Martintonks

2010 Update to Darlington Retail Study 2008

DARLINGTON BOROUGH COUNCIL

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1.0 Introduction

1.1 Martin Tonks of MT Town Planning was appointed by Darlington Borough Council (DBC) in March 2010 to update the capacity assessment sections of the 2008 Darlington Retail Study (DRS) to take into account the effects of the economic downturn on retail forecasts and the most recent Government policy in the form of PPS4 Planning for Sustainable Economic Development published in December 2009. The new PPS was accompanied by a Practice Guide entitled “Planning for Town Centres” that provides additional guidance including a methodology for quantifying retail need (Appendix B).

1.2 This update also utilizes more recent Experian Business Strategies (EBS) expenditure per head forecasts and population forecasts from Office of National Statistics (ONS) than the 2008 DRS as well as changes in floorspace and retailer representation in the catchment area recorded by DBC. In addition this updated study utilizes the latest forecasts of special forms of trading (SFT non-store retailing[1]) and turnover efficiency improvements from EBS.

1.3 The 2008 DRS only undertook a quantitative assessment to 2021 reflecting the EBS forecast growth rates available at the time, however, the study recommended caution in interpreting findings beyond 2016. EBS expenditure per head forecasts are now available to 2026 which coincides with the end of the Darlington LDF Core Strategy plan period but PPS4 Practice guide (4.25) advises capacity assessments should be updated every five years therefore caution is still required in interpreting the longer term findings which are indicative rather than prescriptive.

1.4 The objectives of the original 2008 DRS were to bring up to date the evidence base, conclusions and recommendations of the 2004 Darlington Retail Study in order primarily to:

- inform the emerging Darlington local development framework (LDF) beginning with the Core Strategy;
- assist with the assessment of retail planning proposals; and,
- help in the management of the town centre.

1.5 This update has the same objectives and updates sections five (Methodology for Quantitative Assessment), six (Convenience Goods Quantitative Assessment) and seven (Comparison Goods Quantitative Assessment) of the DRS in the following sections. Conclusions and recommendations arising from this update are presented in section five. Other conclusions and recommendations from the 2008 DRS that are not updated in this report such as the health check and qualitative assessments remain valid.

[1] The glossary in the Practice Guide defines SFT as all retail sales not in shops and stores; including sales via the internet, mail order, TV shopping, party plan, vending machines, door-to-door and temporary open market stalls. Actual SFT estimates and forecasts are taken from EBS Retail Planner Note on non-store retailing dated March 2010.

2.0 Methodology

2.1 The methodology for both comparison and convenience goods in 2008 DRS followed a standard approach based upon the then-PPS6 guidance (para 2.34) and subsequent Secretary of State decisions (Birmingham and Burnham) that indicated there were three sources of quantitative need:

1. growth in expenditure over and above inflation;
2. increased market share within the catchment area arising from an improved offer and clawback of leakage; and,
3. overtrading in existing stores.

2.2 The PPS4 Practice Guide Appendix B (Figure B1) presents a five stage methodology for undertaking quantitative need assessment. It is considered that the 2008 DRS methodology is consistent with this guidance therefore it is used again in this update as detailed below. The five stages of the Practice Guide methodology are

Step 1: Define Assessment Area / Catchment and determine assessment time frame
Step 2: Analyse consumer expenditure
Step 3: Assess existing retail supply and market shares
Step 4: Compare existing retail supply with demand
Step 5: Assess future capacity

Step 1: Define Assessment Area / Catchment and determine assessment time frame

2.3 The PPS4 Practice Guide (para B5) advises that study areas need to be carefully defined in the context of the objectives and the type of assessment. Where assessments are to inform the preparation of development plans (as in this update), it is important that the area is drawn sufficiently widely to thoroughly examine the relationship between centres and their catchments, including any neighbouring centres and areas where these have relationships with the planning authority area.

2.4 This was the approach of the 2008 DRS. The study area was based on the 2004 DRS study area which had been identified from a street survey that identified the origin of shoppers / visitors to Darlington town centre. The study area overlaps with the catchments of competing centres such as Middlesbrough and, for convenience goods, Newton Aycliffe, Northallerton and Richmond / Catterick.

2.5 Paragraph B.12 of the Practice Guide recommends that the study area is divided into zones or sub-areas to enable more detailed analysis of the interrelationship of the roles and functions between different centres. At the local level, sub-areas are likely to comprise the catchments of individual centres, ward boundaries, or postcode sectors.

2.6 Again this was the approach of the 2008 DRS. Seven zones were identified based on postcode sector boundaries. Five zones comprised the 'Greater Darlington' area that forms the primary catchment area of the town centre. Two large secondary catchment zones were also identified although they are fairly self contained for convenience goods shopping and the town centre only draws trade from these areas to any great extent for comparison goods.

2.7 Paragraph B.14 of the Practice Guide advises on the study period or assessment time frame when preparing quantitative need assessments to inform the preparation of development plans; forecasts should also be prepared for intermediate five year intervals. Paragraph B.15 advises that for local assessments, these should cover the period of the development plan document and thus should be up to 10 years ahead but it is recommended that an interim five year forecast is also made.

2.8 In this update forecasts are made to 2026 which is the end of the Darlington Core Strategy plan period split into five year interval periods. However, longer term forecasts are less reliable and PPS4 (EC5.5) advises that sufficient sites to meet at least the need for the first five years from the adoption of the plan should be identified. The PPS4 Practice Guide (4.25) advises “quantitative need assessments should ideally be updated every five years, to take into account changing economic circumstances”. Therefore forecasts after 2016 have to be treated with a degree of caution.

Step 2: Analyse Consumer Expenditure

2.9 Paragraph B.16 of the Practice Guide advises that population and expenditure estimates need to be derived for each sub-area within the area covered by the assessment in order to establish the existing consumer demand at the base year, and will enable projections to be made for each sub-area to the forecast year or design year as appropriate. The expenditure estimates were purchased from EBS and are shown in Tables B and D of Appendix 1. The ONS 2008 midyear estimates / projections (released 27 May 2010) are utilized instead of the lower EBS population projections (that were used in the 2008 DRS).

2.10 Paragraph B.18 goes on to advise in the case of local area assessments that it may be relevant to factor in local population changes such as major planned new housing developments, new settlements etc.

2.11 With regard to local expenditure estimates Paragraph B.19 of the Practice Guide recommends that a constant price base be adopted to ensure that all monetary figures are given in real values and discounted for the effects of price inflation. In this update as in the 2008 DRS a 2006 price base is used.

2.12 Paragraph B.24 advises that consideration needs to be given to spending on special forms of trading (SFT)[2]. In the 2008 DRS SFT was included in the assessment as the household survey recorded internet and other SFT sales for both broad goods categories. However, the 2008 household survey also recorded a significant increase in the market share of SFT particularly for non-bulky comparison goods. The latest

[2] Expenditure that does not take place in shops, such as internet shopping, mail order, through vending machines and market / roadside stalls.

information from EBS[3] indicates that the market share for SFT is set to increase for both broad goods categories and in Appendix 3 of Retail Planner Brief they provide estimates of future SFT levels. Rather than project the low levels of SFT recorded in the household survey across the study period to 2026 the EBS estimates have been utilised and are subtracted from the source expenditure per head figures in Tables B and D (rather than presented in the market share analysis as in the 2008 study).

2.13 Paragraph B.25 advises expenditure that should be calculated for the assessment area and the constituent subareas for both the base and forecast years. This enables the amount of 'growth' in available expenditure to be identified. Within the assessment area the generated expenditure is calculated by multiplying the resident population by the estimate of average spend per head. The practice guide recommends that this calculation is undertaken for each sub-area and this has been undertaken in this update as shown in Tables C and E.

2.14 The practice guide goes on to advise (B.26) that it is necessary to understand the complex pattern of inflows and outflows of spending as no retail catchment is entirely self contained. Outflows, or leakage, can be identified by consumer surveys in the area which is what the household survey that informed the 2008 DRS and utilized in this update does. Market shares and leakage are shown in Tables F to M for convenience goods and Tables N to AC for comparison goods.

2.15 Paragraph B.28 advises the existing level of 'inflow' can be estimated based on 'in centre' surveys which is what the inflow levels adopted in the 2008 study are based upon. This study utilizes the same inflow estimates as shown in Tables 1 and 7. However, because the study area is quite extensive and Darlington isn't a major tourist / employment destination, there is very little inflow from beyond this fairly extensive study area.

Step 3: Assess Existing Retail Supply and Market Shares

2.16 Having established the level of available expenditure (Tables C and E), the practice guide advises (B. 29) it is necessary to determine the existing level of retail supply and the distribution of market shares. The guidance advises it is important that all retail floorspace is included in such assessments and in Darlington this information can be gleaned from the Council's comprehensive schedules of floorspace that are regularly updated. These are summarized in Tables 1 (convenience goods) and 7 (comparison goods). Market shares are shown in Tables F to M for convenience goods and Tables N to AC for comparison goods.

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3 EBS advise in Appendix 3 of Retail Planner Brief 7.1 (August 2009) internet retail sales are collected as part of the monthly ONS Retail Sales Inquiry (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 non-store sales is therefore a comprehensive estimate of SFT in retailing. Actual SFT estimates and forecasts are taken from EBS Retail Planner Note on non-store retailing dated March 2010.

2.17 Paragraph B. 35 advises the main purpose of the survey data in quantitative analysis is to enable a 'baseline' picture of the market share and indicative turnover of existing centres and stores, and where their trade is derived from. This is fundamental to the assessment of what, if any, surplus capacity is likely to arise over the study period.

Step 4: Compare Existing Retail Supply with Demand

2.18 Paragraph B. 36 advises that having identified existing expenditure and market shares it is necessary to identify the relative turnover / performance of each centre and establish how the forecast population and goods-based expenditure growth is likely to be distributed within identified sub-areas.

2.19 The guide goes on to advise (B.37) that the household survey will determine the levels of available retail expenditure retained by individual centres and the plan area as a whole and (B. 39) whether this represents a reasonable baseline for forecasting purposes i.e. are existing facilities trading broadly in line with 'acceptable' levels or is there evidence that facilities are underperforming or 'overtrading'.

2.20 In this update this exercise is undertaken in Table 1 for convenience goods and Table 7 for comparison goods where benchmark or expected turnover levels based on national company average sales densities are compared against turnovers derived from the household survey. The assessment follows guidance in para B.40 of the guide that advises that where survey based turnover significantly exceed benchmark turnovers then existing floorspace may be overtrading and where they are significantly less than the benchmark turnover then existing floorspace may be undertrading.

2.21 The guide advises (B.41) in practice it is often difficult to devise meaningful benchmarks for an 'acceptable' performance of a whole centre, or even a single store. Where it is possible to obtain robust information, the guide encourages the use of benchmarks. In the case of Darlington the Council have detailed schedules of town centre retailers and their floorspace, so it is possible to attach company averages for many stores and where these are not available e.g. independent stores, to apply benchmark sales densities from comparable stores in the same frontages.

2.22 The practice guide urges caution (B.43) against the use of benchmarks alone to identify over or undertrading and advises they should be corroborated by other independent evidence of under-performance, or strong trading such as health check evidence of rents, yields, vacancy rates and retailer demand, or the extent of congestion in store, and queuing at checkouts. This qualitative check was undertaken in the 2008 DRS as updated in this report.

Step 5: Assess Future Capacity

2.23 The practice guide advises (B.45) that assuming existing centres / stores are trading in line with appropriate benchmark levels at the established base year, a comparison between current and forecast turnover levels will give an indication of expenditure 'surplus' or capacity likely to be available within the assessment area by the end of the forecast period i.e. based upon expenditure growth alone.

2.24 The guide goes on to advise that it may be concluded that a large modern food superstore is significantly ‘overtrading’ but other convenience stores in the area are trading badly suggesting there is no overall quantitative need, but there may be a qualitative ‘need’ to improve the quality / performance of existing stock. This is the case in Darlington for convenience goods as shown in Tables 1 to 6 with particularly strong retailing at the two Morrisons stores but undertrading in the town centre convenience stores.

2.25 Paragraph B. 48 advises that capacity assessments should take account of expected improvements in store ‘floorspace productivity’ for both convenience and comparison floorspace, irrespective of location and that assumptions should be realistic, carefully considered and properly justified. The guide advises that it is important that selected rates of growth in floorspace productivity are compatible with assumptions about the growth in per capita expenditure.

2.26 In this update expenditure growth rates and turnover efficiency improvements have both been taken from Experian Retail Planner Brief 7.1 to ensure consistency. In order to be cautious and robust the turnover efficiency rates that are applied in Tables 2 to 6 (convenience goods) and Tables 8 to 12 (comparison goods) are based on the lower rates in the Experian brief. These assume that there is growth in floorspace that reduces efficiency improvements in existing floorspace as shown in Tables 4a and 4b of the Experian brief.

2.27 Paragraph B51 of the Practice Guide advises that where the quantitative analysis indicates that existing retailers are achieving very low levels of turnover per sq m, for example as measured against their indicated company average sales or comparable exercises in other centres, it may be appropriate to apportion a higher level of forecast expenditure growth to support existing floorspace, either by setting a higher benchmark sales level, or applying a higher floorspace productivity factor.

2.28 This has been undertaken for convenience goods in the town centre in this update (but not comparison goods) where the survey based market share turnover is 47.7% lower than the expected turnover based on company average sales densities of shops represented in the town centre. In addition, the adjustment allows for the increased turnover of new stores such as the town centre Tesco Express that have opened since the 2008 household survey was undertaken.

2.29 Conversely the guide advises (B. 52) that it may be appropriate in some cases to factor in a lower ‘benchmark’ turnover, where existing capacity exists to accommodate new development. This may be the case where, for example, a centre has failed to secure new floorspace for several years during which high levels of spending growth have occurred. This ‘latent’ need may be supported by indicators such as congestion / overcrowding limited availability of modern prime retail space, and high levels of demand.

2.30 Whilst comparison goods floorspace in the town centre is recorded as overtrading in the 2008 DRS and this update no such adjustment is made for comparison goods[4]. No negative symptoms of overtrading were recorded in the health check and the overtrading actually benefits the centre in terms of increased footfall and the multiplier effect within the local economy and so shouldn't be used to justify / support sequentially inferior development[5]. Therefore only overtrading in out of centre locations is utilized as a source of capacity to support new floorspace in Darlington for both goods categories.

2.31 Finally the guidance on quantitative need assessments refers to market share assumptions. Paragraph B.53 advises that the common practice of assuming constant market shares i.e. making no claims on clawed back leakage, can serve to maintain the 'status quo' as the largest and most successful centres will continue to be the focus for new development.

2.32 In the case of Darlington it is considered appropriate to maintain constant market shares for both categories of goods as the household survey recorded all centres in and beyond the study area losing market share to internet sales. In addition competing centres have recently improved or have planned improvements to their retail offer. For convenience goods, inflow from the secondary catchment has been reduced by the Tesco superstores at Newton Aycliffe and Catterick. For comparison goods, competing centres and out-of-centre destinations further afield such as Middlesbrough, Teesside Park, Newcastle, Metro Centre, Durham and Bishop Auckland have all improved and continue to improve their offers.

Overall Quantitative Need in this Update Study

2.33 Following the above guidance in Appendix B of the PPS4 Practice Guide, overall quantitative need has been calculated for plan years within the study period in the appended tables and following sections by:

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[4] It is also considered that the household survey may have over-recorded the town centre as a destination for some goods types particularly for residents in the secondary catchment who refer to Darlington generically rather than specific destinations within it for certain goods categories e.g. in response to bulky goods questions the recoded answer was Darlington rather than a specific retail park and the town centre was taken to be the destination. This is a common problem with household surveys that cover a wide catchment area.

[5] Town centre sales densities can be highly elastic and the concept of 'overtrading' has to be applied with caution here (as recognised in the PPS4 Practice Guide). Nationally, a substantial amount of new retail floorspace has been developed in the last two decades but much of it has been in the form of superstores and retail warehouses in out-of-centre locations. Town centre development has been mainly in the higher tier regional shopping centres but the provision of new floorspace has not always matched growth in expenditure with the result that (until the recent recession) sales densities have been rising faster in smaller (unexpanded) town centres, and in retail warehouses (particularly with the development of fashion parks). Sunday trading and extended weekday opening hours have enabled existing floorspace to absorb substantial growth during the 'boom' years. Sales of higher value goods as incomes have risen, which do not necessarily need more space for storage, display and sale (e.g. miniaturization of electrical products), has also resulted in higher sales densities. Sales densities in Darlington Town Centre are likely to have followed a similar pattern.

1 Calculating expenditure growth and deducting from it the proportion of expenditure likely to be spent elsewhere based on GD's current market share within the GD area for convenience expenditure and the market share within the Study Area for comparison goods;

2 deducting from expenditure growth an allowance for existing centres to improve their turnover efficiency over and above the rate of inflation that is held constant by a 2006 price base (based on turnover efficiency rates set out in Tables 4a and 4b of Experian Retail Planner 7.1); and,

3 adding any identified overtrading in out-of-centre stores.

2.34 As indicated above, no allowance is made for capacity arising from an increased market share in the form of clawed back leakage with reference to improvements in the local offer and also that of competing centres.

2.35 The amount of floorspace that can be supported by the identified capacity is calculated using average sales densities. For convenience goods the amount of supermarket floorspace that can be supported is based upon an average of the 'big four' operators average sales densities. For comparison goods only the current town centre average sales density is used to calculate the amount of floorspace that can be supported.

2.36 As in the 2008 DRS, extreme caution is required in interpreting the quantitative need for new retail floorspace beyond 2016 as recognised in the PPS4 Practice Guide (4.25) that recommends updates every five years.

3.0 Convenience Goods

Conclusions of the 2008 Study

3.1 The 2008 study concluded that Darlington was well served by convenience shopping facilities and that there was no immediate need for an increase in floorspace as the Borough's market share had declined within the study area[6]. The study did identify a quantitative need for an additional 625 sq m (gross) floorspace by 2016 and by 1,700 sq m (gross) by 2021, based on average supermarket sales densities.

3.2 The capacity that was identified was on the basis of expenditure growth as well as some 'overtrading' at the out of centre Morton Park Morrisons store. The study concluded there was little prospect of increased market share within the primary catchment area as there was already a high retention level.

3.3 The study recommended that any new convenience goods floorspace in Darlington which was promoted on the basis of quantitative need should be located within defined centres to complement the existing provision.

Shopping Patterns

3.4 The study area for this 2010 update is the same as in 2008 and 2004 - see Map 1 in Appendix 1. For convenience goods Greater Darlington (GD, zones 1 – 5) very much forms the Primary Catchment Area (PCA). The Secondary Catchment Area (SCA) is formed by the Newton Aycliffe (NA) and Dales (DA) zones (6 and 7 respectively).

3.5 The convenience goods market share analysis is shown in Tables F to M in Appendix 1. The main changes in provision since the 2008 household survey are that a Tesco Express has opened in the town centre and a Sainsbury Local on the town centre fringes on Duke Street.

Expenditure Growth

3.6 Population data was obtained from EBS and projected forward to the required dates of 2011, 2016, 2021 and 2026 (Table A in Appendix 1) using the relevant local authority area growth rates in the ONS 2008 subnational population projections. Expenditure per head figures were also obtained from EBS for the seven zones that comprise the study area as shown in Appendix 1, Table B for convenience goods. The figures were projected forward using the EBS forecasts in EBS Retail Planner 7.1 (Fig. 1). EBS forecast 0.6% per annum (pa) growth for per capita convenience expenditure in 2011, 0.8% pa growth between 2012 and 2016, and 0.9% pa growth between 2017 and 2026.

3.7 This update also utilizes the latest forecasts of special forms of trading (SFT non-store retailing) and turnover efficiency improvements from EBS. The 2008 DRS included SFT in the market share assessment as the household survey recorded internet and other SFT sales for both broad goods categories. However, the 2008 household survey also recorded a significant increase in the market share of SFT and the latest

[6] In particular the market share in the secondary catchment area had declined significantly in the Newton Aycliffe area due to the opening of the Tesco superstore there.

EBS brief indicates that the market share for SFT is set to increase for convenience goods. Rather than project the low levels of SFT recorded in the household survey across the study period to 2026 the latest EBS forecasts[7] have been utilised and are subtracted from the source expenditure per head figures in Table B.

3.8 Table C shows the total available expenditure for convenience goods in the study period, calculated by multiplying the population figures by the expenditure figures. This indicates that within the study area there is forecast to be £22.3m growth between 2010 and 2016 and £11.4m growth in the GD area. In the period from 2010 to 2021 there will be £48.5m growth in the study area, including £23.8m growth in the GD area, and in the period 2010 to 2026 this increases to £72.5m growth in the study area and £34.3m growth in the GD area.

3.9 These amounts of expenditure growth cannot be assumed to be all available to support additional retail floorspace in Darlington over the relevant periods. There are other sources of quantitative need to take into account as well as the claims on this, such as for turnover efficiency improvements, commitments and reoccupied vacancies in the primary shopping area (PSA). In addition expenditure growth from the NA and DA zones cannot really be used to support new convenience goods floorspace in the GD area and it is likely that a small percentage of the growth will continue to leak from the GD area, as 4.4% of current expenditure does.

Leakage

3.10 This source of quantitative need is not drawn upon in this convenience goods quantitative assessment because the present level of leakage from GD is so low – 1.0% to NA, 0.1% to DA and 3.5% elsewhere (mainly to shopping centres in Teesside; Table K). Some of this leakage will be associated with journeys to work and / or combined with other regular trips out of Darlington, and much is from peripheral parts of Greater Darlington including the rural area. The level of leakage is so low that no allowance is made here for an increase in market share in the GD area from the current 95.5% level.

Overtrading

3.11 Overtrading, or undertrading, is calculated for main centres and food stores in Darlington by comparing expected levels of turnover with turnover levels derived from the household survey. The expected turnover of existing convenience floorspace is shown in Table 1, calculated with reference to national company average sales densities recorded in the 2009 Verdict Grocery Retailers Report for the larger supermarkets and Mintel's 2009 Retail Rankings for other retailers. The sales densities have been converted to 2006 prices to be consistent with the 2008 DRS.

3.12 Estimated inflow expenditure to Darlington convenience retailers from households living outside the study area is shown in Table 1. The estimates were informed by the 2008 study and the 2006 NERIP which both indicate the catchment extending, albeit relatively weakly and in diminishing strength, beyond the study area in certain directions (particularly extensive to the south and west).

7 EBS Retail Planner Note on non-store retailing (March 2010).

3.13 Estimated actual turnovers, derived from the household survey, are also shown in Table 1 and potential over / undertrading has been calculated by deducting the expected turnover from study area households from the household survey based turnover and is shown in the penultimate column of the table. Whilst several stores are found to be overtrading significantly most of these are located within defined shopping centres, such as North Road Morrisons, and so their overtrading is not included in the quantitative need assessment[8]. The only significant overtrading in an out-of-centre store is the Morton Park Morrisons and this is included in the quantitative need assessment in Tables 2 to 6.

Convenience Goods Capacity Assessment

3.14 Table 2 shows the convenience goods assessment at 2010. There is no expenditure growth as this is the base year. Likewise there are no turnover efficiency improvements to deduct from the growth as this is the base year. No claim is made against leakage that can be realistically clawed back to support quantitative need in GD due to the high retention level within the GD area (95.5%). In the wider study area GD has a 49.8% market share but as there is recently expanded provision in the two outer zones no claim is made for greater inflow from here. There is £6.3m overtrading in out-of-centre supermarkets (the Morton Park Morrisons) that can be used to support new convenience goods floorspace in sequentially preferable locations within Darlington and this is the only source of quantitative need in 2010.

3.15 There is no need to deduct turnover efficiency improvements in the calculations for the base year, however, there are other existing claims on this expenditure as shown in the table 3.1 below. These include commitments such as the convenience elements of the town centre development at Commercial Street which is assumed here to have 725 sq m (net) of its retail floorspace given over to convenience goods. There is a new commitment since 2008 in the form of a mixed use regeneration scheme at Lingfield Point that includes a convenience store of no more than 1,000 sq m (gross – assumed to be c. 650sqm net). There are also the community retail facilities to be provided as part of the Central Park development.

3.16 At a town centre average sales density the convenience element of the Commercial Street proposals are expected to have a turnover of £3.8m drawn from the study area. In addition there is the retail element of the Central Park development (where about 1,500 sq m gross has been granted planning permission for community retail facilities but includes bars and cafes) where around 360 sq m net is assumed to be developed for convenience retail floorspace. At a Spar / Co-operative average sales density the convenience element of the Central Park development are expected to have a turnover of £2.4m[9] drawn from the study area. Finally, also at a Spar / Co-operative average sales density the convenience store at Lingfield Point is expected to have a turnover of £4.3m drawn from the study area.

8 This is on the premise that the overtrading should only be used to support new floorspace in the centre where it occurs as it contributes to the vitality and viability of that centre i.e. it should not be used to support development in sequentially inferior sites.

9 The 2008 DRS used a lower sales density than the Spar / Co-operative density which is used in this update for robustness.

3.17 In addition there are (May 2010) 7,022 sq m (gross) vacant floorspace in the town centre PSA. If 6.5% of this is re-occupied by convenience operators at a town centre average sales density this would account for £1.5m of the identified capacity assuming that as with current town centre floorspace around 5% of trade came from beyond the Study Area.

3.18 The final claim on available convenience goods capacity is for an efficiency improvement in existing town centre floorspace to expected or benchmark levels. Paragraph B51 of the PPS4 Practice Guide advises that where the quantitative analysis indicates that existing retailers are achieving very low levels of turnover per sq m, for example as measured against their indicated company average sales or comparable exercises in other centres, it may be appropriate to apportion a higher level of forecast expenditure growth to support existing floorspace, either by setting a higher benchmark sales level, or applying a higher floorspace productivity factor.

3.19 This has been undertaken for convenience goods in the town centre in this update where the survey based market share turnover is 47.7% lower than the expected turnover based on company average sales densities of shops represented in the town centre. In addition, the adjustment allows for the increased turnover of new stores such as the town centre Tesco Express that have opened since the 2008 household survey was undertaken.

Table 3.1 Claims on Available Convenience Goods Capacity in 2010	
Available Convenience Goods Capacity in GD (£m)	£6.3m
Commitments	
Lingfield Point (650 sq m net)	£4.3m
Commercial Street Development (c. 725 sq m net)	£3.8m
Central Park community retail facilities (c. 360 sq m net)	£2.4m
Re-occupancy of vacant town centre units	£1.5m
Efficiency improvement in Town Centre to expected level	£8.9m
Remaining capacity	-£14.5m

Source: DBC and Appendix 1 Tables 1 & 2

3.20 This update assessment indicates that in the base year once commitments, re-occupied vacancies and efficiency improvement in existing town centre floorspace are taken into account there is no capacity for new convenience goods floorspace in the Borough over and above committed development.

3.21 Table 3 in Appendix 1 shows the projected situations in 2011 by when there is forecast to have been some expenditure growth, although once the 50% expenditure growth likely to be spent outside GD is deducted and the turnover efficiency improvements in existing floorspace there is only £1.6m to support new floorspace. When this is added to overtrading in out-of-centre supermarkets (with an allowance for turnover efficiency) there is a forecast potential capacity of £7.9m.

3.22 The updated assessment in Table 3.2 indicates that as there has only been limited growth in the one year to 2011, once commitments and re-occupied vacancies are taken into account there is no remaining capacity to support additional convenience goods floorspace.

Table 3.2 Claims on Available Convenience Goods Capacity in 2011	
Available Convenience Goods Capacity in GD (£m)	£7.9m
Commitments	
Lingfield Point (650 sq m net)	£4.3m
Commercial Street Development (c. 725 sq m net)	£3.8m
Central Park community retail facilities (c. 360 sq m net)	£2.4m
Re-occupancy of vacant town centre units	£1.5m
Efficiency improvement in Town Centre to expected level	£8.9m
Remaining capacity	£-13.0

Source: DBC and Appendix 1 Tables 1 & 3

3.23 Table 4 in Appendix 1 shows the projected situations in 2016 by when there is forecast to have been further expenditure growth, although once the 50% expenditure growth likely to be spent outside GD is deducted and the turnover efficiency improvements there is only £5.7m to support new floorspace. When this is added to overtrading in out-of-centre supermarkets (with an allowance for turnover efficiency) there is a forecast potential capacity of £12.2m.

Table 3.3 Claims on Available Convenience Goods Capacity in 2016	
Available Convenience Goods Capacity in GD (£m)	£12.2m
Commitments	
Lingfield Point (650 sq m net)	£4.4m
Commercial Street Development (c. 725 sq m net)	£3.9m
Central Park community retail facilities (c. 360 sq m net)	£2.5m
Re-occupancy of vacant town centre units	£1.5m
Efficiency improvement in Town Centre to expected level	£9.2m
Remaining capacity	-£9.3m

Source: DBC and Appendix 1 Tables 1 & 4

3.24 The assessment in Table 3.3 indicates that in 2016 once commitments and re-occupied vacancies are taken into account there is still no remaining capacity to support additional convenience goods floorspace.

3.25 Table 5 in Appendix 1 shows the projected situations in 2021 by when there is almost sufficient expenditure growth to support new floorspace when combined with overtrading in out-of-centre superstores (although caution has to be exercised in interpreting projections this far ahead). When the 50% expenditure growth likely to be spent outside GD is deducted along with turnover efficiency improvements there is £14.3m remaining to support new floorspace. When this is added to overtrading in out-of-centre supermarkets (with an allowance for turnover efficiency) there is a forecast potential capacity of £21.1m.

Table 3.4 Claims on Available Convenience Goods Capacity in 2021	
Available Convenience Goods Capacity in GD (£m)	£21.1m
Commitments	
Lingfield Point (650 sq m net)	£4.5m
Commercial Street Development (c. 725 sq m net)	£4.0m
Central Park community retail facilities (c. 360 sq m net)	£2.5m
Re-occupancy of vacant town centre units	£1.6m
Efficiency improvement in Town Centre to expected level	£9.4m
Remaining capacity	-£0.9m

Source: DBC and Appendix 1 Tables 1 & 5

3.26 The assessment in Table 3.4 indicates that in 2021 once the £22.0m claims on available expenditure are taken into account there is no remaining capacity to support new convenience goods floorspace.

Table 3.5 Claims on Available Convenience Goods Capacity in 2026	
Available Convenience Goods Capacity in GD (£m)	£29.1m
Commitments	
Lingfield Point (650 sq m net)	£4.7m
Commercial Street Development (c. 725 sq m net)	£4.1m
Central Park community retail facilities (c. 360 sq m net)	£2.6m
Re-occupancy of vacant town centre units	£1.6m
Efficiency improvement in Town Centre to expected level	£9.6m
Remaining capacity	£6.5m

Source: DBC and Appendix 1 Tables 1 & 6

3.27 Finally Table 6 in Appendix 1 shows the projected situations in 2026 by when there is forecast to have been sufficient expenditure growth to support new floorspace when combined with overtrading in out-of-centre superstores (although caution has to be exercised in interpreting projections this far ahead). Again when the 50% expenditure growth likely to be spent outside GD is deducted along with turnover efficiency improvements there is £21.6m to support new floorspace. When this is added to overtrading in out-of-centre supermarkets (with an allowance for turnover efficiency) there is a forecast potential capacity of £29.1m. Once the £22.6m claims on available expenditure shown in Table 3.5 are deducted there is £6.5m remaining to support new convenience goods floorspace. At an average supermarket sales density this would support around 800 sq m (gross, c. 500 sq m net) of additional floorspace. At a Spar / Cooperative average sales density this would support around 1,700 sq m (gross, c. 1,100 sq m net) of additional floorspace.

Conclusions

3.28 Darlington continues to be well served by convenience shopping facilities including two Morrisons, one Asda, one Sainsburys superstore, two Nettos, an Aldi, one Lidl and two Icelands. In addition there is the Marks and Spencer foodhall, the town centre shops including a Tesco Express and the covered market. There are smaller shops distributed throughout town including five Co-operative stores and a Sainsburys Local on Duke Street all taking up available expenditure.

3.29 As a result of the existing convenience goods offer, commitments and turnover efficiency improvements there is no capacity to support additional floorspace until 2026 and there is no need to identify a five year land supply of sites for convenience retailing. As the PPS4 Practice Guide advises, longer term forecasts are indicative rather than prescriptive therefore the identified capacity in 2026 has to be treated with caution.

3.30 This update of the 2008 DRS has identified even less capacity than that study, despite the higher EBS expenditure and ONS population projections that have been utilised. This is due to a number of reasons including a greater allowance for SFT to reflect the increasing use of the internet for convenience goods. There are also more commitments than in 2008 and vacancies in the town centre PSA have also increased slightly and these both have a claim on identified capacity. In addition, the PPS4 Practice Guide advises undertrading town centre floorspace can have a claim on identified capacity and such an adjustment has been incorporated into this study.

3.31 This update should not prevent convenience goods floorspace coming forward <u>in</u> existing centres where it is of an appropriate scale as that could introduce further competition and consumer choice.

4.0 Comparison Goods

Conclusions of the 2008 Study

4.1 The 2008 study concluded that Darlington was well served by comparison shopping, including a department store and four variety stores and also that the town had quite a good retail warehouse offer although much of this is located in out-of-centre locations. Darlington town centre had lost considerable market share since 2003 to out-of-centre locations within the Greater Darlington (GD) area where the offer has improved and also to the internet.

4.2 Teesside Retail Park was the only external competing centre to have increased its market share within the study area. There was no then-current capacity for additional new comparison goods floorspace in the study area.

4.3 By 2011 the 2008 DRS identified a small amount of capacity and by 2016 it would become more significant supporting around 9,900 sq m (gross) comparison goods floorspace at an average town centre sales density.

4.4 The study recommended that beyond 2016 the expenditure forecasts became unreliable therefore the 2021 quantitative need had to be treated with some caution. The surplus would support around 25,750 sq m (gross) of additional town centre floorspace in 2021.

4.5 The study recommended that quantitative need should be focused in and around the town centre to address recent trade diversions to out-of-centre facilities. To utilise the surplus elsewhere in the Borough could be to the detriment of the town centre's vitality and viability.

Shopping Patterns

4.6 The study area for the comparison goods assessment for 2010 is the same as in 2003 and 2008 - see Map 1 in Appendix 1. Unlike for convenience goods, the whole study area falls within the Primary Catchment Area (PCA) and not just Greater Darlington (GD), as the market shares of expenditure drawn in from households in the Newton Aycliffe (NA) and Dales (DA), zones are significant (33.8% and 46% respectively). Darlington town centre is the most frequently visited destination for residents in these zones.

4.7 The comparison goods market share analysis is shown in Tables N to AC in Appendix 1. There is a much greater flow of comparison goods expenditure into Greater Darlington than for convenience goods as there is very little comparison goods floorspace in the outer parts of the study area. There has been no significant increase in comparison goods floorspace since 2008 therefore it is considered robust to use 2008 market shares in this update.

4.8 Across the study area there has been a fall in market share for most centres / destinations since 2003. This is largely accounted for by the growth in internet / mail order shopping that accounts for 9.6% of comparison goods expenditure in the study area (2008; Table N), compared with less than 1.9% in 2003. Greater Darlington's market share for comparison goods has fallen from 67.5% to 58.1% since 2003.

Darlington town centre has lost considerable market share (from 50.4% to 33.7%), much of it as a result of increased internet shopping. However, other destinations within GD have increased their market share in the study area, from 17% in 2003 to the current 24.4%.

4.9 This increase in market share for other destinations in GD is from across all zones but is most noticeable within the GD area itself where it has increased from 23.8% in 2003 to the current 33.7% (nearly 10 percentage points). This is largely accounted for by Darlington Retail Park although the larger supermarkets are also retailing a larger range of non-food goods.

4.10 Darlington is not the only town centre drawing trade from the study area and competing centres such as Middlesbrough, Newcastle, Metro Centre, Northallerton and Bishop Auckland have lost market share in the study area since 2003 as a result of the increase in internet shopping. The only competing destination that has increased its market share in the study area since 2003 is Teesside Retail Park.

Expenditure Growth

4.11 Population data was obtained from EBS and projected forward to the required dates of 2011, 2016, 2021 and 2026 (Table A in Appendix 1) using the relevant local authority area growth rates in the ONS 2008 subnational population projections. Expenditure per head figures were also obtained from EBS for the seven zones that comprise the study area as shown in Appendix 1, Table D for comparison goods. The figures were projected forward using the EBS forecasts in EBS Retail Planner 7.1 (Fig. 1). EBS forecast 1.1% per annum (pa) growth for per capita comparison expenditure up to 2011, 2.5% pa growth between 2012 and 2016, and 2.8% pa growth between 2017 and 2026.

4.12 This update also utilizes the latest forecasts of special forms of trading (SFT non-store retailing) and turnover efficiency improvements from EBS[10]. Rather than project the low levels of SFT recorded in the household survey across the study period to 2026 (as in the 2008 DRS) the EBS estimates have been utilised and are subtracted from the source expenditure per head figures in Table D.

4.13 Table E shows the total available expenditure for comparison goods in the study period, calculated by multiplying the population figures by the expenditure figures. This indicates that within the study area there is forecast to be £97.7m growth between 2010 and 2016 and £46.6m growth in the GD area. In the period from 2010 to 2021 there will be £232.6m growth in the study area, including £108.8m growth in the GD area, and in the period 2010 to 2026 this increases to £384.4m growth in the study area and £176.7m growth in the GD area.

4.14 These amounts of expenditure growth cannot be assumed to be all available to support additional retail floorspace in Darlington over the relevant periods. There are other sources of quantitative need to take into account as well as the claims on this such as for turnover efficiency improvements, commitments and reoccupied vacancies. In addition it is likely that a fair percentage of the expenditure growth in the study area like 24% of existing expenditure will be spent outside the study area.

10 EBS Retail Planner Note on non-store retailing (March 2010).

Therefore 24% of the expenditure growth is assumed to be unavailable to support quantitative need in the study area.

Leakage

4.15 This source of quantitative need is not drawn upon for the comparison goods quantitative assessment. Although the market share of GD within the study area has fallen from 67.5%[11] in 2003 to the current 63.5% (Table N Appendix 1). Whilst in theory it should be possible to increase the market share of GD stores and the town centre in particular towards previous levels through an improved offer, competing centres are also improving their offer therefore no claim is made on this source of quantitative need in the comparison goods assessment.

Overtrading

4.16 Overtrading, or undertrading, is calculated for the town centre and other main retail destinations in Darlington by comparing expected levels of turnover with turnover levels derived from the household survey. The expected turnover of existing comparison floorspace is shown in Table 7, calculated with reference to national company average sales densities recorded in Mintel's 2009 Retail Rankings for town centre and retail parks and from the 2009 Verdict Grocery Retailers Report for the areas of comparison goods floorspace which are found in the larger supermarkets. The sales densities have been converted to 2006 prices to be consistent with the 2008 DRS.

4.17 Estimated inflow expenditure to Darlington comparison goods retailers from households living outside the study area is also shown in Table 7. The estimates were informed by the 2008 study and the 2006 NERIP which both indicate the catchment extending beyond the study area particularly to the north and east.

4.18 Estimated actual turnovers, derived from the household survey, are also shown in Table 7 and potential over / undertrading has been calculated by deducting the expected turnover from study area households from the household survey based turnover as shown in the penultimate column. Whilst the town centre is estimated to be overtrading slightly this is not added into the quantitative assessment on the basis that the overtrading here should only be used to support new floorspace in the town centre as it contributes to the overall vitality and viability of the centre. Only overtrading in the out-of-centre Darlington Retail Park and Morton Park is used in the quantitative assessment below.

Comparison Goods Capacity Assessment

4.19 Table 8 shows the comparison goods assessment at 2010. There is no expenditure growth as this is the base year. Likewise there are no turnover efficiency improvements to deduct from the growth as this is the base year. No claim is made for leakage that can be realistically clawed back to support quantitative need in the study

[11] The 2003 study excluded SFT at 7% for comparison goods. This study excludes SFT for comparison goods at 11.5% in the 2010 base year.

area. There is also the £46.0m overtrading at the out-of-centre Darlington Retail Park and Morton Park that can be used to support new comparison goods floorspace in sequentially preferable locations within Darlington.

4.20 Whilst there is no need to deduct turnover efficiency improvements in the calculations for the base year, there are other existing claims on this expenditure as shown in the table 4.1 below. These include commitments at Commercial Street and the modest non-convenience community retail facilities assumed to be provided as part of the Central Park and Lingfield Point developments.

Table 4.1 Claims on Available Comparison Goods Capacity in 2010	
Available Comparison Goods Capacity in Study Area (£m)	£46.0m
Commitments	
Commercial Street (c. 11,625 sq m net)	£41.6
Lingfield Point (85 sq m net)	£0.2
Central Park (c. 130 sq m net)	£0.3
Re-occupancy of vacant town centre units	£14.2
Remaining capacity	-£10.3

Source: DBC and Appendix 1 Tables 7 & 8

4.21 At a town centre average sales density the 11,625 sq m (net) Commercial Street development is estimated here to have a turnover of £41.6m drawn from the study area. The Central Park and Lingfield Point retail facilities are assumed here to have around 130 and 85 sq m (net) of non-food retail floorspace respectively which at a district / local centre average sales density would generate a turnover at £0.5m drawn from the study area.

4.22 In addition there is (at May 2010) 7,022 sq m (gross) vacant floorspace in the town centre PSA. If 87.2% of this is re-occupied by comparison goods operators, reflecting the current percentage of town centre floorspace given over to comparison goods, at a town centre average sales density this would account for £14.2m of the identified capacity assuming that as with current town centre floorspace around 10% of trade came from beyond the study area.

4.23 This assessment indicates that in the base year once commitments and re-occupied vacancies are taken into account there is no capacity for new comparison goods floorspace in the Borough over and above committed development.

4.24 Table 9 in Appendix 1 shows the projected situations in 2011 by when there is forecast to have been expenditure growth since 2010 of £7.4m in the study area, although once the 24% expenditure growth likely to be spent outside the study area is deducted and the turnover efficiency improvements in existing floorspace there is £1.2m remaining. When this is added to the overtrading in out-of-centre retail warehouses (with an allowance for turnover efficiency) there is a forecast potential capacity of £47.7m in 2011.

4.25 The assessment in Table 4.2 indicates that in 2011 once commitments and re-occupied vacancies are taken into account there is still no remaining capacity to support new comparison goods floorspace.

Table 4.2 Claims on Available Comparison Goods Capacity in 2011	
Available Comparison Goods Capacity in Study Area (£m)	£47.7m
Commitments	
Commercial Street (c. 11,625 sq m net)	£42.0m
Lingfield Point (85 sq m net)	£0.2m
Central Park (c. 130 sq m net)	£0.3m
Re-occupancy of vacant town centre units	£14.4m
Remaining capacity	-£9.2m

Source: DBC and Appendix 1 Tables 7 & 9

4.26 Table 10 in Appendix 1 shows the projected situations in 2016 by when there is forecast to have been expenditure growth since 2010 of £97.7m in the study area, although once the 24% expenditure growth likely to be spent outside study area is deducted and the turnover efficiency improvements an estimated £23.3m will be left to support new floorspace. When this is added to the overtrading in out-of-centre retail warehouses (with an allowance for turnover efficiency) there is a forecast potential capacity of £75.2m.

4.27 The assessment in Table 4.3 indicates that in 2016 once commitments and re-occupied vacancies are taken into account there is £11.7m remaining capacity to support new comparison goods floorspace. At a town centre average sales density the surplus in 2016 would support around 4,300 sq m (gross) of additional town centre floorspace.

Table 4.3 Claims on Available Comparison Goods Capacity in 2016	
Available Comparison Goods Capacity in Study Area (£m)	£75.2m
Commitments	
Commercial Street (c. 11,625 sq m net)	£46.9m
Sainsbury (648 sq m net)	£0.2m
Central Park (c. 130 sq m net)	£0.4m
Re-occupancy of vacant town centre units	£16.0m
Remaining capacity	£11.7m

Source: DBC and Appendix 1 Tables 7 & 10

4.28 Table 11 in Appendix 1 also shows the projected situations in 2021 by when there is forecast to have been expenditure growth since 2010 of £232.6m in the study area, although caution has to be exercised in interpreting projections this far ahead. Again when the 24% expenditure growth likely to be spent outside the study area is deducted along with turnover efficiency improvements there is £64.0m to support new floorspace. When this is added to the overtrading in out-of-centre retail warehouses (with an allowance for turnover efficiency) there is a forecast potential capacity of £123.0m.

4.29 The assessment in Table 4.4 indicates that in 2021 once commitments and re-occupied vacancies are taken into account there is £50.7m remaining capacity to support new comparison goods floorspace. At a town centre average sales density the surplus in 2021 would support around 16,600 sq m (gross) of additional town centre floorspace. This is a substantial amount of floorspace and because of the unreliability of longer term forecasts has to be treated with caution.

Table 4.4 Claims on Available Comparison Goods Capacity in 2021	
Available Comparison Goods Capacity in Study Area (£m)	£123.0m
Commitments	
Commercial Street (c. 11,625 sq m net)	£53.3m
Sainsbury (648 sq m net)	£0.3m
Central Park (c. 130 sq m net)	£0.4m
Re-occupancy of vacant town centre units	£18.2m
Remaining capacity	£50.7m

Source: DBC and Appendix 1 Tables 7 & 11

4.30 Finally Table 12 in Appendix 1 shows the projected situations in 2026 by when there is forecast to have been significant expenditure growth since 2010 of £384.4m in the study area, although again caution has to be exercised in interpreting projections this far ahead. Again when the 24% expenditure growth likely to be spent outside the study area is deducted along with turnover efficiency improvements there is £108.9m to support new floorspace. When this is added to the overtrading in out-of-centre retail warehouses (with an allowance for turnover efficiency) there is a forecast potential capacity of £176.0m.

Table 4.5 Claims on Available Comparison Goods Capacity in 2026	
Available Comparison Goods Capacity in Study Area (£m)	£176.0m
Commitments	
Commercial Street (c. 11,625 sq m net)	£60.6m
Sainsbury (648 sq m net)	£0.3m
Central Park (c. 130 sq m net)	£0.5m
Re-occupancy of vacant town centre units	£20.7m
Remaining capacity	£93.9m

Source: DBC and Appendix 1 Tables 7 & 12

4.31 The assessment in Table 4.5 indicates that in 2026 once commitments and re-occupied vacancies are taken into account there is £93.9m remaining capacity to support new comparison goods floorspace. At a town centre average sales density the surplus in 2026 would support around 27,000 sq m (gross) of additional town centre floorspace. This is a substantial amount of floorspace and as the PPS4 Practice Guide indicates such long term projections are indicative rather than prescriptive and should be updated at five year intervals. Extreme caution is therefore required in interpreting this update assessment beyond 2016.

Conclusions

4.32 Darlington is well served for comparison shopping, including a department store and three variety stores, and will gain a second department store and further modern comparison shop units when the Commercial Street development opens. The town also has quite a good retail warehouse offer although much of this is located in out-of-centre locations at the Darlington Retail Park and Morton Park or in freestanding stores.

4.33 Darlington town centre has lost considerable market share since 2003 to out-of-centre locations within the GD area where the offer has improved and also to the internet. Teesside Retail Park is the only external competing centre to have increased its market share within the study area.

4.34 Competing centres continue to improve their offer therefore no claim is made on clawed back leakage towards quantitative need. Quantitative need in 2010 is based solely on overtrading at out-of-centre retail parks and is accounted for by commitments so there is no current capacity for additional new comparison goods floorspace in the study area.

4.35 By 2016 there is expected to be a small amount of additional capacity (£11.7m) supporting around 4,300 sq m (gross) and by 2021 it will become more significant supporting around 16,600 sq m (gross) comparison goods floorspace at an average town centre sales density. The PPS4 Practice Guide advises quantitative assessments should be updated every five years therefore caution is required in interpreting the findings from 2016 onwards.

4.36 By 2026 quantitative need is expected to grow significantly, although some caution is required in interpreting this assessment because the national expenditure forecasts and population projections become less reliable towards the end of the study period. At a town centre average sales density the surplus £93.9m would support around 27,000 sq m (gross) of additional town centre floorspace in 2026. This is a substantial amount of floorspace and again has to be treated with caution.

4.37 This quantitative need should be focused in and around the town centre to address recent trade diversions to out-of-centre facilities. To utilise the surplus elsewhere in the Borough could be to the detriment of the town centre's vitality and viability and the Council need to identify a five year land supply of sites for comparison stores. As the PPS4 Practice Guide advises longer term forecasts are indicative rather than prescriptive therefore the identified capacity at 2021 and 2026 has to be treated with caution.

4.38 This update of the 2008 DRS has identified less capacity than that study despite the higher ONS population projections that have been utilised. The 2010 EBS expenditure forecasts are much lower than in 2008 and EBS have also produced much more robust forecasts of turnover efficiency growth and market shares for SFT.

4.39 Again this update should not prevent comparison goods floorspace coming forward <u>in</u> existing centres within the retail hierarchy where it is of an appropriate scale as that could introduce further competition and consumer choice. The greatest level of overtrading that was identified in the 2008 DRS and this update is in the town centre. This overtrading contributes to the vitality and viability of the town centre in many ways so should not be directed to competing edge or out-of-centre locations that should be justified by other sources of quantitative need.

5.0 Conclusions and Recommendations

5.1 This study was commissioned by Darlington BC to update the capacity assessment sections of the 2008 Darlington Retail Study (DRS) to take into account the effects of the economic downturn on retail forecasts and the most recent Government policy in the form of PPS4 Planning for Sustainable Economic Development published in December 2009.

5.2 This update utilizes more recent Experian Business Strategies (EBS) expenditure per head forecasts and population forecasts from Office of National Statistics (ONS) than the 2008 DRS as well as changes in floorspace and retailer representation in the catchment area recorded by DBC. In addition this updated study utilizes the latest forecasts of special forms of trading (SFT) and turnover efficiency improvements from EBS.

5.3 The 2008 DRS only undertook a quantitative assessment to 2021 reflecting the EBS forecast growth rates available at the time. EBS expenditure per head forecasts are now available to 2026 which coincides with the end of the Darlington LDF Core Strategy plan period. PPS4 Practice Guide (4.25) advises capacity assessments should be updated every five years therefore caution is still required in interpreting the longer term findings which are indicative rather than prescriptive.

5.4 The objectives of the original 2008 DRS were to bring up to date the evidence base, conclusions and recommendations of the 2004 Darlington Retail Study in order primarily to:

- inform the emerging Darlington local development framework (LDF) beginning with the Core Strategy;
- assist with the assessment of retail planning proposals; and,
- help in the management of the town centre.

5.5 This update has the same objectives and updates its sections five (Methodology for Quantitative Assessment), six (Convenience Goods Quantitative Assessment) and seven (Comparison Goods Quantitative Assessment) of the DRS and conclusions and recommendations arising from them. Other conclusions and recommendations from the 2008 DRS, such as the health check and qualitative assessments, remain valid.

5.6 The 2008 DRS found that Darlington Borough has a disproportionately high level of retail floorspace, even after taking into account its extensive catchment area and this is still the case. The majority of convenience floorspace is contained within a small number of modern superstores and supermarkets. There has been some new retail development since 2008 but overall Darlington town centre has not extended its quantity of shopping floorspace. There has not been significant new retail floorspace developed in smaller centres in the study area, outside the Borough, since 2008. Significant retail development has taken place in competing centres outside the area, in particular the Metro Centre and Newcastle, but there has been little development in the main competing centre of Middlesbrough.

Convenience Goods Quantitative Need

5.7 Darlington is well served by convenience shopping facilities. The Borough's market share of convenience spending within the study area has declined since 2003 but this is the result of new stores opening outside the Borough and clawing back some of the expenditure which 'belongs' there - i.e. of households in those areas. There is very little leakage from the Borough itself. As a result of the current offer and limited capacity, there is no immediate, short-term (2016) or medium-term (2021) quantitative need for any additions to convenience goods floorspace in Darlington. Only by 2026 does a need for around 800 sq m to 1,700 sq m (gross) of additional floorspace (at supermarket and convenience store sales densities respectively).

5.8 This update has identified even less convenience goods capacity than the 2008 study, despite the higher EBS expenditure and ONS population projections that have been utilised. This is due to a number of reasons including a greater allowance for SFT to reflect the increasing use of the internet for convenience goods. There are also more commitments than in 2008 and vacancies in the town centre PSA have also increased slightly and these both have a claim on identified capacity. In addition, the PPS4 Practice Guide advises undertrading town centre floorspace can have a claim on identified capacity and such an adjustment has been incorporated into this study for convenience goods (not for comparison goods).

Comparison Goods Quantitative Need

5.9 Darlington is also well served for comparison shopping, including a department store and three variety stores, and will gain a second department store and further modern comparison shop units when the Commercial Street development opens. The town also has quite a good retail warehouse offer although much of this is located in out-of-centre locations at the Darlington Retail Park and Morton Park or in freestanding stores.

5.10 Darlington town centre has lost considerable comparison goods market share since 2003 to out-of-centre locations within the GD area where the offer has improved and also to the internet. Teesside Retail Park is the only external competing centre to have increased its market share within the study area.

5.11 Competing centres continue to improve their offer therefore no claim is made on clawed back leakage towards quantitative need. Quantitative need for comparison goods in 2010 is based solely on overtrading at out-of-centre retail parks and is accounted for by commitments so there is no current capacity for additional new comparison goods floorspace in the study area. By 2016 there is expected to be a small amount of capacity (£11.7m) supporting around 4,300 sq m (gross) and by 2021 it will become more significant supporting around 16,600 sq m (gross) comparison goods floorspace at an average town centre sales density. The PPS4 Practice Guide advises quantitative assessments should be updated every five years therefore caution is required in interpreting the findings from 2016 onwards.

5.12 In 2026 quantitative need for comparison floorspace is expected to grow significantly although some caution is required in interpreting this assessment because the national expenditure forecasts become less reliable towards the end of the study period. At a town centre average sales density the surplus £93.9m would support around 27,000 sq m (gross) of additional town centre floorspace in 2026. This is a substantial amount of floorspace and has to be treated with caution. This quantitative need should be focused in and around the town centre to address recent trade diversions to out-of-centre facilities.

5.13 This update of the 2008 DRS has also identified less comparison goods capacity than the original study despite the higher ONS population projections that have been utilised. The 2010 EBS expenditure forecasts are much lower than in 2008 and EBS have also produced much more robust forecasts of turnover efficiency growth and market shares for SFT.

In-Centre Retail Floorspace Development

5.14 This update has identified a degree of quantitative need for both broad goods categories, particularly in the longer term. This should be focused in the town centre or other centres in the retail hierarchy in development of an appropriate scale. To utilise the surplus elsewhere could be to the detriment of the centres' vitality and viability.

5.15 As the PPS4 Practice Guide advises longer term forecasts are indicative rather than prescriptive, the identified capacity at 2021 and 2026 therefore has to be treated with caution. The Council does not need to identify an immediate five year land supply of sites for either broad goods category. However, the Council may consider at a later date (such as at the first review of the Core Strategy) the phasing and release of allocated sites that central sites are developed ahead of sequentially inferior locations in accordance with guidance in PPS4.

5.16 These updated assessments should not prevent floorspace coming forward in existing centres within the retail hierarchy for either goods category ahead of future quantitative need becoming available where it is of an appropriate scale as that could introduce further competition and consumer choice.

5.17 The greatest level of comparison goods overtrading that was identified in the 2008 DRS and this update is in the town centre. This overtrading contributes to the vitality and viability of the town centre in many ways so should not be directed to competing edge or out-of-centre locations that should be justified by other sources of quantitative need.

Recommendations

Darlington Town Centre

5.18 Darlington town centre is a major asset to the Borough that performs well but needs to be protected, promoted and enhanced through development plan policies, the determination of planning applications and implementation of the proposals for the Commercial Street and Feethams areas.

5.19 In terms of priorities, the town centre's fashion offer within the catchment area needs to be improved through the attraction of national multiples which are currently unrepresented or under-represented in the town centre. The centre also needs to clawback market share lost since 2003 in other comparison goods categories to other destinations, including retail warehouses and supermarkets within the Borough.

5.20 As in 2008, the pressing need is to increase the number of larger shop units (300 to 600 sq m gross) in existing and new primary frontages and provide some larger units (up to 2,000 sq m) to accommodate, in particular, fashion and lifestyle outlets. The centre also still needs to increase the number of anchor stores, that is department and / or variety stores.

5.21 Implementation of the Commercial Street proposal would help achieve both objectives and the development of this key site for comparison goods retailing should take precedence over other retail proposals in the town.

5.22 One of the key roles for the Council will be working with the Commercial Street developers to attract new retailers to the town rather than simply relocating current retailers.

5.23 Diversifying the town centre is the next priority.

5.24 The Council might also adopt a defensive planning strategy in relation to the monitoring of retail proposals in competing locations outside the Borough, and object to them where necessary to safeguard the vitality and viability of the town centre.

Retail Hierarchy

5.25 District and local centres should be protected by policies in the LDF from out-of-centre and edge-of-centre convenience proposals above 100 sq m, including shops in petrol filling stations.

5.26 As part of the LDF the Council should designate the shopping centres at West Park and Middleton St. George as local centres in order to protect them from competition from out-of-centre development in those parts of the Borough and to ensure that local residents continue to benefit from the shops and services they provide.

Convenience Shopping

5.27 It is recommended that no allocations are made in the LDF for new convenience floorspace in the Borough and there is unlikely to be any such necessity before 2026 although the position should be reviewed before 2016. Any claims on the limited future capacity in expenditure to support new foodstores should be directed towards the town centre or, if of an appropriate scale, to other centres within the retail hierarchy.

5.28 Given the limited quantitative need, development even of a small supermarket would be inappropriate in Darlington in the period to 2026. It is recommended therefore that until that time additional convenience floorspace within local centres be restricted to shops no larger than a maximum net sales area of 280 sq m.

Comparison Shopping

5.29 The town centre should be the focus for all comparison goods shopping development.

5.30 There is no current capacity for additional new comparison goods floorspace in the study area but by 2016 there will be a quantitative need for around 4,300 sq m (gross) floorspace and by 2021 around 16,600 sq m (gross;).

5.31 In 2026 quantitative need is expected to have grown significantly and would support around 27,000 sq m (gross) of additional town centre floorspace. However, caution is required in interpreting the assessment in 2016 and beyond. The Commercial Street scheme will meet most identified need in the short to medium term and combined with other sites within the town centre will meet need up to 2021. The position should be reviewed before 2016.

5.32 In both district and local centres it is recommended that new comparison goods floorspace is limited to a maximum gross unit size of 100 sq m to ensure that retailers serving a wider catchment area than that of the district / local centre do not locate in these centres and are directed to the town centre.

Monitoring

5.33 The 2008 DRS and this 2010 update of the quantitative assessment sections should be updated ahead of 2016. The Council should also continue to monitor the vitality and viability of the town centre and centres within the retail hierarchy in accordance with guidance in PPS4.

Population and Expenditure Information

Resident Population by Zone in the Study Area **Table A**

Subzone	Area	2010	2011	2016	2021	2026
1	Darlington SW	20,798	20,964	21,563	22,223	22,711
2	Darlington SE	24,456	24,727	25,432	26,211	26,706
3	Darlington NE	20,830	21,124	21,727	22,392	22,746
4	Darlington NW	22,021	22,399	23,039	23,744	24,047
5	Rural Darlington	15,142	15,448	15,889	16,376	16,534
Sub-Total	**Greater Darlington**	103,247	104,663	107,650	110,947	112,745
6	Newton Aycliffe	56,016	56,080	56,594	57,365	57,875
7	Dales	73,859	74,340	76,748	79,251	81,466
Total	**Total (Study Area)**	233,122	235,083	240,992	247,563	252,086

Notes: 1 Population Based on 2008 ONS mid year estimates / projections and projected forward using 2008 ONS Sub National Population Projections for Darlington (zones 1 to 5), Sedgefield (zone 6) and Richmondshire / Teesdale (zone 7)

Estimated Expenditure Per Head On Convenience Goods in 2010 - 2026 **Table B**

Zone		2010	2011	2016	2021	2026
1	Darlington SW	£1,630	£1,632	£1,677	£1,748	£1,820
2	Darlington SE	£1,440	£1,442	£1,481	£1,544	£1,608
3	Darlington NE	£1,474	£1,477	£1,517	£1,581	£1,647
4	Darlington NW	£1,469	£1,472	£1,512	£1,576	£1,641
5	Rural Darlington	£1,583	£1,585	£1,629	£1,698	£1,768
6	Newton Aycliffe	£1,518	£1,521	£1,562	£1,629	£1,696
7	Dales	£1,464	£1,466	£1,506	£1,570	£1,635

Notes: 1 Expenditure per head estimates from Experian
2 Special forms of trading excluded based on Experian Retail Planner Note on non-store retailing (March 2010) @ 6.0% in 2010, 6.4% in 2011, 7.6% in 2016, 7.9% in 2021 and 8.3% in 2026
3 2010 - 2026 Expenditure Projections based on Experian projections as outlined in Retail Planner Brief 7.1 Figure 1
4 2010 to 2011 growth @ 0.6% per annum, 2012 to 2016 growth @ 0.8% pa and 2017 to 2026 growth @ 0.9% pa
5 All prices 2006

Total Convenience Expenditure 2010 - 2026 in the Study Area **Table C**

		2010	2011	2016	2021	2026	Growth			
	Zone	(£m)	(£m)	(£m)	(£m)	(£m)	10-11(£m)	10-16(£m)	10-21(£m)	10-26(£m)
1	Darlington SW	£33.9	£34.2	£36.2	£38.8	£41.3	£0.3	£2.3	£5.0	£7.4
2	Darlington SE	£35.2	£35.7	£37.7	£40.5	£42.9	£0.5	£2.5	£5.3	£7.7
3	Darlington NE	£30.7	£31.2	£33.0	£35.4	£37.5	£0.5	£2.3	£4.7	£6.7
4	Darlington NW	£32.4	£33.0	£34.8	£37.4	£39.5	£0.6	£2.5	£5.1	£7.1
5	Rural Darlington	£24.0	£24.5	£25.9	£27.8	£29.2	£0.5	£1.9	£3.8	£5.3
Sub-Total	**Greater Darlington**	£156.1	£158.5	£167.5	£180.0	£190.4	£2.4	£11.4	£23.8	£34.3
6	Newton Aycliffe	£85.0	£85.3	£88.4	£93.4	£98.2	£0.2	£3.4	£8.4	£13.1
7	Dales	£108.1	£109.0	£115.6	£124.4	£133.2	£0.9	£7.5	£16.3	£25.1
Total	**Total (Study Area)**	£349.3	£352.8	£371.5	£397.8	£421.8	£3.5	£22.3	£48.5	£72.5

Notes: 1 Source Tables A & B
2 All prices 2006

Estimated Expenditure Per Head On Comparison Goods in 2010 - 2026 **Table D**

Zone		2010	2011	2016	2021	2026
1	Darlington SW	£3,073	£3,083	£3,428	£3,949	£4,555
2	Darlington SE	£2,456	£2,463	£2,739	£3,156	£3,640
3	Darlington NE	£2,617	£2,625	£2,919	£3,362	£3,878
4	Darlington NW	£2,763	£2,772	£3,082	£3,551	£4,096
5	Rural Darlington	£3,064	£3,073	£3,417	£3,937	£4,541
6	Newton Aycliffe	£2,579	£2,587	£2,877	£3,314	£3,822
7	Dales	£2,793	£2,802	£3,116	£3,590	£4,140

Notes: 1 Expenditure per head estimates from Experian
2 Special forms of trading excluded based on Experian Retail Planner Note on non-store retailing (March 2010) @ 11.5% in 2010, 12.2% in 2011, 13.7% in 2016, 13.4% in 2021 and 13.0% in 2026
3 2010 - 2026 Expenditure Projections based on Experian projections as outlined in Retail Planner Brief 7.1 Figure 1
4 2010 to 2011 growth @ 1.1% per annum, 2012 to 2016 growth @ 2.5% pa and 2016 to 2026 growth @ 2.8% pa
5 All prices 2006

Total Comparison Expenditure 2010 - 2026 in the Study Area **Table E**

		2010	2011	2016	2021	2026	Growth			
	Zone	(£m)	(£m)	(£m)	(£m)	(£m)	10-11(£m)	10-16(£m)	10-21(£m)	10-26(£m)
1	Darlington SW	£63.9	£64.6	£73.9	£87.8	£103.5	£0.7	£10.0	£23.8	£39.5
2	Darlington SE	£60.1	£60.9	£69.7	£82.7	£97.2	£0.8	£9.6	£22.7	£37.1
3	Darlington NE	£54.5	£55.4	£63.4	£75.3	£88.2	£0.9	£8.9	£20.8	£33.7
4	Darlington NW	£60.9	£62.1	£71.0	£84.3	£98.5	£1.2	£10.2	£23.5	£37.6
5	Rural Darlington	£46.4	£47.5	£54.3	£64.5	£75.1	£1.1	£7.9	£18.1	£28.7
Sub-Total	**Greater Darlington**	£285.7	£290.5	£332.3	£394.6	£462.4	£4.8	£46.6	£108.8	£176.7
6	Newton Aycliffe	£144.5	£145.1	£162.8	£190.1	£221.2	£0.6	£18.3	£45.6	£76.8
7	Dales	£206.3	£208.3	£239.1	£284.5	£337.3	£2.0	£32.8	£78.2	£131.0
Total	**Total (Study Area)**	£636.5	£643.9	£734.2	£869.1	£1,020.9	£7.4	£97.7	£232.6	£384.4

Notes: 1 Source Tables A & D
2 All prices 2006

Convenience Goods Market Share Analysis

Table F

Main Food Shopping Market Share in the Study Area, 2010

	Destination	Origin %			
		GD	NA	DA	SA
	Morrison Morton Park	20.3%	2.8%	7.4%	12.0%
	Morrison North Road	34.7%	8.3%	1.5%	18.0%
	Sainsbury Victoria Rd	12.0%	0.7%	2.9%	6.4%
	Whinfield Asda	13.9%	2.1%	0.7%	6.9%
	Yarm Rd Aldi	3.3%	0.0%	0.7%	1.7%
	Yarm Rd Lidl	1.0%	0.7%	0.0%	0.6%
	Cockerton Somerfield	1.3%	0.0%	0.0%	0.6%
	Haughton Rd Netto	0.5%	0.0%	0.0%	0.2%
	Neasham Rd Netto	2.1%	0.0%	0.0%	0.9%
	M & S Darlington	1.8%	0.7%	0.0%	1.0%
	Queen St Iceland	1.5%	0.0%	0.0%	0.7%
	Yarm Rd Iceland	1.2%	0.0%	0.0%	0.6%
	Covered Market	0.3%	0.0%	0.7%	0.4%
	Other Darlington Stores	1.4%	0.0%	0.7%	0.9%
1	**Greater Darlington**	**95.3%**	**15.2%**	**14.7%**	**50.9%**
2	Newton Aycliffe	0.8%	53.1%	0.0%	13.3%
3	Dales	0.1%	0.0%	71.3%	22.1%
4	**Study Area**	**96.2%**	**68.3%**	**86.0%**	**86.3%**
5	Elsewhere	3.8%	31.7%	14.0%	13.7%
	TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Table G

Main Food Shopping Expenditure in the Study Area, 2010

	Destination	Origin (£m)			
		GD	NA	DA	SA
	Morrison Morton Park	£22.8	£1.7	£5.7	£30.2
	Morrison North Road	£39.0	£5.1	£1.1	£45.2
	Sainsbury Victoria Rd	£13.5	£0.4	£2.3	£16.2
	Whinfield Asda	£15.6	£1.3	£0.6	£17.5
	Yarm Rd Aldi	£3.7	£0.0	£0.6	£4.3
	Yarm Rd Lidl	£1.1	£0.4	£0.0	£1.5
	Cockerton Somerfield	£1.5	£0.0	£0.0	£1.5
	Haughton Rd Netto	£0.5	£0.0	£0.0	£0.5
	Neasham Rd Netto	£2.3	£0.0	£0.0	£2.3
	M & S Darlington	£2.1	£0.4	£0.0	£2.5
	Queen St Iceland	£1.7	£0.0	£0.0	£1.7
	Yarm Rd Iceland	£1.4	£0.0	£0.0	£1.4
	Covered Market	£0.4	£0.0	£0.6	£0.9
	Other Darlington Store	£1.6	£0.0	£0.6	£2.2
1	**Greater Darlington**	**£107.2**	**£9.3**	**£11.4**	**£127.9**
2	Newton Aycliffe	£0.9	£32.5	£0.0	£33.4
3	Dales	£0.2	£0.0	£55.5	£55.7
4	**Study Area**	**£108.2**	**£41.8**	**£67.0**	**£216.9**
5	Elsewhere	£4.2	£19.4	£10.9	£34.5
	TOTAL	**£112.4**	**£61.2**	**£77.8**	**£251.5**

Table H

Top-up Food Shopping Market Share in the Study Area, 2010

	Destination	Origin %			
		GD	NA	DA	SA
	Morrison Morton Park	12.1%	0.9%	2.1%	6.3%
	Morrison North Road	13.4%	0.9%	0.0%	6.2%
	Sainsbury Victoria Rd	7.6%	0.0%	4.1%	4.7%
	Whinfield Asda	12.2%	0.0%	0.0%	5.4%
	Yarm Rd Aldi	4.7%	0.9%	1.0%	2.6%
	Yarm Rd Lidl	2.3%	0.9%	0.0%	1.3%
	Cockerton Somerfield	6.0%	0.0%	0.0%	2.7%
	Haughton Rd Netto	0.9%	0.0%	1.0%	0.7%
	Neasham Rd Netto	3.9%	0.0%	0.0%	1.7%
	M & S Darlington	5.8%	0.9%	0.0%	2.8%
	Queen St Iceland	3.3%	0.0%	0.0%	1.5%
	Yarm Rd Iceland	1.4%	0.0%	0.0%	0.6%
	Covered Market	0.0%	0.0%	0.0%	0.0%
	Other Darlington Stores	22.3%	1.8%	0.0%	10.4%
1	**Greater Darlington**	**95.8%**	**6.4%**	**8.2%**	**46.9%**
2	Newton Aycliffe	1.4%	73.6%	0.0%	18.6%
3	Dales	0.0%	0.0%	82.5%	25.5%
4	**Study Area**	**97.3%**	**80.0%**	**90.7%**	**91.0%**
5	Elsewhere	2.7%	20.0%	9.3%	9.0%
	TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Table J

Top-up Food Shopping Expenditure in the Study Area, 2010

	Destination	Origin (£m)			
		GD	NA	DA	SA
	Morrison Morton Park	£5.3	£0.2	£0.6	£6.1
	Morrison North Road	£5.9	£0.2	£0.0	£6.1
	Sainsbury Victoria Rd	£3.3	£0.0	£1.2	£4.6
	Whinfield Asda	£5.3	£0.0	£0.0	£5.3
	Yarm Rd Aldi	£2.1	£0.2	£0.3	£2.6
	Yarm Rd Lidl	£1.0	£0.2	£0.0	£1.2
	Cockerton Somerfield	£2.6	£0.0	£0.0	£2.6
	Haughton Rd Netto	£0.4	£0.0	£0.3	£0.7
	Neasham Rd Netto	£1.7	£0.0	£0.0	£1.7
	M & S Darlington	£2.5	£0.2	£0.0	£2.8
	Queen St Iceland	£1.4	£0.0	£0.0	£1.4
	Yarm Rd Iceland	£0.6	£0.0	£0.0	£0.6
	Covered Market	£0.0	£0.0	£0.0	£0.0
	Other Darlington Stores	£9.7	£0.4	£0.0	£10.2
1	**Greater Darlington**	**£41.9**	**£1.5**	**£2.5**	**£45.9**
2	Newton Aycliffe	£0.6	£17.5	£0.0	£18.2
3	Dales	£0.0	£0.0	£25.0	£25.0
4	**Study Area**	**£42.5**	**£19.1**	**£27.5**	**£89.0**
5	Elsewhere	£1.2	£4.8	£2.8	£8.8
	TOTAL	**£43.7**	**£23.8**	**£30.3**	**£97.8**

Table K

Total Convenience Shopping Market Share in the Study Area, 2010

	Destination	Origin %			
		GD	NA	DA	SA
	Morrison Morton Park	18.0%	2.2%	5.9%	10.4%
	Morrison North Road	28.7%	6.2%	1.1%	14.7%
	Sainsbury Victoria Rd	10.8%	0.5%	3.3%	5.9%
	Whinfield Asda	13.4%	1.5%	0.5%	6.5%
	Yarm Rd Aldi	3.7%	0.3%	0.8%	2.0%
	Yarm Rd Lidl	1.4%	0.8%	0.0%	0.8%
	Cockerton Somerfield	2.6%	0.0%	0.0%	1.2%
	Haughton Rd Netto	0.6%	0.0%	0.3%	0.3%
	Neasham Rd Netto	2.6%	0.0%	0.0%	1.1%
	M & S Darlington	2.9%	0.8%	0.0%	1.5%
	Queen St Iceland	2.0%	0.0%	0.0%	0.9%
	Yarm Rd Iceland	1.3%	0.0%	0.0%	0.6%
	Covered Market	0.2%	0.0%	0.5%	0.3%
	Other Darlington Store	7.3%	0.5%	0.5%	3.5%
1	**Greater Darlington**	**95.5%**	**12.7%**	**12.9%**	**49.8%**
2	Newton Aycliffe	1.0%	58.9%	0.0%	14.8%
3	Dales	0.1%	0.0%	74.4%	23.1%
4	**Study Area**	**96.5%**	**71.6%**	**87.3%**	**87.6%**
5	Elsewhere	3.5%	28.4%	12.7%	12.4%
	TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Table M

Total Convenience Shopping Expenditure in the Study Area, 2010

	Destination	Origin (£m)			
		GD	NA	DA	SA
	Morrison Morton Park	£28.1	£1.9	£6.3	£36.4
	Morrison North Road	£44.8	£5.3	£1.1	£51.3
	Sainsbury Victoria Rd	£16.8	£0.4	£3.5	£20.8
	Whinfield Asda	£21.0	£1.3	£0.6	£22.8
	Yarm Rd Aldi	£5.8	£0.2	£0.9	£6.9
	Yarm Rd Lidl	£2.1	£0.6	£0.0	£2.8
	Cockerton Somerfield	£4.1	£0.0	£0.0	£4.1
	Haughton Rd Netto	£0.9	£0.0	£0.3	£1.2
	Neasham Rd Netto	£4.0	£0.0	£0.0	£4.0
	M & S Darlington	£4.6	£0.6	£0.0	£5.2
	Queen St Iceland	£3.2	£0.0	£0.0	£3.2
	Yarm Rd Iceland	£2.0	£0.0	£0.0	£2.0
	Covered Market	£0.4	£0.0	£0.6	£0.9
	Other Darlington Store	£11.3	£0.4	£0.6	£12.3
1	**Greater Darlington**	**£149.0**	**£10.8**	**£13.9**	**£173.8**
2	Newton Aycliffe	£1.5	£50.1	£0.0	£51.5
3	Dales	£0.2	£0.0	£80.5	£80.6
4	**Study Area**	**£150.7**	**£60.9**	**£94.4**	**£306.0**
5	Elsewhere	£5.4	£24.2	£13.7	£43.3
	TOTAL	**£156.1**	**£85.0**	**£108.1**	**£349.3**

Notes:
1 Market Shares from Household Telephone Survey
2 Expenditure from Table C
3 Survey indicates 72% expenditure spent on mainfood trips and 28% on top-up shopping
4 Figures may not add up due to rounding
5 GD = Greater Darlington Zones 1 to 5
6 NA = Newton Aycliffe Zone 6
7 DA = Dales Zone 7
8 SA = Study Area derived from 2008 Darlington Retail Study
9 All Prices 2006

Convenience Goods Retail Capacity Assessment

Convenience Turnover of Darlington Shops in 2010 **Table 1**

Destination	Gross Floorspace (sq m) [1]	Net Floorspace (sq m) [2]	Net Convenience Element (sq m) [3]	Expected Sales Density £'s per sq Metre [4]	Expected Turnover (£m) [5]	% Inflow Expenditure from beyond Study Area [6]	Expected Turnover Excluding [7] Inflows (£m)	Turnover Derived [8] from Household Survey	Potential [9] Over / Under Trading (£m)	Potential [10] Over / Under Trading (%)
Darlington Town Centre	6,200	4,030	3,650	£5,250	£19.2	5%	£18.2	£9.3	-£8.9	-48.8%
Morrison Morton Park	7,900	3,960	2,970	£10,664	£31.7	5%	£30.1	£36.4	£6.3	20.9%
Morrison North Road	7,350	3,860	2,900	£10,664	£30.9	5%	£29.4	£51.3	£21.9	74.5%
Sainsburys Victoria Rd	6,084	3,207	2,806	£9,276	£26.0	5%	£24.7	£20.8	-£4.0	-16.0%
Asda Whinfield	5,140	2,860	1,920	£14,834	£28.5	5%	£27.1	£22.8	-£4.3	-15.8%
Yarm Rd Aldi	1,420	1,210	1,030	£3,736	£3.8	5%	£3.7	£6.9	£3.2	88.0%
Yarm Rd Lidl	1,610	1,210	1,030	£2,916	£3.0	5%	£2.9	£2.8	-£0.1	-3.5%
Yarm Rd Iceland	830	710	710	£5,732	£4.1	5%	£3.9	£2.0	-£1.9	-48.0%
Cockerton Somerfield	740	550	500	£7,204	£3.6	5%	£3.4	£4.1	£0.7	19.3%
Haughton Rd Netto	1,100	720	610	£6,774	£4.1	0%	£4.1	£1.2	-£2.9	-70.4%
Neasham Rd Netto	950	670	570	£6,774	£3.9	5%	£3.7	£4.0	£0.3	9.3%
Cockerton District Centre (other)	1,460	950	950	£3,000	£2.9	0%	£2.9	n/a	n/a	n/a
North Road District Centre (other)	350	230	230	£3,000	£0.7	5%	£0.7	n/a	n/a	n/a
Mowden Local Centre	500	330	290	£4,800	£1.4	0%	£1.4	n/a	n/a	n/a
Neasham Rd Local Centre (other)	450	290	290	£3,000	£0.9	0%	£0.9	n/a	n/a	n/a
Whinfield Local Centre (other)	160	100	100	£2,500	£0.3	5%	£0.2	n/a	n/a	n/a
Yarm Road Local Centre (other)	240	160	160	£3,000	£0.5	0%	£0.5	n/a	n/a	n/a
Elsewhere in Darlington [10]	12,620	8,330	8,330	£2,500	£20.8	5%	£19.8	n/a	n/a	n/a
Greater Darlington	55,104	33,377	29,047		£186.1		£177.3	£173.8	-£3.5	-2.0%

Notes:
1. Gross Floorspace from Darlington Borough Council Survey May 2010
2. Net Floorspace from IGD for superstores / supermarkets and MT survey / estimates for town centre and other stores (range 65% to 85%)
3. Net Convenience Floorspace excludes floorspace given over to comparison goods (from MT survey April 2010)
4. Expected Sales Densities from 2009 Verdict Grocery Retailers Report and 2009 Mintel Retail Rankings (shopping centres aggregated)
5. Expected Turnovers calculated by multiplying Net Convenience Element by Expected Sales Density
6. Inflow Expenditure from surrounding area from 2008 Study reduced from 2004 Study due to declining attraction of Darlington beyond the GD area recorded in survey
7. Expected Turnovers Excluding Inflows calculated by deducting percentage inflow (6) from Expected Turnover (7)
8. Turnover Derived from Household Survey extracted from Table M
9. Potential Over / Undertrading calculated by deducting Expected Turnover (7) from Survey Based Turnover (8)
10. Percentage Over / Undertrading calculated by dividing Potential Over / Undertrading (9) by Expected Turnover (7)
11. Elsewhere in Darlington category includes 13 smaller stores in town centre fringe and 86 local shops.

Convenience Goods Assessment for Greater Darlington Area

TABLE 2: CONVENIENCE GOODS QUANTITATIVE NEED IN 2010 WITH CONSTANT MARKET SHARE

Expenditure growth in study area 2010[1]	£0.0
Minus 50% expenditure spent elsewhere[2]	£0.0
Minus Turnover efficiency improvement[3]	£0.0
Revised notional surplus for GD[4]	£0.0
Plus Leakage that can be realistically clawed back[5]	£0.0
Plus Overtrading in out-of-centre stores in 2010[6]	£6.3
Potential capacity for new floorspace	£6.3

TABLE 3: CONVENIENCE GOODS QUANTITATIVE NEED IN 2011 WITH CONSTANT MARKET SHARE

Expenditure growth in study area 2011[1]	£3.5
Minus 50% expenditure spent elsewhere[2]	£1.8
Minus Turnover efficiency improvement[3]	£0.2
Revised notional surplus for GD[4]	£1.6
Plus Leakage that can be realistically clawed back[5]	£0.0
Plus Overtrading in out-of-centre stores in 2011[6]	£6.3
Potential capacity for new floorspace	£7.9

TABLE 4: CONVENIENCE GOODS QUANTITATIVE NEED IN 2016 WITH CONSTANT MARKET SHARE

Expenditure growth in study area 2016[1]	£22.3
Minus 50% expenditure spent elsewhere[2]	£11.1
Minus Turnover efficiency improvement[3]	£5.5
Revised notional surplus for GD[4]	£5.7
Plus Leakage that can be realistically clawed back[5]	£0.0
Plus Overtrading in out-of-centre stores in 2016[6]	£6.5
Potential capacity for new floorspace	£12.2

TABLE 5: CONVENIENCE GOODS QUANTITATIVE NEED IN 2021 WITH CONSTANT MARKET SHARE

Expenditure growth in study area 2021[1]	£48.5
Minus 50% expenditure spent elsewhere[2]	£24.3
Minus Turnover efficiency improvement[3]	£10.0
Revised notional surplus for GD[4]	£14.3
Plus Leakage that can be realistically clawed back[5]	£0.0
Plus Overtrading in out-of-centre stores in 2021[6]	£6.9
Potential capacity for new floorspace	£21.1

TABLE 6: CONVENIENCE GOODS QUANTITATIVE NEED IN 2026 WITH CONSTANT MARKET SHARE

Expenditure growth in study area 2026[1]	£72.5
Minus 50% expenditure spent elsewhere[2]	£36.2
Minus Turnover efficiency improvement[3]	£14.6
Revised notional surplus for GD[4]	£21.6
Plus Leakage that can be realistically clawed back[5]	£0.0
Plus Overtrading in out-of-centre stores in 2021[6]	£7.4
Potential capacity for new floorspace	£29.1

1. Expenditure Growth from Table C
2. 50% expenditure spent outside GD identified from Table K Market Share Analysis based on NEMS 2008 household survey
3. Turnover efficiency improvements for all floorspace from Experian Retail Planner Brief 7.1 Table 4a at 0.1% per annum 2010 to 2011, 0.6% pa 2012 to 2016 and 0.5%pa 2017 to 2026,
4. Revised Notional Surplus = Expenditure Growth minus Expenditure spent Elsewhere Minus Turnover Efficiency Improvements
5. Due to high market share within GD and current / planned supermarket offer in DA and NA zones no claim is made on Leakage that can be realistically clawed back
6. Overtrading in out-of-centre stores from Table 1 based solely on Morton Park Morrisons
7. 2006 Price Base

Comparison Goods Market Share Analysis

Table N

Total Comparison Shopping Market Share in the Study Area, 2010

		Origin			
Destination		GD	NA	DA	SA
1	Town Centre	47.8%	23.9%	29.5%	36.8%
2	Matalan	1.7%	0.3%	0.6%	1.0%
3	Darlington Retail Park	17.0%	6.4%	13.0%	13.4%
4	Morton Park	3.6%	1.7%	2.7%	2.9%
5	Supermarket	4.3%	0.6%	0.4%	2.3%
6	Darlington Elsewhere	9.8%	4.1%	4.8%	7.0%
	Greater Darlington	84.1%	37.0%	51.0%	63.5%
7	Newton Aycliffe	0.5%	27.2%	0.3%	6.3%
8	NYork/SWDurham	0.2%	0.2%	18.9%	6.0%
	Study Area	84.8%	64.4%	70.2%	75.8%
9	Middlesbrough	2.6%	2.6%	1.1%	2.1%
10	Newcastle	1.6%	1.9%	2.6%	2.0%
11	Metro Centre	1.2%	4.0%	2.3%	2.2%
12	Northallerton	0.8%	0.2%	10.1%	3.5%
13	Bishop Auckland	0.4%	14.2%	1.6%	3.8%
14	Teesside Retail Park	4.9%	2.8%	5.1%	4.5%
15	Leeds	0.1%	0.1%	0.9%	0.3%
16	York	0.1%	0.2%	1.1%	0.5%
17	Harrogate	0.1%	0.0%	0.9%	0.3%
18	Stockton TC	2.1%	1.2%	0.8%	1.5%
19	Durham	0.1%	2.8%	0.3%	0.8%
20	Portrack Lane	0.2%	0.6%	0.0%	0.2%
21	Elsewhere	1.0%	4.9%	3.1%	2.5%
	Total Elsewhere	15.2%	35.6%	29.8%	24.2%
	TOTAL	100.0%	100.0%	100.0%	100.0%

Table O

Overall Comparison Spending in the Study Area, 2010

		Origin			
Destination		GD	NA	DA	SA
1	Town Centre	£136.5	£34.5	£60.8	£231.8
2	Matalan	£4.7	£0.4	£1.3	£6.4
3	Darlington Retail Park	£48.6	£9.2	£26.9	£84.7
4	Morton Park	£10.2	£2.5	£5.6	£18.3
5	Supermarket	£12.3	£0.9	£0.8	£14.0
6	Darlington Elsewhere	£28.0	£5.9	£10.0	£43.9
	Greater Darlington	£240.3	£53.5	£105.3	£399.1
7	Newton Aycliffe	£1.4	£39.3	£0.6	£41.2
8	NYork/SWDurham	£0.7	£0.3	£39.0	£39.9
	Study Area	£242.4	£93.0	£144.8	£480.2
9	Middlesbrough	£7.4	£3.8	£2.2	£13.4
10	Newcastle	£4.6	£2.8	£5.4	£12.8
11	Metro Centre	£3.5	£5.7	£4.7	£14.0
12	Northallerton	£2.1	£0.2	£20.8	£23.2
13	Bishop Auckland	£1.1	£20.5	£3.4	£25.0
14	Teesside Retail Park	£14.0	£4.1	£10.4	£28.5
15	Leeds	£0.3	£0.1	£1.9	£2.2
16	York	£0.4	£0.3	£2.3	£3.0
17	Harrogate	£0.3	£0.0	£1.8	£2.1
18	Stockton TC	£5.9	£1.8	£1.6	£9.3
19	Durham	£0.3	£4.1	£0.6	£5.0
20	Portrack Lane	£0.6	£0.9	£0.0	£1.5
21	Elsewhere	£2.9	£7.0	£6.4	£16.3
	Total Elsewhere	£43.4	£51.4	£61.5	£156.3
	TOTAL	£285.7	£144.5	£206.3	£636.5

Notes:
1 Market Shares from Household Telephone Survey
2 Expenditure from Table E
3 GD = Greater Darlington Zones 1 to 5
4 NA = Newton Aycliffe Zone 6
5 DA = Dales Zone 7
6 SA = Study Area derived from 2008 Darlington Retail Study
7 All Prices 2006

Comparison Goods Retail Capacity Assessment

Comparison Turnover of Darlington Shops in 2010

Table 7

Destination	Gross Floorspace (sq m) [1]	Net Floorspace (sq m) [2]	Expected Sales Density £'s per sq Metre [3]	Expected Turnover (£m) [4]	% Inflow Expenditure from beyond Study Area [5]	Expected Turnover Excluding [6] Inflows (£m)	Turnover Derived [7] from Household Survey	Potential [8] Over / Under Trading (£m)	Potential [9] Over / Under Trading (%)
Darlington Town centre	82,700	53,760	£3,975	£213.7	10%	£192.3	£231.8	£39.5	20.5%
North Road District Centre	5,800	3,770	£2,300	£8.7	5%	£8.2	n/a	n/a	n/a
Cockerton District Centre	800	520	£2,100	£1.1	0%	£1.1	n/a	n/a	n/a
Yarm Road Local Centre	200	130	£1,500	£0.2	0%	£0.2	n/a	n/a	n/a
Neasham Road Local Centre	4,200	2,730	£3,500	£9.6	5%	£9.1	n/a	n/a	n/a
Matalan Neasham Road	4,181	2,718	£2,277	£6.2	10%	£5.6	£6.4	£0.8	15.0%
Whinfield Local Centre	0	0	£0	£0.0	0%	£0.0	n/a	n/a	n/a
Mowden Local Centre	300	200	£2,000	£0.4	0%	£0.4	n/a	n/a	n/a
Darlington Retail Park	16,000	12,800	£3,600	£46.1	10%	£41.5	£84.7	£43.2	104.1%
Morton Park	8,600	6,880	£2,500	£17.2	10%	£15.5	£18.3	£2.9	18.5%
Other Retail Warehouses	21,000	16,800	£2,500	£42.0	5%	£39.9	n/a	n/a	n/a
Supermarket comparison floorspace	0	4,330	£6,000	£26.0	5%	£24.7	£14.0	-£10.7	-43.3%
Elsewhere in Darlington [10]	18,000	11,700	£2,000	£23.4	0%	£23.4	n/a	n/a	n/a
Greater Darlington	161,681	116,338		£394.5		£361.8	£399.1	£37.3	10.3%

Notes:
1. Gross Floorspace from Darlington Borough Council Survey May 2010
2. Net Floorspace based on 65% of gross floorspace area except for Retail Warehouses (85% of gross area)
3. Expected Sales Densities from 2009 Retail Rankings (town centre aggregated) and Verdict (Supermarket comparison element)
4. Expected Turnovers calculated by multiplying Net Floorspace by Expected Sales Density
5. Inflow Expenditure based on 2008 Study
6. Expected Turnovers Excluding Inflows calculated by deducting percentage inflow (5) from Expected Turnover (4)
7. Turnover Derived from Household Survey extracted from Table O
8. Potential Over / Undertrading calculated by deducting Expected Turnover (6) from Survey Based Turnover (7)
9. Percentage Over / Undertrading calculated by dividing Potential Over / Undertrading (8) by Expected Turnover (7)
10. Elsewhere in Darlington - DBC survey indicates there are 129 comparison shops not in shopping centres or Retail Parks / Warehouses
11. All monetary values expressed at 2006 prices.

Comparison Goods Assessment for Greater Darlington Area

TABLE 8: COMPARISON GOODS QUANTITATIVE NEED ASSESSMENT IN 2010

Expenditure growth in study area 2010[1]	£0.0
Minus 24% expenditure spent elsewhere[2]	£0.0
Minus Turnover efficiency improvement[3]	£0.0
Revised notional surplus for Study Area[4]	£0.0
Plus Leakage that can be realistically clawed back[5]	£0.0
Plus Overtrading in out-of-centre stores in 2010[6]	£46.0
Potential capacity for new floorspace	£46.0

TABLE 9: COMPARISON GOODS QUANTITATIVE NEED ASSESSMENT IN 2011

Expenditure growth in study area 2011[1]	£7.4
Minus 24% expenditure spent elsewhere[2]	£1.8
Minus Turnover efficiency improvement[3]	£4.4
Revised notional surplus for Study Area[4]	£1.2
Plus Leakage that can be realistically clawed back[5]	£0.0
Plus Overtrading in out-of-centre stores in 2011[6]	£46.5
Potential capacity for new floorspace	£47.7

TABLE 10: COMPARISON GOODS QUANTITATIVE NEED ASSESSMENT IN 2016

Expenditure growth in study area 2016[1]	£97.7
Minus 24% expenditure spent elsewhere[2]	£23.7
Minus Turnover efficiency improvement[3]	£50.8
Revised notional surplus for Study Area[4]	£23.3
Plus Leakage that can be realistically clawed back[5]	£0.0
Plus Overtrading in out-of-centre stores in 2016[6]	£51.9
Potential capacity for new floorspace	£75.2

TABLE 11: COMPARISON GOODS QUANTITATIVE NEED ASSESSMENT IN 2021

Expenditure growth in study area 2021[1]	£232.6
Minus 24% expenditure spent elsewhere[2]	£56.3
Minus Turnover efficiency improvement[3]	£112.4
Revised notional surplus for Study Area[4]	£64.0
Plus Leakage that can be realistically clawed back[5]	£0.0
Plus Overtrading in out-of-centre stores in 2021[6]	£59.0
Potential capacity for new floorspace	£123.0

TABLE 12: COMPARISON GOODS QUANTITATIVE NEED ASSESSMENT IN 2026

Expenditure growth in study area 2026[1]	£384.4
Minus 24% expenditure spent elsewhere[2]	£93.0
Minus Turnover efficiency improvement[3]	£182.4
Revised notional surplus for Study Area[4]	£108.9
Plus Leakage that can be realistically clawed back[5]	£0.0
Plus Overtrading in out-of-centre stores in 2021[6]	£67.1
Potential capacity for new floorspace	£176.0

Notes & Source.

1. Expenditure Growth from Table E
2. 24% expenditure spent outside Study Area identified from Table N Market Share Analysis based on household survey
3. Turnover efficiency improvements for all floorspace from Experian Retail Planner Brief 7.1 Table 4b at 1.1% per annum 2010 to 2011, 2.2% pa 2012 to 2016 and 2.6%pa 2017 to 2026,
4. Revised Notional Surplus = Expenditure Growth minus Expenditure spent Elsewhere Minus Turnover Efficiency Improvements
5. Due to planned growth in competing centres no allowance is made for Leakage that can be realistically clawed back
6. Overtrading in out-of-centre stores from Table 7 based on Morton Park and Darlington Retail Park
7. 2006 Price Base

Clothes and Fashion Goods Market Share Analysis

Fashion - Respondents with only One Regular Destination, 2010 **Table P**

Destination		GD	NA	DA	SA
		Origin			
1	Town Centre	76.3%	41.4%	51.7%	59.9%
2	Matalan	4.8%	0.0%	3.4%	3.2%
3	Darlington Retail Park	0.5%	0.0%	0.0%	0.2%
4	Morton Park	0.0%	0.0%	0.0%	0.0%
5	Supermarket	1.0%	0.0%	0.0%	0.4%
6	Darlington Elsewhere	4.9%	3.4%	3.4%	4.1%
	Greater Darlington	87.4%	44.8%	58.6%	67.9%
7	Newton Aycliffe	0.0%	10.3%	0.0%	2.5%
8	Dales	0.0%	0.0%	17.2%	5.5%
	Study Area	87.4%	55.2%	75.9%	75.9%
9	Middlesbrough	2.1%	6.9%	0.0%	2.6%
10	Newcastle	1.8%	0.0%	6.9%	3.0%
11	Metro Centre	1.1%	6.9%	0.0%	2.1%
12	Northallerton	0.0%	0.0%	10.3%	3.3%
13	Bishop Auckland	0.0%	10.3%	0.0%	2.5%
14	Teesside Retail Park	2.6%	6.9%	3.4%	3.9%
15	Leeds	0.0%	0.0%	0.0%	0.0%
16	York	0.0%	0.0%	0.0%	0.0%
17	Harrogate	0.0%	0.0%	0.0%	0.0%
18	Stockton TC	1.3%	0.0%	0.0%	0.6%
19	Durham	0.0%	3.4%	0.0%	0.8%
20	Portrack Lane	0.0%	0.0%	0.0%	0.0%
21	Elsewhere	0.0%	0.0%	0.0%	0.0%
22	Internet / mail order	3.7%	10.3%	3.4%	5.2%
	Total Elsewhere	12.6%	44.8%	24.1%	24.1%
	TOTAL	100.0%	100.0%	100.0%	100.0%

Fashion 1st Choice Destination, 2010 **Table Q**

Destination		GD	NA	DA	SA
		Origin			
1	Town Centre	69.8%	52.8%	53.6%	60.5%
2	Matalan	4.6%	0.9%	1.8%	2.8%
3	Darlington Retail Park	0.5%	0.0%	0.9%	0.5%
4	Morton Park	0.2%	0.0%	0.9%	0.4%
5	Supermarket	3.0%	0.9%	0.0%	1.5%
6	Darlington Elsewhere	2.6%	2.8%	5.5%	3.6%
	Greater Darlington	80.7%	57.4%	62.7%	69.3%
7	Newton Aycliffe	0.2%	8.3%	0.0%	2.1%
8	Dales	0.0%	0.0%	8.2%	2.6%
	Study Area	80.9%	65.7%	70.9%	74.0%
9	Middlesbrough	4.4%	0.9%	2.7%	3.0%
10	Newcastle	2.9%	4.6%	2.7%	3.3%
11	Metro Centre	1.1%	2.8%	1.8%	1.7%
12	Northallerton	0.6%	0.0%	3.6%	1.4%
13	Bishop Auckland	0.4%	12.0%	0.0%	3.1%
14	Teesside Retail Park	2.2%	0.9%	2.7%	2.0%
15	Leeds	0.2%	0.0%	0.9%	0.4%
16	York	0.5%	0.9%	3.6%	1.6%
17	Harrogate	0.0%	0.0%	1.8%	0.6%
18	Stockton TC	1.2%	1.9%	0.9%	1.3%
19	Durham	0.0%	2.8%	0.0%	0.7%
20	Portrack Lane	0.0%	0.0%	0.0%	0.0%
21	Elsewhere	0.4%	1.9%	0.0%	0.6%
22	Internet / mail order	5.3%	5.6%	8.2%	6.3%
	Total Elsewhere	19.1%	34.3%	29.1%	26.0%
	TOTAL	100.0%	100.0%	100.0%	100.0%

Fashion 2nd Choice Destination, 2010 **Table R**

Destination		Origin GD	NA	DA	SA
1	Town Centre	43.8%	32.1%	36.2%	38.5%
2	Matalan	2.3%	0.9%	0.0%	1.2%
3	Darlington Retail Park	0.2%	0.0%	0.0%	0.1%
4	Morton Park	0.5%	0.0%	0.0%	0.2%
5	Supermarket	2.0%	0.0%	1.0%	1.2%
6	Darlington Elsewhere	3.4%	4.7%	1.9%	3.3%
	Greater Darlington	52.3%	37.7%	39.0%	44.5%
7	Newton Aycliffe	0.2%	6.6%	0.0%	1.7%
8	Dales	0.7%	0.9%	9.5%	3.6%
	Study Area	53.2%	45.3%	48.6%	49.8%
9	Middlesbrough	15.7%	13.2%	3.8%	11.3%
10	Newcastle	5.6%	3.8%	3.8%	4.6%
11	Metro Centre	5.1%	13.2%	5.7%	7.3%
12	Northallerton	2.3%	0.0%	12.4%	5.0%
13	Bishop Auckland	0.4%	5.7%	1.0%	1.9%
14	Teesside Retail Park	7.2%	4.7%	6.7%	6.4%
15	Leeds	0.7%	0.9%	1.0%	0.8%
16	York	1.1%	0.0%	3.8%	1.7%
17	Harrogate	0.2%	0.0%	1.9%	0.7%
18	Stockton TC	2.6%	1.9%	0.0%	1.6%
19	Durham	0.2%	6.6%	1.9%	2.3%
20	Portrack Lane	0.0%	0.0%	0.0%	0.0%
21	Elsewhere	2.3%	1.9%	2.9%	2.4%
22	Internet / mail order	3.4%	2.8%	6.7%	4.3%
	Total Elsewhere	46.8%	54.7%	51.4%	50.2%
	TOTAL	100.0%	100.0%	100.0%	100.0%

Overall Fashion Goods Market Share, 2010 **Table S**

Destination		Origin GD	NA	DA	SA
1	Town Centre	67.1%	46.3%	49.8%	56.3%
2	Matalan	4.2%	0.7%	1.8%	2.6%
3	Darlington Retail Park	0.4%	0.0%	0.5%	0.3%
4	Morton Park	0.2%	0.0%	0.5%	0.2%
5	Supermarket	2.2%	0.5%	0.2%	1.2%
6	Darlington Elsewhere	3.4%	3.3%	4.3%	3.7%
	Greater Darlington	77.6%	50.9%	57.2%	64.4%
7	Newton Aycliffe	0.1%	8.4%	0.0%	2.1%
8	Dales	0.1%	0.2%	10.3%	3.6%
	Study Area	77.9%	59.5%	67.5%	70.1%
9	Middlesbrough	5.7%	4.6%	2.4%	4.4%
10	Newcastle	3.1%	3.5%	3.8%	3.4%
11	Metro Centre	1.8%	5.7%	2.2%	2.9%
12	Northallerton	0.7%	0.0%	6.8%	2.6%
13	Bishop Auckland	0.3%	10.4%	0.2%	2.7%
14	Teesside Retail Park	3.2%	2.9%	3.7%	3.3%
15	Leeds	0.2%	0.2%	0.7%	0.4%
16	York	0.5%	0.5%	2.9%	1.2%
17	Harrogate	0.0%	0.0%	1.5%	0.4%
18	Stockton TC	1.5%	1.5%	0.5%	1.1%
19	Durham	0.0%	3.7%	0.4%	1.0%
20	Portrack Lane	0.0%	0.0%	0.0%	0.0%
21	Elsewhere	0.6%	1.5%	0.6%	0.8%
22	Internet / mail order	4.5%	6.0%	6.9%	5.6%
	Total Elsewhere	22.1%	40.5%	32.5%	29.9%
	TOTAL	100.0%	100.0%	100.0%	100.0%

Notes:
1 Source: Household Telephone Survey
2 GD = Greater Darlington Zones 1 to 5
3 NA = Newton Aycliffe Zone 6
4 DA = Dales Zone 7
5 SA = Study Area derived from 2008 Darlington Retail Study

Toys Books and Stationary Goods Market Share Analysis

Toys, games and hobby goods (excl. computer games), 2010 **Table T**

		Origin			
Destination		GD	NA	DA	SA
1	Town Centre	50.2%	18.8%	31.0%	36.4%
2	Matalan	0.0%	0.0%	0.0%	0.0%
3	Darlington Retail Park	1.2%	0.0%	0.0%	0.5%
4	Morton Park	0.3%	1.0%	0.0%	0.4%
5	Supermarket	2.8%	0.0%	0.0%	1.2%
6	Darlington Elsewhere	7.4%	5.2%	4.6%	6.0%
	Greater Darlington	61.9%	25.0%	35.6%	44.5%
7	Newton Aycliffe	0.3%	32.3%	1.1%	8.3%
8	Dales	0.5%	0.0%	11.5%	3.9%
	Study Area	62.7%	57.3%	48.3%	56.8%
9	Middlesbrough	2.4%	3.1%	0.0%	1.8%
10	Newcastle	1.2%	2.1%	2.3%	1.8%
11	Metro Centre	0.8%	5.2%	2.3%	2.4%
12	Northallerton	0.5%	0.0%	6.9%	2.4%
13	Bishop Auckland	0.2%	8.3%	0.0%	2.1%
14	Teesside Retail Park	17.0%	5.2%	12.6%	12.7%
15	Leeds	0.0%	0.0%	2.3%	0.7%
16	York	0.0%	0.0%	1.1%	0.4%
17	Harrogate	0.0%	0.0%	1.1%	0.4%
18	Stockton TC	2.0%	0.0%	1.1%	1.2%
19	Durham	0.3%	3.1%	0.0%	0.9%
20	Portrack Lane	0.3%	1.0%	0.0%	0.4%
21	Elsewhere	2.0%	4.2%	4.6%	3.4%
22	Internet / mail order	10.6%	10.4%	17.2%	12.7%
	Total Elsewhere	37.3%	42.7%	51.7%	43.2%
	TOTAL	100.0%	100.0%	100.0%	100.0%

Books and Stationery, 2010 **Table U**

		Origin			
Destination		GD	NA	DA	SA
1	Town Centre	68.6%	30.5%	35.9%	48.9%
2	Matalan	0.0%	0.0%	0.0%	0.0%
3	Darlington Retail Park	0.0%	0.0%	0.0%	0.0%
4	Morton Park	0.0%	0.0%	0.0%	0.0%
5	Supermarket	7.6%	0.8%	0.0%	3.5%
6	Darlington Elsewhere	4.9%	1.5%	2.3%	3.2%
	Greater Darlington	81.1%	32.8%	38.2%	55.6%
7	Newton Aycliffe	0.7%	29.0%	0.0%	7.4%
8	Dales	0.3%	0.0%	28.2%	9.2%
	Study Area	82.2%	61.8%	66.4%	72.2%
9	Middlesbrough	1.0%	1.5%	0.0%	0.8%
10	Newcastle	0.7%	1.5%	1.5%	1.1%
11	Metro Centre	0.2%	3.1%	1.5%	1.3%
12	Northallerton	0.0%	0.0%	7.6%	2.4%
13	Bishop Auckland	0.0%	9.2%	1.5%	2.7%
14	Teesside Retail Park	4.3%	1.5%	0.8%	2.5%
15	Leeds	0.0%	0.0%	0.8%	0.2%
16	York	0.0%	0.0%	0.0%	0.0%
17	Harrogate	0.2%	0.0%	0.0%	0.1%
18	Stockton TC	1.3%	0.0%	0.0%	0.6%
19	Durham	0.0%	4.6%	0.0%	1.1%
20	Portrack Lane	0.3%	0.0%	0.0%	0.1%
21	Elsewhere	0.8%	5.3%	3.1%	2.6%
22	Internet / mail order	9.1%	11.5%	16.8%	12.1%
	Total Elsewhere	17.8%	38.2%	33.6%	27.8%
	TOTAL	100.0%	100.0%	100.0%	100.0%

Notes:
1 Source: Household Telephone Survey
2 GD = Greater Darlington Zones 1 to 5
3 NA = Newton Aycliffe Zone 6
4 DA = Dales Zone 7
5 SA = Study Area derived from 2008 Darlington Retail Study

CDS / DVDs and Pharmacy Goods Market Share Analysis

CDs, DVDs, tapes and computer games, 2010 — **Table V**

		Origin			
Destination		GD	NA	DA	SA
1	Town Centre	50.8%	20.9%	27.5%	36.1%
2	Matalan	0.0%	0.0%	0.0%	0.0%
3	Darlington Retail Park	0.0%	0.0%	0.0%	0.0%
4	Morton Park	0.0%	0.0%	0.0%	0.0%
5	Supermarket	18.5%	4.3%	2.9%	10.1%
6	Darlington Elsewhere	1.7%	0.9%	2.0%	1.6%
	Greater Darlington	71.0%	26.1%	32.4%	47.7%
7	Newton Aycliffe	0.4%	31.3%	0.0%	7.8%
8	Dales	0.0%	0.0%	31.4%	10.0%
	Study Area	71.4%	57.4%	63.7%	65.6%
9	Middlesbrough	1.1%	3.5%	0.0%	1.3%
10	Newcastle	0.5%	1.7%	1.0%	0.9%
11	Metro Centre	0.2%	5.2%	0.0%	1.4%
12	Northallerton	0.0%	0.0%	6.9%	2.2%
13	Bishop Auckland	0.0%	7.0%	2.0%	2.3%
14	Teesside Retail Park	2.8%	1.7%	2.9%	2.6%
15	Leeds	0.5%	0.0%	0.0%	0.2%
16	York	0.0%	0.0%	0.0%	0.0%
17	Harrogate	0.0%	0.0%	1.0%	0.3%
18	Stockton TC	1.4%	0.0%	0.0%	0.6%
19	Durham	0.0%	1.7%	0.0%	0.4%
20	Portrack Lane	0.0%	0.0%	0.0%	0.0%
21	Elsewhere	0.7%	6.1%	2.9%	2.7%
22	Internet / mail order	21.5%	15.7%	19.6%	19.5%
	Total Elsewhere	28.6%	42.6%	36.3%	34.4%
	TOTAL	100.0%	100.0%	100.0%	100.0%

Pharmacy Goods, 2010 — **Table W**

		Origin			
Destination		GD	NA	DA	SA
1	Town Centre	65.1%	8.3%	27.7%	39.3%
2	Matalan	0.0%	0.0%	0.0%	0.0%
3	Darlington Retail Park	0.7%	0.0%	0.0%	0.3%
4	Morton Park	0.5%	0.0%	0.0%	0.2%
5	Supermarket	12.4%	2.1%	0.0%	5.9%
6	Darlington Elsewhere	13.5%	0.0%	0.0%	5.9%
	Greater Darlington	92.1%	10.3%	27.7%	51.6%
7	Newton Aycliffe	0.5%	70.3%	0.0%	17.3%
8	Dales	0.3%	0.0%	58.5%	18.8%
	Study Area	92.9%	80.7%	86.2%	87.8%
9	Middlesbrough	0.8%	0.7%	0.0%	0.5%
10	Newcastle	0.0%	0.7%	1.5%	0.7%
11	Metro Centre	0.1%	2.1%	0.0%	0.6%
12	Northallerton	0.0%	0.0%	7.7%	2.5%
13	Bishop Auckland	0.2%	5.5%	0.0%	1.4%
14	Teesside Retail Park	1.4%	0.7%	0.0%	0.8%
15	Leeds	0.0%	0.0%	0.0%	0.0%
16	York	0.0%	0.0%	0.8%	0.2%
17	Harrogate	0.0%	0.0%	0.0%	0.0%
18	Stockton TC	1.8%	0.0%	0.8%	1.1%
19	Durham	0.1%	2.8%	0.0%	0.7%
20	Portrack Lane	0.0%	0.0%	0.0%	0.0%
21	Elsewhere	0.2%	4.8%	0.0%	1.2%
22	Internet / mail order	2.5%	2.1%	3.1%	2.6%
	Total Elsewhere	7.1%	19.3%	13.8%	12.2%
	TOTAL	100.0%	100.0%	100.0%	100.0%

Notes:
1 Source: Household Telephone Survey
2 GD = Greater Darlington Zones 1 to 5
3 NA = Newton Aycliffe Zone 6
4 DA = Dales Zone 7
5 SA = Study Area derived from 2008 Darlington Retail Study

Hardware and Jewellery Goods Market Share Analysis

Hardware and tableware, 2010 **Table X**

		Origin			
Destination		GD	NA	DA	SA
1	Town Centre	47.4%	15.0%	24.3%	32.2%
2	Matalan	6.3%	0.0%	1.0%	3.1%
3	Darlington Retail Park	0.6%	0.0%	0.0%	0.3%
4	Morton Park	3.1%	0.0%	1.0%	1.7%
5	Supermarket	13.4%	2.7%	2.9%	7.5%
6	Darlington Elsewhere	6.0%	0.1%	6.8%	4.8%
	Greater Darlington	77.0%	17.8%	35.9%	49.4%
7	Newton Aycliffe	1.2%	48.6%	0.0%	12.3%
8	Dales	0.4%	0.0%	28.2%	9.2%
	Study Area	78.5%	66.4%	64.1%	71.0%
9	Middlesbrough	2.2%	2.7%	1.0%	1.9%
10	Newcastle	1.7%	1.8%	2.9%	2.1%
11	Metro Centre	4.3%	3.5%	6.8%	4.9%
12	Northallerton	0.6%	0.0%	7.8%	2.8%
13	Bishop Auckland	0.0%	14.1%	0.0%	3.4%
14	Teesside Retail Park	1.4%	1.8%	0.0%	1.0%
15	Leeds	0.0%	0.0%	1.0%	0.3%
16	York	0.3%	0.0%	1.0%	0.4%
17	Harrogate	0.0%	0.0%	1.0%	0.3%
18	Stockton TC	3.5%	1.8%	0.0%	2.0%
19	Durham	0.4%	2.7%	0.0%	0.8%
20	Portrack Lane	0.2%	0.0%	0.0%	0.1%
21	Elsewhere	0.9%	0.9%	3.9%	1.8%
22	Internet / mail order	5.9%	4.4%	10.7%	7.1%
	Total Elsewhere	21.5%	33.6%	35.9%	29.0%
	TOTAL	100.0%	100.0%	100.0%	100.0%

Jewellery and watches, 2010 **Table Y**

		Origin			
Destination		GD	NA	DA	SA
1	Town Centre	68.5%	25.6%	36.1%	47.7%
2	Matalan	0.2%	0.0%	0.0%	0.1%
3	Darlington Retail Park	0.0%	0.0%	0.0%	0.0%
4	Morton Park	0.3%	0.0%	0.0%	0.1%
5	Supermarket	1.2%	0.0%	0.0%	0.5%
6	Darlington Elsewhere	7.3%	2.3%	4.2%	5.1%
	Greater Darlington	77.5%	27.9%	40.3%	53.5%
7	Newton Aycliffe	0.2%	24.4%	0.0%	6.0%
8	Dales	0.5%	0.0%	25.0%	8.2%
	Study Area	78.2%	52.3%	65.3%	67.8%
9	Middlesbrough	2.4%	5.8%	0.0%	2.5%
10	Newcastle	1.8%	1.2%	4.2%	2.4%
11	Metro Centre	1.0%	7.0%	1.4%	2.6%
12	Northallerton	0.8%	0.0%	13.9%	4.8%
13	Bishop Auckland	0.0%	9.3%	1.4%	2.7%
14	Teesside Retail Park	1.2%	1.2%	1.4%	1.3%
15	Leeds	0.2%	0.0%	4.2%	1.4%
16	York	0.0%	1.2%	0.0%	0.3%
17	Harrogate	0.5%	0.0%	0.0%	0.2%
18	Stockton TC	0.3%	0.0%	1.4%	0.6%
19	Durham	0.3%	4.7%	0.0%	1.3%
20	Portrack Lane	0.0%	0.0%	0.0%	0.0%
21	Elsewhere	2.3%	4.7%	1.4%	2.6%
22	Internet / mail order	10.9%	12.8%	5.6%	9.7%
	Total Elsewhere	21.8%	47.7%	34.7%	32.2%
	TOTAL	100.0%	100.0%	100.0%	100.0%

Notes:
1 Source: Household Telephone Survey
2 GD = Greater Darlington Zones 1 to 5
3 NA = Newton Aycliffe Zone 6
4 DA = Dales Zone 7
5 SA = Study Area derived from 2008 Darlington Retail Study

Electrical Goods, Furniture & Carpets Market Share Analysis

Electrical Goods, 2010 **Table Z**

		Origin			
Destination		GD	NA	DA	SA
1	Town Centre	16.9%	3.8%	7.8%	10.8%
2	Matalan	0.0%	0.0%	0.0%	0.0%
3	Darlington Retail Park	56.2%	19.2%	44.2%	43.4%
4	Morton Park	1.3%	2.3%	0.8%	1.4%
5	Supermarket	3.7%	0.0%	0.0%	1.6%
6	Darlington Elsewhere	2.8%	0.0%	3.1%	2.2%
	Greater Darlington	80.9%	25.4%	55.8%	59.4%
7	Newton Aycliffe	1.0%	32.3%	0.0%	8.3%
8	Dales	0.0%	0.0%	10.9%	3.5%
	Study Area	81.9%	57.7%	66.7%	71.1%
9	Middlesbrough	0.8%	0.0%	0.0%	0.3%
10	Newcastle	0.6%	1.5%	1.6%	1.1%
11	Metro Centre	0.4%	1.5%	0.8%	0.8%
12	Northallerton	0.3%	0.0%	3.9%	1.4%
13	Bishop Auckland	0.8%	12.3%	1.6%	3.8%
14	Teesside Retail Park	4.0%	3.1%	7.0%	4.7%
15	Leeds	0.0%	0.0%	0.8%	0.2%
16	York	0.0%	0.0%	0.0%	0.0%
17	Harrogate	0.2%	0.0%	0.0%	0.1%
18	Stockton TC	0.5%	1.5%	1.6%	1.1%
19	Durham	0.2%	1.5%	0.8%	0.7%
20	Portrack Lane	0.0%	0.0%	0.0%	0.0%
21	Elsewhere	0.3%	5.4%	3.1%	2.4%
22	Internet / mail order	10.1%	15.4%	12.4%	12.1%
	Total Elsewhere	18.1%	42.3%	33.3%	28.9%
	TOTAL	100.0%	100.0%	100.0%	100.0%

Furniture and carpets, 2010 **Table AA**

		Origin			
Destination		GD	NA	DA	SA
1	Town Centre	27.8%	17.1%	11.5%	20.0%
2	Matalan	0.0%	0.0%	0.0%	0.0%
3	Darlington Retail Park	30.2%	16.2%	19.5%	23.4%
4	Morton Park	1.9%	0.9%	2.7%	1.9%
5	Supermarket	0.2%	0.0%	0.0%	0.1%
6	Darlington Elsewhere	20.7%	3.4%	5.3%	11.6%
	Greater Darlington	80.8%	37.6%	38.9%	56.9%
7	Newton Aycliffe	0.4%	19.7%	0.9%	5.3%
8	Dales	0.5%	0.9%	23.9%	8.1%
	Study Area	81.7%	58.1%	63.7%	70.2%
9	Middlesbrough	0.9%	1.7%	1.8%	1.4%
10	Newcastle	2.1%	0.0%	1.8%	1.5%
11	Metro Centre	2.3%	2.6%	3.5%	2.7%
12	Northallerton	2.6%	0.9%	15.0%	6.1%
13	Bishop Auckland	0.4%	17.9%	4.4%	5.9%
14	Teesside Retail Park	1.1%	0.0%	1.8%	1.0%
15	Leeds	0.0%	0.0%	0.0%	0.0%
16	York	0.0%	0.0%	0.0%	0.0%
17	Harrogate	0.4%	0.0%	0.9%	0.5%
18	Stockton TC	3.3%	1.7%	0.0%	1.9%
19	Durham	0.0%	0.9%	0.0%	0.2%
20	Portrack Lane	0.4%	1.7%	0.0%	0.6%
21	Elsewhere	1.1%	9.4%	4.4%	4.2%
22	Internet / mail order	3.9%	5.1%	2.7%	3.8%
	Total Elsewhere	18.3%	41.9%	36.3%	29.8%
	TOTAL	100.0%	100.0%	100.0%	100.0%

Notes:
1. Source: Household Telephone Survey
2. GD = Greater Darlington Zones 1 to 5
3. NA = Newton Aycliffe Zone 6
4. DA = Dales Zone 7
5. SA = Study Area derived from 2008 Darlington Retail Study

Soft Furnishings and DIY Goods Market Share Analysis

Soft Furnishings, 2010 **Table AB**

		Origin			
Destination		GD	NA	DA	SA
1	Town Centre	48.4%	20.3%	16.9%	31.5%
2	Matalan	7.4%	2.3%	1.7%	4.3%
3	Darlington Retail Park	1.2%	0.0%	0.8%	0.8%
4	Morton Park	0.9%	0.8%	0.8%	0.8%
5	Supermarket	2.0%	0.0%	0.0%	0.9%
6	Darlington Elsewhere	11.0%	4.7%	5.1%	7.6%
	Greater Darlington	70.9%	28.1%	25.4%	46.0%
7	Newton Aycliffe	0.6%	21.9%	0.0%	5.6%
8	Dales	0.0%	0.8%	25.4%	8.3%
	Study Area	71.5%	50.8%	50.8%	59.8%
9	Middlesbrough	1.7%	3.9%	1.7%	2.2%
10	Newcastle	1.1%	0.8%	3.4%	1.7%
11	Metro Centre	2.5%	3.9%	4.2%	3.4%
12	Northallerton	1.6%	0.0%	15.3%	5.6%
13	Bishop Auckland	0.3%	14.1%	0.8%	3.8%
14	Teesside Retail Park	1.9%	3.9%	0.8%	2.1%
15	Leeds	0.0%	0.0%	0.0%	0.0%
16	York	0.2%	0.8%	0.8%	0.5%
17	Harrogate	0.0%	0.0%	0.0%	0.0%
18	Stockton TC	5.3%	2.3%	0.8%	3.2%
19	Durham	0.0%	1.6%	0.0%	0.4%
20	Portrack Lane	1.3%	2.3%	0.0%	1.1%
21	Elsewhere	2.2%	6.3%	3.4%	3.5%
22	Internet / mail order	10.6%	9.4%	17.8%	12.6%
	Total Elsewhere	28.5%	49.2%	49.2%	40.2%
	TOTAL	100.0%	100.0%	100.0%	100.0%

DIY Goods, 2010 **Table AC**

		Origin			
Destination		GD	NA	DA	SA
1	Town Centre	15.4%	4.5%	7.8%	10.3%
2	Matalan	0.0%	0.0%	0.0%	0.0%
3	Darlington Retail Park	7.5%	1.5%	5.2%	5.3%
4	Morton Park	32.3%	10.5%	22.4%	23.8%
5	Supermarket	1.7%	0.8%	0.9%	1.2%
6	Darlington Elsewhere	35.9%	18.8%	9.5%	23.3%
	Greater Darlington	92.8%	36.1%	45.7%	64.0%
7	Newton Aycliffe	0.0%	16.5%	0.0%	4.0%
8	Dales	0.2%	0.0%	10.3%	3.4%
	Study Area	93.0%	52.6%	56.0%	71.4%
9	Middlesbrough	0.3%	0.0%	0.9%	0.4%
10	Newcastle	0.0%	0.0%	0.9%	0.3%
11	Metro Centre	0.0%	0.0%	2.6%	0.8%
12	Northallerton	0.2%	0.8%	25.0%	8.2%
13	Bishop Auckland	0.2%	33.1%	5.2%	9.8%
14	Teesside Retail Park	0.0%	1.5%	0.9%	0.6%
15	Leeds	0.0%	0.0%	0.0%	0.0%
16	York	0.0%	0.0%	0.0%	0.0%
17	Harrogate	0.0%	0.0%	0.9%	0.3%
18	Stockton TC	4.4%	1.5%	0.0%	2.3%
19	Durham	0.0%	2.3%	0.0%	0.5%
20	Portrack Lane	0.5%	2.3%	0.0%	0.8%
21	Elsewhere	1.1%	4.5%	5.2%	3.2%
22	Internet / mail order	0.3%	1.5%	2.6%	1.3%
	Total Elsewhere	7.0%	47.4%	44.0%	28.6%
	TOTAL	100.0%	100.0%	100.0%	100.0%

Notes:
1 Source: Household Telephone Survey
2 GD = Greater Darlington Zones 1 to 5
3 NA = Newton Aycliffe Zone 6
4 DA = Dales Zone 7
5 SA = Study Area derived from 2008 Darlington Retail Study

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