation of the average sales density for converting expenditure into floorspace is set out in Section 4 in the main report.

(3) Gross floorspace is estimated from sales floorspace by applying a net to gross ratio of 65:100.

Sources:

Colliers International.

Table 11 - Convenience Goods Expenditure Pattern and Centre Turnover Estimates, 2021 (£ Million)

Retail Supply: Where the Money is Spent	Study Area										Total Expenditure Drawn from Survey Area	Estimated Inflow Expenditure from Residents(1)	Estiamted Inflow Expenditure from Tourists(1)	Total Turnover
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	A	B	C	D=A+B+C
WITHIN RECAR & CLEVELAND BOROUGH														
Zone 1 (Redcar area)	61.7	20.3	18.5	5.2	1.6	3.3	1.6	2.7	0.5	0.0	115.5	0.0	1.3	116.8
Zone 2 (Marske by the Sea area)	0.0	3.8	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	4.0	0.0	0.0	4.0
Zone 3 (Saltburn by the Sea area)	0.0	0.1	11.8	0.3	0.7	0.0	0.3	0.1	0.0	0.0	13.3	0.0	0.5	13.8
Zone 4 (Loftus area)	0.0	0.4	0.8	2.6	0.0	0.0	0.0	0.0	0.0	0.0	3.8	0.0	0.0	3.8
Zone 5 (Guisborough area)	0.4	0.0	3.1	4.4	30.5	1.2	0.1	1.2	6.3	2.9	50.3	0.0	0.4	50.7
Zone 6 (Eston area)	0.0	0.0	0.0	1.6	0.0	1.2	0.3	0.0	0.0	4.5	7.6	0.0	0.0	7.6
Zone 7 (South Bank area)	0.0	0.3	1.3	0.1	0.8	23.4	13.9	0.3	0.3	1.5	41.9	0.0	0.0	41.9
	62.1	24.9	35.5	14.2	33.9	29.1	16.1	4.4	7.2	8.9	236.3	0.0	2.2	238.5
OUTSIDE OF BOROUGH														
Morrisons, Berwick Hills Centre, Ormesby	0.0	0.0	0.3	0.2	0.3	10.0	2.4	0.1	0.0	55.9	69.1			
Tesco Extra, Parkway Shoping Centre	0.0	0.0	0.0	0.1	0.6	2.1	0.2	0.2	7.7	41.9	52.8			
Stokeley - Co-op	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.3	0.0	6.3			
Morrisons, Teeside Retail Park	0.0	0.0	0.0	0.3	0.3	1.1	0.0	0.0	1.1	2.5	5.2			
Asda, Portrack Lane, Stockton-on-Tees	0.0	0.0	0.0	0.1	0.0	1.5	0.1	0.0	0.9	1.2	3.8			
Co-op, Whitby	0.0	0.0	0.0	0.1	0.0	1.3	0.0	1.5	0.1	1.5	4.6			
All Other Centres/Stores	0.0	0.0	0.0	0.0	1.0	2.8	0.5	1.9	7.0	5.4	18.7			
	0.0	0.0	0.3	0.8	2.2	18.9	3.2	3.7	23.1	108.4	160.5			
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	62.1	24.9	35.7	15.1	36.0	48.1	19.2	8.1	30.3	117.3	396.8			

Notes:

For each cell, the monetry figure is derived by multiplying the 2021 available convenience goods expenditure in the zone (excl. SFT) (Table 4) by the unadjusted convenience goods market share of the specific centre in that zone (Table 7).

(1) Estimated by Colliers International (see Appendix 6).

Sources:

Colliers International.

Date of Preparation: 25/08/2011

Table 12 - Calculation of Potential Convenience Goods Headroom Expenditure, 2021 (£ Million)

Zone/Town Area	2011 Turnover (Base Year)	2021 Turnover Potential	Turnover Allocation for Existing Retailers 2011-2021(1)	Residual Turnover Potential at 2021	Headroom Expenditure at 2021
	A	B	C	D=B-C	E=D-A
	(Table 6, D)	(Table 11, D)			
WITHIN REDCAR AND CLEVELALND BOROUGH					
Zone 1 (Redcar area)	108.0	116.8	4.6	112.2	4.2
Zone 2 (Marske by the Sea area)	3.7	4.0	0.4	3.6	-0.1
Zone 3 (Saltburn by the Sea area)	12.7	13.8	0.8	13.0	0.3
Zone 4 (Loftus area)	3.5	3.8	0.2	3.6	0.1
Zone 5 (Guisborough area)	46.6	50.7	2.2	48.5	1.9
Zone 6 (Eston area)	6.9	7.6	0.5	7.1	0.2
Zone 7 (South Bank area)	38.8	41.9	1.3	40.6	1.8
TOTAL	**220.3**	**238.5**	**9.8**	**228.7**	**8.4**

Notes:

(1) We assume that all existing convenience goods floorspace at the base year (2011) will achieve a real gain in sales productivity. The estimated turnover allocation is based on research by Experian (see Appendix 4E). The sales productivity gain is applied to the estimated 2011 (base year) benchmark convenience of the town as set out in Table 6 (Column H).

Sources:

Colliers International and Experian - Retail Planner Briefing Note 8.1 (August 2010)

Date of Preparation: 25/08/2011

Table 13 - Calculation of Convenience Goods Floorspace Need, 2021

Zone/Town Area	Headroom Expenditure at 2021 Before Commitments (£m)	Forecast Turnover at 2021 of Commitments (£m)(1)	Headroom Expenditure at 2021 After Commitments (£m)	Adjustment for Over/Under Trading at the Base Year (£m)	Residual Headroom Expenditure at 2021 (£m)	Assumed Average Sales Density at 2021 (£ Per Sq M Net)(2)	Estimated Retail Floorspace Need (Sq M Net)	Estimated Retail Floorspace Need (Sq M Gross)(3)
	A	B	C=A-B	D	E=C+D	F	G=E/F	H=Gx100/65
	(Table 12, E)			(Table 6, I)				
WITHIN RECAR & CLEVELAND BOROUGH								
Zone 1 (Redcar area)	4.2	0.0	4.2	-3.8	0.3	8,325	41	64
Zone 2 (Marske by the Sea area)	-0.1	0.0	-0.1	-5.5	-5.6	8,325	-673	-1,035
Zone 3 (Saltburn by the Sea area)	0.3	0.0	0.3	-7.3	-7.0	8,325	-840	-1,293
Zone 4 (Loftus area)	0.1	0.0	0.1	-1.3	-1.2	8,325	-144	-221
Zone 5 (Guisborough area)	1.9	0.0	1.9	-6.3	-4.4	8,325	-525	-808
Zone 6 (Eston area)	0.2	6.9	-6.7	-4.3	-11.0	8,325	-1,319	-2,029
Zone 7 (South Bank area)	1.8	40.7	-38.9	7.2	-31.7	8,325	-3,805	-5,853
TOTAL	**8.4**	**47.6**	**-39.2**	**-21.3**	**-60.5**	**-**	**-7,265**	**-11,177**

Notes:

(1) Schedule of commitments is set out at Appendix 5D. Sales floorspace and estimated turnover are given for each commitment.
(2) The deviation of the average sales density for converting expenditure into floorspace is set out in Section 4 in the main report.
(3) Gross floorspace is estimated from sales floorspace by applying a net to gross ratio of 65:100.

Sources:

Colliers International.

Table 14 - Convenience Goods Expenditure Pattern and Centre Turnover Estimates, 2026 (£ Million)

Retail Supply: Where the Money is Spent	Study Area										Total Expenditure Drawn from Survey Area	Estimated Inflow Expenditure from Residents(1)	Estiamted Inflow Expenditure from Tourists(1)	Total Turnover
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	A	B	C	D=A+B+C
WITHIN RECAR & CLEVELAND BOROUGH														
Zone 1 (Redcar area)	64.7	21.3	19.4	5.4	1.7	3.5	1.6	2.9	0.6	0.0	121.0	0.0	1.4	122.4
Zone 2 (Marske by the Sea area)	0.0	3.9	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	4.2	0.0	0.0	4.2
Zone 3 (Saltburn by the Sea area)	0.0	0.1	12.3	0.3	0.8	0.0	0.3	0.2	0.0	0.0	13.9	0.0	0.5	14.4
Zone 4 (Loftus area)	0.0	0.4	0.8	2.8	0.0	0.0	0.0	0.0	0.0	0.0	4.0	0.0	0.0	4.0
Zone 5 (Guisborough area)	0.4	0.1	3.3	4.6	32.0	1.3	0.1	1.3	6.8	3.1	52.8	0.0	0.4	53.2
Zone 6 (Eston area)	0.0	0.0	0.0	1.7	0.0	1.3	0.3	0.0	0.0	4.7	8.0	0.0	0.0	8.0
Zone 7 (South Bank area)	0.0	0.3	1.3	0.1	0.8	24.5	14.5	0.3	0.4	1.6	43.9	0.0	0.0	43.9
	65.1	**26.1**	**37.1**	**14.9**	**35.4**	**30.5**	**16.8**	**4.7**	**7.7**	**9.4**	**247.8**	**0.0**	**2.3**	**250.1**
OUTSIDE OF BOROUGH														
Morrisons, Berwick Hills Centre, Ormesby	0.0	0.0	0.3	0.2	0.3	10.5	2.5	0.1	0.0	59.1	72.9			
Tesco Extra, Parkway Shoping Centre	0.0	0.0	0.0	0.1	0.7	2.2	0.2	0.2	8.3	44.2	55.8			
Stokeley - Co-op	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.7	0.0	6.7			
Morrisons, Teeside Retail Park	0.0	0.0	0.0	0.3	0.3	1.2	0.0	0.0	1.2	2.6	5.5			
Asda, Portrack Lane, Stockton-on-Tees	0.0	0.0	0.0	0.1	0.0	1.6	0.1	0.0	0.9	1.2	4.0			
Co-op, Whitby	0.0	0.0	0.0	0.1	0.0	1.4	0.0	1.6	0.1	1.6	4.8			
All Other Centres/Stores	0.0	0.0	0.0	0.0	1.1	3.0	0.6	2.1	7.5	5.7	19.8			
	0.0	**0.0**	**0.3**	**0.9**	**2.3**	**19.8**	**3.3**	**3.9**	**24.7**	**114.5**	**169.6**			
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	**65.1**	**26.1**	**37.4**	**15.8**	**37.7**	**50.3**	**20.1**	**8.7**	**32.4**	**123.9**	**417.4**			

Notes:

For each cell, the monetry figure is derived by multiplying the 2026 available convenience goods expenditure in the zone (excl. SFT) (Table 4) by the unadjusted convenience goods market share of the specific centre in that zone (Table 7).

(1) Estimated by Colliers International (see Appendix 6).

Sources:

Colliers International.

Date of Preparation: 25/08/2011

Table 15 - Calculation of Potential Convenience Goods Headroom Expenditure, 2026 (£ Million)

Centre	2011 Turnover (Base Year)	2026 Turnover Potential	Turnover Allocation for Existing Retailers 2011-2026	Residual Turnover Potential at 2026	Headroom Expenditure at 2026
	A	B	C	D=B-C	E=D-A
	(Table 6, D)	(Table 14, D)			
WITHIN REDCAR AND CLEVELALND BOROUGH					
Zone 1 (Redcar area)	108.0	122.4	7.5	114.9	6.9
Zone 2 (Marske by the Sea area)	3.7	4.2	0.6	3.5	-0.1
Zone 3 (Saltburn by the Sea area)	12.7	14.4	1.3	13.1	0.4
Zone 4 (Loftus area)	3.5	4.0	0.3	3.6	0.1
Zone 5 (Guisborough area)	46.6	53.2	3.5	49.7	3.1
Zone 6 (Eston area)	6.9	8.0	0.8	7.2	0.3
Zone 7 (South Bank area)	38.8	43.9	2.1	41.8	3.0
TOTAL	220.3	250.1	16.2	233.9	13.6

Notes:

(1) We assume that all existing convenience goods floorspace at the base year (2011) will achieve a real gain in sales productivity. The assumed turnover allocation is based on research by Experian (see Appendix 4E). The sales productivity gain is applied to the estimated 2011 (base year) benchmark convenience of the town goods turnover as set out in Table 6 (Column H).

Sources:

Colliers International and Experian - Retail Planner Briefing Note 8.1 (August 2010).

Date of Preparation: 25/08/2011

Table 16 - Calculation of Convenience Goods Floorspace Need, 2026

Centre	Headroom Expenditure at 2026 Before Commitments (£m)	Forecast Turnover at 2026 of Commitments (£m)(1)	Headroom Expenditure at 2026 After Commitments (£m)	Adjustment for Over/Under Trading at the Base Year (£m)	Residual Headroom Expenditure at 2026 (£m)	Assumed Average Sales Density at 2026 (£ Per Sq M Net)(2)	Estimated Retail Floorspace Need (Sq M Net)	Estimated Retail Floorspace Need (Sq M Gross)(3)
	A	B	C=A-B	D	E=C+D	F	G=E/F	H=Gx100/65
	(Table 15, E)			(Table 6, I)				
WITHIN RECAR & CLEVELAND BOROUGH								
Zone 1 (Redcar area)	6.9	0.0	6.9	-3.8	3.0	8,535	354	544
Zone 2 (Marske by the Sea area)	-0.1	0.0	-0.1	-5.5	-5.7	8,535	-663	-1,020
Zone 3 (Saltburn by the Sea area)	0.4	0.0	0.4	-7.3	-6.9	8,535	-807	-1,242
Zone 4 (Loftus area)	0.1	0.0	0.1	-1.3	-1.1	8,535	-134	-207
Zone 5 (Guisborough area)	3.1	0.0	3.1	-6.3	-3.2	8,535	-376	-579
Zone 6 (Eston area)	0.3	7.0	-6.7	-4.3	-11.0	8,535	-1,286	-1,979
Zone 7 (South Bank area)	3.0	41.7	-38.7	7.2	-31.5	8,535	-3,691	-5,679
TOTAL	13.6	48.7	-35.1	-21.3	-56.4	-	-6,605	-10,162

Notes:

(1) Schedule of commitments is set out at Appendix 5D. Sales floorspace and estimated turnover is given for each commitment.
(2) The deviation of the average sales density for converting expenditure into floorspace is set out in Section 4 in the main report.
(3) Gross floorspace is estimated from sales floorspace by applying a net to gross ratio of 65:100.

Sources:

Colliers International.

APPENDIX 7

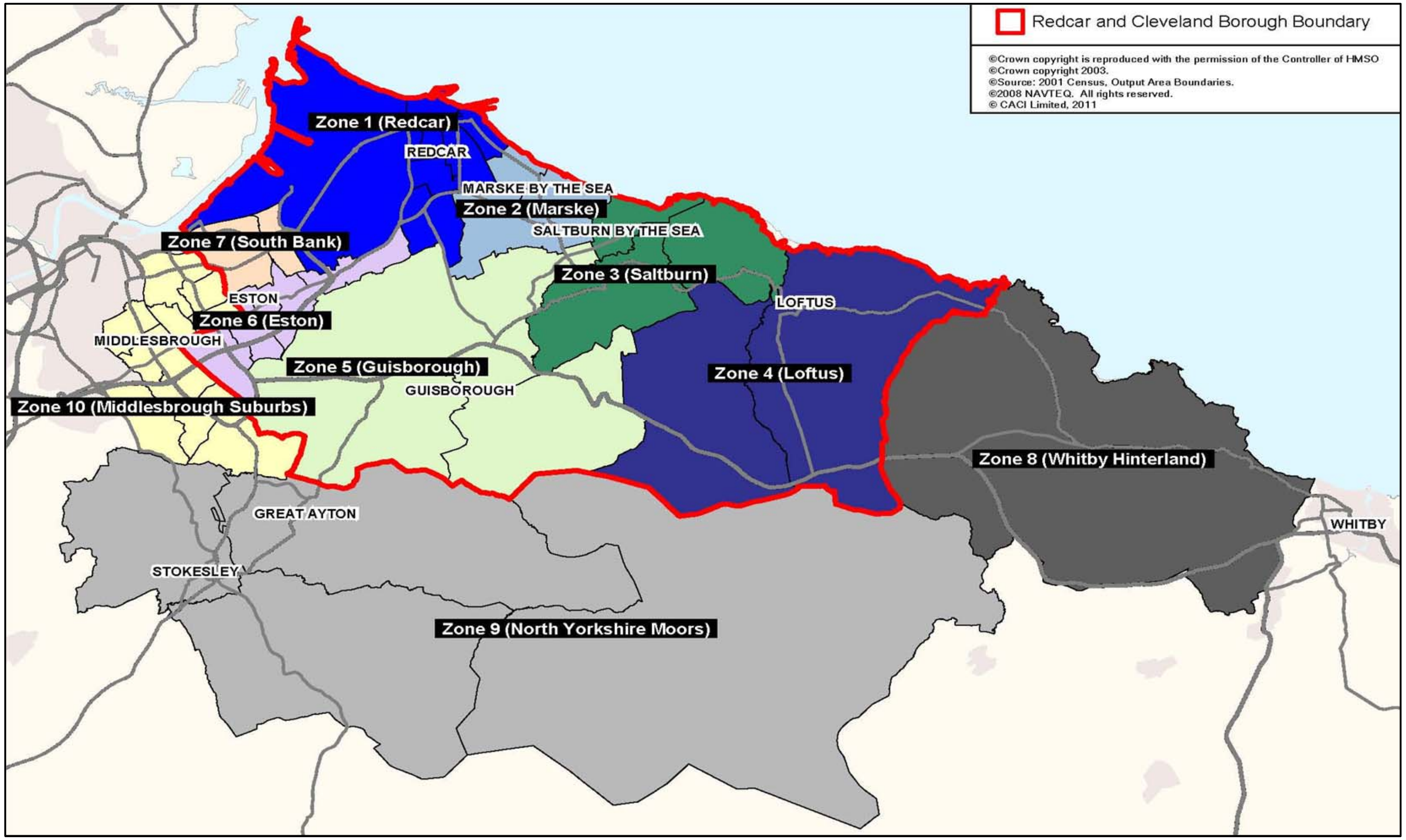
Retail Floorspace Need Assessment

(E) Alternative Scenario 1: Adjusting Upwards the Market Share of Redcar for Non-Bulky Comparison Goods (within zone 1 only)

Colliers International: Retail Floorspace Need Assessment

Client: Redcar & Cleveland Borough Council
Project: Redcar & Cleveland Retail Study

Household Survey Area and Constituent Zones



Non-Bulky Comparison Goods
Alternative Scenario 1: Adjusting Upwards the Market Share of Redcar (within Zone 1 only).

Date of Preparation: 25/08/2011

Table 1 - Population Change by Zone

Zone	Area	2011 Population (Base Year)	Projected 2016 Population	Projection 2021 Population	Projected 2026 Population	Total Increase (2011-2026)	Percentage Increase (2011-2026)
Redcar & Cleveland Borough	**Zone 1**	36,055	36,105	36,285	36,450	395	1.1%
	Zone 2	13,345	13,365	13,435	13,490	145	1.1%
	Zone 3	20,500	20,530	20,635	20,725	225	1.1%
	Zone 4	8,805	8,820	8,865	8,900	95	1.1%
	Zone 5	19,815	19,845	19,945	20,030	215	1.1%
	Zone 6	26,970	27,010	27,145	27,265	295	1.1%
	Zone 7	12,110	12,125	12,190	12,240	130	1.1%
SUB TOTAL		**137,600**	**137,800**	**138,500**	**139,100**	**1,500**	**1.1%**
Hinterland	**Zone 8**	3,510	3,590	3,690	3,790	280	8.0%
	Zone 9	14,400	14,710	15,105	15,480	1,080	7.5%
	Zone 10	66,930	67,735	68,590	69,490	2,560	3.8%
SUB TOTAL		**84,840**	**86,035**	**87,385**	**88,760**	**3,920**	**4.6%**
TOTAL		**222,440**	**223,835**	**225,885**	**227,860**	**5,420**	**2.4%**

Notes:

Projections are ONS 2008-based sub-national population projections for local authority area applied to zones. The projection for Zone 2 (Marske) also takes into account substantial new housing planned over the period to 2026. The methodology is described at Appendix 3.

Sources:

Office for National Statistics and Redcar & Cleveland Borough Council.

Date of Preparation: 25/08/2011

Table 2 - Average Residents Expenditure Per Head on Non-Bulky Comparison Goods by Zone (Including Expenditure By Special Forms of Trading)

Zone	Area	Expenditure Per Head (£)						
		2009	2011 (Base Year)	2016	2021	2026	Total Increase (2011-2026)	Percentage Increase (2011-2026)
Redcar & Cleveland Borough	**Zone 1**	1,659	1,692	1,922	2,203	2,529	836	49.4%
	Zone 2	1,796	1,832	2,081	2,384	2,737	905	49.4%
	Zone 3	1,678	1,712	1,944	2,228	2,558	846	49.4%
	Zone 4	1,647	1,680	1,908	2,187	2,510	830	49.4%
	Zone 5	1,750	1,785	2,028	2,323	2,667	882	49.4%
	Zone 6	1,716	1,750	1,988	2,278	2,616	865	49.4%
	Zone 7	1,529	1,560	1,772	2,030	2,330	771	49.4%
Hinterland	**Zone 8**	2,129	2,172	2,467	2,827	3,245	1,073	49.4%
	Zone 9	1,943	1,982	2,251	2,580	2,962	979	49.4%
	Zone 10	1,657	1,690	1,920	2,200	2,526	835	49.4%

Notes:

Average consumer expenditure per head on non-bulky comparison goods for 2009 has been estimated by Experian for each zone. The 2009 expenditure per head figures in each zone have been projected forwards to 2011 (the base year) and the forecast years of 2016, 2021 and 2026 by using the latest available UK expenditure per head growth forecasts published by Experian (see Appendix 4C).

Sources:

Experian - bespoke data purchase and Retail Planner Briefing Note 8.1. (August 2010).

Date of Preparation: 25/08/2011

Table 3 - Average Residents Expenditure Per Head on Non-Bulky Comparison Goods by Zone (Excluding Expenditure By Special Forms of Trading)

Zone	Area	Expenditure Per Head (£)					
		2011 (Base Year)	2016	2021	2026	Total Increase (2011-2026)	Percentage Increase (2011-2026)
Redcar & Cleveland Borough	**Zone 1**	1,532	1,722	1,978	2,276	744	48.6%
	Zone 2	1,658	1,865	2,141	2,464	806	48.6%
	Zone 3	1,549	1,742	2,001	2,302	753	48.6%
	Zone 4	1,520	1,710	1,964	2,259	739	48.6%
	Zone 5	1,616	1,817	2,086	2,401	785	48.6%
	Zone 6	1,584	1,781	2,046	2,354	770	48.6%
	Zone 7	1,412	1,587	1,823	2,097	686	48.6%
Hinterland	**Zone 8**	1,965	2,210	2,538	2,921	955	48.6%
	Zone 9	1,794	2,017	2,316	2,665	872	48.6%
	Zone 10	1,530	1,720	1,975	2,273	743	48.6%

Notes:

The expenditure per head figures in Table 2 have been discounted by 9.5% at the base year of 2011, to exclude non-store retail sales,which includes e-tailing. At 2016, 2021 and 2026, discounts of 10.4%, 10.2% and 10.0% have been assumed. (See Appendix 4D).

Sources:

Experian - Retail Planner Briefing Note 8.1 (August 2010).

Date of Preparation: 25/08/2011

Table 4 - Total Available Residents Expenditure on Non-Bulky Comparison Goods By Zone (Excluding Expenditure By Special Forms of Trading)

Zone	Area	Total Available Expenditure (£m)					
		2011 (Base Year)	2016	2021	2026	Total Increase (2011-2026)	Percentage Increase (2011-2026)
Redcar & Cleveland Borough	**Zone 1**	55.2	62.2	71.8	83.0	27.7	50.2%
	Zone 2	22.1	24.9	28.8	33.2	11.1	50.2%
	Zone 3	31.8	35.8	41.3	47.7	15.9	50.2%
	Zone 4	13.4	15.1	17.4	20.1	6.7	50.2%
	Zone 5	32.0	36.1	41.6	48.1	16.1	50.2%
	Zone 6	42.7	48.1	55.5	64.2	21.5	50.2%
	Zone 7	17.1	19.2	22.2	25.7	8.6	50.2%
SUB TOTAL		**214.3**	**241.4**	**278.6**	**321.9**	**107.6**	**50.2%**
Hinterland	**Zone 8**	6.9	7.9	9.4	11.1	4.2	60.4%
	Zone 9	25.8	29.7	35.0	41.3	15.4	59.7%
	Zone 10	102.4	116.5	135.5	158.0	55.6	54.3%
SUB TOTAL		**135.1**	**154.1**	**179.9**	**210.3**	**75.2**	**55.6%**
TOTAL		**349.4**	**395.5**	**458.4**	**532.2**	**182.8**	**52.3%**

Notes:

Total available expenditure totals for non-bulky comparison goods are calculated as follows: Population (Table 1) multiplied by consumer expenditure per head after making appropriate reductions for SFT (Table 3).

Sources:

Colliers International.

Date of Preparation: 25/08/2011

Table 5 - Non-Bulky Comparison Goods Market Shares By Zone at the Base Year, 2011 (Column Percent)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)									
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10
WITHIN RECAR & CLEVELAND BOROUGH										
Zone 1 (Redcar area)	33.2	9.3	19.4	32.1	10.9	6.6	10.4	31.4	2.5	0.0
Zone 2 (Marske by the Sea area)	0.5	13.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Zone 3 (Saltburn by the Sea area)	0.3	0.8	2.4	0.8	0.0	0.0	0.0	1.1	0.7	0.0
Zone 4 (Loftus area)	0.0	0.0	0.0	17.3	0.0	0.0	0.0	0.0	0.0	0.0
Zone 5 (Guisborough area)	0.0	0.0	2.7	33.1	20.8	0.0	0.0	4.8	1.3	0.0
Zone 6 (Eston area)	0.0	0.0	0.0	0.5	1.2	2.0	0.0	0.0	0.0	0.0
Zone 7 (South Bank area)	20.4	16.0	9.9	10.2	2.4	3.2	7.2	0.8	1.1	1.0
SUB TOTAL	**54.4**	**39.5**	**34.4**	**94.0**	**35.3**	**11.8**	**17.6**	**38.1**	**5.6**	**1.0**
OUTSIDE OF BOROUGH										
Middlesbrough Town Centre	29.8	36.5	19.1	1.8	46.9	78.2	77.6	32.9	50.6	84.1
Teeside Retail Park	10.5	23.2	44.7	2.7	8.8	6.6	4.2	3.7	10.9	9.2
Stokesley	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	9.3	2.1
Northallerton	0.0	0.0	0.0	0.0	1.8	1.3	0.0	0.0	5.1	0.5
Stockton-on-Tees Town Centre	3.9	0.5	0.0	0.0	0.0	0.0	0.6	0.0	0.0	0.0
Whitby	0.0	0.0	0.2	0.0	0.0	0.0	0.0	14.9	0.6	0.0
All Other Centres/Stores	1.4	0.3	1.6	1.5	7.2	2.1	0.0	10.4	17.9	3.1
SUB TOTAL	**45.6**	**60.5**	**65.6**	**6.0**	**64.7**	**88.2**	**82.4**	**61.9**	**94.4**	**99.0**
TOTAL	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Notes:

The market share percentages are derived from a household telephone survey carried out in February/March, 2011. (See Appendix 2).

Sources:

Colliers International.

Date of Preparation: 25/08/2011

Table 6 - Estimated Non-Bulky Comparison Goods Expenditure Pattern and Centre Turnover Estimates at the Base Year, 2011 (£ Million)

Colliers INTERNATIONAL

Retail Supply: Where the Money is Spent	Study Area										Total Expenditure Drawn from Survey Area	Estimated Inflow Expenditure from Residents(1)	Estiamted Inflow Expenditure from Tourists(1)	Total Turnover	Available Floorspace (sq.m. net)(2)	Derived Sales Density (£ per sq.m. net)	Benchmark Sales Density (£ per sq. m net)(3)	Benchmark Turnover (£m)	Estimated Extent of Any Over/Under Trading (£m)
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	A	B	C	D=A+B+C	E	F=D/E	G	H=GxE	I=D-H
WITHIN REDCAR AND CLEVELALND BOROUGH																			
Zone 1 (Redcar area)	18.3	2.1	6.2	4.3	3.5	2.8	1.8	2.2	0.6	0.0	41.7	0.0	5.6	47.3	12,678	3,735	3,955	50.1	-2.8
Zone 2 (Marske by the Sea area)	0.3	3.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.2	0.0	0.0	3.2	601	5,393	3,500	2.1	1.1
Zone 3 (Saltburn by the Sea area)	0.2	0.2	0.8	0.1	0.0	0.0	0.0	0.1	0.2	0.0	1.5	0.0	2.6	4.1	1,251	3,252	3,355	4.2	-0.1
Zone 4 (Loftus area)	0.0	0.0	0.0	2.3	0.0	0.0	0.0	0.0	0.0	0.0	2.3	0.0	0.0	2.3	458	5,057	3,500	1.6	0.7
Zone 5 (Guisborough area)	0.0	0.0	0.9	4.4	6.7	0.0	0.0	0.3	0.3	0.0	12.6	0.0	1.2	13.8	5,626	2,455	3,500	19.7	-5.9
Zone 6 (Eston area)	0.0	0.0	0.0	0.1	0.4	0.9	0.0	0.0	0.0	0.0	1.3	0.0	0.0	1.3	661	1,975	3,180	2.1	-0.8
Zone 7 (South Bank area)	11.3	3.5	3.1	1.4	0.8	1.4	1.2	0.1	0.3	1.0	24.0	2.4	0.0	26.4	9,202	2,874	3,585	33.0	-6.5
SUB TOTAL	**30.0**	**8.7**	**10.9**	**12.6**	**11.3**	**5.0**	**3.0**	**2.6**	**1.4**	**1.0**	**86.7**	**2.4**	**9.4**	**98.5**	**30,477**	**-**	**-**	**112.8**	**-14.3**
OUTSIDE OF BOROUGH																			
Middlesbrough Town Centre	16.5	8.1	6.1	0.2	15.0	33.4	13.3	2.3	13.1	86.1	194.0								
Teeside Retail Park	5.8	5.1	14.2	0.4	2.8	2.8	0.7	0.3	2.8	9.4	44.3								
Stokesley	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.4	2.2	4.6								
Northallerton	0.0	0.0	0.0	0.0	0.6	0.6	0.0	0.0	1.3	0.5	3.0								
Stockton-on-Tees Town Centre	2.2	0.1	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	2.4								
Whitby	0.0	0.0	0.1	0.0	0.0	0.0	0.0	1.0	0.2	0.0	1.2								
All Other Centres/Stores	0.8	0.1	0.5	0.2	2.3	0.9	0.0	0.7	4.6	3.2	13.3								
SUB TOTAL	**25.2**	**13.4**	**20.8**	**0.8**	**20.7**	**37.7**	**14.1**	**4.3**	**24.4**	**101.4**	**262.7**								
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	**55.2**	**22.1**	**31.8**	**13.4**	**32.0**	**42.7**	**17.1**	**6.9**	**25.8**	**102.4**	**349.4**								

Notes:

For each cell the monetory figure is dervied by multiplying the 2011 available non-bulky comparison expenditure in the zone (excl SFT) (Table 4), by the survey-based convenience goods market share of that specific centre in that zone (Table 5).

(1) Estimated by Colliers International (see Appendix 6).

(2) Floorpsace estimated from a range of sources (see Appendix 5B for full details).

(3) Benchmark sales density estimated by Colliers International (see Appendix 5C for full details).

Sources:

Colliers International.

Date of Preparation: 25/08/2011

Table 7 - Adjusted Non-Bulky Comparison Goods Centre Market Shares By Zone (Column Percent)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)									
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10
WITHIN RECAR & CLEVELAND BOROUGH										
Zone 1 (Redcar area)	50.0	9.3	19.4	32.1	10.9	6.6	10.4	31.4	2.5	0.0
Zone 2 (Marske by the Sea area)	0.5	13.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Zone 3 (Saltburn by the Sea area)	0.3	0.8	2.4	0.8	0.0	0.0	0.0	1.1	0.7	0.0
Zone 4 (Loftus area)	0.0	0.0	0.0	17.3	0.0	0.0	0.0	0.0	0.0	0.0
Zone 5 (Guisborough area)	0.0	0.0	2.7	33.1	20.8	0.0	0.0	4.8	1.3	0.0
Zone 6 (Eston area)	0.0	0.0	0.0	0.5	1.2	2.0	0.0	0.0	0.0	0.0
Zone 7 (South Bank area)	20.4	16.0	9.9	10.2	2.4	3.2	7.2	0.8	1.1	1.0
SUB TOTAL	**71.2**	**39.5**	**34.4**	**94.0**	**35.3**	**11.8**	**17.6**	**38.1**	**5.6**	**1.0**
OUTSIDE OF BOROUGH										
Middlesbrough Town Centre	18.8	36.5	19.1	1.8	46.9	78.2	77.6	32.9	50.6	84.1
Teeside Retail Park	6.6	23.2	44.7	2.7	8.8	6.6	4.2	3.7	10.9	9.2
Stokesley	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	9.3	2.1
Northallerton	0.0	0.0	0.0	0.0	1.8	1.3	0.0	0.0	5.1	0.5
Stockton-on-Tees Town Centre	2.5	0.5	0.0	0.0	0.0	0.0	0.6	0.0	0.0	0.0
Whitby	0.0	0.0	0.2	0.0	0.0	0.0	0.0	14.9	0.6	0.0
All Other Centres/Stores	0.9	0.3	1.6	1.5	7.2	2.1	0.0	0.4	17.9	3.1
SUB TOTAL	**28.8**	**60.5**	**65.6**	**6.0**	**64.7**	**88.2**	**82.4**	**51.9**	**94.4**	**99.0**
TOTAL	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**90.0**	**100.0**	**100.0**

Notes:

The market share percentages have been adjusted from those presented in Table 5. We have increased the market share of Redcar in zone 1 from 33.2% at the base year (2011) to 50.0% to better reflect its potential to retain locally generated expenditure. As a result, we have also reduced the leakage to Middlesbrough, Teeside Retail Park, Stockton-on-Tees and other centres to ensure all market shares in zone 1 continue to sum to 100%

Sources:

Colliers International.

Date of Preparation: 25/08/2011

Table 8 - Non-Bulky Comparison Goods Expenditure Pattern and Centre Turnover Estimates, 2016 (£ Million)

Retail Supply: Where the Money is Spent	Study Area										Total Expenditure Drawn from Survey Area	Estimated Inflow Expenditure from Residents	Estiamted Inflow Expenditure from Tourists(1)	Total Turnover
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	A	B	C	D=A+B+C
WITHIN REDCAR AND CLEVELALND BOROUGH														
Zone 1 (Redcar area)	31.1	2.3	6.9	4.8	3.9	3.2	2.0	2.5	0.7	0.0	57.5	0.0	6.6	64.1
Zone 2 (Marske by the Sea area)	0.3	3.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.7	0.0	0.0	3.7
Zone 3 (Saltburn by the Sea area)	0.2	0.2	0.9	0.1	0.0	0.0	0.0	0.1	0.2	0.0	1.7	0.0	3.0	4.7
Zone 4 (Loftus area)	0.0	0.0	0.0	2.6	0.0	0.0	0.0	0.0	0.0	0.0	2.6	0.0	0.0	2.6
Zone 5 (Guisborough area)	0.0	0.0	1.0	5.0	7.5	0.0	0.0	0.4	0.4	0.0	14.2	0.0	1.4	15.6
Zone 6 (Eston area)	0.0	0.0	0.0	0.1	0.4	1.0	0.0	0.0	0.0	0.0	1.5	0.0	0.0	1.5
Zone 7 (South Bank area)	12.7	4.0	3.5	1.5	0.9	1.5	1.4	0.1	0.3	1.2	27.1	2.8	0.0	29.9
SUB TOTAL	**44.3**	**9.8**	**12.3**	**14.2**	**12.7**	**5.7**	**3.4**	**3.0**	**1.7**	**1.2**	**108.2**	**2.8**	**11.0**	**122.0**
OUTSIDE OF BOROUGH														
Middlesbrough Town Centre	11.7	9.1	6.8	0.3	16.9	37.6	14.9	2.6	15.0	98.0	213.0			
Teeside Retail Park	4.1	5.8	16.0	0.4	3.2	3.2	0.8	0.3	3.2	10.7	47.7			
Stokesley	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.8	2.4	5.2			
Northallerton	0.0	0.0	0.0	0.0	0.6	0.6	0.0	0.0	1.5	0.0	2.8			
Stockton-on-Tees Town Centre	1.6	0.1	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	1.8			
Whitby	0.0	0.0	0.1	0.0	0.0	0.0	0.0	1.2	0.2	0.0	1.4			
All Other Centres/Stores	0.6	0.1	0.6	0.2	2.6	1.0	0.0	0.0	5.3	3.6	14.0			
SUB TOTAL	**17.9**	**15.1**	**23.5**	**0.9**	**23.3**	**42.4**	**15.9**	**4.1**	**28.0**	**114.8**	**285.9**			
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	**62.2**	**24.9**	**35.8**	**15.1**	**36.1**	**48.1**	**19.2**	**7.9**	**29.7**	**116.5**	**395.5**			

Notes:

For each cell, the monetry figure is derived by multiplying the 2016 available non-bulky comparison goods expenditure in the zone (excl. SFT) (Table 4) by the unadjusted non-bulky comparison goods market share of the specific centre in that zone (Table 7).

(1) Estimated by Colliers International (see Appendix 6).

Sources:

Colliers International.

Date of Preparation: 25/08/2011

Table 9 - Calculation of Potential Non-Bulky Comparison Goods Headroom Expenditure, 2016 (£ Million)

Zone/Town Area	2011 Turnover (Base Year)	2016 Turnover Potential	Turnover Allocation for Existing Retailers 2011-2016 (1)	Residual Turnover Potential at 2016	Headroom Expenditure at 2016
	A	B	C	D=B-C	E=D-A
	(Table 6, D)	(Table 8, D)			
WITHIN RECAR & CLEVELAND BOROUGH					
Zone 1 (Redcar area)	47.3	64.1	5.8	58.3	11.0
Zone 2 (Marske by the Sea area)	3.2	3.7	0.2	3.4	0.2
Zone 3 (Saltburn by the Sea area)	4.1	4.7	0.5	4.2	0.1
Zone 4 (Loftus area)	2.3	2.6	0.2	2.4	0.1
Zone 5 (Guisborough area)	13.8	15.6	2.3	13.3	-0.5
Zone 6 (Eston area)	1.3	1.5	0.2	1.2	-0.1
Zone 7 (South Bank area)	26.4	29.9	3.8	26.1	-0.4
TOTAL	**98.5**	**122.0**	**13.1**	**108.9**	**10.4**

Notes:

(1) We assume that all existing non-bulky comparison goods floorspace at the base year (2011) will achieve a real gain in sales productivity. The estimated turnover allocation is based on research by Experian (see Appendix 4E). The sales productivity gain is applied to the estimated 2011 (base year) benchmark non-bulky of the town as set out in Table 6 (Column H).

Sources:

Colliers International and Experian - Retail Planner Briefing Note 8.1 (August 2010).

Date of Preparation: 25/08/2011

Table 10 - Calculation of Non-Bulky Comparison Goods Floorspace Need, 2016

Zone/Town Area	Headroom Expenditure at 2016 Before Commitments (£m)	Forecast Turnover at 2016 of Commitments (£m)(1)	Headroom Expenditure at 2016 After Commitments (£m)	Adjustment for Over/Under Trading at the Base Year (£m)	Residual Headroom Expenditure at 2016 (£m)	Assumed Average Sales Density at 2016 (£ Per Sq M Net)(2)	Estimated Retail Floorspace Need (Sq M Net)	Estimated Retail Floorspace Need (Sq M Gross)(3)
	A	B	C=A-B	D	E=C+D	F	G=E/F	H=Gx100/65
	(Table 9, E)			(Table 6, I)				
WITHIN RECAR & CLEVELAND BOROUGH								
Zone 1 (Redcar area)	11.0	0.0	11.0	-2.8	8.2	4,465	1,830	2,815
Zone 2 (Marske by the Sea area)	0.2	0.0	0.2	1.1	1.3	4,465	292	449
Zone 3 (Saltburn by the Sea area)	0.1	0.0	0.1	-0.1	0.0	4,465	-5	-8
Zone 4 (Loftus area)	0.1	0.0	0.1	0.7	0.8	4,465	184	283
Zone 5 (Guisborough area)	-0.5	0.0	-0.5	-5.9	-6.4	4,465	-1,423	-2,189
Zone 6 (Eston area)	-0.1	0.0	-0.1	-0.8	-0.9	4,465	-196	-302
Zone 7 (South Bank area)	-0.4	13.8	-14.2	-6.5	-20.7	4,465	-4,640	-7,139
TOTAL	**10.4**	**13.8**	**-3.4**	**-14.3**	**-17.7**	**-**	**-3,960**	**-6,092**

Notes:

(1) Schedule of commitments is set out at Appendix 5D. Sales floorspace and estimated turnover are given for each commitment.
(2) The deviation of the average sales density for converting expenditure into floorspace is set out in Section 4 in the main report.
(3) Gross floorspace is estimated from sales floorspace by applying a net to gross ratio of 65:100.

Sources:

Colliers International.

Date of Preparation: 25/08/2011

Table 11 - Non-Bulky Comparison Goods Expenditure Pattern and Centre Turnover Estimates, 2021 (£ Million)

Retail Supply: Where the Money is Spent	Study Area										Total Expenditure Drawn from Survey Area	Estimated Inflow Expenditure from Residents	Estiamted Inflow Expenditure from Tourists(1)	Total Turnover
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	A	B	C	D=A+B+C
WITHIN RECAR & CLEVELAND BOROUGH														
Zone 1 (Redcar area)	35.9	2.7	8.0	5.6	4.5	3.7	2.3	2.9	0.9	0.0	66.5	0.0	7.9	74.4
Zone 2 (Marske by the Sea area)	0.4	3.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.2	0.0	0.0	4.2
Zone 3 (Saltburn by the Sea area)	0.2	0.2	1.0	0.1	0.0	0.0	0.0	0.1	0.2	0.0	1.9	0.0	3.6	5.5
Zone 4 (Loftus area)	0.0	0.0	0.0	3.0	0.0	0.0	0.0	0.0	0.0	0.0	3.0	0.0	0.0	3.0
Zone 5 (Guisborough area)	0.0	0.0	1.1	5.8	8.7	0.0	0.0	0.4	0.5	0.0	16.4	0.0	1.7	18.1
Zone 6 (Eston area)	0.0	0.0	0.0	0.1	0.5	1.1	0.0	0.0	0.0	0.0	1.7	0.0	0.0	1.7
Zone 7 (South Bank area)	14.6	4.6	4.1	1.8	1.0	1.8	1.6	0.1	0.4	1.4	31.3	3.1	0.0	34.4
	51.1	**11.4**	**14.2**	**16.4**	**14.7**	**6.6**	**3.9**	**3.6**	**2.0**	**1.4**	**125.1**	**3.1**	**13.2**	**141.4**
OUTSIDE OF BOROUGH														
Middlesbrough Town Centre	13.5	10.5	7.9	0.3	19.5	43.4	17.2	3.1	17.7	114.0	247.1			
Teeside Retail Park	4.7	6.7	18.5	0.5	3.7	3.7	0.9	0.3	3.8	12.5	55.2			
Stokesley	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.3	2.8	6.1			
Northallerton	0.0	0.0	0.0	0.0	0.7	0.7	0.0	0.0	1.8	0.7	3.9			
Stockton-on-Tees Town Centre	1.8	0.1	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	2.1			
Whitby	0.0	0.0	0.1	0.0	0.0	0.0	0.0	1.4	0.2	0.0	1.7			
All Other Centres/Stores	0.6	0.1	0.7	0.3	3.0	1.2	0.0	0.0	6.3	4.2	16.3			
	20.7	**17.4**	**27.1**	**1.0**	**26.9**	**49.0**	**18.3**	**4.9**	**33.0**	**134.1**	**332.4**			
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	**71.8**	**28.8**	**41.3**	**17.4**	**41.6**	**55.5**	**22.2**	**9.4**	**35.0**	**135.5**	**458.4**			

Notes:

For each cell, the monetry figure is derived by multiplying the 2021 available non-bulky comparison goods expenditure in the zone (excl. SFT) (Table 4) by the unadjusted non-bulky comparison goods market share of the specific centre in that zone (Table 7).

(1) Estimated by Colliers International (see Appendix 6).

Sources:

Colliers International.

Date of Preparation: 25/08/2011

Table 12 - Calculation of Potential Non-Bulky Comparison Goods Headroom Expenditure, 2021 (£ Million)

Zone/Town Area	2011 Turnover (Base Year)	2021 Turnover Potential	Turnover Allocation for Existing Retailers 2011-2021(1)	Residual Turnover Potential at 2021	Headroom Expenditure at 2021
	A	B	C	D=B-C	E=D-A
	(Table 6, D)	(Table 11, D)			
WITHIN REDCAR AND CLEVELALND BOROUGH					
Zone 1 (Redcar area)	47.3	74.4	12.5	61.9	14.5
Zone 2 (Marske by the Sea area)	3.2	4.2	0.5	3.7	0.4
Zone 3 (Saltburn by the Sea area)	4.1	5.5	1.0	4.5	0.4
Zone 4 (Loftus area)	2.3	3.0	0.4	2.6	0.3
Zone 5 (Guisborough area)	13.8	18.1	4.9	13.2	-0.6
Zone 6 (Eston area)	1.3	1.7	0.5	1.2	-0.1
Zone 7 (South Bank area)	26.4	34.4	8.2	26.2	-0.3
TOTAL	**98.5**	**141.4**	**28.1**	**113.2**	**14.7**

Notes:

(1) We assume that all existing non-bulky comparison goods floorspace at the base year (2011) will achieve a real gain in sales productivity. The estimated turnover allocation is based on research by Experian (see Appendix 4E). The sales productivity gain is applied to the estimated 2011 (base year) benchmark non-bulky comparison of the town as set out in Table 6 (Column H).

Sources:

Colliers International and Experian - Retail Planner Briefing Note 8.1 (August 2010)

Date of Preparation: 25/08/2011

Table 13 - Calculation of Non-Bulky Comparison Goods Floorspace Need, 2021

Zone/Town Area	Headroom Expenditure at 2021 Before Commitments (£m)	Forecast Turnover at 2021 of Commitments (£m)(1)	Headroom Expenditure at 2021 After Commitments (£m)	Adjustment for Over/Under Trading at the Base Year (£m)	Residual Headroom Expenditure at 2021 (£m)	Assumed Average Sales Density at 2021 (£ Per Sq M Net)(2)	Estimated Retail Floorspace Need (Sq M Net)	Estimated Retail Floorspace Need (Sq M Gross)(3)
	A	B	C=A-B	D	E=C+D	F	G=E/F	H=Gx100/65
	(Table 12, E)			(Table 6, I)				
WITHIN RECAR & CLEVELAND BOROUGH								
Zone 1 (Redcar area)	14.5	0.0	14.5	-2.8	11.7	4,990	2,354	3,621
Zone 2 (Marske by the Sea area)	0.4	0.0	0.4	1.1	1.6	4,990	318	489
Zone 3 (Saltburn by the Sea area)	0.4	0.0	0.4	-0.1	0.3	4,990	56	86
Zone 4 (Loftus area)	0.3	0.0	0.3	0.7	1.0	4,990	202	311
Zone 5 (Guisborough area)	-0.6	0.0	-0.6	-5.9	-6.5	4,990	-1,295	-1,992
Zone 6 (Eston area)	-0.1	0.0	-0.1	-0.8	-0.9	4,990	-186	-286
Zone 7 (South Bank area)	-0.3	15.5	-15.8	-6.5	-22.3	4,990	-4,472	-6,880
TOTAL	**14.7**	**15.5**	**-0.8**	**-14.3**	**-15.1**	**-**	**-3,023**	**-4,650**

Notes:

(1) Schedule of commitments is set out at Appendix 5D. Sales floorspace and estimated turnover are given for each commitment.
(2) The deviation of the average sales density for converting expenditure into floorspace is set out in Section 4 in the main report.
(3) Gross floorspace is estimated from sales floorspace by applying a net to gross ratio of 65:100.

Sources:

Colliers International.

Date of Preparation: 25/08/2011

Table 14 - Non-Bulky Comparison Goods Expenditure Pattern and Centre Turnover Estimates, 2026 (£ Million)

Retail Supply: Where the Money is Spent	Study Area										Total Expenditure Drawn from Survey Area	Estimated Inflow Expenditure from Residents(1)	Estiamted Inflow Expenditure from Tourists(1)	Total Turnover
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	A	B	C	D=A+B+C
WITHIN RECAR & CLEVELAND BOROUGH														
Zone 1 (Redcar area)	41.5	3.1	9.3	6.5	5.2	4.2	2.7	3.5	1.0	0.0	76.9	0.0	9.3	86.2
Zone 2 (Marske by the Sea area)	0.4	4.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.9	0.0	0.0	4.9
Zone 3 (Saltburn by the Sea area)	0.2	0.3	1.1	0.2	0.0	0.0	0.0	0.1	0.3	0.0	2.2	0.0	4.3	6.5
Zone 4 (Loftus area)	0.0	0.0	0.0	3.5	0.0	0.0	0.0	0.0	0.0	0.0	3.5	0.0	0.0	3.5
Zone 5 (Guisborough area)	0.0	0.0	1.3	6.7	10.0	0.0	0.0	0.5	0.5	0.0	19.0	0.0	2.0	21.0
Zone 6 (Eston area)	0.0	0.0	0.0	0.1	0.6	1.3	0.0	0.0	0.0	0.0	2.0	0.0	0.0	2.0
Zone 7 (South Bank area)	16.9	5.3	4.7	2.1	1.2	2.1	1.8	0.1	0.5	1.6	36.2	3.6	0.0	39.8
	59.1	**13.1**	**16.4**	**18.9**	**17.0**	**7.6**	**4.5**	**4.2**	**2.3**	**1.6**	**144.7**	**3.6**	**15.6**	**163.9**
OUTSIDE OF BOROUGH														
Middlesbrough Town Centre	15.6	12.1	9.1	0.4	22.6	50.2	19.9	3.6	20.9	132.8	287.2			
Teeside Retail Park	5.5	7.7	21.3	0.5	4.2	4.2	1.1	0.4	4.5	14.5	64.0			
Stokesley	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.8	3.3	7.2			
Northallerton	0.0	0.0	0.0	0.0	0.9	0.8	0.0	0.0	2.1	0.8	4.6			
Stockton-on-Tees Town Centre	2.1	0.2	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	2.4			
Whitby	0.0	0.0	0.1	0.0	0.0	0.0	0.0	1.6	0.2	0.0	2.0			
All Other Centres/Stores	0.7	0.1	0.8	0.3	3.5	1.3	0.0	0.0	7.4	4.9	19.0			
	23.9	**20.1**	**31.3**	**1.2**	**31.1**	**56.6**	**21.2**	**5.7**	**38.9**	**156.4**	**386.4**			
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	**83.0**	**33.2**	**47.7**	**20.1**	**48.1**	**64.2**	**25.7**	**11.1**	**41.3**	**158.0**	**532.2**			

Notes:

For each cell, the monetry figure is derived by multiplying the 2026 available non-bulky comparison goods expenditure in the zone (excl. SFT) (Table 4) by the unadjusted non-bulky comparison goods market share of the specific centre in that zone (Table 7).
(1) Estimated by Colliers International (see Appendix 6).

Sources:

Colliers International.

Date of Preparation: 25/08/2011

Table 15 - Calculation of Potential Non-Bulky Comparison Goods Headroom Expenditure, 2026 (£ Million)

Centre	2011 Turnover (Base Year)	2026 Turnover Potential	Turnover Allocation for Existing Retailers 2011-2026	Residual Turnover Potential at 2026	Headroom Expenditure at 2026
	A	B	C	D=B-C	E=D-A
	(Table 6, D)	(Table 14, D)			
WITHIN REDCAR AND CLEVELALND BOROUGH					
Zone 1 (Redcar area)	47.3	86.2	20.0	66.2	18.8
Zone 2 (Marske by the Sea area)	3.2	4.9	0.8	4.0	0.8
Zone 3 (Saltburn by the Sea area)	4.1	6.5	1.7	4.9	0.8
Zone 4 (Loftus area)	2.3	3.5	0.6	2.8	0.5
Zone 5 (Guisborough area)	13.8	21.0	7.9	13.1	-0.7
Zone 6 (Eston area)	1.3	2.0	0.8	1.1	-0.2
Zone 7 (South Bank area)	26.4	39.8	13.2	26.6	0.2
TOTAL	**98.5**	**163.9**	**45.1**	**118.8**	**20.2**

Notes:

(1) We assume that all existing non-bulky comparison goods floorspace at the base year (2011) will achieve a real gain in sales productivity. The assumed turnover allocation is based on research by Experian (see Appendix 4E). The sales productivity gain is applied to the estimated 2011 (base year) benchmark convenience of the town goods turnover as set out in Table 6 (Column H).

Sources:

Colliers International and Experian - Retail Planner Briefing Note 8.1 (August 2010).

Date of Preparation: 25/08/2011

Table 16 - Calculation of Non-Bulky Comparison Goods Floorspace Need, 2026

Centre	Headroom Expenditure at 2026 Before Commitments (£m)	Forecast Turnover at 2026 of Commitments (£m)(1)	Headroom Expenditure at 2026 After Commitments (£m)	Adjustment for Over/Under Trading at the Base Year (£m)	Residual Headroom Expenditure at 2026 (£m)	Assumed Average Sales Density at 2026 (£ Per Sq M Net)(2)	Estimated Retail Floorspace Need (Sq M Net)	Estimated Retail Floorspace Need (Sq M Gross)(3)
	A	B	C=A-B	D	E=C+D	F	G=E/F	H=Gx100/65
	(Table 15, E)			(Table 6, I)				
WITHIN RECAR & CLEVELAND BOROUGH								
Zone 1 (Redcar area)	18.8	0.0	18.8	-2.8	16.1	5,595	2,869	4,414
Zone 2 (Marske by the Sea area)	0.8	0.0	0.8	1.1	1.9	5,595	344	529
Zone 3 (Saltburn by the Sea area)	0.8	0.0	0.8	-0.1	0.7	5,595	117	181
Zone 4 (Loftus area)	0.5	0.0	0.5	0.7	1.2	5,595	221	340
Zone 5 (Guisborough area)	-0.7	0.0	-0.7	-5.9	-6.5	5,595	-1,170	-1,800
Zone 6 (Eston area)	-0.2	0.0	-0.2	-0.8	-1.0	5,595	-175	-270
Zone 7 (South Bank area)	0.2	17.3	-17.1	-6.5	-23.7	5,595	-4,232	-6,511
TOTAL	**20.2**	**17.3**	**2.9**	**-14.3**	**-11.3**	**-**	**-2,027**	**-3,118**

Notes:

(1) Schedule of commitments is set out at Appendix 5D. Sales floorspace and estimated turnover is given for each commitment.
(2) The deviation of the average sales density for converting expenditure into floorspace is set out in Section 4 in the main report.
(3) Gross floorspace is estimated from sales floorspace by applying a net to gross ratio of 65:100.

Sources:

Colliers International.

APPENDIX 7

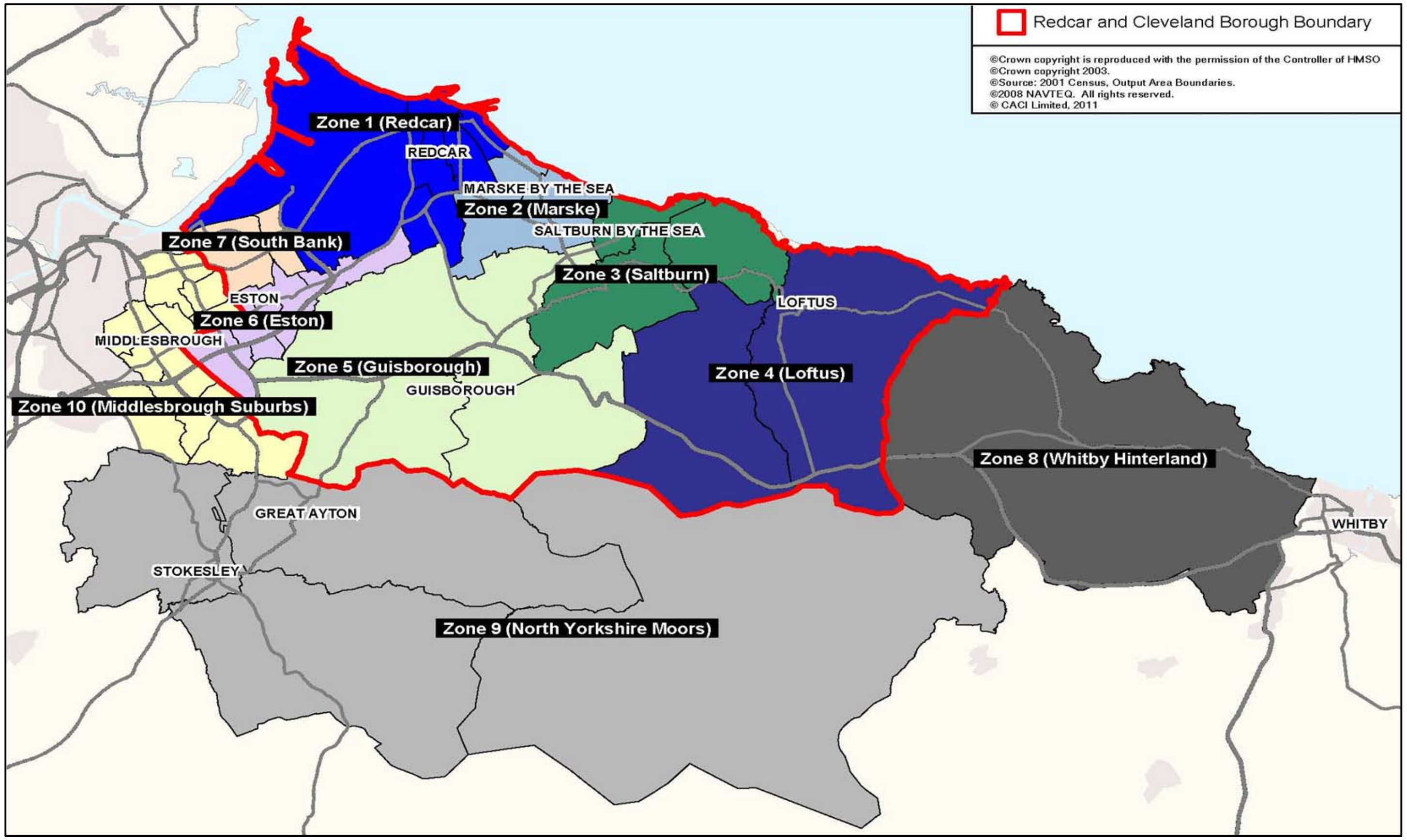
Retail Floorspace Need Assessment

(F) Alternative Scenario 2: Adjusting the Market Shares for Convenience Goods to Take into Account the Potential to Redistribute Expenditure within the Borough

Colliers International: Retail Floorspace Need Assessment

Client: Redcar & Cleveland Borough Council
Project: Redcar & Cleveland Retail Study

Household Survey Area and Constituent Zones



Convenience Goods

Alternative Scenario 2: Adjusting the Market Shares for Convenience Goods to Take into Account the Potential to Redistribute Expenditure within the Borough

Date of Preparation: 25/08/2011

Table 1 - Population Change by Zone

Zone	Area	2011 Population (Base Year)	Projected 2016 Population	Projection 2021 Population	Projected 2026 Population	Total Increase (2011-2026)	Percentage Increase (2011-2026)
Redcar & Cleveland Borough	**Zone 1**	36,055	36,105	36,285	36,450	395	1.1%
	Zone 2	13,345	13,365	13,435	13,490	145	1.1%
	Zone 3	20,500	20,530	20,635	20,725	225	1.1%
	Zone 4	8,805	8,820	8,865	8,900	95	1.1%
	Zone 5	19,815	19,845	19,945	20,030	215	1.1%
	Zone 6	26,970	27,010	27,145	27,265	295	1.1%
	Zone 7	12,110	12,125	12,190	12,240	130	1.1%
SUB TOTAL		**137,600**	**137,800**	**138,500**	**139,100**	**1,500**	**1.1%**
Hinterland	**Zone 8**	3,510	3,590	3,690	3,790	280	8.0%
	Zone 9	14,400	14,710	15,105	15,480	1,080	7.5%
	Zone 10	66,930	67,735	68,590	69,490	2,560	3.8%
SUB TOTAL		**84,840**	**86,035**	**87,385**	**88,760**	**3,920**	**4.6%**
TOTAL		**222,440**	**223,835**	**225,885**	**227,860**	**5,420**	**2.4%**

Notes:

Projections are ONS 2008-based sub-national population projections for local authority area applied to zones. The projection for Zone 2 (Marske) also takes into account substantial new housing planned over the period to 2026. The methodology is described at Appendix 3.

Sources:

Office for National Statistics and Redcar & Cleveland Borough Council.

Date of Preparation: 25/08/2011

Table 2 - Average Residents Expenditure Per Head on Convenience Goods by Zone (Including Expenditure By Special Forms of Trading)

Zone	Area	Expenditure Per Head (£)						
		2009	2011 (Base Year)	2016	2021	2026	Total Increase (2011-2026)	Percentage Increase (2011-2026)
Redcar & Cleveland Borough	**Zone 1**	1,659	1,664	1,725	1,802	1,885	221	13.3%
	Zone 2	1,796	1,801	1,867	1,951	2,040	239	13.3%
	Zone 3	1,678	1,683	1,744	1,823	1,906	223	13.3%
	Zone 4	1,647	1,652	1,712	1,789	1,871	219	13.3%
	Zone 5	1,750	1,755	1,819	1,901	1,988	233	13.3%
	Zone 6	1,716	1,721	1,784	1,864	1,949	228	13.3%
	Zone 7	1,529	1,534	1,590	1,661	1,737	203	13.3%
Hinterland	**Zone 8**	2,129	2,135	2,213	2,312	2,418	283	13.3%
	Zone 9	1,943	1,949	2,020	2,110	2,207	258	13.3%
	Zone 10	1,657	1,662	1,723	1,800	1,882	220	13.3%

Notes:

Average consumer expenditure per head on convenience goods for 2009 has been estimated by Experian for each zone. The 2009 expenditure per head figures in each zone have been projected forwards to 2011 (the base year) and the forecast years of 2016, 2021 and 2026 by using the latest available UK expenditure per head growth forecasts published by Experian (see Appendix 4C).

Sources:

Experian - bespoke data purchase and Retail Planner Briefing Note 8.1. (August 2010).

Table 3 - Average Residents Expenditure Per Head on Convenience Goods by Zone (Excluding Expenditure By Special Forms of Trading)

Zone	Area	Expenditure Per Head (£)					
		2011 (Base Year)	2016	2021	2026	Total Increase (2011-2026)	Percentage Increase (2011-2026)
Redcar & Cleveland Borough	**Zone 1**	1,597	1,642	1,712	1,785	187	11.7%
	Zone 2	1,729	1,778	1,853	1,932	203	11.7%
	Zone 3	1,616	1,661	1,731	1,805	189	11.7%
	Zone 4	1,586	1,630	1,699	1,772	186	11.7%
	Zone 5	1,685	1,732	1,806	1,883	198	11.7%
	Zone 6	1,652	1,698	1,771	1,846	194	11.7%
	Zone 7	1,472	1,513	1,578	1,645	173	11.7%
Hinterland	**Zone 8**	2,050	2,107	2,197	2,290	240	11.7%
	Zone 9	1,871	1,923	2,005	2,090	219	11.7%
	Zone 10	1,595	1,640	1,710	1,783	187	11.7%

Notes:

The expenditure per head figures in Table 2 have been discounted by 4.0% at the base year of 2011, to exclude non-store retail sales,which includes e-tailing. At 2016, 2021 and 2026, discounts of 4.8%, 5.0% and 5.3% have been assumed. (See Appendix 4D).

Sources:

Experian - Retail Planner Briefing Note 8.1 (August 2010).

Date of Preparation: 25/08/2011

Table 4 - Total Available Residents Expenditure on Convenience Goods By Zone (Excluding Expenditure By Special Forms of Trading)

Zone	Area	Total Available Expenditure (£m)					
		2011 (Base Year)	2016	2021	2026	Total Increase (2011-2026)	Percentage Increase (2011-2026)
Redcar & Cleveland Borough	**Zone 1**	57.6	59.3	62.1	65.1	7.5	12.9%
	Zone 2	23.1	23.8	24.9	26.1	3.0	12.9%
	Zone 3	33.1	34.1	35.7	37.4	4.3	12.9%
	Zone 4	14.0	14.4	15.1	15.8	1.8	12.9%
	Zone 5	33.4	34.4	36.0	37.7	4.3	12.9%
	Zone 6	44.6	45.9	48.1	50.3	5.8	12.9%
	Zone 7	17.8	18.3	19.2	20.1	2.3	12.9%
SUB TOTAL		**223.5**	**230.1**	**241.1**	**252.5**	**28.9**	**12.9%**
Hinterland	**Zone 8**	7.2	7.6	8.1	8.7	1.5	20.6%
	Zone 9	26.9	28.3	30.3	32.4	5.4	20.1%
	Zone 10	106.8	111.1	117.3	123.9	17.1	16.0%
SUB TOTAL		**140.9**	**146.9**	**155.7**	**164.9**	**24.0**	**17.0%**
TOTAL		**364.5**	**377.0**	**396.8**	**417.4**	**52.9**	**14.5%**

Notes:

Total available expenditure totals for convenience goods are calculated as follows: Population (Table 1) multiplied by consumer expenditure per head after making appropriate reductions for SFT (Table 3).

Sources:

Colliers International.

Date of Preparation: 25/08/2011

Table 5 - Convenience Goods Market Shares By Zone at the Base Year, 2011 (Column Percent)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)									
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10
WITHIN RECAR & CLEVELAND BOROUGH										
Zone 1 (Redcar area)	99.4	81.7	51.8	34.4	4.4	6.9	8.1	33.6	1.7	0.0
Zone 2 (Marske by the Sea area)	0.0	15.1	0.0	0.0	0.6	0.0	0.0	0.0	0.0	0.0
Zone 3 (Saltburn by the Sea area)	0.0	0.4	33.0	1.8	2.0	0.0	1.5	1.8	0.0	0.0
Zone 4 (Loftus area)	0.0	1.5	2.1	17.5	0.0	0.0	0.0	0.2	0.0	0.0
Zone 5 (Guisborough area)	0.6	0.2	8.8	29.1	84.8	2.5	0.4	15.3	20.9	2.5
Zone 6 (Eston area)	0.0	0.0	0.0	10.8	0.0	2.5	1.5	0.0	0.0	3.8
Zone 7 (South Bank area)	0.0	1.1	3.6	0.8	2.2	48.7	72.1	3.8	1.1	1.3
SUB TOTAL	**100.0**	**100.0**	**99.3**	**94.4**	**94.0**	**60.6**	**83.6**	**54.7**	**23.7**	**7.6**
OUTSIDE OF BOROUGH										
Morrisons, Berwick Hills Centre, Ormesby	0.0	0.0	0.7	1.1	0.7	20.9	12.3	1.3	0.0	47.7
Tesco Extra, Parkway Shoping Centre	0.0	0.0	0.0	0.8	1.8	4.4	0.8	2.1	25.5	35.7
Stokeley - Co-op	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	20.8	0.0
Morrisons, Teeside Retail Park	0.0	0.0	0.0	2.2	0.7	2.3	0.0	0.0	3.6	2.1
Asda, Portrack Lane, Stockton-on-Tees	0.0	0.0	0.0	0.9	0.0	3.1	0.5	0.0	2.9	1.0
Co-op, Whitby	0.0	0.0	0.0	0.6	0.0	2.8	0.0	18.2	0.4	1.3
All Other Centres/Stores	0.0	0.0	0.0	0.0	2.8	5.9	2.8	23.7	23.1	4.6
SUB TOTAL	**0.0**	**0.0**	**0.7**	**5.6**	**6.0**	**39.4**	**16.4**	**45.3**	**76.3**	**92.4**
TOTAL	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Notes:

The market share percentages are derived from a household telephone survey carried out in February/March, 2011. (See Appendix 2).

Sources:

Colliers International.

Date of Preparation: 25/08/2011

Table 6 - Estimated Convenience Goods Expenditure Pattern and Centre Turnover Estimates at the Base Year, 2011 (£ Million)

Retail Supply: Where the Money is Spent	Study Area										Total Expenditure Drawn from Survey Area	Estimated Inflow Expenditure from Residents(1)	Estiamted Inflow Expenditure from Tourists(1)	Total Turnover	Available Floorspace (sq.m. net)(2)	Derived Sales Density (£ per sq.m. net)	Benchmark Sales Density (£ per sq. m net)(3)	Benchmark Turnover (£m)	Estimated Extent of Any Over/Under Trading (£m)
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	A	B	C	D=A+B+C	E	F=D/E	G	H=GxE	I=D-H
WITHIN REDCAR AND CLEVELALND BOROUGH																			
Zone 1 (Redcar area)	57.2	18.9	17.2	4.8	1.5	3.1	1.4	2.4	0.5	0.0	106.9	0.0	1.1	108.0	12,240	8,826	9,140	111.9	-3.8
Zone 2 (Marske by the Sea area)	0.0	3.5	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	3.7	0.0	0.0	3.7	1,828	2,016	5,035	9.2	-5.5
Zone 3 (Saltburn by the Sea area)	0.0	0.1	10.9	0.3	0.7	0.0	0.3	0.1	0.0	0.0	12.3	0.0	0.4	12.7	2,913	4,373	6,865	20.0	-7.3
Zone 4 (Loftus area)	0.0	0.3	0.7	2.4	0.0	0.0	0.0	0.0	0.0	0.0	3.5	0.0	0.0	3.5	1,077	3,250	4,438	4.8	-1.3
Zone 5 (Guisborough area)	0.3	0.0	2.9	4.1	28.3	1.1	0.1	1.1	5.6	2.7	46.3	0.0	0.3	46.6	5,743	8,109	9,210	52.9	-6.3
Zone 6 (Eston area)	0.0	0.0	0.0	1.5	0.0	1.1	0.3	0.0	0.0	4.1	6.9	0.0	0.0	6.9	2,233	3,111	5,015	11.2	-4.3
Zone 7 (South Bank area)	0.0	0.3	1.2	0.1	0.7	21.7	12.9	0.3	0.3	1.4	38.8	0.0	0.0	38.8	2,903	13,368	10,885	31.6	7.2
SUB TOTAL	**57.6**	**23.1**	**32.9**	**13.2**	**31.4**	**27.0**	**14.9**	**3.9**	**6.4**	**8.1**	**218.5**	**0.0**	**1.8**	**220.3**	**28,937**	**-**	**-**	**241.5**	**-21.3**
OUTSIDE OF BOROUGH																			
Morrisons, Berwick Hills Centre, Ormesby	0.0	0.0	0.2	0.2	0.2	9.3	2.2	0.1	0.0	50.9	63.2								
Tesco Extra, Parkway Shoping Centre	0.0	0.0	0.0	0.1	0.6	2.0	0.1	0.2	6.9	38.1	48.0								
Stokeley - Co-op	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.6	0.0	5.6								
Morrisons, Teeside Retail Park	0.0	0.0	0.0	0.3	0.2	1.0	0.0	0.0	1.0	2.2	4.8								
Asda, Portrack Lane, Stockton-on-Tees	0.0	0.0	0.0	0.1	0.0	1.4	0.1	0.0	0.8	1.1	3.4								
Co-op, Whitby	0.0	0.0	0.0	0.1	0.0	1.2	0.0	1.3	0.1	1.4	4.1								
All Other Centres/Stores	0.0	0.0	0.0	0.0	0.9	2.6	0.5	1.7	6.2	4.9	16.9								
SUB TOTAL	**0.0**	**0.0**	**0.2**	**0.8**	**2.0**	**17.6**	**2.9**	**3.3**	**20.6**	**98.7**	**146.0**								
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	**57.6**	**23.1**	**33.1**	**14.0**	**33.4**	**44.6**	**17.8**	**7.2**	**26.9**	**106.8**	**364.5**								

Notes:

For each cell the monetory figure is dervied by multiplying the 2011 available convenience expenditure in the zone (excl SFT) (Table 4), by the survey-based convenience goods market share of that specific centre in that zone (Table 5).

(1) Estimated by Colliers International (see Appendix 6).

(2) Floorpsace estimated from a range of sources (see Appendix 5B for full details).

(3) Benchmark sales density estimated by Colliers International (see Appendix 5C for full details).

Sources:

Colliers International.

Table 7 - Adjusted Convenience Goods Centre Market Shares By Zone (Column Percent)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)									
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10
WITHIN RECAR & CLEVELAND BOROUGH										
Zone 1 (Redcar area)	99.4	81.7	26.9	21.0	4.4	3.9	6.0	20.0	1.7	0.0
Zone 2 (Marske by the Sea area)	0.0	15.1	0.0	0.0	0.6	0.0	0.0	0.0	0.0	0.0
Zone 3 (Saltburn by the Sea area)	0.0	0.4	65.0	40.0	2.0	0.0	1.5	25.0	0.0	0.0
Zone 4 (Loftus area)	0.0	1.5	2.1	15.5	0.0	0.0	0.0	0.2	0.0	0.0
Zone 5 (Guisborough area)	0.6	0.2	4.5	19.0	84.8	1.5	0.4	13.0	20.9	2.5
Zone 6 (Eston area)	0.0	0.0	0.0	4.0	0.0	2.5	1.5	0.0	0.0	3.8
Zone 7 (South Bank area)	0.0	1.1	1.5	0.5	2.2	70.0	85.0	3.8	1.1	20.0
SUB TOTAL	**100.0**	**100.0**	**100.0**	**100.0**	**94.0**	**77.9**	**94.4**	**62.0**	**23.7**	**26.3**
OUTSIDE OF BOROUGH										
Morrisons, Berwick Hills Centre, Ormesby	0.0	0.0	0.0	0.0	0.7	10.9	4.6	1.3	0.0	38.6
Tesco Extra, Parkway Shoping Centre	0.0	0.0	0.0	0.0	1.8	2.0	0.0	2.1	25.5	29.7
Stokeley - Co-op	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	20.8	0.0
Morrisons, Teeside Retail Park	0.0	0.0	0.0	0.0	0.7	1.8	0.0	0.0	3.6	1.5
Asda, Portrack Lane, Stockton-on-Tees	0.0	0.0	0.0	0.0	0.0	2.6	0.0	0.0	2.9	0.5
Co-op, Whitby	0.0	0.0	0.0	0.0	0.0	2.3	0.0	15.2	0.4	0.8
All Other Centres/Stores	0.0	0.0	0.0	0.0	2.8	2.5	1.0	19.4	23.1	2.6
SUB TOTAL	**0.0**	**0.0**	**0.0**	**0.0**	**6.0**	**22.1**	**5.6**	**38.0**	**76.3**	**73.7**
TOTAL	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Notes:

The market share percentages have been adjusted from those presented in Table 5 to take into account the potential that exists in zones 3 (Saltburn) and 7 (South Bank) for additional large food stores, which would reduce the considerable leakage that currently exists to neighbouring zones and/or outside of the Borough.

Sources:

Colliers International.

Date of Preparation: 25/08/2011

Table 8 - Convenience Goods Expenditure Pattern and Centre Turnover Estimates, 2016 (£ Million)

Retail Supply: Where the Money is Spent	Study Area										Total Expenditure Drawn from Survey Area	Estimated Inflow Expenditure from Residents(1)	Estiamted Inflow Expenditure from Tourists(1)	Total Turnover
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	A	B	C	D=A+B+C
WITHIN REDCAR AND CLEVELALND BOROUGH														
Zone 1 (Redcar area)	58.9	19.4	9.2	3.0	1.5	1.8	1.1	1.5	0.5	0.0	96.9	0.0	1.2	98.1
Zone 2 (Marske by the Sea area)	0.0	3.6	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	3.8	0.0	0.0	3.8
Zone 3 (Saltburn by the Sea area)	0.0	0.1	22.2	5.8	0.7	0.0	0.3	1.9	0.0	0.0	30.9	0.0	0.4	31.3
Zone 4 (Loftus area)	0.0	0.4	0.7	2.2	0.0	0.0	0.0	0.0	0.0	0.0	3.3	0.0	0.0	3.3
Zone 5 (Guisborough area)	0.4	0.0	1.5	2.7	29.1	0.7	0.1	1.0	5.9	2.8	44.3	0.0	0.4	44.7
Zone 6 (Eston area)	0.0	0.0	0.0	0.6	0.0	1.1	0.3	0.0	0.0	4.2	6.2	0.0	0.0	6.2
Zone 7 (South Bank area)	0.0	0.3	0.5	0.1	0.8	32.1	15.6	0.3	0.3	22.2	72.1	0.0	0.0	72.1
SUB TOTAL	**59.3**	**23.8**	**34.1**	**14.4**	**32.3**	**35.7**	**17.3**	**4.7**	**6.7**	**29.2**	**257.5**	**0.0**	**2.0**	**259.5**
OUTSIDE OF BOROUGH														
Morrisons, Berwick Hills Centre, Ormesby	0.0	0.0	0.0	0.0	0.2	5.0	0.8	0.1	0.0	42.9	49.1			
Tesco Extra, Parkway Shoping Centre	0.0	0.0	0.0	0.0	0.6	0.9	0.0	0.2	7.2	33.0	41.9			
Stokeley - Co-op	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.9	0.0	5.9			
Morrisons, Teeside Retail Park	0.0	0.0	0.0	0.0	0.2	0.8	0.0	0.0	1.0	0.0	2.1			
Asda, Portrack Lane, Stockton-on-Tees	0.0	0.0	0.0	0.0	0.0	1.2	0.0	0.0	0.8	0.6	2.6			
Co-op, Whitby	0.0	0.0	0.0	0.0	0.0	1.1	0.0	1.1	0.1	0.9	3.2			
All Other Centres/Stores	0.0	0.0	0.0	0.0	1.0	1.1	0.2	1.5	6.5	2.9	13.2			
SUB TOTAL	**0.0**	**0.0**	**0.0**	**0.0**	**2.1**	**10.1**	**1.0**	**2.9**	**21.6**	**80.2**	**117.9**			
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	**59.3**	**23.8**	**34.1**	**14.4**	**34.4**	**45.9**	**18.3**	**7.6**	**28.3**	**111.1**	**377.0**			

Notes:

For each cell, the monetry figure is derived by multiplying the 2016 available convenience goods expenditure in the zone (excl. SFT) (Table 4) by the unadjusted convenience goods market share of the specific centre in that zone (Table 7).

(1) Estimated by Colliers International (see Appendix 6).

Sources:

Colliers International.

Date of Preparation: 25/08/2011

Table 9 - Calculation of Potential Convenience Goods Headroom Expenditure, 2016 (£ Million)

Colliers INTERNATIONAL

Zone/Town Area	2011 Turnover (Base Year)	2016 Turnover Potential	Turnover Allocation for Existing Retailers 2011-2016 (1)	Residual Turnover Potential at 2016	Headroom Expenditure at 2016
	A	B	C	D=B-C	E=D-A
	(Table 6, D)	(Table 8, D)			
WITHIN RECAR & CLEVELAND BOROUGH					
Zone 1 (Redcar area)	108.0	98.1	1.8	96.3	-11.7
Zone 2 (Marske by the Sea area)	3.7	3.8	0.1	3.6	0.0
Zone 3 (Saltburn by the Sea area)	12.7	31.3	0.3	30.9	18.2
Zone 4 (Loftus area)	3.5	3.3	0.1	3.2	-0.3
Zone 5 (Guisborough area)	46.6	44.7	0.9	43.8	-2.8
Zone 6 (Eston area)	6.9	6.2	0.2	6.0	-0.9
Zone 7 (South Bank area)	38.8	72.1	0.5	71.6	32.8
TOTAL	220.3	259.5	3.9	255.6	35.3

Notes:

(1) We assume that all existing convenience goods floorspace at the base year (2011) will achieve a real gain in sales productivity. The estimated turnover allocation is based on research by Experian (see Appendix 4E). The sales productivity gain is applied to the estimated 2011 (base year) benchmark convenience of the town as set out in Table 6 (Column H).

Sources:

Colliers International and Experian - Retail Planner Briefing Note 8.1 (August 2010).

Date of Preparation: 25/08/2011

Table 10 - Calculation of Convenience Goods Floorspace Need, 2016

Zone/Town Area	Headroom Expenditure at 2016 Before Commitments (£m)	Forecast Turnover at 2016 of Commitments (£m)(1)	Headroom Expenditure at 2016 After Commitments (£m)	Adjustment for Over/Under Trading at the Base Year (£m)	Residual Headroom Expenditure at 2016 (£m)	Assumed Average Sales Density at 2016 (£ Per Sq M Net)(2)	Estimated Retail Floorspace Need (Sq M Net)	Estimated Retail Floorspace Need (Sq M Gross)(3)
	A	B	C=A-B	D	E=C+D	F	G=E/F	H=Gx100/65
	(Table 9, E)			(Table 6, I)				
WITHIN RECAR & CLEVELAND BOROUGH								
Zone 1 (Redcar area)	-11.7	0.0	-11.7	-3.8	-15.6	8,130	-1,913	-2,943
Zone 2 (Marske by the Sea area)	0.0	0.0	0.0	-5.5	-5.6	8,130	-684	-1,052
Zone 3 (Saltburn by the Sea area)	18.2	0.0	18.2	-7.3	10.9	8,130	1,346	2,071
Zone 4 (Loftus area)	-0.3	0.0	-0.3	-1.3	-1.5	8,130	-190	-292
Zone 5 (Guisborough area)	-2.8	0.0	-2.8	-6.3	-9.1	8,130	-1,119	-1,721
Zone 6 (Eston area)	-0.9	6.6	-7.5	-4.3	-11.8	8,130	-1,447	-2,225
Zone 7 (South Bank area)	32.8	39.7	-6.9	7.2	0.3	8,130	39	60
TOTAL	35.3	46.3	-11.0	-21.3	-32.2	-	-3,966	-6,102

Notes:

(1) Schedule of commitments is set out at Appendix 5D. Sales floorspace and estimated turnover are given for each commitment.

(2) The deviation of the average sales density for converting expenditure into floorspace is set out in Section 4 in the main report.

(3) Gross floorspace is estimated from sales floorspace by applying a net to gross ratio of 65:100.

Sources:

Colliers International.

Date of Preparation: 25/08/2011

Table 11 - Convenience Goods Expenditure Pattern and Centre Turnover Estimates, 2021 (£ Million)

Retail Supply: Where the Money is Spent	Study Area										Total Expenditure Drawn from Survey Area	Estimated Inflow Expenditure from Residents(1)	Estiamted Inflow Expenditure from Tourists(1)	Total Turnover
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	A	B	C	D=A+B+C
WITHIN RECAR & CLEVELAND BOROUGH														
Zone 1 (Redcar area)	61.7	20.3	9.6	3.2	1.6	1.9	1.2	1.6	0.5	0.0	101.6	0.0	1.3	102.9
Zone 2 (Marske by the Sea area)	0.0	3.8	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	4.0	0.0	0.0	4.0
Zone 3 (Saltburn by the Sea area)	0.0	0.1	23.2	6.0	0.7	0.0	0.3	2.0	0.0	0.0	32.4	0.0	0.5	32.9
Zone 4 (Loftus area)	0.0	0.4	0.8	2.3	0.0	0.0	0.0	0.0	0.0	0.0	3.5	0.0	0.0	3.5
Zone 5 (Guisborough area)	0.4	0.0	1.6	2.9	30.5	0.7	0.1	1.1	6.3	2.9	46.5	0.0	0.4	46.9
Zone 6 (Eston area)	0.0	0.0	0.0	0.6	0.0	1.2	0.3	0.0	0.0	4.5	6.5	0.0	0.0	6.5
Zone 7 (South Bank area)	0.0	0.3	0.5	0.1	0.8	33.6	16.3	0.3	0.3	23.5	75.8	0.0	0.0	75.8
	62.1	**24.9**	**35.7**	**15.1**	**33.9**	**37.4**	**18.2**	**5.0**	**7.2**	**30.8**	**270.3**	**0.0**	**2.2**	**272.5**
OUTSIDE OF BOROUGH														
Morrisons, Berwick Hills Centre, Ormesby	0.0	0.0	0.0	0.0	0.3	5.2	0.9	0.1	0.0	45.3	51.7			
Tesco Extra, Parkway Shoping Centre	0.0	0.0	0.0	0.0	0.6	1.0	0.0	0.2	7.7	34.8	44.3			
Stokeley - Co-op	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.3	0.0	6.3			
Morrisons, Teeside Retail Park	0.0	0.0	0.0	0.0	0.3	0.9	0.0	0.0	1.1	1.8	4.0			
Asda, Portrack Lane, Stockton-on-Tees	0.0	0.0	0.0	0.0	0.0	1.2	0.0	0.0	0.9	0.6	2.7			
Co-op, Whitby	0.0	0.0	0.0	0.0	0.0	1.1	0.0	1.2	0.1	0.9	3.4			
All Other Centres/Stores	0.0	0.0	0.0	0.0	1.0	1.2	0.2	1.6	7.0	3.0	14.0			
	0.0	**0.0**	**0.0**	**0.0**	**2.2**	**10.6**	**1.1**	**3.1**	**23.1**	**86.4**	**126.5**			
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	**62.1**	**24.9**	**35.7**	**15.1**	**36.0**	**48.1**	**19.2**	**8.1**	**30.3**	**117.3**	**396.8**			

Notes:

For each cell, the monetry figure is derived by multiplying the 2021 available convenience goods expenditure in the zone (excl. SFT) (Table 4) by the unadjusted convenience goods market share of the specific centre in that zone (Table 7).

(1) Estimated by Colliers International (see Appendix 6).

Sources:

Colliers International.

Date of Preparation: 25/08/2011

Table 12 - Calculation of Potential Convenience Goods Headroom Expenditure, 2021 (£ Million)

Zone/Town Area	2011 Turnover (Base Year)	2021 Turnover Potential	Turnover Allocation for Existing Retailers 2011-2021 (1)	Residual Turnover Potential at 2021	Headroom Expenditure at 2021
	A	B	C	D=B-C	E=D-A
	(Table 6, D)	(Table 11, D)			
WITHIN REDCAR AND CLEVELALND BOROUGH					
Zone 1 (Redcar area)	108.0	102.9	4.6	98.4	-9.7
Zone 2 (Marske by the Sea area)	3.7	4.0	0.4	3.6	-0.1
Zone 3 (Saltburn by the Sea area)	12.7	32.9	0.8	32.1	19.3
Zone 4 (Loftus area)	3.5	3.5	0.2	3.3	-0.2
Zone 5 (Guisborough area)	46.6	46.9	2.2	44.8	-1.8
Zone 6 (Eston area)	6.9	6.5	0.5	6.1	-0.9
Zone 7 (South Bank area)	38.8	75.8	1.3	74.5	35.7
TOTAL	**220.3**	**272.5**	**9.8**	**262.7**	**42.4**

Notes:

(1) We assume that all existing convenience goods floorspace at the base year (2011) will achieve a real gain in sales productivity. The estimated turnover allocation is based on research by Experian (see Appendix 4E). The sales productivity gain is applied to the estimated 2011 (base year) benchmark convenience of the town as set out in Table 6 (Column H).

Sources:

Colliers International and Experian - Retail Planner Briefing Note 8.1 (August 2010)

Date of Preparation: 25/08/2011

Table 13 - Calculation of Convenience Goods Floorspace Need, 2021

Zone/Town Area	Headroom Expenditure at 2021 Before Commitments (£m)	Forecast Turnover at 2021 of Commitments (£m)(1)	Headroom Expenditure at 2021 After Commitments (£m)	Adjustment for Over/Under Trading at the Base Year (£m)	Residual Headroom Expenditure at 2021 (£m)	Assumed Average Sales Density at 2021 (£ Per Sq M Net)(2)	Estimated Retail Floorspace Need (Sq M Net)	Estimated Retail Floorspace Need (Sq M Gross)(3)
	A	B	C=A-B	D	E=C+D	F	G=E/F	H=Gx100/65
	(Table 12, E)			(Table 6, I)				
WITHIN RECAR & CLEVELAND BOROUGH								
Zone 1 (Redcar area)	-9.7	0.0	-9.7	-3.8	-13.5	8,325	-1,624	-2,498
Zone 2 (Marske by the Sea area)	-0.1	0.0	-0.1	-5.5	-5.6	8,325	-673	-1,035
Zone 3 (Saltburn by the Sea area)	19.3	0.0	19.3	-7.3	12.1	8,325	1,450	2,231
Zone 4 (Loftus area)	-0.2	0.0	-0.2	-1.3	-1.5	8,325	-180	-277
Zone 5 (Guisborough area)	-1.8	0.0	-1.8	-6.3	-8.1	8,325	-973	-1,497
Zone 6 (Eston area)	-0.9	6.9	-7.8	-4.3	-12.0	8,325	-1,442	-2,219
Zone 7 (South Bank area)	35.7	40.7	-5.0	7.2	2.2	8,325	262	403
TOTAL	42.4	47.6	-5.2	-21.3	-26.5	-	-3,180	-4,892

Notes:

(1) Schedule of commitments is set out at Appendix 5D. Sales floorspace and estimated turnover are given for each commitment.
(2) The deviation of the average sales density for converting expenditure into floorspace is set out in Section 4 in the main report.
(3) Gross floorspace is estimated from sales floorspace by applying a net to gross ratio of 65:100.

Sources:

Colliers International.

Table 14 - Convenience Goods Expenditure Pattern and Centre Turnover Estimates, 2026 (£ Million)

Retail Supply: Where the Money is Spent	Study Area										Total Expenditure Drawn from Survey Area	Estimated Inflow Expenditure from Residents(1)	Estiamted Inflow Expenditure from Tourists(1)	Total Turnover
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	A	B	C	D=A+B+C
WITHIN RECAR & CLEVELAND BOROUGH														
Zone 1 (Redcar area)	64.7	21.3	10.1	3.3	1.7	2.0	1.2	1.7	0.6	0.0	106.4	0.0	1.4	107.8
Zone 2 (Marske by the Sea area)	0.0	3.9	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	4.2	0.0	0.0	4.2
Zone 3 (Saltburn by the Sea area)	0.0	0.1	24.3	6.3	0.8	0.0	0.3	2.2	0.0	0.0	34.0	0.0	0.5	34.5
Zone 4 (Loftus area)	0.0	0.4	0.8	2.4	0.0	0.0	0.0	0.0	0.0	0.0	3.6	0.0	0.0	3.6
Zone 5 (Guisborough area)	0.4	0.1	1.7	3.0	32.0	0.8	0.1	1.1	6.8	3.1	48.9	0.0	0.4	49.3
Zone 6 (Eston area)	0.0	0.0	0.0	0.6	0.0	1.3	0.3	0.0	0.0	4.7	6.9	0.0	0.0	6.9
Zone 7 (South Bank area)	0.0	0.3	0.6	0.1	0.8	35.2	17.1	0.3	0.4	24.8	79.6	0.0	0.0	79.6
	65.1	**26.1**	**37.4**	**15.8**	**35.4**	**39.2**	**19.0**	**5.4**	**7.7**	**32.6**	**283.6**	**0.0**	**2.3**	**285.9**
OUTSIDE OF BOROUGH														
Morrisons, Berwick Hills Centre, Ormesby	0.0	0.0	0.0	0.0	0.3	5.5	0.9	0.1	0.0	47.8	54.6			
Tesco Extra, Parkway Shoping Centre	0.0	0.0	0.0	0.0	0.7	1.0	0.0	0.2	8.3	36.8	46.9			
Stokeley - Co-op	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.7	0.0	6.7			
Morrisons, Teeside Retail Park	0.0	0.0	0.0	0.0	0.3	0.9	0.0	0.0	1.2	1.9	4.2			
Asda, Portrack Lane, Stockton-on-Tees	0.0	0.0	0.0	0.0	0.0	1.3	0.0	0.0	0.9	0.6	2.9			
Co-op, Whitby	0.0	0.0	0.0	0.0	0.0	1.2	0.0	1.3	0.1	1.0	3.6			
All Other Centres/Stores	0.0	0.0	0.0	0.0	1.1	1.3	0.2	1.7	7.5	3.2	14.9			
	0.0	**0.0**	**0.0**	**0.0**	**2.3**	**11.1**	**1.1**	**3.3**	**24.7**	**91.3**	**133.8**			
TOTAL AVAILABLE EXPENDITURE (WITHIN HOUSEHOLD SURVEY AREA - FROM TABLE 4)	**65.1**	**26.1**	**37.4**	**15.8**	**37.7**	**50.3**	**20.1**	**8.7**	**32.4**	**123.9**	**417.4**			

Notes:

For each cell, the monetry figure is derived by multiplying the 2026 available convenience goods expenditure in the zone (excl. SFT) (Table 4) by the unadjusted convenience goods market share of the specific centre in that zone (Table 7).

(1) Estimated by Colliers International (see Appendix 6).

Sources:

Colliers International.

Date of Preparation: 25/08/2011

Table 15 - Calculation of Potential Convenience Goods Headroom Expenditure, 2026 (£ Million)

Centre	2011 Turnover (Base Year)	2026 Turnover Potential	Turnover Allocation for Existing Retailers 2011-2026	Residual Turnover Potential at 2026	Headroom Expenditure at 2026
	A	B	C	D=B-C	E=D-A
	(Table 6, D)	(Table 14, D)			
WITHIN REDCAR AND CLEVELALND BOROUGH					
Zone 1 (Redcar area)	108.0	107.8	7.5	100.3	-7.7
Zone 2 (Marske by the Sea area)	3.7	4.2	0.6	3.5	-0.1
Zone 3 (Saltburn by the Sea area)	12.7	34.5	1.3	33.1	20.4
Zone 4 (Loftus area)	3.5	3.6	0.3	3.3	-0.2
Zone 5 (Guisborough area)	46.6	49.3	3.5	45.8	-0.8
Zone 6 (Eston area)	6.9	6.9	0.8	6.1	-0.8
Zone 7 (South Bank area)	38.8	79.6	2.1	77.4	38.6
TOTAL	**220.3**	**285.9**	**16.2**	**269.7**	**49.4**

Notes:

(1) We assume that all existing convenience goods floorspace at the base year (2011) will achieve a real gain in sales productivity. The assumed turnover allocation is based on research by Experian (see Appendix 4E). The sales productivity gain is applied to the estimated 2011 (base year) benchmark convenience of the town goods turnover as set out in Table 6 (Column H).

Sources:

Colliers International and Experian - Retail Planner Briefing Note 8.1 (August 2010).

Date of Preparation: 25/08/2011

Table 16 - Calculation of Convenience Goods Floorspace Need, 2026

Centre	Headroom Expenditure at 2026 Before Commitments (£m)	Forecast Turnover at 2026 of Commitments (£m)(1)	Headroom Expenditure at 2026 After Commitments (£m)	Adjustment for Over/Under Trading at the Base Year (£m)	Residual Headroom Expenditure at 2026 (£m)	Assumed Average Sales Density at 2026 (£ Per Sq M Net)(2)	Estimated Retail Floorspace Need (Sq M Net)	Estimated Retail Floorspace Need (Sq M Gross)(3)
	A	B	C=A-B	D	E=C+D	F	G=E/F	H=Gx100/65
	(Table 15, E)			(Table 6, I)				
WITHIN RECAR & CLEVELAND BOROUGH								
Zone 1 (Redcar area)	-7.7	0.0	-7.7	-3.8	-11.5	8,535	-1,350	-2,077
Zone 2 (Marske by the Sea area)	-0.1	0.0	-0.1	-5.5	-5.7	8,535	-663	-1,020
Zone 3 (Saltburn by the Sea area)	20.4	0.0	20.4	-7.3	13.1	8,535	1,537	2,364
Zone 4 (Loftus area)	-0.2	0.0	-0.2	-1.3	-1.5	8,535	-171	-264
Zone 5 (Guisborough area)	-0.8	0.0	-0.8	-6.3	-7.1	8,535	-834	-1,283
Zone 6 (Eston area)	-0.8	7.0	-7.8	-4.3	-12.1	8,535	-1,412	-2,172
Zone 7 (South Bank area)	38.6	41.7	-3.1	7.2	4.1	8,535	485	747
TOTAL	**49.4**	**48.7**	**0.7**	**-21.3**	**-20.6**	**-**	**-2,408**	**-3,704**

Notes:

(1) Schedule of commitments is set out at Appendix 5D. Sales floorspace and estimated turnover is given for each commitment.
(2) The deviation of the average sales density for converting expenditure into floorspace is set out in Section 4 in the main report.
(3) Gross floorspace is estimated from sales floorspace by applying a net to gross ratio of 65:100.

Sources:

Colliers International.

Date of Preparation: 25/08/2011

APPENDIX 8

Redcar and Cleveland Borough Council: Interim Policy on Hot Food Takeaways

INTERIM POLICY ON HOT FOOD TAKEAWAYS

Proposals for hot food takeaways (Class A5 and A3 or A4 with A5 uses) in town, district and local shopping centres will only be permitted where:

(A) The proposed use will not result in the proportion of commercial units in the centre in hot food takeaway uses exceeding 5%; and

(B) The proposed use will not result in more than two adjacent hot food uses.

In addition to any requirements arising from consideration of LDF Policies DP2 and DP3, developers will be required to take account of the potential impact of the proposal on the amenity of the area by way of controlling the hours of opening and ensuring the provision of satisfactory ventilation.

Developer contributions will be negotiated to mitigate the effects of developments and legal agreements will be sought. For mixed uses, these will be based on the proportion of the business that derives from the takeaway business.

Justification

It is important to maintain the appropriate balance of uses in the town, district and local centres to maintain their vitality and viability, particularly during the day so that centres continue to serve the retail and other needs of local communities. The policy will apply to proposals for hot food takeaways and for restaurants and drinking establishments where the hot food takeaway is more than an ancillary element of the business.

There has been an increase in the number of hot food takeaways in many centres in the Borough over recent years, many of which are only open during the evenings and to serve the late night economy. This has led to an increase in closed and shuttered units during the day time. There has also been an increase in associated problems particularly of litter. Developer contributions will be sought to cover the costs of street cleaning and litter collection arising from hot food takeaways.

There are a number of residential units within or close to town, district and local centres. To reduce the impact of hot food takeaways on residential amenity, there is a need for controls on the opening hours and to ensure appropriate ventilation.

Adopted by Redcar and Cleveland Borough Council 17 July 2008 following consultation.

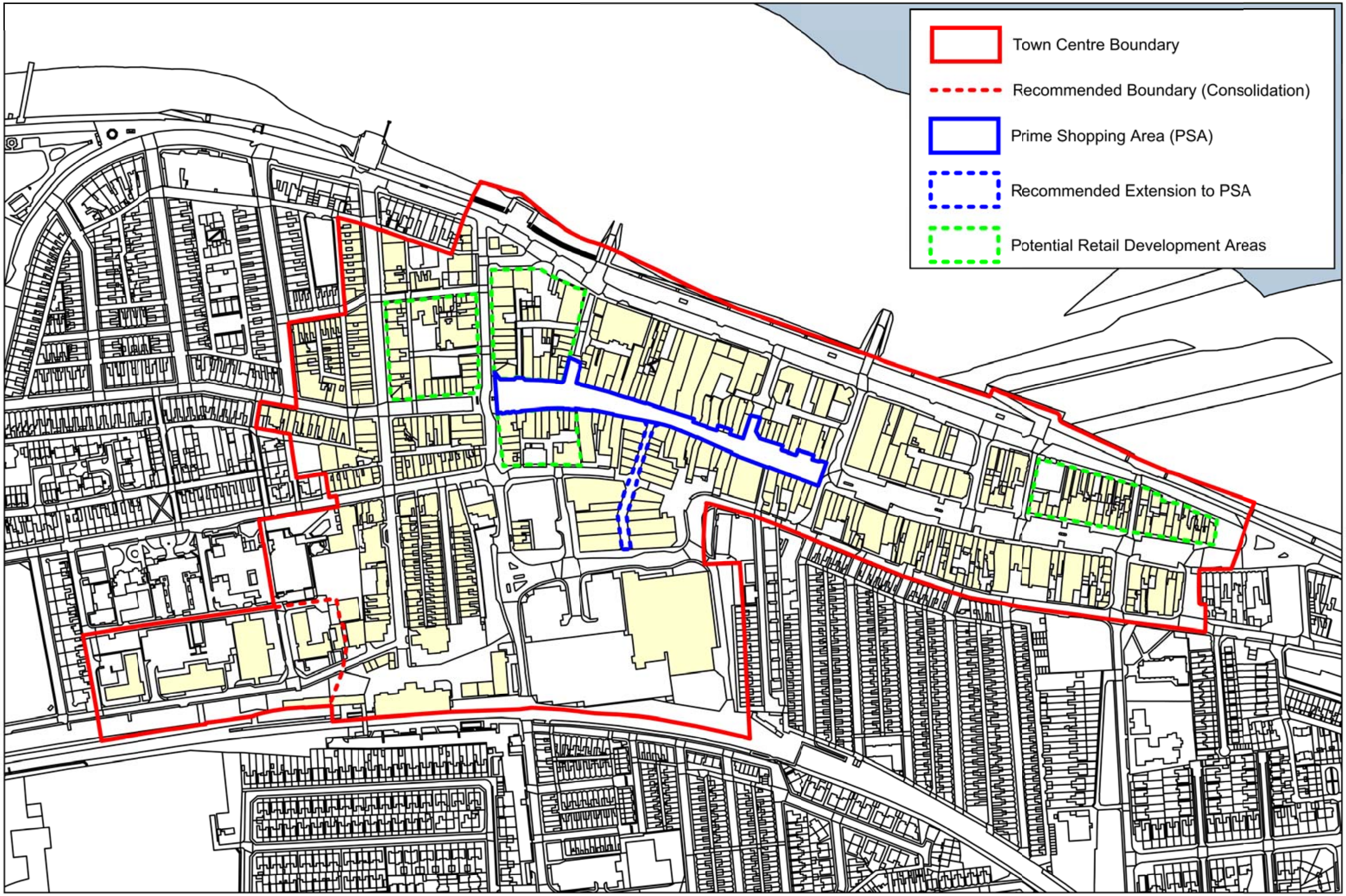
APPENDIX 9

Maps of Town, District and Local Centres in Redcar and Cleveland Borough

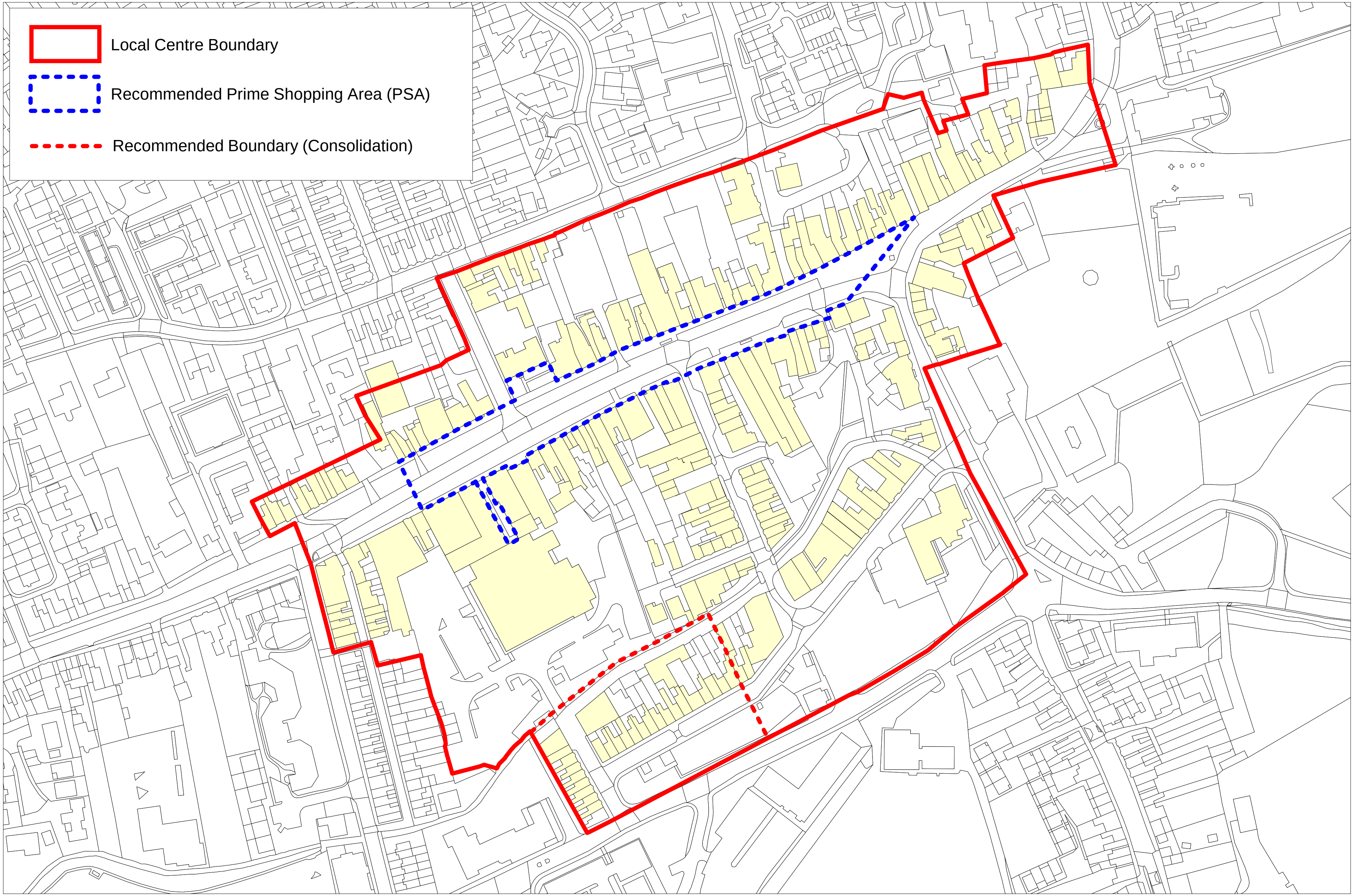
Boundary Maps

Map A	Redcar Town Centre
Map B	Guisborough District Centre
Map C	Loftus District Centre
Map D	Low Grange Farm District Centre (Proposed)
Map E	Eston District Centre
Map F	Marske District Centre
Map G	Saltburn District Centre
Map H	Brotton, High Street
Map I	Carlin How, Front Street
Map J	Dormanstown, Ennis Square
Map K	Guisborough, Enfield Chase
Map L	New Marske, Birkdale Road
Map M	Normanby
Map N	Nunthorpe
Map O	Redcar, Park Avenue
Map P	Redcar, Roseberry Square
Map Q	Skelton, High Street

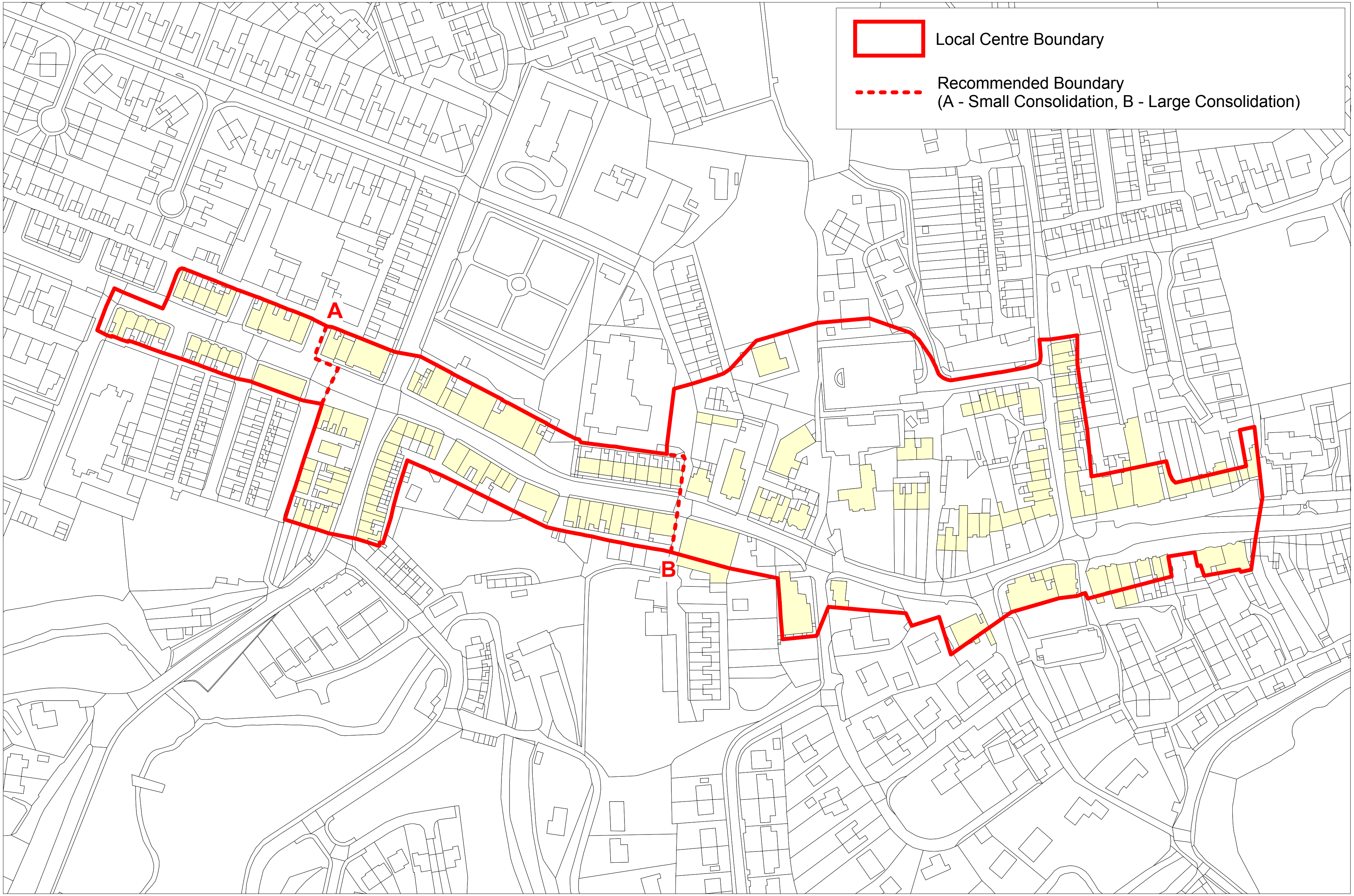
REDCAR


Town Centre Boundary
Recommended Boundary (Consolidation)
Prime Shopping Area (PSA)
Recommended Extension to PSA
Potential Retail Development Areas

GUISBOROUGH

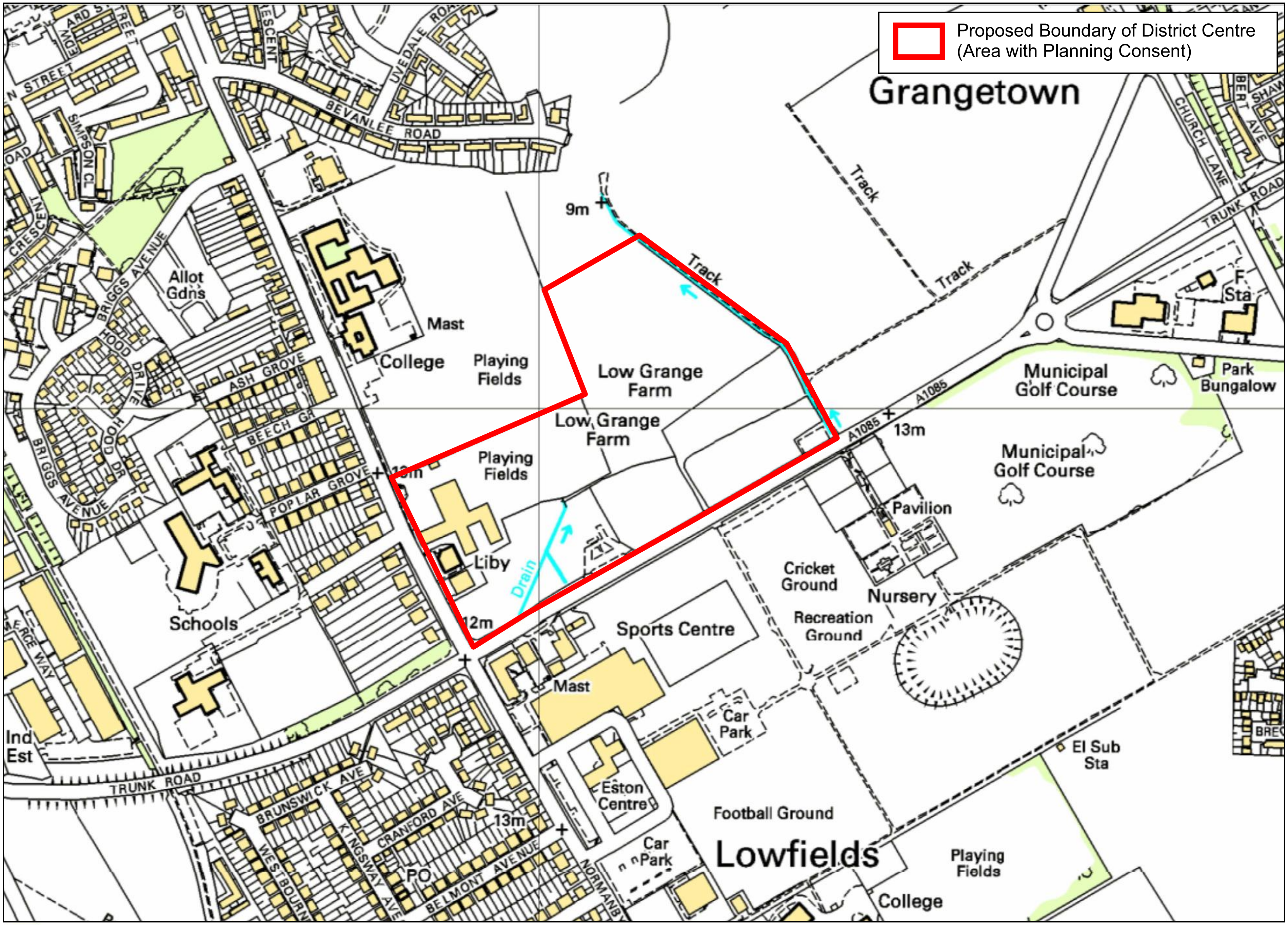


LOFTUS



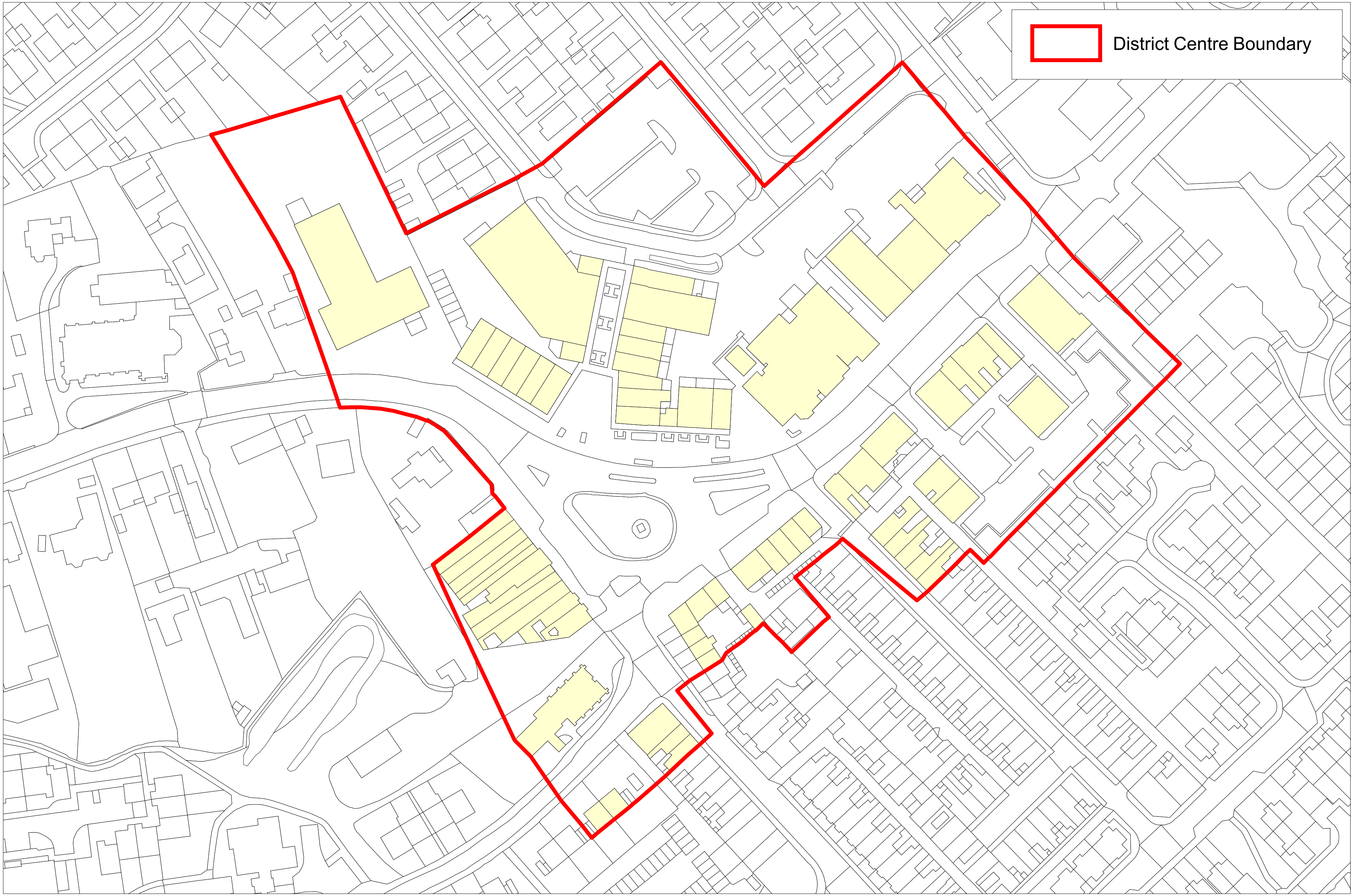
Local Centre Boundary
Recommended Boundary
(A - Small Consolidation, B - Large Consolidation)
A
B

LOW GRANGE FARM DISTRICT CENTRE (PROPOSED)

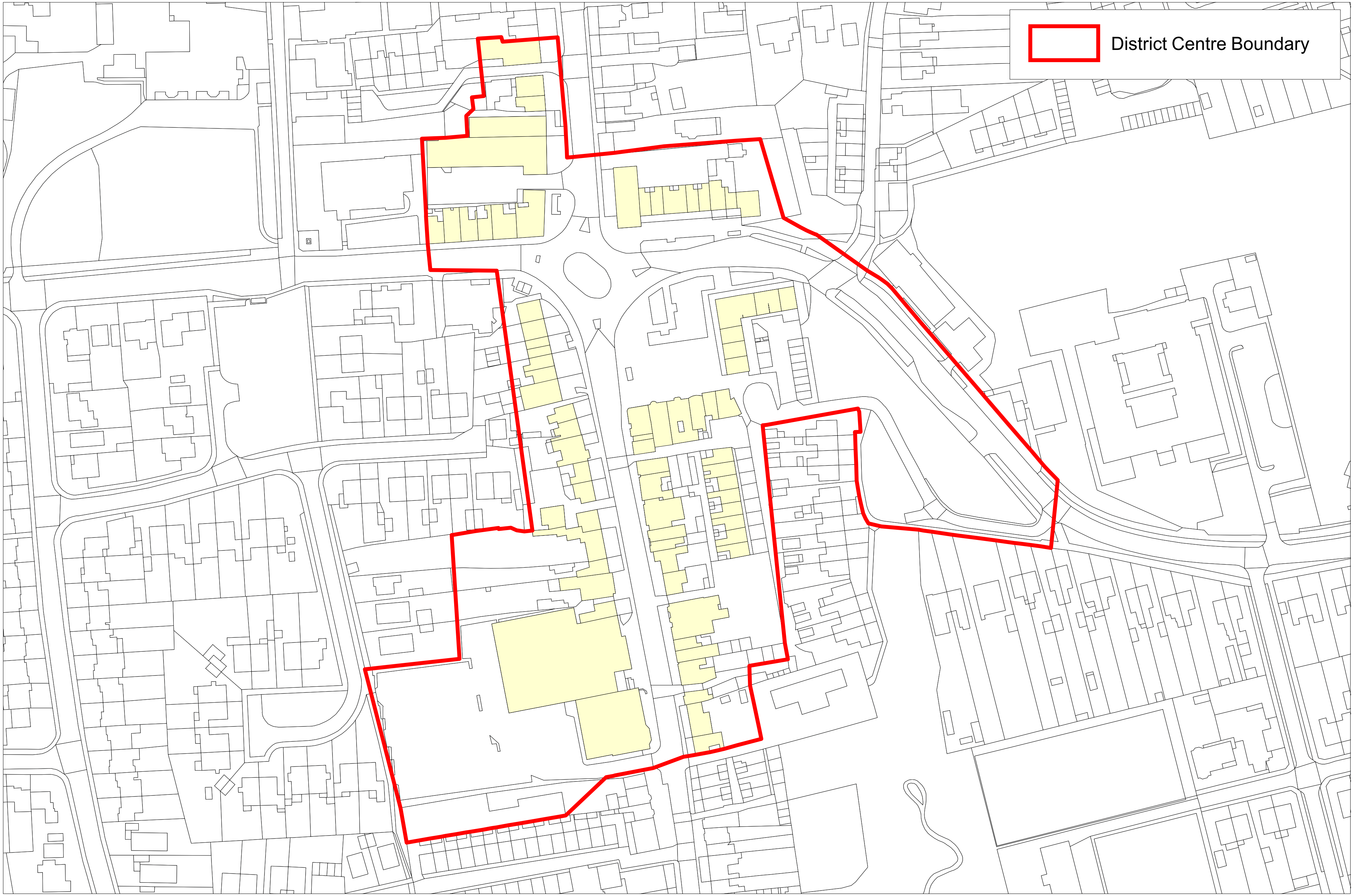


Promap

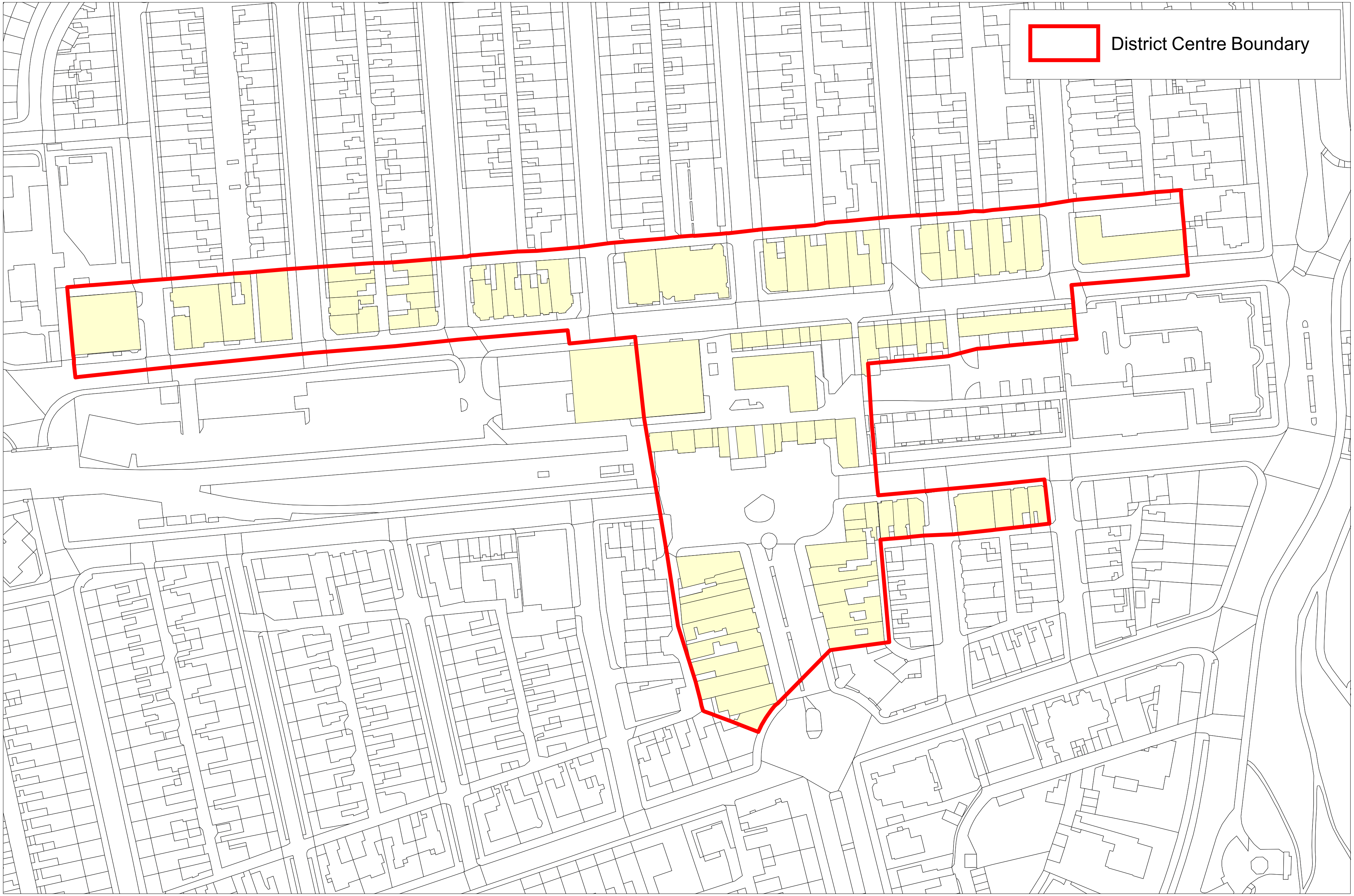
ESTON



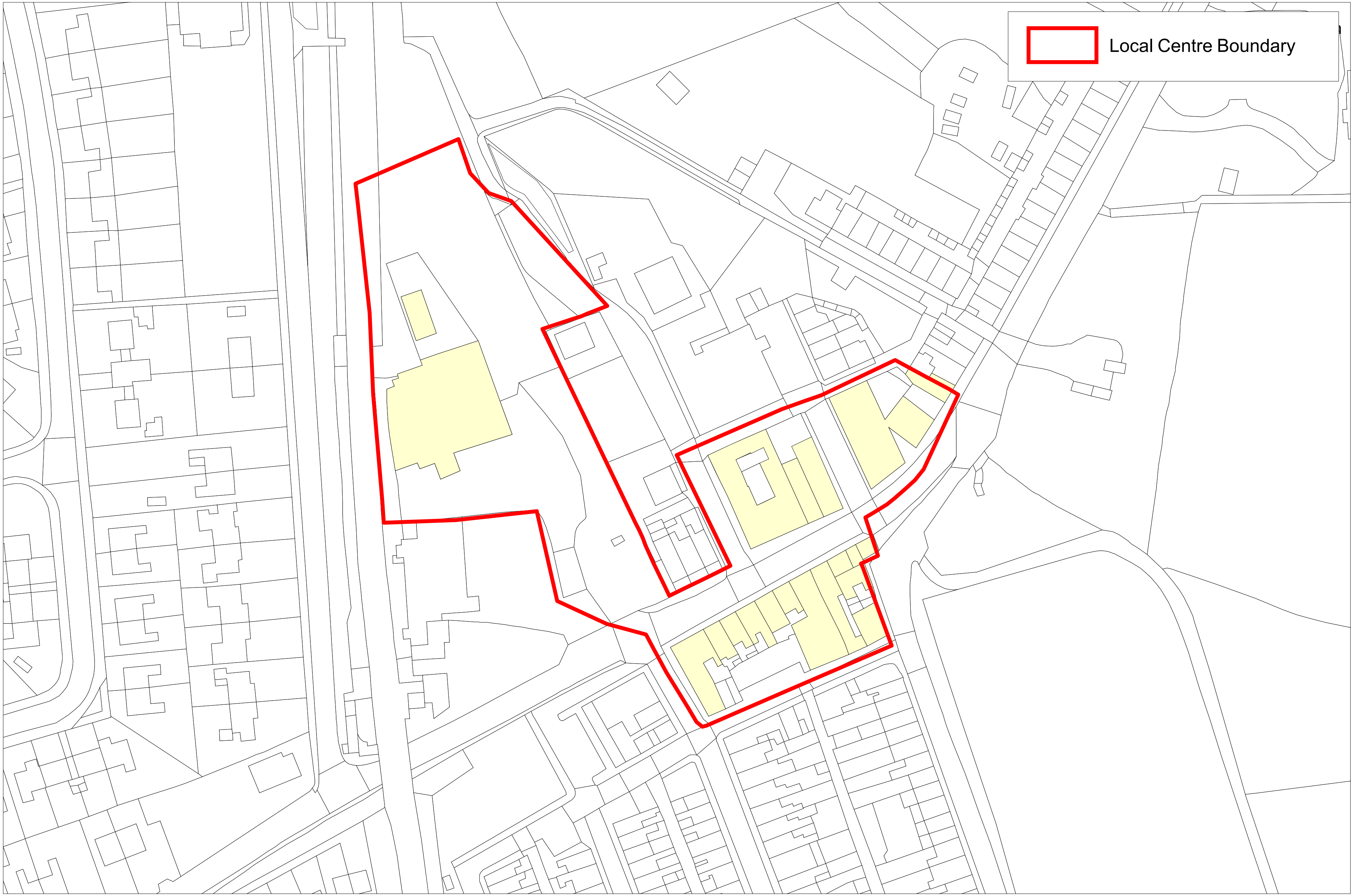
MARSKE



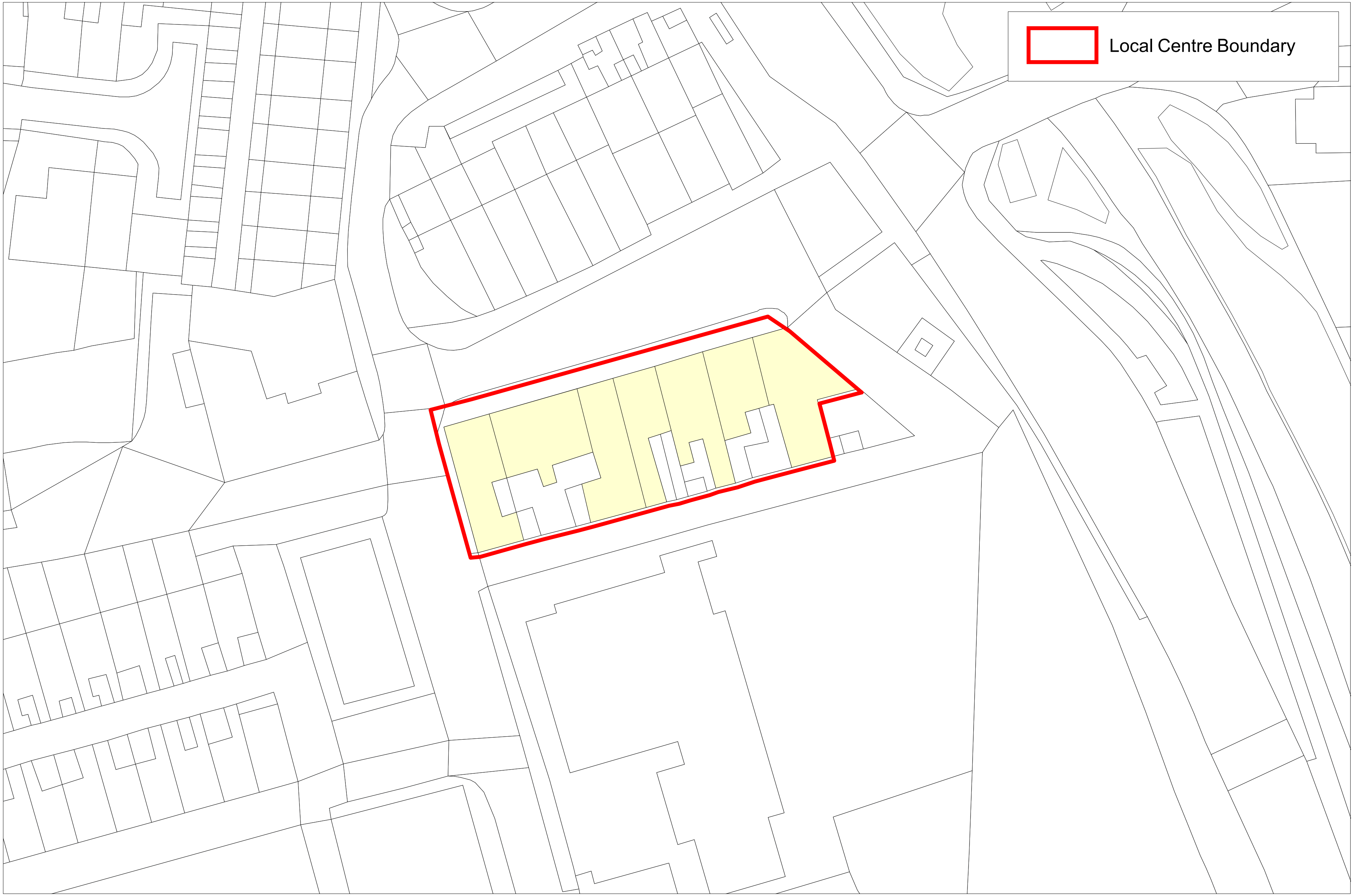
SALTBURN



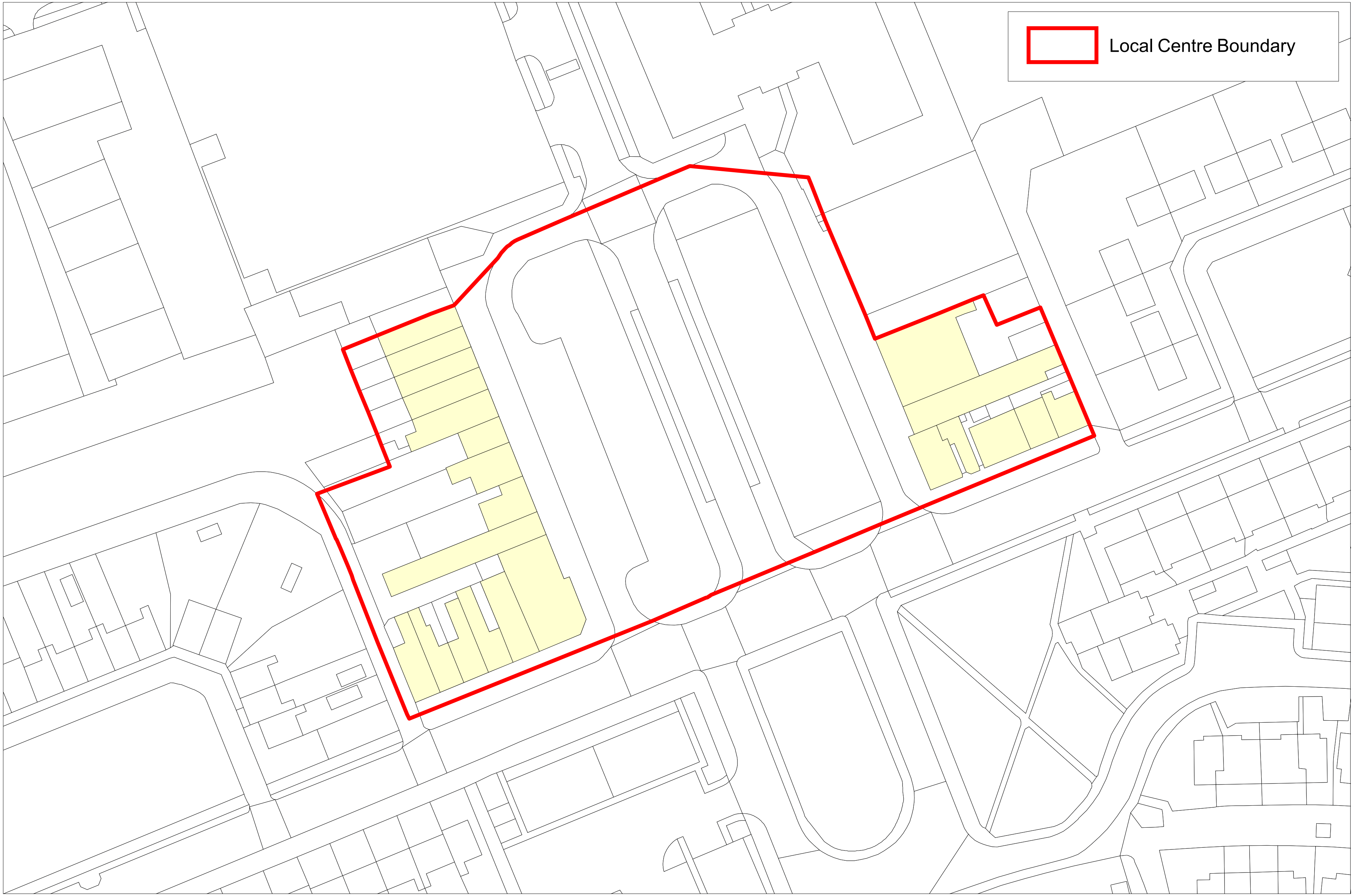
BROTTON - HIGH STREET



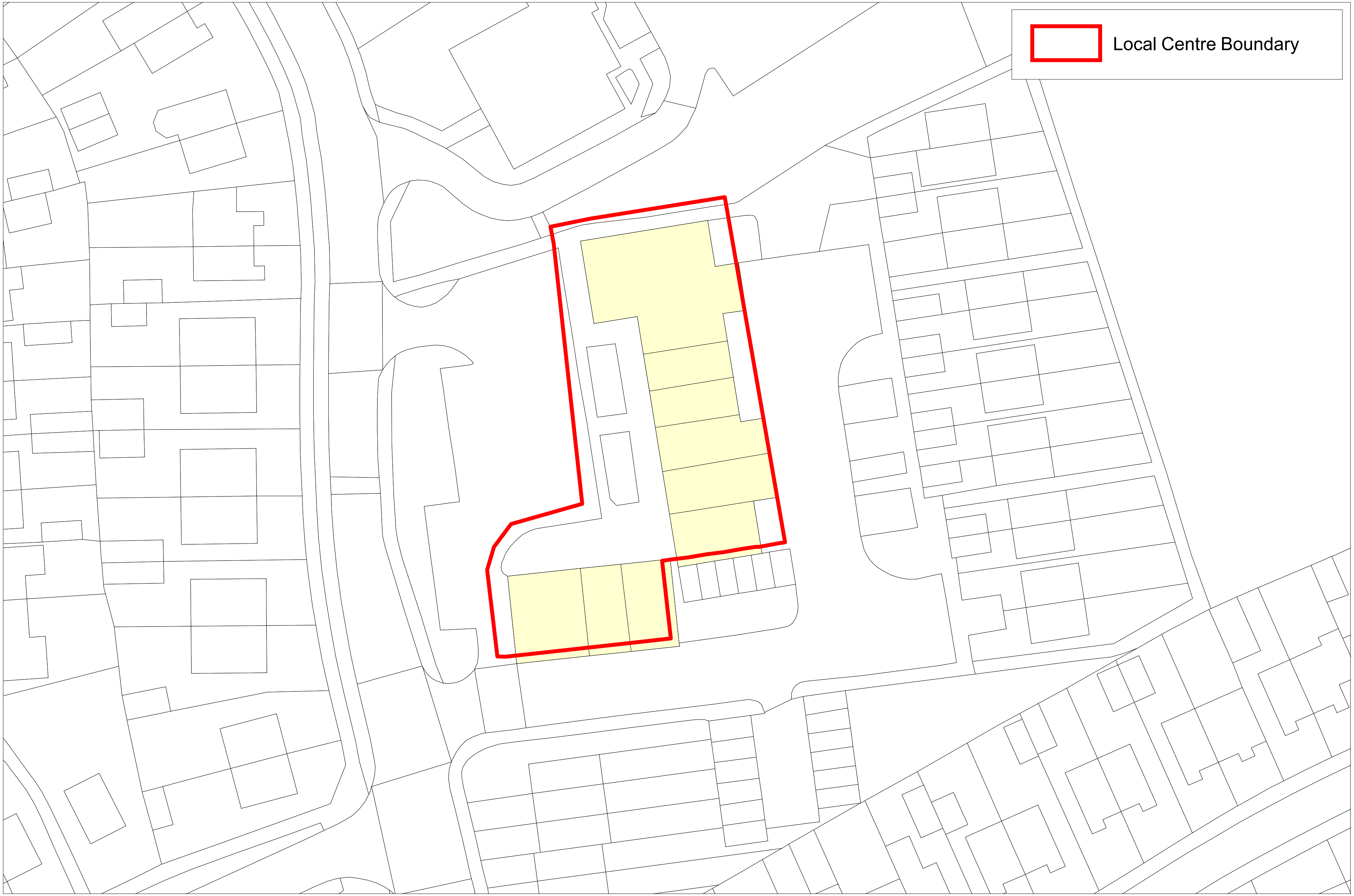
CARLIN HOW - FRONT STREET



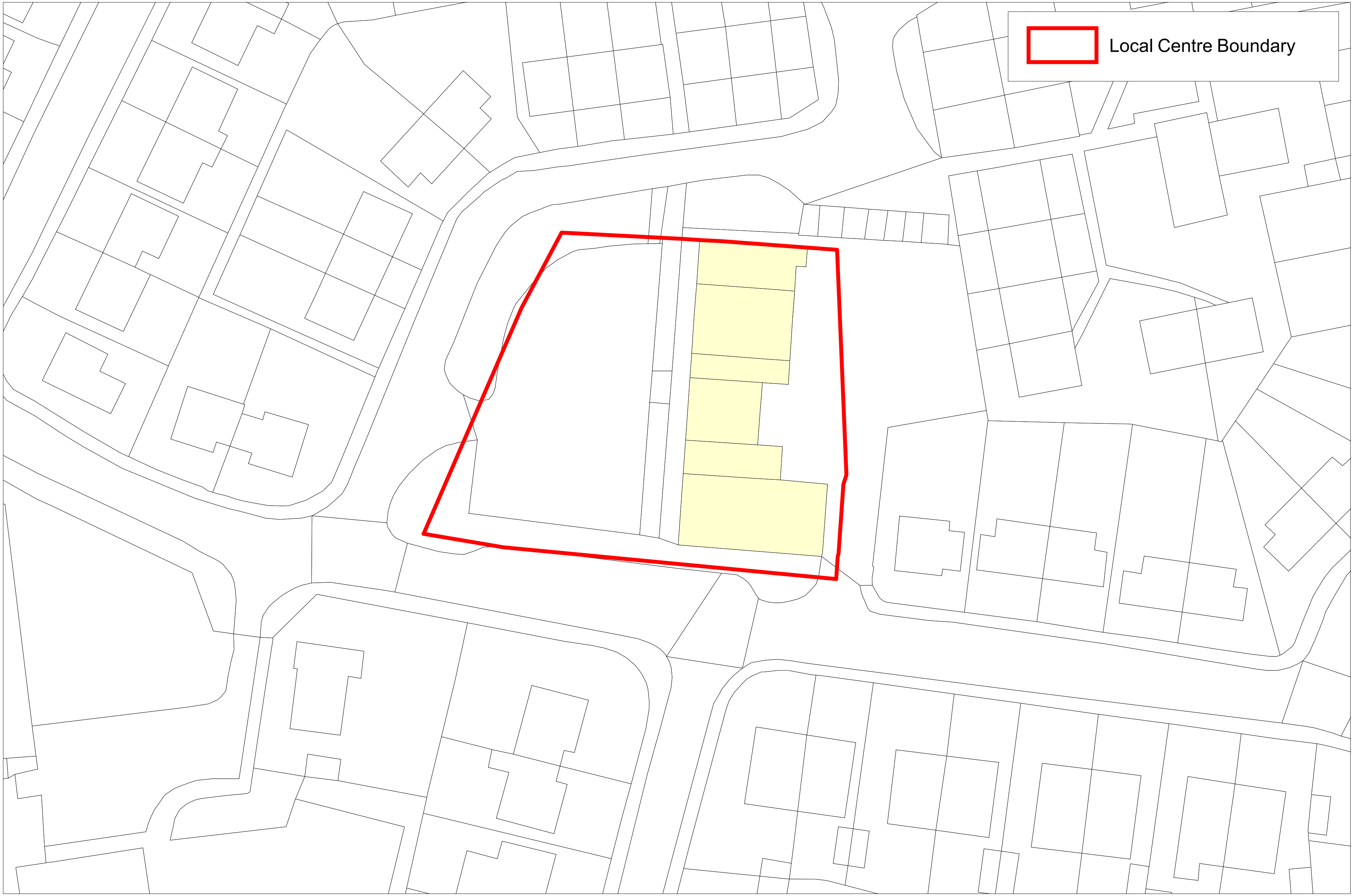
DORMANSTOWN - ENNIS SQUARE



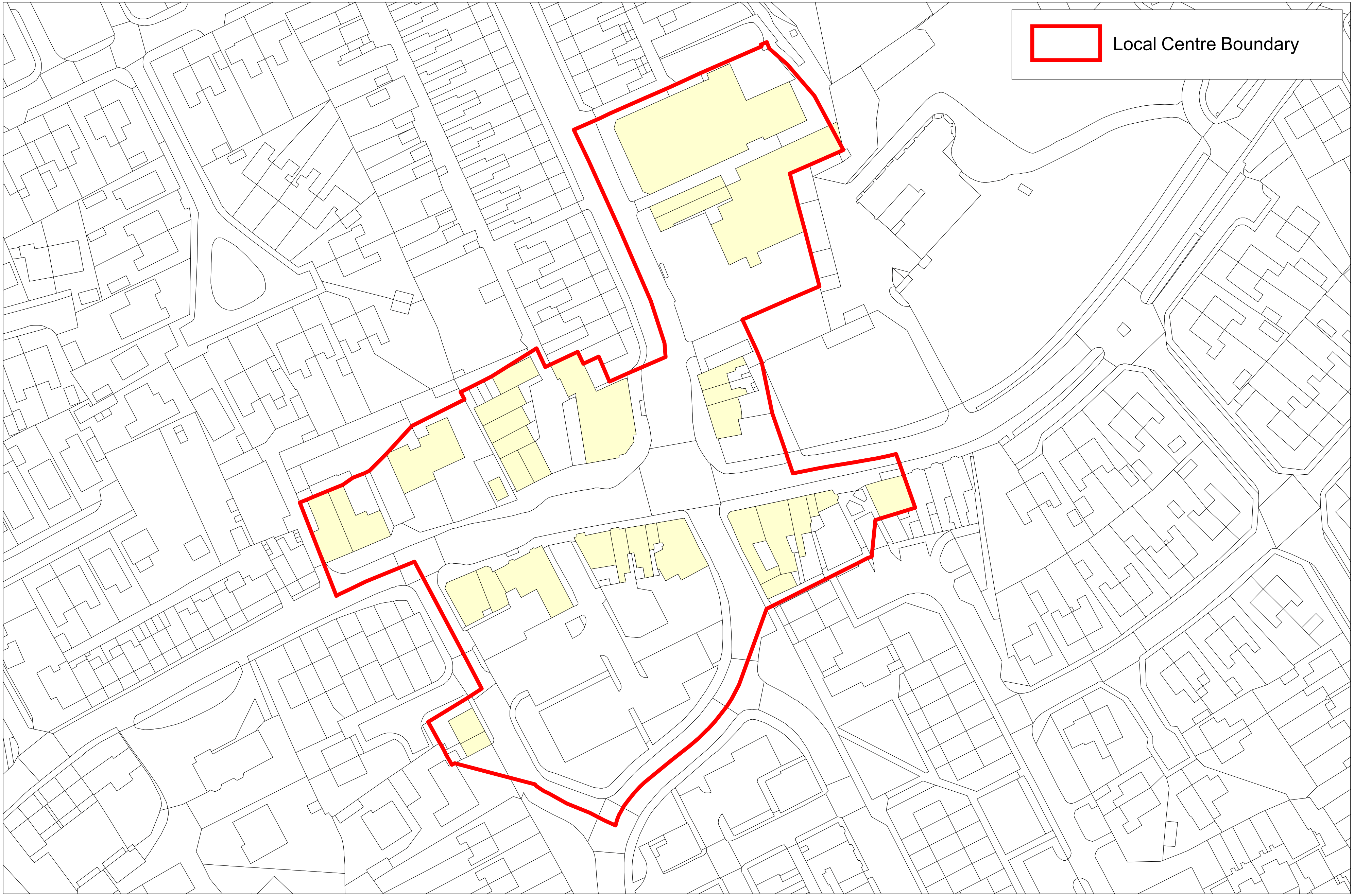
GUISBOROUGH - ENFIELD CHASE



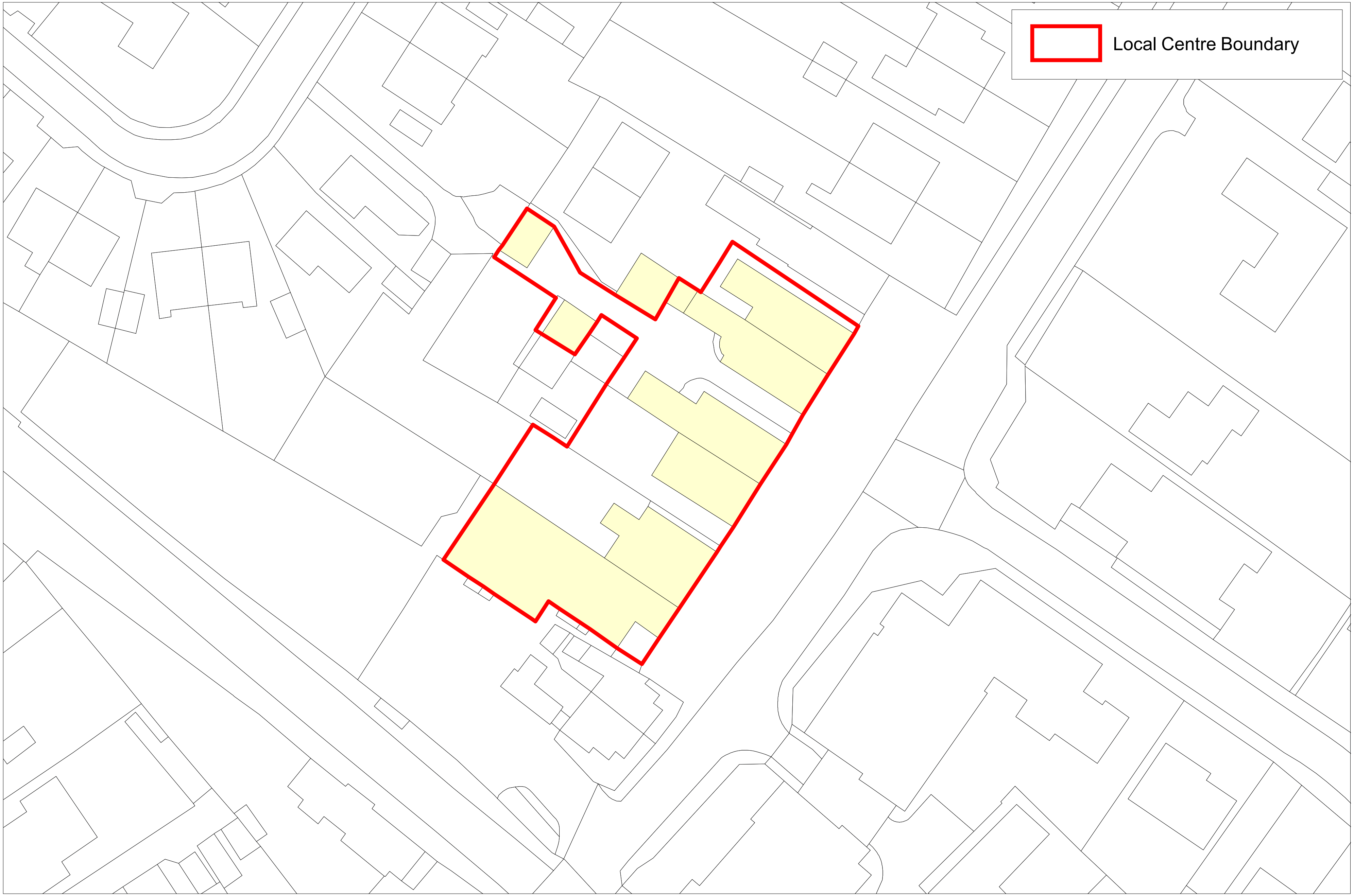
NEW MARSKE - BIRKDALE ROAD



NORMANBY

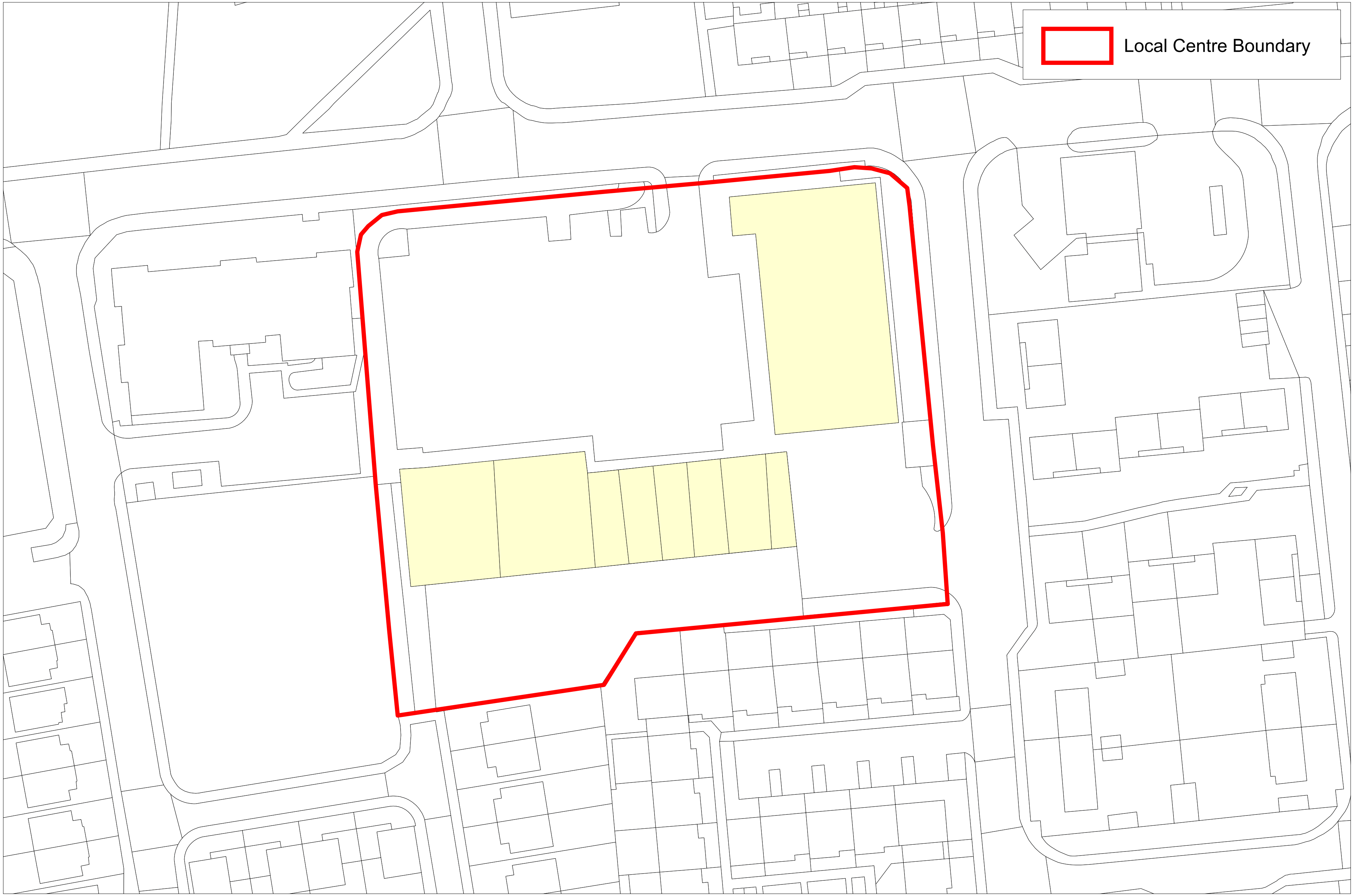


NUNTHORPE

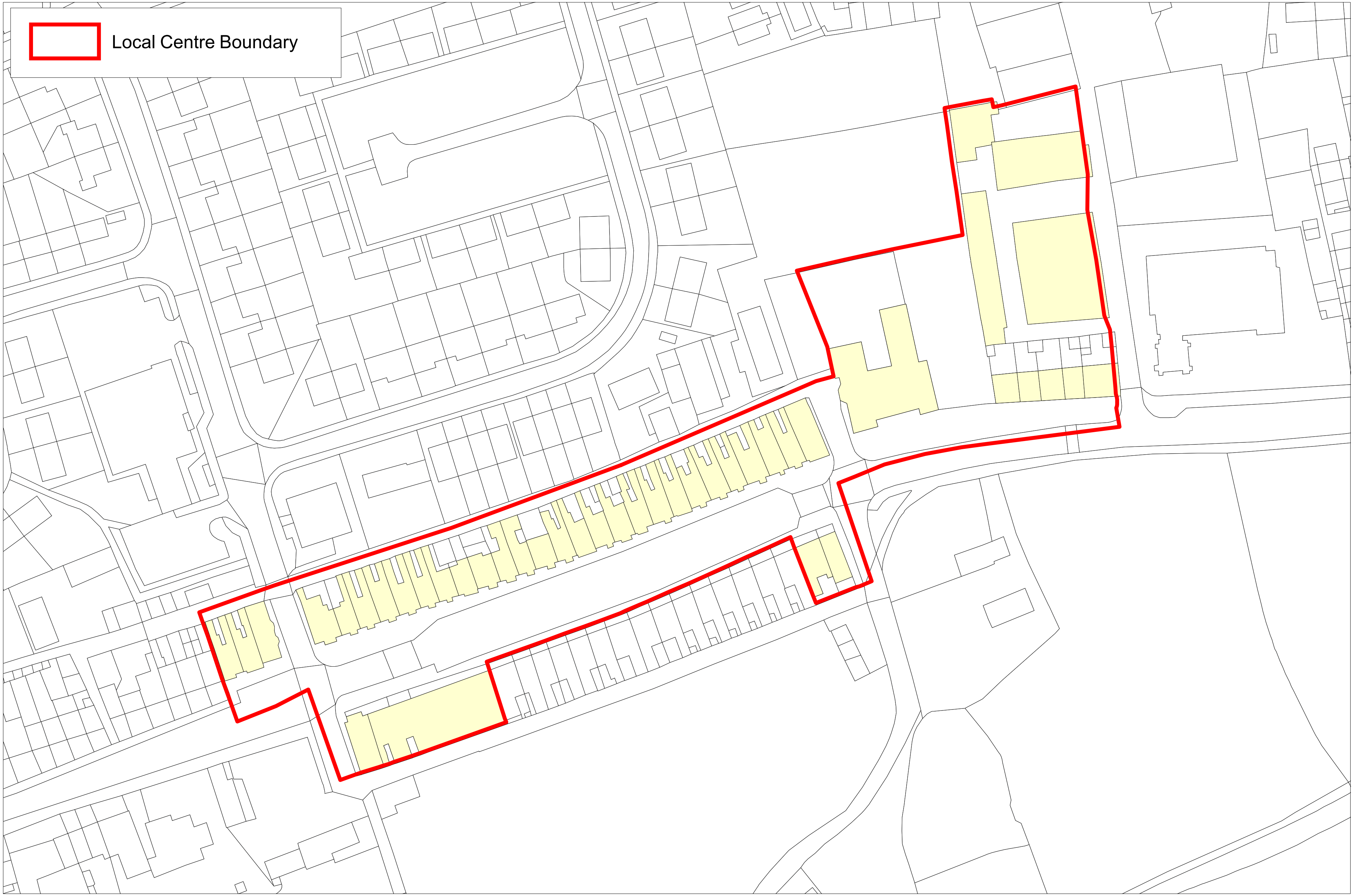


REDCAR - PARK AVENUE

REDCAR - ROSEBERRY SQUARE



SKELTON - HIGH STREET



APPENDIX 10

List of Principal Information and Data Sources

APPENDIX 10

Planning Policy Statement 4: Planning for Sustainable Economic Growth, December 2009.

Draft National Planning Policy Framework, July 2011.

The North East of England Regional Economic Strategy, July 2006.

The North East of England Regional Economic Strategy, July 2008.

The North East Retail and Leisure Study, DTZ, February 2011.

Redcar and Cleveland Strategic Retail, Leisure and Office Study, Nathaniel Lichfield and Partners, August 2006.

Redcar and Cleveland Local Development Framework: Core Strategy, July 2007.

Redcar and Cleveland Local Development Framework: Development Policies, July 2007.

Redcar and Cleveland Local Plan, June 1999.

Interim Policy on Hot Food Takeaways, Redcar and Cleveland Borough Council, July 2008.

Low Grange Farm SPD.

Redcar and Cleveland Borough Council, 2010 (Town and District Centres) and 2011 (Local Centres) Monitoring Surveys.

Cleveland Regeneration Masterplan; East Cleveland Area Spatial Framework, April 2010; South Tees Area Spatial Framework, April 2010; Greater Eston Area Spatial Framework, April 2010; and Redcar Area Spatial Framework, April 2010.

Cleveland Regeneration Masterplan; Economic Futures: A Regeneration Strategy for Redcar and Cleveland, April 2010.

Redcar Regeneration Strategy: To Identify a Bespoke Strategy for Redcar Town Centre, June 2010.

Planning for Town Centres: Practice Guidance on Need, Impact and the Sequential Approach.

Tees Valley Hotel Futures, Hotel Solutions, July 2009.

Office for National Statistics (ONS): 2009 Mid Year Population Estimates and 2008-Based Sub National Population Projections for Local Authority Areas.

Experian: Retail Planner Briefing Note 8.1, August 2010.

UK Retail Rankings, Mintel, 2010.

CONTACT DETAILS

Colliers International
Research and Forecasting
9 Marylebone Lane
London
W1U 1HL

www.colliers.com/uk