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Report

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Retail Study

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[NEMS SURVEY DATA PROVIDED UNDER SEPARATE COVER]

Prepared by:



(Chris Argent) . Status Director Date November 2014

For and on behalf of GVA Grimley Ltd

1. INTRODUCTION

- 1.1 GVA has been appointed by Hartlepool Borough Council to lead a consultancy team in the preparation of a Regeneration Masterplan for Hartlepool. The Masterplan is to provide a long-term vision for the future development and regeneration of the Hartlepool town centre and Waterfront Marina area.
- 1.2 A key element of the Regeneration Masterplan is the preparation of a Retail Revival Strategy, which will set out a comprehensive strategy and action plan for improving retail opportunities in the town centre.
- 1.3 The Council is also at an early stage in preparing a new replacement Local Plan. This retail study therefore provides an up-to-date and robust evidence base to underpin the development of new retail policies (frontages, boundary designations etc.) and site-specific allocations.
- 1.4 In summary, the terms of the study are as follows:
- To understand current shopping (on convenience and comparison retail goods¹) and leisure visitation patterns across the borough and in adjoining areas through commissioning a new up-to-date household telephone survey.
 - To provide a comparative assessment of changes in shopping patterns, market share and overall performance against the 2009 Hartlepool Retail Study findings.
 - Provide a comparative review of the vitality and viability of Hartlepool town centre through completing new floorspace / fascia surveys to establish changes in representation and vacancy within the centre.
 - To assess the future quantitative capacity and qualitative need for additional retail floorspace, having regard to new and planned developments / commitments within the borough and wider sub-region.
 - To provide strategic advice on the overall future retail need to inform the Retail Revival Strategy and Regeneration Masterplan exercises.
- 1.5 The study is informed by a number of detailed independent survey exercises, designed in conjunction with the Borough Council, including:

¹ Convenience goods comprises food and non-alcoholic beverages, tobacco, alcoholic beverages, newspapers and periodicals and non-durable household goods. Comparison goods comprises any other goods, including clothing, shoes, furniture, household appliances, tools, medical goods, games and toys, books and stationery, jewellery and other personal effects.

- **Floorspace / Use Survey;** detailed surveys of Hartlepool town centre and local centres within the borough to establish the current amount and split of various types of floorspace (convenience, comparison, services and vacancies).
 - **Household Telephone Survey;** a detailed survey establishing where residents within the borough and adjacent areas (Peterlee and Billingham) travel to for convenience and non-food shopping activities as well as leisure. The survey informs the quantitative component of the study, identifying the current market share performance of town centre, individual stores and retail park destinations.
 - **In-Centre Shopper Survey;** a full shopper survey within the town centre to determine the profile of visitors and shoppers; the strengths and weaknesses of the centre in terms of the existing retail offer, wider facilities and physical environment; patterns of usage of the centre (i.e. frequency of visits, modal split, dwell times); and suggested qualitative improvements which would persuade shoppers to visit the centre more frequently or stay for longer.
 - **Retailer Business Survey;** surveys circulated to all retailers within the town centre² to establish current trading performance; the relative strength and weaknesses of the centre; and specific initiatives that could be delivered to improve the performance and the overall attractiveness of the centre.
- 1.6 The results of the survey exercises are drawn together to provide a set of robust recommendations to enable the Council to proactively plan for future development. The study conclusions represent a 'point-in-time' assessment of performance and opportunity and will inform the Retail Revival Strategy and Regeneration Masterplan.
- 1.7 As the study is to form part of the emerging Local Plan evidence base, it is important that the Council continues to monitor the health of the town centre, revisiting the strategy to address changing circumstances.

REPORT STRUCTURE

- 1.8 In accordance with the terms of the Study Brief this report is structured as follows:

PART ONE – BACKGROUND DETAIL AND CONTEXT

- **Section 2 – Hartlepool Context** describes the current retail offer within the borough and details its socio-demographic profile.

² Distribution extends beyond the defined town centre boundary to include adjacent retail and service outlets within the area covered by Experian's GOAD plan for Hartlepool.

- **Section 3 – Retail Trends** summarises the current market conditions and developments within the retail and leisure sector.
- **Section 4 – Planning Policy Framework** sets out the requirements of NPPF in terms of promoting competitive town centre environments.
- **Section 5 – Sub-Region Overview** details the existing and emerging retail and leisure schemes in surrounding centres outside of the borough which may impact on the future performance of Hartlepool town centre.

PART TWO – QUALITATIVE ASSESSMENT

- **Section 6 – Healthcheck Assessment** assesses the changes in floorspace / fascia composition of Hartlepool town centre and defined local centres within the borough. The assessment seeks to comparatively assess and benchmark against Experian Goad averages.
- **Section 7 – In-Centre Survey Results** summarises the main headline findings of the survey exercise completed in Hartlepool town centre. A comparative assessment against the 2009 Retail Study findings is provided where appropriate.
- **Section 8 – Retailer Business Survey** summarises the main headline findings of the survey exercise completed in Hartlepool town centre. A comparative assessment against the 2009 Retail Study findings is provided where appropriate.
- **Section 9 – Swot Analysis** summarises the headline findings of the survey exercises to inform the qualitative assessment of Hartlepool town centre.

PART THREE – QUANTITATIVE ASSESSMENT

- **Section 10 – Retail Capacity Methodology** sets out the methodology underpinning the quantitative capacity modelling exercise.
- **Section 11 – Convenience Retail Assessment** reviews and comparatively assesses changes in the convenience goods market share and performance of Hartlepool town centre and Hartlepool Borough as a whole since 2009. The need / capacity for new convenience retail provision within the borough is identified, having regard to projected population and expenditure growth as well as planned / emerging commitments.
- **Section 12 – Comparison Retail Assessment** reviews and comparatively assesses changes in market share and performance of Hartlepool town centre and the borough as a whole since 2009. A detailed assessment of need / capacity is provided thereafter.

- **Section 13 – Leisure Assessment** contains our assessment of leisure needs in Hartlepool town centre, drawing on the findings of our updated health check and our analysis of current leisure spending patterns.

PART FOUR – CONCLUSIONS AND STRATEGIC ADVICE

- **Section 14 – Summary and Conclusions** contains a summary of the study findings and recommendations to the Council, along with advice on the most appropriate strategy for meeting identified needs for retail and leisure uses.
- 1.9 The next section therefore sets out the current retail and leisure offer within the town centre and wider borough.

2. HARTLEPOOL CONTEXT

RETAIL

TOWN CENTRE

- 2.1 The retail offer within Hartlepool town centre is commensurate with its sub-regional status. The centre has a varied retail offer including national multiple retailers and independent shops.
- 2.2 The traditional retail centre developed around the historic high street axis of Lynn Street and Church Street and has subsequently gravitated west towards Middleton Grange Shopping Centre, which was opened in the late 1960's and is the third largest covered shopping centre in the North East.
- 2.3 This historical development and subsequent gravitation in the retail offer within the town centre is reflected in distinct areas of activity, as follows:

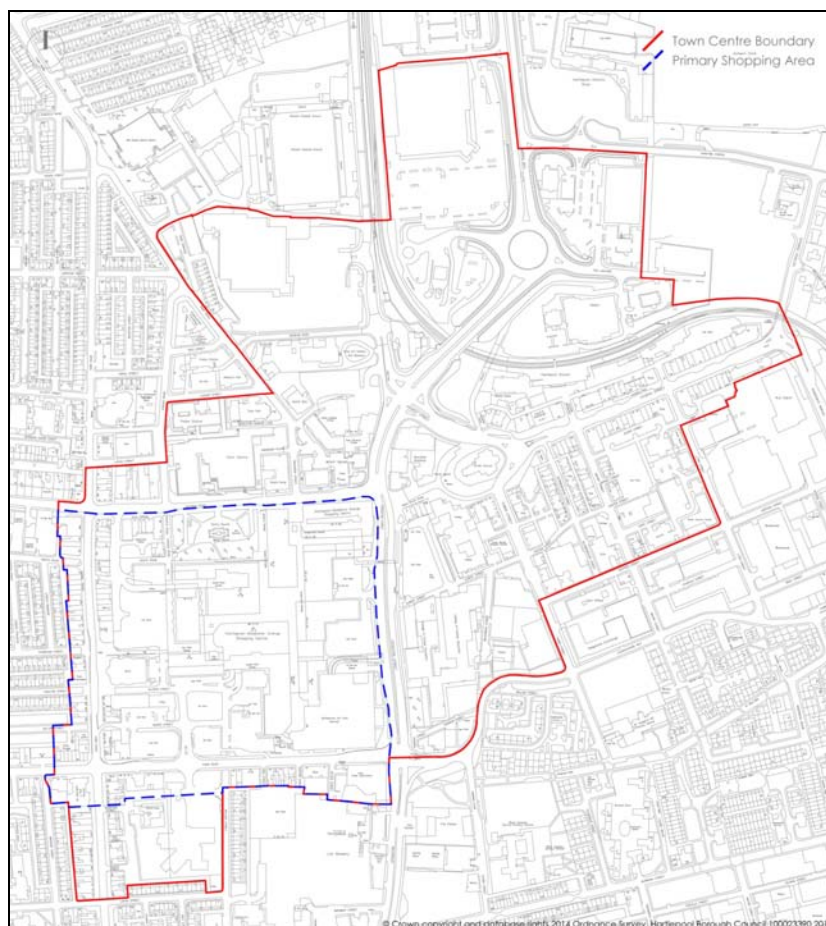
- **MIDDLETON GRANGE;** the two storey purpose-built shopping mall accommodates mainstream national fashion multiples such as Primark, BHS, River Island and Marks & Spencer (M&S) at ground floor. However, there is some churn occurring within the shopping centre with M&S recently announcing its intention to relocate to Anchor Retail Park outside of the town centre and TJ Hughes recently occupying a c. 3,500 m² unit adjacent to Primark. A number of food and non-food discount orientated stores are located around the indoor market on the second floor.

The shopping centre is dominant (and distinct) in physical terms from the more traditional areas of the town centre and is not particularly well integrated (internalised mall).

- **YORK ROAD / PARK ROAD;** traditional linear high streets comprising local independent shops and services. The Central Library is prominently located.
 - **CHURCH STREET;** a traditional linear high street (covered by conservation area designation) comprising some local independent shops and services, The street is however a particular focus for the town centre evening economy with bars, cafes and hot food takeaways.
- 2.4 The town centre primary shopping area (PSA) is well defined by York Road, Park Road and particularly Stockton Street to the east. The latter is the primary north-south arterial route through the town and acts a significant physical barrier from Church Street to the east.

- 2.5 Moving outwards from the town centre PSA, the area to the north of Middleton Grange comprises the historic commercial and administrative area with the Civic Centre fronting on to Victory Square.

Figure 2.1 – Defined Town Centre and PSA Boundaries



EDGE-OF-CENTRE / OUT-OF-CENTRE

- 2.6 Given that the town centre PSA is particularly well defined by surrounding land-use (residential to the west) and main road infrastructure, there is a significant clustering of freestanding mainstream foodstores and retail park developments to the north in the intervening area between the town centre and the marina / former docks. The main retail provision is as follows:

- **MAINSTREAM FOODSTORES:** large freestanding Morrison's and Asda foodstores are located opposite each other to the north of the town centre. A Tesco Extra store is located to the south of the town centre PSA.

- **RETAIL PARKS;** Anchor, Highpoint and the newly renamed Vision Retail Park are located to the north of the town centre and accommodate a mix of bulky and high street comparison retailers including Next, Matalan, Currys, PC World, Brantano, Boots, Pets at Home and Carpetright. Tees Bay Retail Park to the south of the town centre is anchored by a B&Q Warehouse.

- 2.7 In addition to the above, there is a large number of local / neighbourhood shopping centres in surrounding residential areas which meet predominantly top-up based convenience shopping needs.

LEISURE

- 2.8 The town centre leisure offer comprises a mix of traditional evening economy uses including public houses, bars and restaurants; these uses are predominantly focused around the Church Street area. Other prominent cultural leisure destinations in the town centre include the Town Hall Theatre and Hartlepool Art Gallery.
- 2.9 As with retail provision, there has been significant development of leisure facilities around the primarily tourist orientated Hartlepool Maritime Experience (HME) and HMS Trincomalee adjacent to the marina. There is a cluster of independent bars and restaurants around the marina although these are a significant distance from the town centre. A 7 screen Vue cinema and Mecca Bingo hall are located on The Lanyard to the immediate north east of the town centre. Unlike other mainstream cinemas, there is a limited family orientated restaurant offer. Mill House leisure centre (swimming pool, sports hall and gym) is located to the rear of the Morrison's foodstore.

DEMOGRAPHIC COMPOSITION

- 2.10 It is increasingly important for Local Planning Authorities to ensure that the retail and leisure offer within its main town centre (or centres) reflects the requirements of its catchment. Likewise, in preparing an appropriate future retail and leisure strategy, it is important to recognise that the demographic profile of a particular catchment may influence the potential to attract higher order retailers and leisure operators necessary to deliver a step-change in future performance.
- 2.11 The headline population estimates utilised in preparing the quantitative need assessment, which are based on ONS mid-year projections from the 2011 Census results and calibrated to Local Authority District targets, are set out later in the report. However, in summary, consistent with the 2009 Borough Retail Study, the catchment area defined for Hartlepool comprises (catchment plan provided at Appendix 1):
- **BOROUGH;** three catchment zones covering North and South Hartlepool and Outer Area.

- **OUTSIDE BOROUGH;** two catchments covering the Peterlee and Billingham areas.

2.12 Focusing on the three catchment zones within the borough, a separate population profiling exercise has been undertaken utilising the *Experian Mosaic* database to establish the socio-demographic profile of the town. A national UK average is also provided so as to enable a 'broad' comparative assessment to be undertaken. The definition of each *Experian Mosaic* group is provided at Appendix 6 for reference.

Table 2.1 - Experian Mosaic Profiling

MOSAIC group	Zone 1 North Hartlepool	Zone 2 South Hartlepool	Zone 3 Hartlepool Villages	UK Average
A: Alpha Territory	1.24%	0.01%	0.92%	3.51%
B: Professional Rewards	6.56%	2.62%	17.81%	8.70%
C: Rural Solitude	0.01%	0.02%	2.05%	4.43%
D: Small Town Diversity	1.95%	3.35%	12.63%	8.74%
E: Active Retirement	2.45%	2.76%	0.98%	3.62%
F: Suburban Mindsets	10.32%	10.07%	12.43%	12.43%
G: Careers and Kids	6.59%	3.53%	12.59%	5.63%
H: New Homemakers	1.74%	0.63%	2.52%	4.33%
I: Ex-Council Community	14.61%	17.55%	1.21%	9.84%
J: Claimant Cultures	24.44%	25.64%	0%	5.95%
K: Upper floor living	4.52%	3.11%	1.74%	4.97%
L: Elderly Needs	4.98%	4.87%	1.97%	3.86%
M: Industrial Heritage	6.86%	20.86%	14.55%	7.71%
N: Terraced melting pot	11.86%	4.95%	0%	7.25%
O: Liberal Opinions	1.59%	0.00%	0%	8.41%
U: Unclassified	0.27%	0.04%	0%	0.64%

2.13 The Experian Mosaic results for the three individual catchments within the borough highlight the following:

- **ZONE 1 (NORTH HARTLEPOOL);** the area is characterised by:
 - A low proportion of residents within the New Home-Makers (1.74% to 4.33% nationally) and Liberal Opinions (1.59% to 8.41% nationally) categories.
 - A high proportion of residents within the Ex-Council Community (14.61% compared to 9.84% nationally), Claimant Cultures (24.44% to 5.95% nationally) and Terraced Melting Pot group (11.86% to 7.25% nationally) categories.

- **ZONE 2 (SOUTH HARTLEPOOL)**; the area is similar to Zone 1 in that:
 - There is a lower proportion of New Homemakers (0.63% to 4.33%) compared to the national average. There are no Liberal Opinions groups.
 - There is also a significantly higher proportion of Ex-Council Community (17.55% to 9.84% nationally) and Claimant Cultures (25.64% compared to 5.95%).
 - There is a significantly greater proportion of the Industrial Heritage group (20.86%) compared with the national average (7.71%). This group is typically traditional and conservative, comprising of older residents with children who have left the family home. The communities were historically dependent on mines, mills and assembly plants.
- **ZONE 3 (HARTLEPOOL VILLAGES)**; the area is distinct from the urban area:
 - The area contains around double the national average proportion of Industrial Heritage (14.55% compared to 7.71% nationally).
 - There is a higher proportion of Professional Rewards than the national average (17.81% compared with 8.7% nationally).
 - There is double the proportion of Careers and Kids (12.59%) than the national average (5.63%). This group typically comprises of young couples living with their children. The parents are often established in a technical, junior or middle management career and benefit from the prospect of future career development. The housing occupied by this group typically consists of purpose built family housing with a range of services in the area.
 - There is a significantly lower proportion of the Ex-Council Community group (1.21% compared with 9.84% nationally) and no Claimant Cultures, Terraced Melting Pot or Liberal Opinions categories,

2.14 Whilst the higher proportion of lower grade Experian Mosaic categories in the inner Hartlepool area is not dissimilar to other towns which have historically grown around primary economic activities such as heavy manufacturing (e.g. Middlesbrough and Durham Coalfields), it potentially highlights the existing limitations in the town's comparison retail offer in particular (as detailed later in the report).

3. RETAIL AND LEISURE TRENDS

- 3.1 It is essential that the future strategy for Hartlepool is formulated in the context of the wider economic climate. This section therefore considers the impact of the economic conditions on retail and leisure provision in Hartlepool and how wider economic and social trends are likely to influence both local resident and operator requirements in the future. Key trends and drivers for change in the retail industry are considered and those of particular relevance to Hartlepool town centre outlined. The review draws on a range of published data sources including Verdict, Mintel and Experian.
- 3.2 This section also provides a brief analysis of relevant government research and town centre strategies which have come forward over the last few years, partly in response to the retail trends identified, to promote a consistent policy objective which seeks to strengthen town centres.

Economic Outlook

- 3.3 Advice published by Experian³ identifies that the UK economy has continued to struggle following the recession as a result of weak domestic demand, declining disposable incomes, low levels of investment and reduced government spending. However, the economic outlook improved in 2013 and Experian expects that as inflation continues to ease steadily and output and employment growth accelerates, household finances will gradually improve and retail spending growth will increase.
- 3.4 The consensus outlook for the medium term is for annual average GDP growth of about 2.4% over the next five years, which is slightly below the long term trend rate and less buoyant than before the recession. This is primarily due to pressure on government finances, weak bank lending and high household debt. Over the longer term the rate of economic growth is predicted to improve slightly, however due to continuing fiscal restraint this growth is likely to be constrained.
- 3.5 Overall, consumers remain cautious with spending not only on discretionary items but also on needs, cutting wastage, which will impact on food & grocery volumes. There is an increased focus on buying efficiently. Big ticket and home-related purchases remain low.
- 3.6 As the housing market recovers, certain sectors (e.g. home furnishing and DIY) may benefit from increasing demand. However, it is anticipated that sales through the town centre will remain weak with online and out-of-centre retailers continuing to take a greater market share. Space and store numbers in town centre locations are also

³ Experian Retail Planner 11 (October 2013)

expected to decline as retailers drive efficiencies by closing underperforming space; these trends are discussed in more detail below.

Retail Expenditure and Sales Efficiency Growth

Retail Expenditure Growth

- 3.7 Comparison goods expenditure is expected to grow at a much higher rate than convenience goods spending over the study period. For comparison goods, expenditure growth per head was 3.1% in 2012, increasing to 3.2% in 2013 and 2.3% in 2014 according to Experian. Between 2014 and 2029 annual average growth is expected to be an average of around 2.9% pa.
- 3.8 For convenience goods, spending declined slightly between 2012 and 2014. However, Experian estimate a return to positive expenditure growth between 2014 and 2024 of an average of around 0.8% pa.
- 3.9 To put these forecasts into historical context, comparison goods growth averaged 4.2% pa over the last 40 years, with stronger growth of 5.2% pa over the last 30 years and 5.6% pa over the last 20 years. Convenience goods growth has been much weaker, averaging 0.4% pa over the last 40 years and 0.3% pa over the last 20 years.

Online Spending

- 3.10 The popularity of online retailing grew rapidly between 2008 and 2012. Most retailers now have an online presence, thus it is expected that this growth will slow. It is, however, likely to continue outpacing growth in total retail sales each year from 2013 to 2018, rising from £33.7bn to £50.2bn, an overall increase of 49%⁴.
- 3.11 Internet spending and other forms of sales which are not derived from physical floorspace need to be taken into account when undertaking retail studies. Special Forms of Trading (SFT) includes all types of non-store retailing (internet, markets and mail order) and in 2014 was equivalent to 8.5% of total retailing (11.6% for comparison goods and 2.7% for convenience goods). In 2018, Experian predict that non-store sales will reach 11% of total retail, growing steadily until plateauing at c. 13% in 2026.
- 3.12 Not all of non-store sales reduce the need for physical floorspace (for instance click and collect and the fulfilment of many grocery internet orders through local stores). Therefore, as set out in the retail methodology section of the report, adjustments to account for SFT have been made so as to provide robust projections of quantitative need over the study period.

⁴ Verdict: Online & Remote Shopping, E Retail in the UK (August 2013)

Sales Efficiency Growth

- 3.13 The sales efficiency growth rate represents the potential ability of retailers to increase their productivity and absorb higher than inflation increases in their costs (e.g. rent, rates and service charges) by increasing their average sales densities.
- 3.14 Following the weak or negative overall sales growth during the recession and the growth of online shopping, many retailers have struggled to increase or maintain sales density levels and, together with other financial problems, this has forced some retailers into administration. As a result sales density growth is now significantly lower than the high rates seen during the boom of the latter half of the 1990s and first half of the 2000s.
- 3.15 The trend towards the demolition of inefficient stores and the provision of more modern stores with higher and more efficient sales densities is expected to result in less scope to increase comparison goods sales densities in the future. Accordingly, Experian expect an efficiency growth rate for comparison goods of c. 2% p.a. between 2014 and 2029.
- 3.16 Scope for increased sales densities is even more limited for convenience goods given that the majority of foodstores already drive high sales efficiencies and the significant expansion in store provision has led to increasingly overlap with other stores and a resultant 'cannibalisation' of existing sales. An efficiency growth rate of close to zero % p.a. between 2014 and 2029 is therefore recommended by Experian and these assumptions inform our approach.

Internet Growth and Multi-Channel Retailing

- 3.17 The online shopping population is reaching saturation, with over 40 million online shoppers in the UK expected by 2017. Future growth in the market is likely to come from increased consumer spend driven by new technology and improved delivery options. Changes in technology are driving sales with the expansion of tablet devices which provide a better browsing experience. Quick Response codes (QR codes) for example have increased consumer and retailer interaction and engagement, enabling customers to gain direct access to the product website, marketing, competitions and product information.
- 3.18 Click and collect is forecast to be one of the most significant drivers of growth, with a rise of 62.7% in click and collect purchases expected between 2013 and 2018⁵. The service provides physical retailers with an important benefit over pure internet

⁵ Verdict: Online & Remote Shopping, E Retail in the UK (August 2013)

operators and creates opportunities for making additional purchases when customers collect orders from stores.

- 3.19 The growth in online sales has implications for bricks and mortar stores as it potentially reduces the need for so many outlets. However, trends indicate that online and in-store shopping channels are becoming more blurred as shoppers increasingly research items online or in stores before making purchases. According to Verdict, in 2012, 61% of shoppers researched goods online before purchasing in store, and some 38% of customers researched goods in store before buying online.
- 3.20 These trends, combined with the importance of 'click and collect' highlight that physical stores will still have a significant role in the multichannel shopping environment, although their size and format will differ from traditional stores. The advantages of physical stores, in terms of the shopping experience (in-store ambience), service and immediacy of products in a showroom setting, will see a network of key stores remain a fundamental component of retailer's strategies to provide an integrated multichannel retail offer.
- 3.21 Beyond Retail⁶ identifies the need for 'digitisation' of town centres / high streets through a variety of initiatives, including:
- **Contextual marketing:** encouragement of the use of online learning platforms and support for independent retailers wishing to improve their online presence and digital skills. Twitter is identified as a valuable tool in promoting independent shops, events and new footfall.
 - **Town centre website:** an important promotional and information platform for all stakeholders in order to promote footfall, loyalty and spend within towns. Free 'in-town' Wi-Fi is identified as a critical element to this in order to better engage with visitors. The provision of interactive maps and town centre applications are particularly important in the overall 'digital' offer.
 - **Branding and PR:** it is critical that a town centre or high street destination is given a key USP. A holistic approach should be adopted and the USP should not solely be focused on retailing and leisure; community facilities provide an important element of the overall attractiveness of the offer.
 - Traditional centres and high streets will therefore need to effectively re-position themselves to complement rather than compete with multi-channel retailing. The future focus accordingly to Beyond Retail should be omni-channel retailing whereby mobile, on-line and in-store experiences complement each other. Town centres should therefore prepare for the requirements of the digital age.

⁶ Beyond Retail – *Redefining the shape and purpose of town centres* (November 2013)

Changing Retailer Requirements

Space Requirements

- 3.22 The retail sector has undergone significant changes over the last decade which has fundamentally altered how, where and when we shop. This has had major implications for retailers' space requirements, which combined with the recent recession, has changed the retail landscape of our towns and cities.
- 3.23 During the recession retailers' margins were squeezed, whilst other costs continued to rise and a raft of multiple and independent retailers either collapsed or have significantly shrunk their store portfolios. The decline in the amount of occupied retail space in town centre locations has not typically been offset by new retail developments. Many town centre schemes have been put on hold or significantly scaled down in size, and with 'fairly weak' expenditure growth forecast in the medium term, retailers are expected to remain cautious about store expansion.
- 3.24 The growth of the multi-channel retailing means that retailers no longer need stores in every town to achieve national coverage. Many retailers are therefore focusing their development programmes on the provision of large flagship stores in strategic locations, supported by smaller satellite stores and transactional websites.
- 3.25 The larger flagships accommodate full product ranges whilst smaller stores offer more select ranges, supplemented by internet kiosks allowing access to the full range. This offers many advantages to retailers including lower property costs, more efficient logistics and being able to open stores where there is a high level of demand despite space restrictions.
- 3.26 This polarisation of retailing will result in larger dominant centres on a sub-regional level continuing to attract key retailers (where space is available), with medium sized centres potentially struggling to attract investment. Local and neighbourhood centres should be less affected by this trend and are likely to retain their attraction for top-up and day-to-day convenience shopping and services. This changing retail structure needs to be considered carefully when analysing household survey results as it will have implications on how to plan for growth and change.
- 3.27 Retailers are opting to develop stores in the most strategic and cost effective locations; this has led to a notable resurgence in out-of-centre destinations which offer benefits of lower rents, larger retail units and in most cases, free car parking.

Out-of-Centre Pressures

- 3.28 According to Verdict, out-of-town retailing is the only form of retailing which has seen store numbers increase consistently since 2000. The Department for Business, Innovation and Skills (BIS) reports that the number of out-of-centre stores has increased by up to c.1,800 (25%) since 2000; whilst the number of town centre stores fell by almost 15,000 between 2000 and 2009, the majority of which are likely to have been in 'high street' locations.
- 3.29 Many traditional town centre retailers have developed out-of-town store formats, including John Lewis, who now operates a number of 'At Home' stores in out-of-centre locations, as well as other retailers such as Next, Primark and H&M.

The Role of the Town Centre

- 3.30 The town centre has historically been the main shopping destination. However, with weaker expenditure growth and the loss of trade to out-of-centre and online, its future role is set to change dramatically. Emerging trends suggest that many centres will be used increasingly for leisure and social activities as well as traditional retailing, with more bars, restaurants, food outlets and community spaces opening in vacant units.
- 3.31 As retailers improve their multichannel offer, the expectation is that town centre stores will be used increasingly as showrooms to support e-retailing (with click and collect points and safe drop boxes for customers to collect online orders, and in-store kiosks for customers to make online purchases). Towns will need to capitalise on the opportunities that click and collect services offer. Where overall demand for retail floorspace stabilises or declines, it is anticipated that more secondary and tertiary space, which suffers from lower levels of footfall, will increasingly be converted into alternative town centre and residential uses.
- 3.32 Enhancing the non-retail offer so that towns function as more than just retail locations will also help drive footfall and increase dwell time. Towns should promote unique attractions such as heritage assets, historic buildings and cultural features which can differentiate a centre and improve its attractiveness.
- 3.33 To ensure that town centres have a viable function moving forwards they must provide an attractive shopping and leisure experience which the internet is unable to match. Councils /town centre managers need to gain a better understanding of the catchment and what local people want from their town, to provide the right mix of outlets and services. A vital component of this will be making town centres as accessible as possible, with improved and cheaper car parking.
- 3.34 An important consideration for councils and town centre managers over the next few years will be that many retail leases are due to expire, which will enable retailers to

easily exit properties in poorer performing locations. This situation needs to be monitored closely and reinforces the need to improve town centres.

- 3.35 Some of these trends have recently been identified and promoted by the Government in the Portas Review, the Government's Response and a Government supported industry taskforce report.

Retail Sector Trends

Food and Groceries

- 3.36 The top four supermarkets⁷ continue to dominate the market and represent approximately 60% of the total convenience market⁸. With vast store networks and online offers, their coverage is reaching peak levels and the 'race for floorspace' has significantly diminished. Given weaker spending on convenience goods and the transfer of trade online, expansion plans are increasingly focused on redevelopment and refurbishment of existing stores rather than on delivering new floorspace through new superstore development. In some cases, for example Tesco, space within their larger format stores is being sub-let to restaurants, gyms and children's play centres. There is also potential for larger format stores to fill its existing non-food sales area with non-food fashion concessions.
- 3.37 The development of smaller convenience store formats for top up food shopping has become increasingly popular in response to consumers seeking to reduce waste by moving from weekly shops to more frequent smaller shops, or to avoid the high fuel prices associated with travelling long distances. As a result, many of the main operators are expanding their smaller concept stores - Tesco Express, Sainsbury's Local, M Local, Little Waitrose etc.
- 3.38 The value/discount retailers are continuing to expand rapidly, having gained considerable market share during the recession. Aldi and Lidl have both succeeded in attracting customers who originally looked to trade down in price but not quality. Whilst this was initially viewed as a temporary response to the recession, it is clear that a more permanent shift in shopping preferences towards quality, value-orientated goods has occurred. This has placed significant pressure on the mainstream larger-format retailers who are now responding with substantial price cuts. Sainsbury's has also recently announced plans for a new Netto discount brand in the UK and is potentially looking at co-locating Netto stores within existing large superstores.

⁷ The Top 4 convenience retailers are known to be Asda, Sainsbury's, Tesco and Morrison's.

⁸ Verdict: Food & Grocery Market Forecasts, December 2013

- 3.39 Food retailers are also continuing to develop online offers to meet increasing consumer demand for convenient food shopping, much of which is still fulfilled through existing store networks. Click and collect services are expanding into the grocery sector with some retailers developing 'drive-through' collection points for picking up online orders.
- 3.40 The significant forecast growth in 'click and collect' has been acknowledged by the Government in its recent draft consultation (August 2014) on extending General Permitted Development Rights to enable shops to build new 'click and collect' facilities without the need for a planning application.

Clothing and Footwear

- 3.41 By 2017, Verdict estimates that the clothing and footwear sector will represent 15.9% of total retail spend (a marginal increase from 15.2% in 2012). The proportion of clothing sales transacted online is currently around 12.4% and is expected to rise to just over 20% by 2017 as browsing services improve.
- 3.42 Low levels of consumer confidence in addition to high prices are expected to keep clothing and footwear sales volumes low. Premium and luxury brands will continue to maintain their consumer appeal, whilst growth from value retailers will become more subdued as they seek to ensure their profitability.

Premium and Luxury Goods

- 3.43 More affluent consumers have been able to maintain a higher level of personal and discretionary spending during the recession and therefore the premium and luxury goods sector has remained relatively strong. There is still high demand for premium brands and goods across all retail sectors, from clothing and accessories to high tech items. In response to this trend, Verdict predict that the premium sector of the UK department store market will account for 43% of total department store expenditure in 2017 as midmarket department stores expand designer and luxury goods ranges (e.g. John Lewis, House of Fraser and Debenhams).

Electricals

- 3.44 The electrical sector has suffered as a result of the recession as households cut back on 'big ticket' items combined with the shift of spending online. Since 2008 the proportion of electrical spending which takes place online has more than doubled to

43%⁹. Casualties in the sector include Comet and Jessops, along with Best Buy who exited the UK market.

- 3.45 Growth remains strong however for smaller, high tech items such as tablets and premium electrical goods, with retailers such as Apple and John Lewis continuing to do well. There is also demand for 'value' ranges of electrical goods, much of which has been captured by the supermarkets. Over the medium-term at least, sales of big-ticket items are likely to remain subdued.

Homewares

- 3.46 Growth in the more traditional part of the homewares market (such as furniture and floorcoverings) is heavily reliant on the housing market and has been weak in recent years. Growth is expected to remain subdued during 2014, but will improve as the housing market strengthens. The softer end of the homewares market (i.e. smaller more decorative items), has been more resilient as consumers look at cheaper ways to refresh their homes.

Music, Videos and Books

- 3.47 Technology is removing the need for physical stores as consumers can now download/stream music and films directly. As a result the music and video sector has shrunk significantly with negative growth in retail spending. Over three-quarters (78%) of music and video sales are now online and Verdict predicts that by 2017 online sales will account for 90% of the market.
- 3.48 The book sector has been heavily influenced by the growth of e-reader devices (e.g. Kindle), and the sector is increasingly moving from physical to digital products. By 2018 it is estimated that nearly three-quarters of the book market will be online, with almost half of the online market attributed to digital sales.

Relevant Government Research

The Portas Review

- 3.49 In May 2011, Mary Portas was appointed to lead an independent review into the future of the high street, in response to the effects of the recession on the retail industry and local high streets in particular.

⁹ Verdict: UK Retail Review & Sector Forecasts to 2017

3.50 The report suggested measures to tackle the further decline of the high street. Amongst 28 separate recommendations, there is a call to strengthen policy in favour of 'town centres first' following the publication of the (then draft) NPPF. In summary the recommendations aim to:

- **Run town centres like businesses:** by strengthening the management of high streets through 'Town Teams', developing the BID model and encouraging new markets;
- **Get the basics right:** by looking at how the business rate system could better support small businesses and independent retailers, encouraging affordable town centre car parking and looking at further opportunities to remove red tape on the high street;
- **Level the playing field:** by ensuring a strong town centre first approach in planning, introducing Secretary of State 'exceptional sign off' for out-of-centre proposals and encouraging large retailers to show their support for high streets by mentoring local businesses;
- **Define landlords' roles/responsibilities:** by looking at disincentives for landlords leaving properties vacant, empowering local authorities where landlords are negligent and making proactive use of Compulsory Purchase Order powers; and
- **Give communities greater say:** by including the high street in neighbourhood planning and encouraging innovative community uses of empty high street spaces.

Government Response to Portas

3.51 The Government published its formal response to the Portas Review in March 2012, which accepted the majority of Portas' recommendations. It announced a number of 'Portas Pilot' towns, which were chosen to set up Town Teams to create plans for the future of their high streets. In addition, the Government announced their intention to provide investment to help Business Improvement Districts (BIDs) access loans for set-up costs and provide funding for a Future High Street X-Fund (now rebranded as the High Streets Renewal Fund) to reward towns which are delivering innovative plans to bring their town centres back to life. Other initiatives included a National Market Day in June; plans to double small business rate relief; community involvement in the redesigning the concept of their high streets to reinvigorate areas of decline, to increase footfall and encourage people to live in town centres.

3.52 One measure which did not receive Government support was the call to introduce Secretary of State 'exceptional sign off' for all new out-of-town developments and require all large new developments to have an 'affordable shops' quota. The

Government stated that LPAs are best placed to understand local needs and 'exceptional sign off' is contrary to the Government's ethos of devolution. As such, the Government will continue to use the call-in power sparingly.

Beyond Retail

3.53 Arising from key recommendations in the Portas Review, the Government supported the establishment of an industry taskforce to analyse retail property issues relating to town centres. This taskforce published their report, Beyond Retail – Redefining the shape and purpose of town centres in November 2013. The principal recommendations for achieving rejuvenated town centres fit for the future requires:-

- Retail capacity models need to fully reflect impact of multi-channel retailing.
- Proactive use of Compulsory Purchase Orders (CPO) to enable regeneration of town centres, alongside an urgent review of the complexity and costs of such approach.
- Local authorities to take more risk in investing capital reserves now to help improve town centres, which can be repaid as the local economy recovers.
- Piloting the concept of a joint venture vehicle and associated high street property fund so that land assets can be pooled to overcome fragmented ownership.
- Town centres to develop an integrated digital strategy, incorporating mobile, social media and website, to encourage more shoppers and longer visits.
- The quality, quantity and cost of town centre car parking to be reviewed in relation to free out-of-centre provision. Flexible parking policies are needed to attract town centre visitors.

Overall Summary

- 3.54 Economic growth will continue to remain muted over the plan period, with relatively weak expenditure growth in the short-medium term.
- 3.55 It is evident that the traditional high street faces a number of challenges, not least from the impacts of the recession, including tightening of retail spending and changing consumer behaviour, but also from increasing competition posed by the internet, multichannel retailing and out of centre developments.
- 3.56 Town centre strategies which support the continued evolution of the high street are considered ever more vital. This may involve providing a high quality shopping

‘experience’, maximising the benefits of tourist trade, and improving the mix of retail and non-retail outlets to increase length of stay and spend.

- 3.57 It will be important for town centres to be well positioned to be able to adapt to on-going changes in the retail and leisure sector over the development plan period and to reaffirm their unique selling points which differentiate their retail offer from other centres.
- 3.58 The on-going pattern of polarisation suggests that larger centres are well placed to maintain and enhance their offer. However, this is dependent on continued investment to ensure the right mix of retailers and other services.

Implications for Hartlepool

- 3.59 The national market trends in retail and leisure detailed will have specific and localised impacts upon the future of retail provision within Hartlepool. The combined impact of increasing competition from multi-channel retailing (primarily the internet) and the rationalisation of operator representation towards sub-regional centres and out of town shopping destinations will impact on the future strategy for Hartlepool town centre.
- 3.60 Whilst the town has a retail and leisure offer commensurate with its sub-regional status, by virtue of its coastal location and proximity to competing sub-regional centres and out-of-centre destinations ((Middlesbrough, Stockton, Sunderland and Teesside Shopping Park), it has a geographically constrained catchment.
- 3.61 Allied to its constrained catchment, the demographic profile of the borough, as set out in the previous chapter, is orientated towards lower social grades and this has consequent implications on spending capacity and may limit the potential of Hartlepool to attract the higher order retailers and leisure operators necessary to deliver a step-change in its future performance.
- 3.62 As identified in the healthcheck assessment later in the report, there is currently a significant quantum of vacant retail floorspace in the town centre, including Middleton Grange Shopping Centre, which contains a range of modern (regularised) retail unit floorplates. This initially suggests an existing over-provision of retail floorspace within the town centre.
- 3.63 Taking account of location specifics and wider fundamental ongoing changes within the retail sector, it will be important to develop an appropriate retail revival strategy which seeks to qualitatively distinguish the town centre rather than promote further physical expansion of the retail offer. As recognised in the regeneration masterplan brief, the tourist assets within the town such as the Marina and Maritime Experience

are critically important in developing a holistic approach to firstly maintaining but secondly substantially enhancing its sub-regional profile and attractiveness.

- 3.64 The strategy must also embrace and not compete against multi-channel retailing. The retail revival strategy should ensure that Hartlepool town centre is responsive to changes in technology and able to tap into opportunities such as the capability of town centres to act as 'click & collect' locations.
- 3.65 Planning policy should ensure flexibility, especially in relation to periphery locations on the edge of the town centres, to allow the role of the town centre to adapt to the market trends identified in this section.

4. PLANNING POLICY CONTEXT

- 4.1 Whilst the study is ultimately to inform the Retail Revival Strategy and Regeneration Masterplan, it is also to form part of the emerging Local Plan evidence base. This section therefore provides an overview of the current national and local planning policy context relating to town centres and economic development.
- 4.2 As the study is to inform emerging policy, the key requirements of the National Planning Policy Framework (NPPF, March 2012) and the National Planning Practice Guidance (NPPG, March 2014) are set out below prior to briefly summarising the main policies of the existing adopted Hartlepool Local Plan of relevance to this study.

National Planning Policy Framework (NPPF)

Town Centre Vitality and Viability

- 4.3 The NPPF (Section 2) specifies that planning policy should promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. Local Planning Authorities (LPAs) are directed to:
- Recognise town centres as the heart of their communities and pursue policies to support their viability and vitality.
 - Define hierarchies and the extent of town centres and primary shopping areas.
 - Promote competitive town centres that provide customer choice and a diverse retail offer which reflects the individuality of town centres.
 - Retain and enhance existing markets, ensuring they remain attractive and competitive.
 - Allocate appropriate in-centre sites which are not compromised by limited site availability. If it is not possible to ensure a sufficient range of suitable sites, appropriate, well connected edge of centre sites should be allocated.
 - Where town centres are in decline, local authorities should plan positively for their futures and encourage economic activity.
- 4.4 The long-standing sequential test is retained in the NPPF albeit that there is increased emphasis on LPAs to ensure an available supply of sites (plan to meet needs in full).

Evidence Base Requirements

- 4.5 Local Plans should be based on adequate, up-to-date and relevant evidence. In relation to planning to meet business requirements, LPAs are required to have a clear understanding of business needs within the economic markets operating in and across their area. LPAs are directed to use the evidence base to assess (amongst others):
- The needs for land or floorspace for economic development, including both the quantitative and qualitative needs for all foreseeable types of economic activity over the plan period, including for retail and leisure development.
 - The role and function of town centres and the relationship between them, including any trends in the performance of centres; and
 - The capacity of existing centres to accommodate new town centre development.
- 4.6 Ultimately, whilst the NPPF specifies that Local Plans should be aspirational, they are required to be realistic and deliverable. The Regeneration Masterplan and Retail Revival Strategy are therefore to be prepared within this context.
- 4.7 NPPF constitutes a material consideration which LPAs should take into account from the date of publication in development management decisions.

National Planning Practice Guidance (NPPG)

- 4.8 The recently published NPPG amplifies the requirements of the NPPF. The main guidance of relevance to this study exercise, the Regeneration Masterplan and Retail Revival Strategy are summarised below.

Town Centre Strategies

- 4.9 The guidance details that any strategy should be based on evidence of the current state of town centres and opportunities to meet development needs and support their viability and vitality. The Regeneration Masterplan and Retail Revival Strategy will therefore, alongside other evidence of relevance, establish:
- What is the appropriate and realistic role and function of the town centre over the emerging Local Plan period;
 - What the most appropriate mix of uses would be to enhance the overall vitality and viability of the town centre;
 - Can the town centre accommodate the scale of assessed need for main town centre uses (as defined by NPPF). Any assessment should include consideration of

expanding centres or development opportunities to enable new development or redevelopment of existing underutilised space; and

- What timeframe can new development within the town centre be delivered.

- 4.10 In seeking to identify appropriate, sequentially compliant development site opportunities, it is necessary to complete a thorough assessment of the suitability, viability and availability of locations for main town centre uses. NPPG directs local planning authorities to take full account of relevant market signals when planning for town centres and keep land allocations under regular review.

Hartlepool Local Plan

- 4.11 The Local Plan was adopted in April 2006 and a significant number of policies were saved under direction from the Secretary of State in 2009. There are a number of allocations and designations specifically relevant to guiding development in the Masterplan Area. The relevant policies are outlined below.

Policy Com1 - Development of the Town Centre

- 4.12 The policy states that the Town Centre as defined on the Proposals Map will be developed as the main shopping, commercial and social centre of Hartlepool. The Policy states that the Town Centre presents opportunities for a range of commercial and mixed-use development subject to the provisions of other relevant policies in the Local Plan.
- 4.13 The policy also states that proposals for revitalisation and redevelopment within the Town Centre should, where possible secure physical (environmental, transport, public realm etc.) improvements. The re-use of vacant commercial properties, particularly for residential purposes, is to be encouraged.

Policy Com2 - Primary Shopping Area

- 4.14 The policy states that proposals for retail development falling within Class A1 will be permitted within the Primary Shopping Area (PSA) where the development is of an appropriate design and to an appropriate scale having regard to the overall appearance and character of the area. Alternative non Class A1 retail uses will be permitted subject to (amongst others) not adversely impacting upon the retail function of the PSA.

Policy Com3 - Primary Shopping Area Opportunity Site

- 4.15 An area south and west of Middleton Grange is identified for future retail development to complement the Shopping Centre subject to the provisions of policies Com1 and Com2.

Additional Relevant Policies

- 4.16 In addition to the above specific allocations and designations shown on the Proposals Map, a number of other saved Local Plan policies are relevant:

Table 4.1 – Relevant Saved Local Plan Policies

Policy	Wording
Com9: Main Town Centre Uses	Main Town Centre Uses (retail, office, business, cultural, tourism, leisure, entertainment uses etc) likely to attract large numbers of visitors should be located within the Town Centre. If no suitable sites are available then a sequential approach identifying major regeneration areas (including the Marina) accessible by public transport, after edge of centre areas as preferable to out of centre locations.
Com12: Food and Drink	Proposals for food and drink developments (classes A3, A4 and A5) will only be permitted where there are no amenity impacts on neighbours or the character of the area and they will not lead to traffic congestion.
Rec14: Major Leisure Developments	Major leisure developments likely to attract large numbers of visitors should be located within the Town Centre. If no suitable sites are available then a sequential approach identifying major regeneration areas (including the Marina) accessible by public transport, after edge of centre areas as preferable to out of centre locations.

- 4.17 In May 2014, the Council published the Planning Policy Framework Justification summarising the saved 2006 Local Plan policies and establishing their consistency with the NPPF in terms of full, partial or not consistent.
- 4.18 Of the relevant saved policies outlined above, all are considered to be fully compliant with the NPPF with the exception of Com9 which is only considered to be partially consistent given that it seeks to only allow main town centre uses outside of the town centre where need is demonstrated. Therefore, the Council determined that NPPF should be used to determine planning application relating for main town centre uses with policy Com9 utilised to establish the hierarchy of centres.

Emerging New Replacement Local Plan

- 4.19 A new Local Plan reached the submission stage in June 2012 but was formally withdrawn in November 2013. The Council is now at an early stage in preparing a replacement new Local Plan. Consultation was recently held on Issues and Options (May to July 2014).
- 4.20 A number of the issues and questions posed in the consultation were of relevance to the preparation of this study. These include:

Locational Strategy (Covering Housing and Regeneration Themes)

- Where should further major retail developments be located?
 - How can the town centre be made more attractive to users and investors?
 - Would providing more housing (including affordable housing) on sites close to the town centre (edge of centre sites) strengthen the opportunities for ensuring its key role as the main retail, commercial and leisure heart of Hartlepool?
 - Are there ways of reducing the barrier caused by the A689 (Stockton Street) to provide a more cohesive town centre?
- 4.21 The Council is currently considering the responses received to the consultation process and will utilise the responses to prepare a Preferred Options version of the emerging replacement new Local Plan.

5. SUB-REGIONAL OVERVIEW

- 5.1 Hartlepool does not operate in isolation and it is important to understand the nature of the existing and emerging retail and leisure offer in surrounding 'competing' centres given that planned improvements can materially impact upon shopping patterns (market share), future performance and overall vitality and viability. This section therefore summaries the existing and proposed changes to the retail and leisure offer within the wider sub-region hierarchy.

MIDDLESBROUGH

Town Centre

- 5.2 Middlesbrough is located c. 10 miles to the south of Hartlepool and is readily accessible by road or by rail. The town centre retail offer is commensurate with its sub-regional status; retail provision is dominated by four large managed shopping centres (Cleveland Centre, Hill Street Centre, Captain Cook Square and Dundas Shopping). The retail offer comprises a number of key stores including Debenhams, House of Fraser, Marks & Spencer, BHS and Primark¹⁰.

Out-of-Centre

- 5.3 The main retail park destination is Cleveland Retail Park which is located to the east of the town (Redcar and Cleveland BC); the retail park comprises a mix of bulky and high street comparison retailers. Teesside Shopping Park, which is located in Stockton-on-Tees also exerts considerable influence over local residents comparison shopping patterns in the town.

STOCKTON-ON-TEES

Town Centre

- 5.4 The town is located c. 13 miles to the south of the borough and is relatively accessible via the A689 / A19 or by rail. The town centre retail offer comprises a reasonable department store offer including Debenhams and M&S. The town centre 'high street' fashion offer is more limited although H&M, River Island and Topshop are present.

¹⁰ Sourced from PROMIS Retail Report

Out-of-Centre

- 5.5 There is a significant concentration of retail parks around Stockton; the most prominent are Teesside Shopping Park and Portrack Retail Park. Whereas Portrack is more bulky orientated, Teesside Shopping Park, which is located strategically at the junction of the A19 and A66, serves a wide sub-regional catchment given its extensive retail and leisure offer. Key retail attractors include national multiple fashion brands such as Next, River Island, New Look and Marks & Spencer. The leisure offer comprises a cinema, casino, bowling alley as well as a number of family orientated national branded restaurants.

DARLINGTON

Town Centre

- 5.6 Darlington is located c. 17 miles to the south west of Hartlepool. The town's retail offer is broadly commensurate with its sub-regional status; the town centre retail offer comprises two shopping centres (The Cornmill and Queen Street Mall). Key department store anchors include M&S, Primark and House of Fraser. The town has mid-range fashion multiples including Bank, Next, Topshop and River Island.
- 5.7 There have been long-standing plans for new comparison retail development within the town centre. The Oval scheme, which was to deliver c. 20,000 m² net additional retail including department store, shops and multiplex, has yet to proceed and a much reduced scheme may ultimately come forward. There are also committed plans to extend The Cornmill to provide a new Debenhams department store.
- 5.8 With respect to leisure, a planning application has recently been approved for a leisure-led mixed-use development at The Feethams site including a new multiplex, restaurants, bars and hotels; this scheme has significant potential to enhance the offer and profile of Darlington to a wider sub-regional catchment. The development is scheduled to open in spring 2016.

Out-of-Centre

- 5.9 The main out-of-centre retail provision is at Darlington Road and Neasham Road. The former is predominantly bulky goods orientated whereas Neasham Road comprises a mix of convenience and comparison retailers including Asda and Matalan.

DURHAM

City Centre

- 5.10 Durham is located c. 20 miles to the north west of Hartlepool. The town's sub-regional retail offer comprises two shopping centres (Prince of Bishops Centre and Gates Shopping Centre). The key department store anchor is BHS. The town has mid-range fashion multiples including Monsoon, Next, Topshop and River Island.

Out-of-Centre

- 5.11 There are several retail parks around the city. The Arnison Retail Centre is located to the north of the city and accommodates a large Sainsbury's store in addition to a mix of comparison and bulky retailers including M&S, Homebase, Next and Asda Living.
- 5.12 The Dragonville Retail Park is located to the east of the city and comprises an Aldi store and a mix of discount retailers including Matalan, Peacocks and Home Bargains. A large Tesco Extra store is adjacent.
- 5.13 Durham City Retail Park is located to the east of the city centre near to the A1(M) and includes large bulky good operators such as B&Q and Argos.

SUNDERLAND

City Centre

- 5.14 Sunderland city centre is a sub-regional centre and retail provision is focused within The Bridges Shopping Centre which accommodates a wide range a major 'high street' national multiple retailers including BHS, Debenhams, M&S and Primark. Other key retail attractors include Burton, Debenhams, H&M, Next, TK Maxx, New Look, Topshop, River Island, Monsoon and USC.

Out-of-Centre Provision

- 5.15 A number of retail parks are located around Sunderland, the most prominent of which are Sunderland and Hylton Riverside Retail Parks to the north. Sunderland Retail Park is bulky orientated goods and has recently been subject to comprehensive redevelopment to accommodate a large Tesco Extra store.
- 5.16 Hylton Riverside is orientated towards comparison retailing and provides a mixed high street, fashion and bulky offer, including Argos, B&M, Matalan (Clearance), Pets at Home and Aldi.

- 5.17 In terms of leisure provision, the Sunnyside Leisure Complex comprises a cinema, bowling alley, casino and a number of national chain family restaurants.

PETERLEE

- 5.18 Peterlee is located c. 8 miles to the north west of Hartlepool. Retail provision in the town centre is focused on the Castle Dene shopping centre which comprises a number of national comparison retailers including Wilkinson's, Argos and New Look. However, the high street fashion offer is significantly limited and is orientated towards discount and value operators.
- 5.19 Proposals for a new railway station to the east of the town (Horden) are also advancing (planning application and funding submissions) and this would present future major opportunities for local residents to travel for shopping and leisure in Sunderland or Newcastle. This could have future implications for comparison retail shopping patterns in the wider sub-region as those in the Peterlee catchment who presently shop in Hartlepool may begin to make more frequent shopping trips to higher order regional centres.

DALTON PARK (MURTON)

- 5.20 Dalton Park Outlet Shopping Centre is the largest of its type in the region and is located to the north west of Peterlee off the A19. The outlet village accommodates over 80 shops including designer and high street outlet stores, such as Adidas, Next, Marks & Spencer and Gap. Planning permission was granted in March 2012 for the expansion of Dalton Park to provide a cinema, new restaurants, a foodstore, petrol station, hotel and pub. Frankie and Benny's, Cineworld, KFC, Morrison's are now confirmed as tenants and the development of the scheme is expected to be completed in mid-2015.

BILLINGHAM

- 5.21 Billingham district centre is located to the south west of Hartlepool. The retail offer is relatively limited and orientated towards discount and value operators.

NEWCASTLE

- 5.22 The comparison retail offer in Newcastle City Centre is commensurate with its status as the main regional shopping centre destination for the North East. The major redevelopment activity over recent years has been at Eldon Square (Debenhams department store anchor etc.). There are emerging proposals for further substantial comparison retail development at the East Pilgrim Street opportunity site within the City Centre which is actively being promoted.

METRO CENTRE

- 5.23 The Metro Centre is the largest out-of-town sub-regional shopping complex and is highly accessible to the wider North East region given its prominent location off the A1. The centre has a range of department stores, mid and higher range national comparison multiples as well as a leisure complex. There are also a number of separate retail parks (high street and bulky) in the locality.

6. TOWN CENTRE FLOORSPEACE SURVEY

6.1 The NPPF states that comprehensive up-to-date monitoring of town centre performance is essential to improve the vitality and viability of centres and effectively plan for the future. The floorspace composition of the Hartlepool town centre has been surveyed utilising the following data sources:

- **Experian GOAD Survey – Hartlepool Town Centre:** the published Goad plan and accompanying category report has been used to enable a comparative assessment against the 2009 Study and national ‘benchmark’ data from the Experian Goad database.
- **GVA Floorspace Survey – Hartlepool Town Centre Update:** GVA undertook its own floorspace survey of Hartlepool town centre to update the Goad survey data. Given that Goad centre surveys are based on Experian’s own interpretation of the true extent of retailing within a centre rather than the town centre primary shopping area (PSA) boundaries as defined in adopted policy, GVA therefore conducted its own floorspace analysis of Hartlepool town centre PSA based on adopted boundaries.

6.2 Detailed analysis is provided on this basis below.

Hartlepool Town Centre

Experian Goad Floorspace Survey (Updated by GVA)

6.3 The most recent Experian Goad survey was completed in July 2013. GVA therefore undertook its own floorspace survey of Hartlepool town centre in July 2014, based on the Experian Goad boundary, to update the Goad survey data. A plan showing the extent of the Goad survey area of Hartlepool town centre is provided at Appendix 7 and a summary of the Goad floorspace data (updated by GVA) is set out below.

Table 6.1 – Experian Goad Floorspace Survey (Updated by GVA, July 2014)

Retail Sector	No. Outlets	% Outlets		Floorspace (sq. m)	% Floorspace	
		Hartlepool	UK		Hartlepool	UK
Convenience	18	4.1	8.17	5,440	5.65	14.75
Comparison	125	28.47	33.02	35,400	36.74	36.7
Retail Services ¹¹	50	11.39	13.87	5,560	5.77	7.43
Restaurants, Cafes and Takeaways	92	20.96	22.22	18,780	19.49	23.8
Financial & Professional Services ¹²	44	10.02	11.0	7,840	8.14	8.42
Vacant	110	25.06	11.56	23,320	24.21	9.4
TOTAL¹³	439	100	100	96,340	100	100

6.4 The survey results highlight the following:

- **CONVENIENCE:** the number of units and quantum of floorspace are significantly below the national average. This reflects the concentration of large foodstores (Asda, Morrison's and Tesco Extra) in edge and out-of-centre locations around the town. The convenience offer within the town centre is limited to predominantly top-up orientated provision.
- **COMPARISON:** the number of outlets dedicated to comparison retailing is below the Goad national average whereas the proportion of floorspace is above. This reflects the larger floorplate units primarily located within the purpose-built Middleton Grange shopping centre. The below average number of comparison retail units may also be partially reflective of the significant quantum of vacant floorspace within the town centre PSA.
- **VACANT:** both the number of outlets and quantum of floorspace are significantly above the national average at more than double in each case. This potentially reflects the significant contraction in retail provision (as with many centres).

6.5 The Goad survey indicates that the town centre is not performing particularly well, with high vacancy levels (c. 23,320 m² gross) a major issue. Examination of the locations of vacant units reveals that vacancies are distributed fairly evenly throughout the centre, both in the PSA as well as in adjacent town centre areas, albeit with a slightly greater concentration within the PSA. Four small vacant units on York Road are located in a building currently undergoing redevelopment.

¹¹ Hairdressers, beauty parlours & health centres; laundries & dry cleaners; and travel agents (Goad definition).

¹² Banks & financial services (including accountants); building societies, estate agents & auctioneers (Goad definition).

¹³ Excluding miscellaneous and other uses.

- 6.6 A significant number of vacancies are within Middleton Grange. The shopping centre, which covers most of the town centre defined PSA, provides a major focus for national multiple high street stores (modern regular floorplate configurations and servicing arrangements). At July 2014, a 2,160 m² (gross) unit adjacent to Primark (strong retail attractor) within the shopping centre was vacant, which was the largest vacant unit in the centre. However, this unit has since been occupied by TJ Hughes.
- 6.7 Nevertheless, the recent announcement by Marks & Spencer to relocate from Middleton Grange to the out-of-centre Anchor Retail Park will further compound vacancy issues within the town centre PSA.
- 6.8 The number, distribution and type of vacant floorspace is potentially indicative of an over provision of retail floorspace in the town centre.

Comparative Assessment (2009 Study)

- 6.9 The floorspace survey which informed the 2009 Study was based on varying data sources including on-site surveys by the Council and an Experian Goad report from June 2008. The study set out the retail composition of the centre as follows:

Table 6.2 – Experian Goad Floorspace Survey (2009 Retail Study)

Retail Sector	No. Outlets	% Outlets		Floorspace (sq. m)	% Floorspace	
		Hartlepool	UK		Hartlepool	UK
Convenience	22	4.97	8.80	4,812	4.94	14.13
Comparison	141	31.83	34.67	38,481	39.47	37.95
Retail Service	58	13.09	13.00	6,874	7.05	6.98
Restaurants, Cafes and Takeaways	100	22.57	21.46	21,237	21.79	22.68
Financial & Professional Services	50	11.29	11.19	7,739	7.94	8.76
Vacant	71	16.03	11.19	18,042	18.51	8.77
TOTAL	442	100	100	97,185	100	100

- 6.10 The table below highlights the changes in the composition of the town centre between 2014 and the 2008 Experian Goad Survey (latter informs the 2009 Study):

Table 6.3 – Experian Goad Floorspace Survey (Change 2009 – 2014)

Retail Sector	No. Outlets	% Outlets		Floorspace (sq. m)	% Floorspace	
		Hartlepool	UK		Hartlepool	UK
Convenience	-4	-0.87	-0.63	-628	0.71	0.62
Comparison	-16	-3.36	-1.65	-3,081	-2.73	-1.25
Retail Service	-8	-1.7	0.87	-1,314	-1.28	0.45
Restaurants, Cafes and Takeaways	-8	-1.61	0.76	-2,457	-2.3	1.12
Financial & Professional Services	-6	-1.27	-0.19	+101	0.2	-0.34
Vacant	+39	9.03	0.37	+5,278	5.7	0.63

6.11 In headline terms, the differences between the survey results are as follows:

- **Convenience:** the number of outlets has decreased by 4 and the floorspace quantum has decreased slightly.
- **Comparison:** the number of outlets and the quantum of floorspace in particular have decreased significantly (c. 16 outlets / 3,100 m² floorspace).
- **Vacant:** the number of vacant units (39 units) and quantum of floorspace in particular has increased significantly (c. 5,300 m² floorspace).

6.12 The decline in comparison retailing is consistent with the significant increase in vacancies within the town centre; this may in part be attributable to the recent adverse economic climate which occurred between the two respective survey dates. The relocation of M&S from Middleton Grange to Anchor Retail Park will further increase vacancies unless new replacement occupiers can be secured.

Primary Shopping Area Floorspace Survey

6.13 As detailed in the introduction, the Experian Goad survey is based on its interpretation of the true extent of retailing within a centre rather than the town centre primary shopping area (PSA) boundaries defined in the adopted Local Plan. GVA has therefore undertaken its own assessment of the composition of the defined PSA. For consistency and to ensure ease of comparison with existing Goad data, we have categorised the town centre floorspace using the Goad definitions. The PSA survey findings are shown in the plan at Appendix 4 and summarised below.

Table 6.4 – Hartlepool Town Centre PSA Floorspace Survey (July 2014)

Retail Sector	Floorspace (sq. m gross)	Units
Convenience	4,311	15
Comparison	28,009	71
Retail Services	2,420	19
Restaurants, Cafes and Takeaways	3,456	17
Financial & Professional Services	3,620	24
Vacant	13,278	64
TOTAL	56,890	215

6.14 Comparative analysis of the PSA survey area with the Goad survey area identifies the following differences:

- **Convenience:** there is a decrease in terms of the number of units and the quantum of floorspace; this is due to the GVA survey excluding the Church Street area and the lower stretches of York Road which are located outside of the PSA.
- **Comparison:** there is a significant difference between the two survey areas in terms of number of outlets and a slight decrease in quantum of floorspace. This difference is attributable to the GVA survey excluding areas dominated by comparison retail units to the south of York Road and in the Church Street area.
- **Vacant:** the number and quantum of units identified in the PSA survey is below that recorded for the Experian Goad survey area. This is likely to be due to the tighter boundary of the PSA survey.

6.15 The specific survey results for the PSA further indicate that the health (vitality and viability) of the town centre has declined since 2009.

7. LOCAL CENTRE SURVEYS

- 7.1 Detailed 'on-site' floorspace surveys of the existing 20 local centres in the Borough have been completed based on adopted boundaries.
- 7.2 Nineteen of the local centres and their respective boundaries were originally defined under saved Policy Com5 of the 2006 Hartlepool Local Plan. However, changes to the boundaries of 10 of these local centres¹⁴ along with the designation of a new local centre¹⁵ were approved by the Council in July 2010¹⁶
- 7.3 The plans and associated floorspace schedules of each local centre (Appendix 5) identify the floorspace quantum and composition of each centre¹⁷. The headline findings of the floorspace assessments are presented below; where possible the results of the surveys are compared the 2009 Study findings.
- 7.4 Recommendations in respect of new local centres proposed as part of future strategic housing allocations is provided at the end of the chapter and the Council should seek to adopt a robust approach in securing viable local centres.

Table 7.1 – Existing Defined Local Centres

Purpose Built Shopping Parades	Streets Important for Local Shopping and Facilities
Belle Vue Brierton Lane Brus Corner Catcote Road Elizabeth Way Fens Jutland Road King Oswy Drive Middle Warren Northgate Northgate/Durham Street Owton Manor East Owton Manor West Wiltshire Way Wynyard Road	Chatham Road/Raby Road Murray Street Raby Road/Hart Lane Oxford Road Stockton Road (Brenda Road/Sydenham Road)

¹⁴ Oxford Road, Raby/Chatham Road, Brierton Lane, Middle Warren, Murray Street, Owton Manor East, Owton Manor West, Stockton Road (Brenda Road/Sydenham Road), Wiltshire Way and Wynyard Road.

¹⁵ Belle Vue local centre.

¹⁶ Hartlepool Borough Council Cabinet Agenda, 19 July 2010.

¹⁷ The summary presented in this Section is based on the defined local centre boundaries and excludes floorspace identified on the local centre plans at Appendix 5 which is located outside of the boundary.

PURPOSE BUILT SHOPPING PARADES

Belle Vue

- 7.5 Belle Vue local centre is located c. 1.5km south of Hartlepool town centre at the intersection of Belle Vue Way and Brenda Road. The centre comprises a small row of modern retail units fronting Belle Vue Way together with a row of older units fronting Stanley Road to the rear. The retail property offer comprises a mix of one and two storey buildings. A small dedicated car parking area is provided in front of the modern retail units and on street parking is available on Stanley Road to the rear.

Operator Type	2014			
	Units		Floorspace	
	Number	%	sq. m	%
Convenience	2	25	331	24
Comparison	1	13	384	27
Retail Services ¹⁸	2	25	339	24
Food & Drink ¹⁹	0	0	0	0
Financial, Professional & Other Services ²⁰	1	13	112	8
Vacant	2	25	231	17
Total²¹	8	100	1,397	100

- 7.6 The centre comprises a mix of convenience, comparison retail and retail service uses. Two units are currently vacant as at July 2014, comprising a quarter of all units. The 2009 Study predates the designation of Belle Vue as a new local centre in 2010 and the centre was not therefore assessed as part of the 2009 Study.

Brierton Lane

- 7.7 Brierton Lane local centre is c. 3km to the south west of Hartlepool town centre. The centre is very small and comprises a small purpose-built shopping parade with a paved pedestrianised area to the front, adjacent to Eskdale Road. The retail property offer comprises a mix of one and two storey buildings. A small amount of street parking is available on Eskdale Road and a small car park is provided to the rear of the centre, off Brierton Lane.

¹⁸ Retail services within use Class A1

¹⁹ Use Classes A3 – A5 (Restaurants, cafes, drinking establishments, fast food and takeaway uses).

²⁰ Use Class A2 (Banks, building societies, estate agents, employment agencies, betting shops and pay day loan shops)

²¹ Excluding miscellaneous and other uses.

Operator Type	2014				2009		Change 2009-2014
	Units		Floorspace		Units		Units
	Number	%	sq. m	%	Number	%	Number
Convenience	3	50	184	53	2	67	1
Comparison	0	0	0	0	0	0	0
Retail Service	0	0	0	0	0	0	0
Food & Drink	1	17	42	12	1	33	0
Financial, Professional & Other Services	0	0	0	0	0	0	0
Vacant	2	33	119	34	0	0	2
Total	6	100	345	100	3	100	3

- 7.8 The centre is focused on convenience retail, which comprises half of the current provision both in terms of the number of units and floorspace. Two units are currently vacant as at July 2014, comprising a third of all units. A comparative analysis shows that the two vacancies have arisen since the 2009 Study.

Brus Corner

- 7.9 Brus Corner local centre lies c. 3km north of Hartlepool town centre. The centre comprises a small purpose-built shopping parade which is set back from the main road and is served by a separate access road which also provides car parking directly in front of the units.

Operator Type	2014				2009		Change 2009-2014
	Units		Floorspace		Units		Units
	Number	%	sq. m	%	Number	%	Number
Convenience	2	25	104	21	2	20	0
Comparison	2	25	106	22	4	40	-2
Retail Service	0	0	0	0	1	10	-1
Food & Drink	2	25	156	32	3	30	-1
Financial, Professional & Other Services	0	0	0	0	0	0	0
Vacant	2	25	127	26	0	0	2
Total	8	100	493	100	10	100	-2

- 7.10 The centre contains a mix of convenience, comparison, retail service and food & drink operators. Two units are currently vacant, comprising a quarter of the total number of units. A comparative analysis shows that the current vacancies in the centre have arisen since the 2009 Study was completed.

Catcote Road

- 7.11 The centre lies c. 3km south west of Hartlepool town centre and has been subject to recent investment with modern retail units being constructed. As part of the recent development, dedicated car parking is located to the north.

Operator Type	2014				2009		Change 2009-2014
	Units		Floorspace		Units		Units
	Number	%	sq. m	%	Number	%	Number
Convenience	3	19	747	33	3	30	0
Comparison	1	6	121	5	1	10	0
Retail Service	3	19	389	17	0	0	3
Food & Drink	6	38	594	26	1	10	5
Financial, Professional & Other Services	1	6	129	6	1	10	0
Vacant	2	13	287	13	4	40	-2
Total	16	100	2,267	100	10	100	6

- 7.12 The centre contains a good mix of uses with convenience retailing occupying the most floorspace (33%). Two units are currently vacant, comprising 13% in terms of units. A comparative analysis with the 2009 Study shows that there has been an increase in the overall number of units and a decrease in vacancies.

Elizabeth Way

- 7.13 Elizabeth Way local centre is c. 3.5km south east of Hartlepool town centre in Seaton Carew. The centre comprises a small purpose-built shopping parade and includes a dedicated car park directly in front of the units. The units comprise two storey buildings, with the floors used predominantly for residential accommodation with ground floor commercial uses and residential above.

Operator Type	2014				2009		Change 2009-2014
	Units		Floorspace		Units		Units
	Number	%	sq. m	%	Number	%	Number
Convenience	3	27	344	38	3	38	0
Comparison	2	18	143	16	1	13	1
Retail Service	2	18	156	17	1	13	1
Food & Drink	2	18	162	18	2	25	0
Financial, Professional & Other Services	1	9	42	5	1	13	0
Vacant	1	9	65	7	0	0	1
Total	11	100	912	100	8	100	3

- 7.14 The centre contains a good mix of uses, with convenience retail being the dominant use both in terms of floorspace (38%) and number of units (27%). One unit is currently vacant. A comparative analysis with the 2009 Study shows that the vacant unit in the centre has arisen since 2009.

Fens

- 7.15 The Fens local centre lies approximately 4km south west of Hartlepool town centre and comprises a large purpose-built shopping parade set back from the main road with a relatively large car parking area directly in front of the units.

Operator Type	2014				2009		Change 2009-2014
	Units		Floorspace		Units		Units
	Number	%	sq. m	%	Number	%	Number
Convenience	5	31	1,046	49	5	33	0
Comparison	3	19	312	15	5	33	-2
Retail Service	3	19	181	8	1	7	2
Food & Drink	3	19	284	13	1	7	2
Financial, Professional & Other Services	1	6	192	9	1	7	0
Vacant	1	6	135	6	2	13	-1
Total	16	100	2,150	100	15	100	1

- 7.16 The centre contains a good mix of uses with convenience retail being the dominant use both in terms of floorspace (49%) and quantum of units (31%). One unit is currently vacant, comprising 6% in terms of units and floorspace. A comparative analysis with the 2009 Study shows that there has been an increase in the number of retail service and food & drink outlets and a decrease in comparison retail and vacant units.

Jutland Road

- 7.17 Jutland Road is c. 3.5km to the south of Hartlepool town centre. The centre comprises a small purpose-built shopping centre and is surrounded by residential uses to the north and west and a large expanse of industrial land to the south and east.

Operator Type	2014				2009		Change 2009-2014
	Units		Floorspace		Units		Units
	Number	%	sq. m	%	Number	%	Number
Convenience	2	29	293	40	3	75	-1
Comparison	0	0	0	0	0	0	0
Retail Service	0	0	0	0	0	0	0
Food & Drink	1	14	83	11	1	25	0
Financial, Professional & Other Services	0	0	0	0	0	0	0
Vacant	4	57	349	48	0	0	4
Total	7	100	725	100	4	100	3

- 7.18 Jutland Road is experiencing high levels of vacancy with four (57%) of the total 7 units vacant as at July 2014. A comparative analysis shows that the vacancy in the centre has arisen since the 2009 Study.

King Oswy Drive

- 7.19 King Oswy Drive local centre is located c. 5km northwest of Hartlepool town centre and comprises a small purpose-built shopping precinct surrounding a central paved pedestrianised area. A car park is provided to the north, accessible via Nicholson Way.

Operator Type	2014				2009		Change 2009-2014
	Units		Floorspace		Units		Units
	Number	%	sq. m	%	Number	%	Number
Convenience	4	33	516	43	7	50	-3
Comparison	1	8	114	10	1	7	0
Retail Service	2	17	112	9	1	7	1
Food & Drink	2	17	140	12	3	21	-1
Financial, Professional & Other Services	1	8	117	10	1	7	0
Vacant	2	17	189	16	1	7	1
Total	12	100	1,188	100	14	100	-2

- 7.20 The centre contains a reasonably good mix of uses, with a focus on convenience retail, retail services and food & drink uses. Two units are currently vacant as at July 2014. A comparative analysis with the previous retail study in 2009 shows that there has been a small rise in vacant units and retail service units, and a reduction in the amount of convenience and food & drink outlets.

Middle Warren

- 7.21 The centre is located to the far northwest of Hartlepool town centre and comprises a single storey modern centre constructed in 2008. There is a significant amount of dedicated car parking. The centre was constructed to serve the surrounding major residential estate, parts of which remain under construction.

Operator Type	2014				2009		Change 2009-2014
	Units		Floorspace		Units		Units
	Number	%	sq. m	%	Number	%	Number
Convenience	1	25	820	56	1	33	0
Comparison	0	0	0	0	0	0	0
Retail Service	0	0	0	0	0	0	0
Food & Drink	2	50	561	38	1	33	1
Financial, Professional & Other Services	1	25	93	6	0	0	1
Vacant	0	0	0	0	1	33	-1
Total	4	100	1,474	100	3	100	1

- 7.22 The dominant use within the centre in terms of quantum of floorspace is convenience retail (56%). None of the units are currently vacant as at July 2014. A comparative analysis with the 2009 retail study shows that the then recently constructed vacant unit has since been occupied by a food & drink operator. Construction and opening of the public house within the centre has also been completed since 2009.

Northgate

- 7.23 The centre is c. 4km north of Hartlepool town centre and comprises a linear purpose-built shopping parade. The centre is relatively large but has little in the way of dedicated parking.

Operator Type	2014				2009		Change 2009-2014
	Units		Floorspace		Units		Units
	Number	%	sq. m	%	Number	%	Number
Convenience	2	8	83	4	7	28	-5
Comparison	3	12	203	10	9	36	-6
Retail Service	6	24	465	22	1	4	5
Food & Drink	8	32	779	37	5	20	3
Financial, Professional & Other Services	0	0	0	0	1	4	-1
Vacant	6	24	596	28	2	8	4
Total	25	100	2,126	100	25	100	0

- 7.24 The centre contains a large variety of uses, with food & drink uses the dominant use in terms of the number of units (32%) and floorspace (37%). Six units are currently vacant, equating to a quarter of all units. A comparative analysis with the 2009 Study shows that the vacancy levels have increased and there has been considerable churn in centre with a substantial decrease in the number of both convenience and comparison operators and an increase in retail services and food & drink uses.

Northgate/Durham Street

- 7.25 Northgate/Durham Street local centre is c. 3.5 km north east of Hartlepool town centre and comprises a small linear purpose-built shopping parade. The centre is set back from the main road with off street car parking provided in front of the units.

Operator Type	2014				2009		Change 2009-2014
	Units		Floorspace		Units		Units
	Number	%	sq. m	%	Number	%	Number
Convenience	1	9	210	17	1	14	0
Comparison	0	0	0	0	0	0	0
Retail Service	1	9	77	6	1	14	0
Food & Drink	3	27	548	44	3	43	0
Financial, Professional & Other Services	0	0	0	0	0	0	0
Vacant	6	55	409	33	2	29	4
Total	11	100	1,244	100	7	100	4

- 7.26 The centre has a high vacancy level with over half of all units currently vacant as at July 2014. A comparative analysis with the 2009 retail study shows that the number of vacant units has increased from 2 to 6 units since 2009.

Owton Manor East

- 7.27 The centre is c. 3.5 km from Hartlepool town centre and comprises a small purpose-built shopping parade on the northern side of Owton Manor Lane. The parade is set back from the main road and car parking is provided on the frontage.

Operator Type	2014				2009		Change 2009-2014
	Units		Floorspace		Units		Units
	Number	%	sq. m	%	Number	%	Number
Convenience	5	63	420	70	4	67	1
Comparison	0	0	0	0	0	0	0
Retail Service	1	13	47	8	0	0	1
Food & Drink	2	25	132	22	2	33	0
Financial, Professional & Other Services	0	0	0	0	0	0	0
Vacant	0	0	0	0	0	0	0
Total	8	100	599	100	6	100	2

- 7.28 The centre contains a mix of uses, with convenience retail the dominant use both in terms of units (63%) and floorspace (70%). Food & drink uses occupy the next highest amount of floorspace (22%). None of the units are currently vacant. A comparative analysis with the 2009 Study shows that there has been a slight increase in the number of convenience retail and retail service uses with no change in other categories.

Owton Manor West

- 7.29 The centre is c. 4 km south west of Hartlepool town centre and comprises a small purpose-built shopping parade on the northern side of Owton Manor Lane. Roadside car parking is provided directly in front of the units in a layby.

Operator Type	2014				2009		Change 2009-2014
	Units		Floorspace		Units		Units
	Number	%	sq. m	%	Number	%	Number
Convenience	6	55	643	54	6	46	0
Comparison	1	9	46	4	1	8	0
Retail Service	1	9	85	7	1	8	0
Food & Drink	3	27	417	35	4	31	-1
Financial, Professional & Other Services	0	0	0	0	0	0	0
Vacant	0	0	0	0	1	8	-1
Total	11	100	1,191	100	13	100	-2

- 7.30 The centre contains a mix of uses with convenience retail the dominant use in terms of units (55%). Convenience retail also occupies the greatest amount of floorspace (54%) followed by food & drink uses (35%). None of the units are currently vacant. A comparative analysis with the 2009 Study indicates that there has been a decrease in the number of food & drink and vacant units.

Wiltshire Way

- 7.31 Wiltshire way local centre is c. 2km northwest of Hartlepool town centre and comprises a small purpose-built shopping parade with car parking in front.

Operator Type	2014				2009		Change 2009-2014
	Units		Floorspace		Units		Units
	Number	%	sq. m	%	Number	%	Number
Convenience	2	33	378	52	2	25	0
Comparison	0	0	0	0	2	25	-2
Retail Service	1	17	88	12	1	13	0
Food & Drink	2	33	173	24	2	25	0
Financial, Professional & Other Services	1	17	85	12	1	13	0
Vacant	0	0	0	0	0	0	0
Total	6	100	724	100	8	100	-2

- 7.32 Convenience retail is the dominant use in the centre, occupying over half of the total floorspace in the centre. None of the units are currently vacant. A comparative analysis with the 2009 Study shows that there has been a slight decrease in the number of comparison retail operators in the centre.

Wynyard Road

- 7.33 Wynyard Road local centre is c. 2.5 km south west of Hartlepool town centre and is a purpose-built shopping parade. Roadside car parking is provided directly in front of the units in a layby.
- 7.34 The centre comprises a mixture of single, two and three storey buildings, with the upper floors, where available, used for either residential accommodation or storage and offices associated with ground floor commercial uses.

Operator Type	2014				2009		Change 2009-2014
	Units		Floorspace		Units		Units
	Number	%	sq.m	%	Number	%	Number
Convenience	5	28	840	36	5	31	0
Comparison	5	28	568	25	1	6	4
Retail Service	3	17	450	20	2	13	1
Food & Drink	4	22	373	16	3	19	1
Financial, Professional & Other Services	0	0	0	0	0	0	0
Vacant	1	6	73	3	5	31	-4
Total	18	100	2,304	100	16	100	2

- 7.35 The centre contains a good mix of uses with over a quarter of all units occupied by comparison retail operators, which is unusual for small local centres. Only one unit is currently vacant. A comparative analysis with the 2009 Study shows that vacancy in the centre has decreased substantially with a corresponding increase in the comparison retail provision.

STREETS IMPORTANT FOR LOCAL SHOPPING AND FACILITIES

Chatham Road / Raby Road

- 7.36 Chatham Road / Raby Road local centre is located around 1 km north of Hartlepool town centre and predominantly comprises small two-storey shops. There is limited parking provision with no dedicated car park.

Operator Type	2014			
	Units		Floorspace	
	Number	%	sq. m	%
Convenience	2	14	186	13
Comparison	1	7	77	5
Retail Service	1	7	59	4
Food & Drink	4	29	250	18
Financial, Professional & Other Services	1	7	110	8
Vacant	5	36	720	51
Total	14	100	1,402	100

- 7.37 The centre contains high levels of vacancy with over a third of all units currently vacant. No operator data for this centre was available in the 2009 Study.

Murray Street

- 7.38 Murray Street local centre is located around 0.5 km northwest of Hartlepool town centre and predominantly comprises a mix of traditional two to three-storey buildings. There is a small dedicated car park and on-street parking is also available in laybys.

Operator Type	2014				2009		Change 2009-2014
	Units		Floorspace		Units		Units
	Number	%	sq. m	%	Number	%	Number
Convenience	8	18	951	25	5	14	3
Comparison	11	25	925	24	9	24	2
Retail Services	7	16	446	12	3	8	4
Food & Drink	12	27	1,139	29	10	27	2
Financial, Professional & Other Services	0	0	0	0	1	3	0
Vacant	6	14	411	11	9	24	-3
Total	44	100	3,872	100	37	100	7

- 7.39 The centre contains a good mix of use, with a notable focus on food & drink and comparison retail provision. Six of the total units are currently vacant. A comparative analysis with the 2009 Study shows that vacancy in the centre has decreased slightly and that the total number of operators has increased.

Raby Road/Hart Lane

- 7.40 Raby Road/Hart Lane local centre is c. 600m north of Hartlepool town centre and comprises a mix of buildings. The majority of the units are located on the western side of Raby Road and at the junction of Hart Lane. There is no dedicated car park and opportunities for on-street parking are limited.

Operator Type	2014				2009		Change 2009-2014
	Units		Floorspace		Units		Units
	Number	%	sq. m	%	Number	%	Number
Convenience	1	6	149	8	2	14	-1
Comparison	6	38	1,090	62	2	14	4
Retail Service	2	13	99	6	7	50	-5
Food & Drink	2	13	138	8	1	7	1
Financial, Professional & Other Services	1	6	50	3	0	0	1
Vacant	4	25	232	13	2	14	2
Total	16	100	1,758	100	14	100	2

- 7.41 Comparison retail is the dominant use in the centre both in terms of the number of units (38%) and the amount of floorspace (62%). There is only one convenience retail operator. Four of the units are vacant. A comparative assessment against the 2009 Study shows that there has been a significant increase in the number of comparison retail units and a decrease in the number of retail services units.

Oxford Road

- 7.42 Oxford Road local centre is c. 1 km south of Hartlepool town centre and comprises a small centre located at the junction of Oxford Road, Shrewsbury Street and Fernwood Avenue. There is no dedicated car park and on-street parking is limited.

Operator Type	2014				2009		Change 2009-2014
	Units		Floorspace		Units		Units
	Number	%	sq. m	%	Number	%	Number
Convenience	6	35	648	51	4	44	2
Comparison	3	18	140	11	2	22	1
Retail Service	3	18	218	17	1	11	2
Food & Drink	3	18	149	12	1	11	2
Financial, Professional & Other Services	1	6	64	5	1	11	0
Vacant	1	6	48	4	0	0	1
Total	17	100	1,267	100	9	100	8

- 7.43 The centre contains a good mix of uses with a focus on convenience retail. Only one unit is vacant. A comparative analysis with the 2009 Study indicates that there has been a significant increase in the overall number of operators in the centre. However, this increase is likely to be attributable to differing survey areas; the 2014 survey reflects the 2010 local centre boundary, which encompasses a number of additional units.

Stockton Road (Brenda Road/Sydenham Road)

- 7.44 Stockton Road (Brenda Road/Sydenham Road) local centre is c. 1 km south of Hartlepool town centre. Parking is available on-street.

Operator Type	2014			
	Units		Floorspace	
	Number	%	sq. m	%
Convenience	1	25	80	29
Comparison	0	0	0	0
Retail Service	0	0	0	0
Food & Drink	2	50	130	47
Financial, Professional & Other Services	0	0	0	0
Vacant	1	25	69	25
Total	4	100	279	100

- 7.45 The centre contains only one vacant unit. No operator data for this centre is provided in the 2009 retail study.

PLANNING FOR NEW LOCAL / NEIGHBOURHOOD CENTRES

- 7.46 Following the advent of NPPF there is no formal definition of what comprises a 'local centre' within national policy; the only definition of what comprises a 'local centre' is provided in the now cancelled PPS4 guidance (Annex B), as follows:

'A range of small shops of a local nature serving a small catchment; typically a local centre might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a takeaway and laundrette'.

- 7.47 In order to ensure that future proposed new local centres associated with strategic residential sites predominantly serve local needs and do not function as retail destinations which could serve wider catchments and compete with existing provision, it is important that the Council:

- Establishes the potential quantitative needs likely to be generated by proposed new residential provision; and
- Constructs appropriate policy framework so as to ensure that new provision solely serves local needs.

- 7.48 Whilst it is possible to identify the quantum of Class A1 convenience and comparison floorspace arising from a strategic housing allocation, it is difficult to quantify the need for (Class A1) retail service uses such as hairdressers, pharmacies and dry cleaners (amongst others) given the lack of expenditure data available. In addition to retail and service uses, as per the (now cancelled) PPS4 definition, a new local retail centre may also include Class A2 premises (bookmakers, banks etc.), Class A3 / A5 outlets

(i.e. takeaway outlet) and possibly a doctor's surgery and dentist (depending on PCT requirements).

7.49 Therefore, it is recommended that the Council should consider the following when constructing future site-specific policies for new local centres as part of new large / strategic residential developments:

- **Convenience Floorspace;** the maximum Class A1 convenience floorspace within the scheme should be specified.
- **Range of Uses;** the range of uses (Classes A1 – A5, D1 etc.) which would create a viable local centre offer should be set out.
- **Maximum Unit Size;** the maximum floorspace (square metres gross) size for an individual unit should be specified so as to ensure that large units are not created.
- **Phasing;** policy should set out the quantum of residential development which should be constructed prior to commencement of trading so as to ensure that the local centre does not come forward in advance or isolation of the residential it is intended to serve.

7.50 The headline policy framework would enable the Council to control the nature of local centre provision that comes forward whilst enabling a viable scheme to emerge and to respond to commercial market interest.

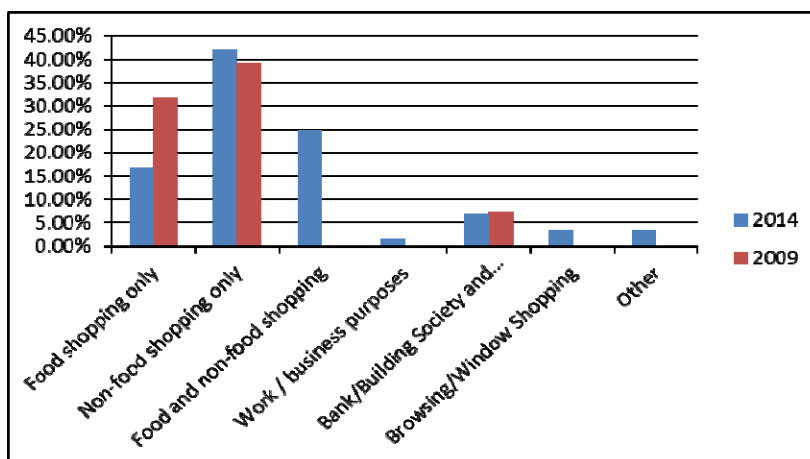
8. IN-CENTRE SHOPPER SURVEY

- 8.1 In order to inform the wider qualitative review, a total of 202 in-centre shopper surveys were completed in Hartlepool town centre in July 2014. The surveys were spread across several days in order to capture a wide cross-section of regular town centre users and visitors.
- 8.2 As set out in the introductory chapter to this report, the survey was designed in conjunction with the Council to determine:
- The profile of visitors and shoppers;
 - The strengths and weaknesses of Hartlepool town centre in terms of the existing retail offer, wider facilities and physical environment;
 - The usage of the centre (i.e. frequency of visits, modal split, dwell time); and
 - Suggested qualitative improvements which would persuade shoppers to visit Hartlepool town centre more often, or stay in the centre for longer.
- 8.3 The survey asked a broader range of questions than the previous 2009 Study and therefore a comparative assessment is only provided where appropriate.

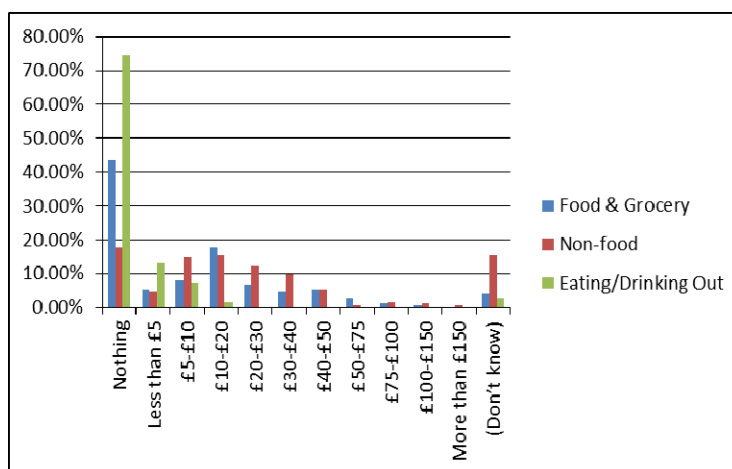
Survey Overview

- 8.4 A total of 202 in-centre surveys were completed in Hartlepool across 6 days in July 2014. The surveys covered weekend and weekdays so as to obtain responses from local residents and visitors.
- 8.5 The headline survey results are as follows:
- **Reason for Visit:** the most popular reason for visiting the town centre was for non-food shopping (42.1%); this is broadly similar to the 2009 Study (39.2%). Visiting the town centre for food and non-food shopping was the next most popular reason (24.75%) in the new survey, followed by undertaking food shopping (16.8%). A small number of respondents were visiting for work/business purposes (1.5%).

As the graph below shows, the 2014 survey results differ from the 2009 study, whereby undertaking food shopping was the second most popular response (31.6%) followed by banks, building societies and retail services (7.3%).

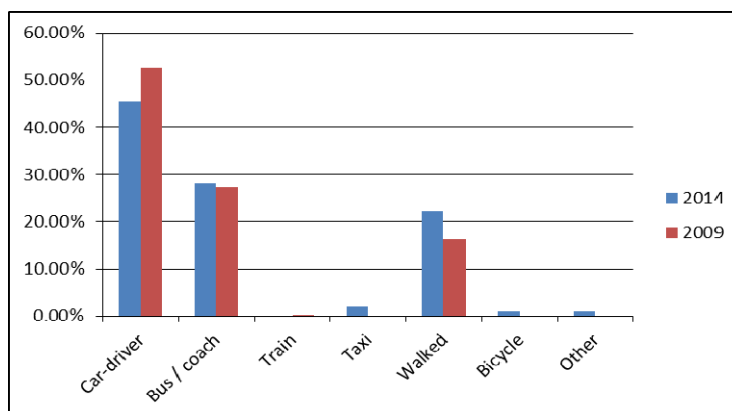


- **Length of Stay:** most respondents were planning to stay for between either 30 – 60 minutes or 1.5 – 2 hours (23.8% and 20.8% respectively). A total of 18.3% were planning to stay for between 60 and 90 minutes and 11.4% for between both 15 – 30 minutes and 2 – 3 hours.
- **Frequency of Visit:** when asked their frequency of visits to the town centre, 37.7% of respondents stated several times a week, followed by 27.7% weekly and 10.9% once every 2 to 3 weeks. 9.4% of respondents stated they visited daily.
- **Expected Spend:** the graph below shows what respondents were expected to spend on shopping and leisure items; the majority expected to spend up to £20.



- **Travel:** the survey identified that most respondents (45.5%) travelled to the town centre by car; either as a driver or passenger. This was followed by people getting

the bus (28.2%) or walking (22.3%). The graph below shows that these results are broadly in line with the 2009 Study findings.

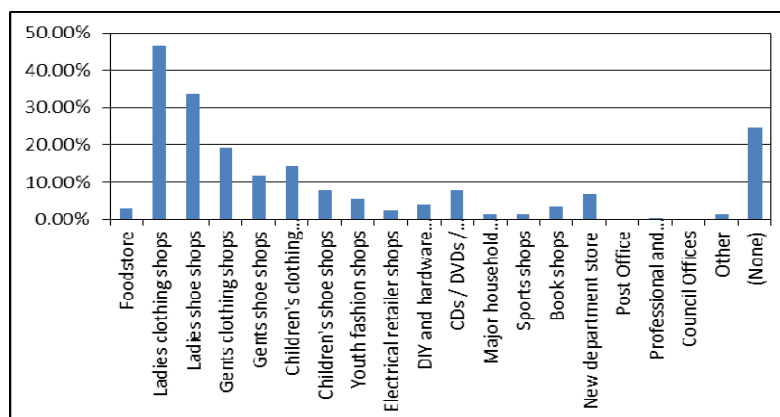


- **Leisure:** 14.4% of respondents visit Hartlepool for leisure purposes. This is an increase from the 2009 Study, where 3.0% of respondents visited for leisure purposes. A total of 34.8% of respondents visit in the evening.
- **Leisure Reason for Visit:** the main reason for visiting was to go to cafes (34.8%), followed by pubs/bars (28.3%), restaurants (17.4%) and cinemas (17.4%).
- **Main Shopping Dislikes:** the majority stated the poor range of independent shops (25.7%) with 24.8% stating the poor choice of multiple shops as to why they disliked the centre. 19.3% had no particular view in terms of shopping dislikes, 17.8% quoted the lack of fashion retailers and 16.8% had no particular reason for disliking the centre. 2.0% stated they disliked nothing.

These responses are comparable to the results of the 2009 Study, where 45.5% stated the poor choice/range of shops as a dislike. 16.9% stated they disliked nothing showing a major decline in this response between the two studies.

- **Town Centre Markets:** 36.1% of respondents never visit the markets. This is followed by 18.3% who visit once a week and 15.8% who visit once every 2 to 3 weeks.
- **Town Centre Markets- Perceptions:** 56% considered the market to be conveniently located (53.5%) with 20.2% stating it was of a good quality. The main improvements respondents cited were nothing/don't know (52.5%), improved range of goods (16.8%) and increased number of market stalls (16.8%).
- **Retail Provision Improvements:** in terms of the type of retail provision that would encourage respondents to shop in the town centre more often, 46.5% stated

more ladies shops, followed by ladies shoe shops (33.7%), none (24.8%) and gents clothing shops (19.3%).



- **Leisure/Entertainment Improvements;** when asked what improvements would persuade them to visit the town centre more often, the majority of respondents (59.9%) gave no strong opinion. This followed 7.9% and 6.9% citing improved range of places to eat and improved policing/enhanced security respectively.
- **Environmental Improvements;** aside from the majority expressing no strong opinion, the main suggestions are improved street furniture/floral displays (8.4%), clean shopping streets (6.9%) and improved/ new facilities for young adults (4.5%).
- **Transport Improvements;** aside from the majority expressing no strong opinion, the main suggestions relate to reduced cost of parking (4.5%) and improved safety of pedestrians (3.5%).
- **Greatest Improvements;** the main suggestions to improve the town centre were to provide more shops (34.7%) and a better range of shops (29.7%).

8.6 The survey results indicate that there is a strong desire to see enhancements to the town centre retail offer and particularly in terms of high street fashion shops (national chains). The lack of such provision potentially reflects national trends (gravitation of higher order retailers towards larger regional centres), the geographically constrained catchment which Hartlepool serves (competition from Middlesbrough and Teesside Shopping Park) and the town's lower order socio-demographic profile.

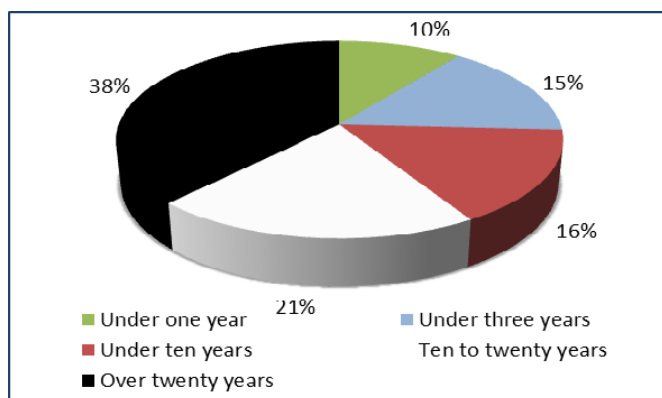
8.7 With respect to the suggested environmental and transport improvements, on the basis of our experience elsewhere in completing comparable surveys, the suggestions are relatively standard responses and have already been recognised by the Council in respect of the Regeneration Masterplan brief.

9. BUSINESS SURVEY

- 9.1 Whilst the in-centre shopper survey is important for understanding local shoppers and visitors views of Hartlepool town centre, it is critical to also understand the current performance and requirements of existing local retail and leisure businesses. Approximately 375 detailed business surveys were therefore distributed in late July 2014 to a mix of national and independent retail and service operators within Hartlepool town centre. Each survey contained a pre-paid reply envelope to encourage a positive response rate. A summary of the main headline findings from the business survey is set out below.
- 9.2 Of the approximately 375 surveys distributed to businesses within Hartlepool town centre with a total of 58 responses were received back. The majority of responses were from non-food retailers (28%), followed by retail service operators (24%) and food retailers (22%). 10% of respondents were leisure operators, and 9% were professional services.

Length of Time Trading

- 9.3 The survey results indicate that the majority of businesses (38%) have traded from their current premises for over 20 years, with a further 21% having traded from their current premises for between 10 and 20 years; this suggests low levels of business turnover in the town centre and is a very positive trend given the current economic conditions.



- 9.4 In terms of representation elsewhere in the borough, the survey results indicate that 17% of businesses in Hartlepool town centre operate other businesses in other centres within the borough. A further 55% of the survey respondents with representation elsewhere in the borough indicated that their other business traded the same in the alternative location, with 18% stating that it traded better and 27% worse.

Current Unit Requirements

- 9.5 In terms of whether local businesses are satisfied with their current premises, most respondents confirmed that they are satisfied in relation to their trading location within the town centre and have no plans to relocate in the next 5 years (46%). However, 27% of respondents indicated that they plan to relocate either within or nearby to the town centre. Eleven respondents have plans to refurbish their existing floorspace, with a further 3 respondents confirming that they are looking to relocate out of the town centre. A prominent relocation which has been recently announced is M&S from Middleton Grange to Anchor Retail Park.

Ownership

- 9.6 With regards to the current ownership status, the majority of respondents (81%) occupied leased premises; only around one fifth of respondents are owner-occupiers. The significant proportion of leased premises may reflect that the majority of the town centre primary shopping area is covered by Middleton Grange shopping centre.

Current Trading Performance

- 9.7 A total of 26% of businesses responded that they had traded well or very well over the last 12 months, with 40% stating that they had traded moderately. However, 35% considered that they had traded poorly or very poorly. The survey results, in our view, portray a moderate picture given that the wider economic climate remains in the initial stage of recovery following the recession.

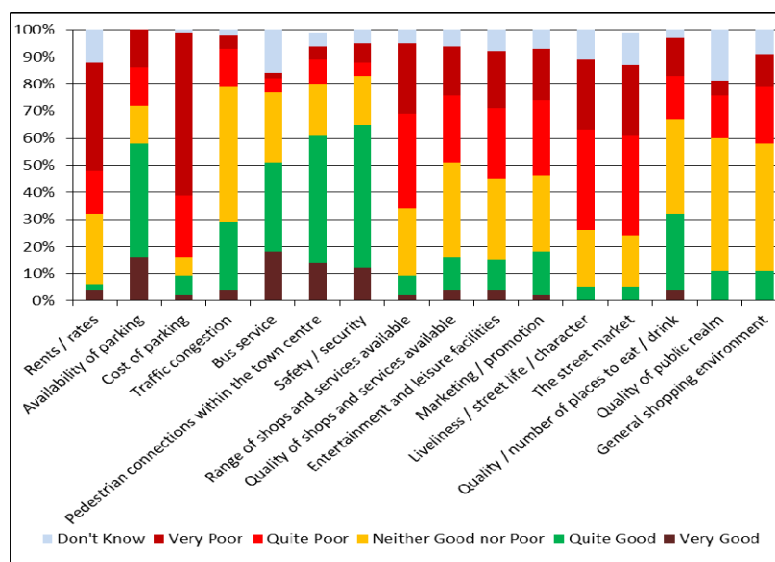
Anticipated Trading Performance

- 9.8 34% of respondents expected their business to perform either well or very well over the next 12 months. However, 40% only expected trade to remain moderate/static and 26% expected their business to perform poorly or very poorly over the next 12 months. Overall, these results reflect an expectation of improved trading conditions in Hartlepool over the next year.

Town Centre Perceptions

- 9.9 Local businesses were asked to rate the current quality of the town centre against a variety of indicators including: the range of services, environmental quality, public transport access, car parking availability, security and leisure provision.

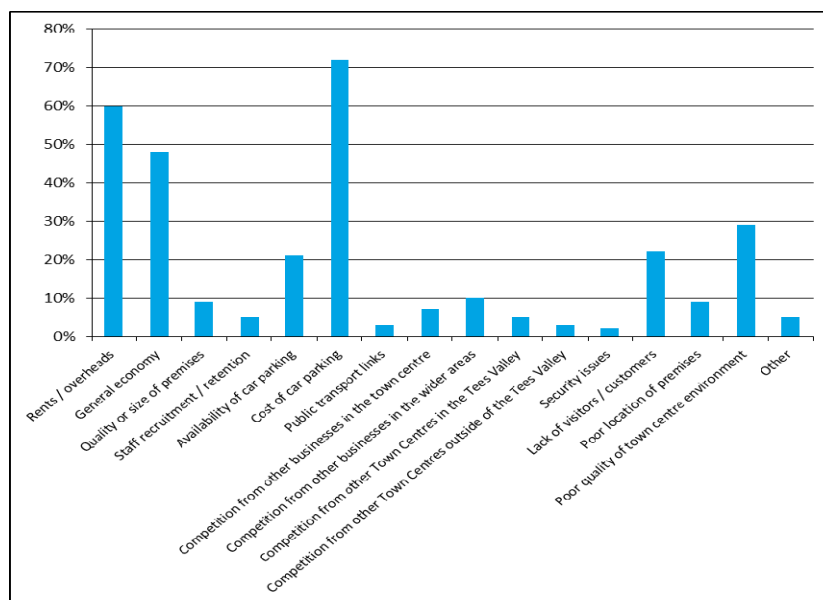
- 9.10 The table below highlights that local businesses considered the main issue facing the town centre to be the cost of parking. Other town centre indicators highlighted as poor were rents / rates, the range of shops/services, the liveliness of the centre and the street market.



- 9.11 In terms of positive perceptions, local businesses consider the town's safety and security to be particularly good, as well as the availability of parking and pedestrian connections within the town centre. Local bus services are also held in relatively high regard by the majority of local businesses.

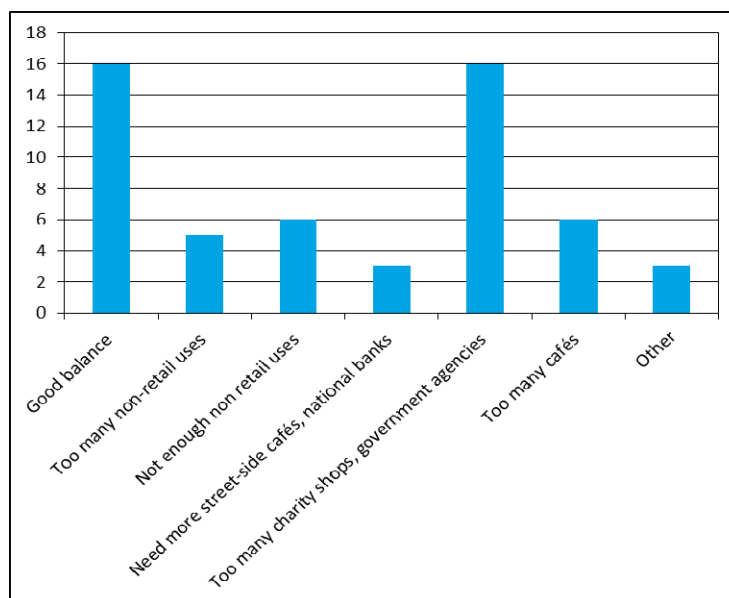
Main Town Centre Issues

- 9.12 Local businesses were asked to highlight the main issues constraining their business. As the table below indicates, the cost of car parking was highlighted as the most significant issue with 70% of respondents identifying this as an issue; this is not dissimilar to the national picture as parking costs in our experience is a highly politicised issue. This primary issue was followed by rents / overheads (60%) and the general economy (48%). The poor quality of the town centre environment was highlighted as another significant issue by 29% of respondents.



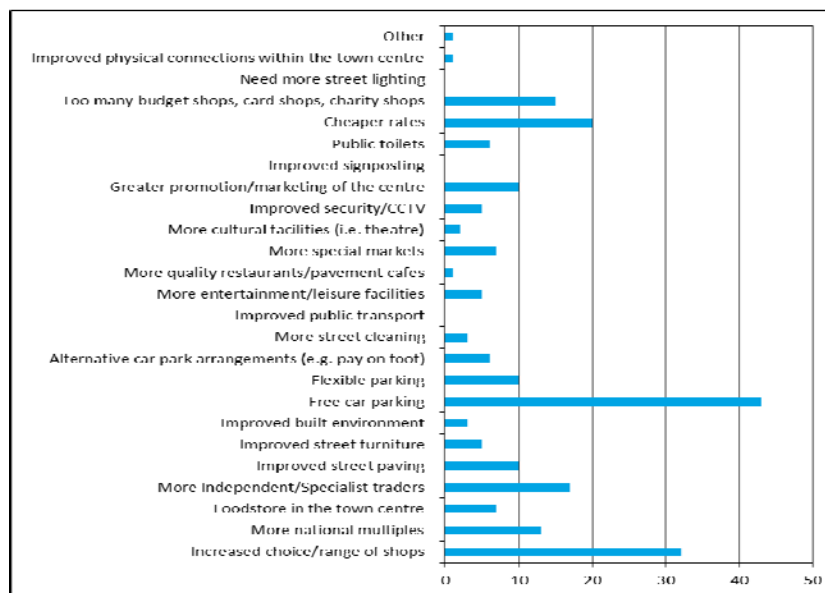
Range of Shops and Services

- 9.13 A total of 16 respondents (28%) considered that there is a good balance of shops in Hartlepool town centre, whereas a further 16 respondents (28%) considered that there are too many charity shops. Other popular responses include not enough non-retail uses and too many cafes (both 6 respondents (10%)). In contrast, 5 respondents (9%) considered the town to have too many non-retail uses.



Suggested Town Centre Improvements

- 9.14 The most popular suggestions for the town centre improvements by town centre businesses are for the provision of free parking (43 responses / 75%), an increased choice/range of shops (32 responses / 55%) and cheaper rates (20 responses / 34%). A summary of the main suggested town centre improvements is provided below.



- 9.15 Whilst the provision of cheaper rates cannot be dealt with at a local level, the transport and environmental improvements should be addressed as part of a wider Regeneration Masterplan. The suggestion to increase the choice / range of shops is particularly interesting given existing vacancies but also the potential competition that would be introduced by facilitating further expansion in the town centre retail offer; this is explored in more detail in the quantitative retail assessment section.

10. SWOT ANALYSIS

10.1 This section summarises the key messages arising from the floorspace, in-centre shopper and business survey exercises.

Table 10.1 – SWOT Analysis of Hartlepool

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> Sub-regional retail centre – critical mass of retail provision. Middleton Grange Shopping Centre provides modern retail environment accommodating a variety of national multiple retailers (fashion, department stores and discount orientated). Varied local independent retail and services offer on York Road. Retail warehouse parks (Anchor, Highpoint etc.) in relatively close proximity to the town centre to facilitate potential linked trips. Large mainstream foodstores in close proximity to the town centre to facilitate potential linked trips. Commercial leisure offer (Vue Cinema, Mill House Sports Centre, Football Club and Mecca Bingo) located in close proximity to town centre PSA. Cultural attractions such as Town Hall Theatre and Art Gallery. Regionally renown tourist offer 	<ul style="list-style-type: none"> Significant number of vacant units within the town centre primary shopping area (PSA). Lack of higher order national and international fashion brands. Increasing concentration of discount orientated retail provision within town centre PSA. Severance of the town centre PSA from retail (foodstores / retail parks) leisure (cinema) and tourist destinations (marina etc.). Severance / physical barrier created by Stockton Street – Church Street conservation area separated from wider town centre PSA. Middleton Grange Shopping Centre – internal shopping mall not integrated with traditional town centre PSA streets. Negative external environment (visually ‘dominant’ and turns back) and impermeable. Lack of family-orientated national chain restaurants in close 	<ul style="list-style-type: none"> Critical mass of retail and leisure operators to potentially attract additional operators to the town centre. Improved marketing / promotion of the town, including ‘digitisation’ of the High Street (Wi-Fi etc.). Qualitatively distinguish the town centre offer. Physical intervention works to re-integrate Middleton Grange Shopping Centre with wider town centre PSA. Opportunity sites around Marina and Tourist destinations to develop complementary attractions. Enhance linkages between town centre PSA and edge / out-of-centre retail, leisure and tourist destinations – more coherent circuit, Address existing deficiency in family-orientated national restaurant chains around Vue 	<ul style="list-style-type: none"> Relocation of Marks & Spencer from Middleton Grange to the out-of-centre Anchor Retail Park – loss of key retail attractor from town centre PSA. Continued contraction in the comparison retail offer within the town centre PSA. Potential for gravitation to out-of-centre locations (e.g. M&S relocation). Negative perceptions (retailers and visitors) over car parking availability and charging regime. Wider retail and leisure trends, including multi-channel competition and the polarisation of operators to higher order retail destinations – loss of key anchors. Increasing perception of down market offer allied to lower grade socio-demographic profile – difficult to attract new retail and leisure operators. New railway station at Peterlee (Horden) will increase access to visit higher order regional shopping destinations (e.g.

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
(Marina, Maritime Experience and HMS Trincomalee). <ul style="list-style-type: none"> Readily accessible by public and private transport. 	proximity standalone Vue cinema. Restaurant provision at Marina too distant. <ul style="list-style-type: none"> Constrained catchment for sub-regional centre (coastal location and proximity to Teesside). Socio-demographic profile of catchment (towards lower social grades). Significant competition from retail and leisure destinations (Middlesbrough, Teesside Shopping Park). 	Cinema.	Newcastle) at expense of Hartlepool (loss of inflow trade).

10.2 A significant number of the points raised in the above SWOT analysis of the town centre have already been recognised by the Borough Council and its regeneration partners in commissioning the Regeneration Masterplan and Retail Revival Strategy which this study ultimately informs.

11. RETAIL CAPACITY METHODOLOGY

- 11.1 The quantitative assessment adopts a conventional step-by-step methodology, drawing upon the results of the household telephone survey to understand existing shopping patterns and to model existing flows of available expenditure to the main retail destinations within the borough and wider sub-region (Peterlee and Billingham).
- 11.2 Having established the baseline position, the quantitative capacity modelling exercise goes on to establish the performance of the town centre and separate retail stores and retail park destinations. The methodology, data inputs and assumptions adopted in the assessment exercise are set out below.

1) Study Area Definition

- 11.3 The study area for the survey is shown on the plan in Appendix 1 and is consistent with the catchment zones adopted in the 2009 Study. The study area is based on postcode sector boundaries, which facilitates the use of population and expenditure data from the Experian Micromarketer system (derived from ONS mid-year estimates).
- 11.4 The study area represents the catchment area of Hartlepool town centre²² and is disaggregated into five study zones, broadly encompassing the administrative area of Hartlepool (Zones 1 to 3) along with the adjacent area of Peterlee and surrounding villages to the north of the borough (Zone 4) and Billingham and surrounding villages to the south (Zone 5).
- 11.5 Zones 1 to 3 represent the Primary Catchment Area (PCA) of Hartlepool town centre, with Zones 4 and 5 enabling the identification of expenditure inflows into Hartlepool from adjoining areas.

2) Household Telephone Survey

- 11.6 A total of **500 household telephone surveys** were completed across the study area by NEMS Market Research in June 2014; the number of surveys undertaken in each individual catchment zone is set out in the table below.

²² The study area in the 2009 HRS was defined based on the catchment area of Hartlepool town centre identified from the findings of an on street shopper survey alongside discussions with Hartlepool Borough Council and consideration of previous identified catchment areas.

Table 11.1 – Catchment Area Zones and Number of Surveys

Zone / Postcode Sectors	Number of Surveys
ZONE 1 – HARTLEPOOL NORTH: 1 TS24 0, TS24 7, TS24 8, TS24 9, TS26 0, TS26 8, TS26 9	125
ZONE 2 – HARTLEPOOL SOUTH: TS25 1, TS25 2, TS25 3, TS25 4, TS25 5 125	125
ZONE 3 – HARTLEPOOL VILLAGES (RURAL): TS27 3	50
ZONE 4 – PETERLEE: SR8 1, SR8 2, SR8 4, SR8 5, TS27 4, TS28 5, TS29 6	100
ZONE 5 – BILLINGHAM: TS22 5, TS23 1, TS23 2, TS23 3, TS23 4	100

- 11.7 The survey questionnaire, which is provided under separate cover to this report, was designed to establish a detailed picture of residents' shopping and leisure habits, as well as the strengths and weaknesses of Hartlepool town centre.

Retail Goods

- 11.8 The survey questionnaire sought to establish patterns of spending on categories of retail goods as follows:

Table 11.2 – Survey Questionnaire Categories of Retail Goods

CONVENIENCE GOODS	COMPARISON GOODS	BULKY DURABLE GOODS	LEISURE
Main (Bulk) Food	Clothing, Footwear and Fashion Goods	Furniture, Floors and Household Textiles	Health & Fitness
Top-Up (Daily)	Books and Stationary Items, CDs and DVDs	DIY and Decorating Goods	Cinema
	Chemist Goods (including Health and Beauty Products)	Major Household Appliances	Socialising
	Jewellery, Watches and Personal Effects	Large Electrical Goods (Audio-Visual etc.)	Eating Out
	Recreational Goods (Bicycles, Games, Toys, Sports and Camping Equipment and Musical Instruments)	Gardens, Pets and Related Products	Theatre
	Small Household Goods and Personal Effects (including glassware, table, jewellery and watches)		

- 11.9 The results of the two types of food shopping questions are merged through the application of a weighting (75% main food; 25% top-up food shopping split), which

reflects the estimated proportion of expenditure accounted for main (bulk) and daily top-up food shopping. This produces a composite pattern of convenience spending, enabling the identification of each main centre and foodstore market share.

- 11.10 With regards to comparison goods, the results of all these questions were merged using a weighting (Table 2, Appendix 3) to reflect the amount of per capita expenditure in the survey zones for each of the different categories of goods.

Qualitative Questions

- 11.11 In addition to spending on retail goods and leisure activities, the household survey also sought to identify the following in relation to Hartlepool town centre:
- The usage for the centre (i.e. purpose of visit, frequency of visits, and usage of the tourist attractions and town centre markets);
 - The strengths and weaknesses of Hartlepool town centre in terms of the existing retail offer, wider facilities and physical environment; and
 - Suggested qualitative improvements which would persuade shoppers or other visitors to the centre to visit more often.

3) Data Variables

i) Baseline Population Estimates

- 11.12 The population estimates and forecasts for each of the survey zones (Table 1, Appendices 2 and 3) are derived from the Experian Micromarketer database. The population estimates are based on trend-line projections from the 2011 Census results and are calibrated to Local Authority District targets on the most recently available Government household and population data (ONS mid-year projections).

ii) Available Expenditure

Expenditure per Person

- 11.13 The latest Experian Micromarketer data (Briefing Note 11, October 2013) was used to provide estimates of per person expenditure on convenience and comparison goods in 2012 prices. The spend figures for convenience are set out in Table 2, Appendix 2; and for comparison in Table 3 of Appendix 3.

Expenditure Growth Rates

- 11.14 The retail expenditure growth rates set out in the latest Experian Retail Planner briefing note (October 2013²³) are summarised below. Whilst Experian projects that expenditure growth will return to historic levels in 2015/16, the ongoing legacy of the economic recession is that there is a reduced amount of available convenience and comparison expenditure in the short term, which allied to slower growth projections have implications for forward quantitative capacity as highlighted later in the report.

Table 11.3 – Expenditure Growth Rates

Period	Convenience Goods Per Capita Expenditure Growth	Comparison Goods Per Capita Expenditure Growth
2014-2019	0.7% per annum	2.9% per annum
2019-2024	0.9% per annum	2.9% per annum
2024-2029	0.8% per annum	2.9% per annum

Special Forms of Trading

- 11.15 The latest Experian projections of special forms of trading (SFT) (e.g. expenditure not available to spend in the shops - primarily internet sales²⁴), is projected to rise over the forecast period, as follows:

Table 11.4 – Special Forms of Trading Rates

Year	Convenience Goods Expenditure Spent on SFT	Comparison Goods Expenditure Spent on SFT
2014	2.7%	11.6%
2019	4.0%	15.1%
2024	4.9%	15.9%
2029	5.5%	16.0%

- 11.16 It should however be noted that the current Experian projections identify that longer-term growth in non-store (i.e. internet) based sales, particularly for convenience goods, are less strong than historically predicted due to current logistical difficulties in

²³ Retail Planner Briefing Note 11, Experian, October 2013

²⁴ Experian define SFTs as expenditure that does not take place in shops, such as that via mail order houses, door to door salesmen and stalls and markets. It also includes spending using digital TV and over the Internet.

servicing customer demand on line (main retailers are beginning to open 'dark' stores²⁵ to meet demand).

- 11.17 As previously detailed in the retail trends chapter, the overall trend for less expenditure being physically available to spend in traditional centres / stores poses significant challenges to traditional 'bricks and mortar' retailing and town centres as a whole. The amount of 'physical' spending capacity available is therefore reduced.

iii) Store Performance

Benchmark Turnovers

- 11.18 In order to review the current turnover performance of Hartlepool town centre as a retail destination and its main stores, particularly larger format foodstores, published benchmark data (estimates of trading at company average levels) has been compared against the survey-derived turnover figures identified in the capacity modelling assessment. The company benchmark (turnover) has been calculated from average sales density figures obtained from Mintel Retail Rankings and Verdict.

Sales Density Improvements (Trading Efficiency)

- 11.19 The Experian sales density projections (Briefing Note 11) as set out below are relatively static in the medium term due to the current economic conditions:

Table 11.5 – Sales Density Growth Rates

Period	Convenience Sales Density Growth	Comparison Sales Density Growth
2014-2019	-0.1%	2.1%
2019-2024	0.1%	2.0%
2024-2029	0.1%	2.0%

4) Capacity Review

- 11.20 The quantitative capacity is presented for every five year period over the entire study period of 2014 to 2029. Having established the baseline capacity position, the assessment then goes on to consider what may be achievable in terms of potential increases in market share.

²⁵ Dark Stores are large warehouses with interiors laid out like supermarkets so staff can walk around to compile orders (Class B8 warehouse and distribution use rather than Class A1 retail). They are not open to the general public.

- 11.21 It should be noted that the potential uplift in expenditure only represents actual capacity if retail proposals and operators that emerge can genuinely qualitatively add to the existing retail offer of the town centre by strengthening its attractiveness so as to achieve the envisaged improvements in market share.
- 11.22 Any market share enhancement assessment should be viewed against the positive planning policy framework provided by NPPF. Therefore, should proposals emerge for the development of new retail facilities within the primary shopping area of the town centre then the application should be considered on its merits.
- 11.23 In the same respect, there is no NPPF based policy support for the diversion of trade from sequentially preferable central locations to new provision which is out-of-centre and is likely to lead to the loss of trade and wider benefits including linked shopping trips and footfall within Hartlepool town centre.

12. CONVENIENCE RETAIL ANALYSIS

- 12.1 Notwithstanding brand loyalty, shoppers usually travel to their nearest and most accessible foodstore or town centre to undertake the main (bulk) shopping. In contrast, top-up shopping for daily perishables (milk, bread etc.) is more localised in its nature with shoppers likely to buy daily goods from local convenience shops near to their home.
- 12.2 The existing convenience provision within Hartlepool town centre is relatively limited in scale and is predominantly oriented towards top-up shopping (the town centre is primarily a sub-regional comparison shopping destination). The main (bulk) food destinations are the large freestanding Asda (Marina Way) and Morrison's (Clarence Road) to the north and Tesco Extra (Belle Vue) to the south.
- 12.3 The main discount operators (Aldi and Lidl) are also well represented. A network of smaller convenience stores within local centres meets local day-to-day top-up needs.
- 12.4 As detailed in the retail methodology chapter, the catchment area defined for the current study are broadly the same as for the 2009 Study, enabling a comparative market share analysis to be completed as below.

i) Main Food Shopping Patterns

Primary Catchment Area (Survey Zones 1, 2 and 3)

- 12.5 The main food expenditure pot (Table 3b, Appendix 2) within the PCA (Hartlepool survey zones 1, 2 and 3) is projected to rise from c. £122.5m in 2014 to £127.4m in 2019 and £140.3m by 2029 (£17.72m increase over period 2014 to 2029).
- 12.6 In terms of specific store destinations, the changes in market share since the 2009 Study are detailed below²⁶:

²⁶ Note '-' is used to indicate instances where the destination was not assessed as part of the 2009 study.

Table 12.1 – Main Food Destinations Market Share

Destination/Foodstore	2009 Study PCA	2014 Study PCA
Hartlepool Town Centre		
M&S, Middleton Grange Shopping Centre	2.1%	1.7% (£2.1m)
Iceland, Middleton Grange Shopping Centre	1.6%	1.0% (£1.2m)
Heron Foods, Middleton Grange Shopping Centre	-	0.3% (£0.3m)
Tesco Express, York Road	1.5%	0.0% (£0.0m)
Other, Hartlepool Town Centre	1.5% ²⁷	0.3% (£0.3m) ²⁸
Main Foodstores Destinations (Non Town Centre PSA)		
Morrison's, Clarence Road, Hartlepool	20.1%	14.2% (£17.4m)
Asda, Marina Way, Hartlepool	40.8%	41.4% (£50.7m)
Tesco Extra, Belle Vue Way, Hartlepool	26.4%	23.1% (£28.3m)
Aldi, Dunston Road, Hartlepool	1.3%	7.3% (£8.9m)
Aldi, Tees Bay Retail Park, Hartlepool	0.8%	6.3% (£7.7m)
Lidl, Jesmond Gardens, Hartlepool	-	1.1% (£1.3m)
Farmfoods, Catcote Road, Hartlepool	-	0.7% (£0.8m)
Sainsbury's Local, Station Lane, Seaton Carew	-	0.0% (£0.0m)
Local Centres		
Local Centres, Hartlepool Total	1.8%	1.8% (£2.2m)

12.7 The main changes since 2009 are as follows:

- A slight decline in the main food market share of Hartlepool town centre destinations. This is not too concerning given that the town centre does not perform a main food shopping role.
- The Asda store at Marina Way to the north of the town centre has maintained its market share. Morrison's and to a lesser extent Tesco Extra market share has however declined; this is reflective in part of wider national trends (price sensitivity decreasing market share).
- The two Aldi stores in the town have significantly improved their performance and are likely to increased market share at the expense of Morrison's and Tesco Extra.

²⁷ Other destinations at Middleton Grange Shopping Centre

²⁸ Excludes Heron Foods at Middleton Grange Shopping Centre, which is listed separately

The increase in the market share reflects a significant national growth in sales as shoppers remain price sensitive but demanding of quality produce.

- As expected, the local centres in the borough perform a minor main food shopping function.

12.8 Overall, the borough retains 99.3% of the main food shopping expenditure arising within the PCA (broadly reflecting borough boundaries). There is consequently negligible leakage to foodstore destinations outside of the borough.

Inflow (From Outside Borough)

12.9 Hartlepool also attracts some main food inflows from outside of the borough; the main inflow from the Peterlee and Billingham Zones (survey zones 4 and 5, respectively) are:

Table 12.2 – Main Food Leakage Destinations Market Share

Destination/Foodstore	2009 Study Peterlee (Zone 4)	2014 Study Peterlee (Zone 4)	2009 Study Billingham (Zone 5)	2014 Study Billingham (Zone 5)
Hartlepool Town Centre				
Hartlepool Town Centre	0.0%	1.3% (£0.8m)	3.0%	0.7% (£0.4m)
Main Foodstores Destinations (Non Town Centre PSA)				
Asda, Marina Way, Hartlepool	13.2%	17.5% (£10.5m)	8.1%	4.0% (£2.1m)
Morrison's, Clarence Road, Hartlepool	7.9%	6.8% (£4.1m)	2.0%	2.1% (£1.1m)
Aldi, Dunston Road, Hartlepool	0.7%	1.3% (£0.8m)	1.0%	0.0% (£0.0m)
Aldi, Tees Bay Retail Park, Hartlepool	0.0%	0.0% (£0.0m)	0.0%	0.7% (£0.4m)
Tesco Extra, Belle Vue Way, Hartlepool	2.6%	0.0% (£0.0m)	3.0%	0.0% (£0.0m)

12.10 The level of inflow from the Peterlee zone to the Asda store in Hartlepool is surprising given that there is an existing full-range Asda store in Peterlee town centre; the inflow to the Asda and other stores in Hartlepool may however be part of a linked trip or associated with travel-to-work. The realisation of any of the mainstream foodstore commitments in Peterlee (two separate planning permissions exist) may ultimately reduce this current inflow pattern.

12.11 With respect to Billingham, the minor changes in market share do not readily highlight any significant variation in main food shopping destination preferences.

ii) Top-Up Food Shopping Patterns

Primary Catchment Area (Survey Zones 1, 2 and 3)

- 12.12 The top-up expenditure pot (Table 3c, Appendix 2) within the PCA (Zones 1, 2 and 3) is projected to rise from c. £40.8m in 2014 to £42.5m in 2019 and £46.8m by 2029 (£5.9m increase over the 2014 – 2029 study period).
- 12.13 The survey results (Table 5, Appendix 2) reveal the following changes in market share since the 2009 Study:

Table 12.3 – Top-Up Food Destinations Market Share

Destination/Foodstore	2009 Study PCA	2014 Study PCA
Hartlepool Town Centre		
Tesco Express, York Road	1.6%	2.0% (£0.8m)
Iceland, Middleton Grange Shopping Centre	5.8%	1.3% (£0.5m)
M&S, Middleton Grange Shopping Centre	7.6%	0.7% (£0.3m)
Heron Foods, Middleton Grange Shopping Centre	-	0.1% (£0.1m)
Other, Hartlepool Town Centre	3.4% ²⁹	10.3% (£4.2m)
Main Foodstores Destinations (Non Town Centre PSA)		
Morrison's, Clarence Road, Hartlepool	9.9%	9.7% (£4.0m)
Asda, Marina Way, Hartlepool	11.3%	12.5% (£5.1m)
Aldi, Dunston Road, Hartlepool	4.8%	9.3% (£3.8m)
Tesco Extra, Belle Vue Way, Hartlepool	4.8%	7.3% (£3.0m)
Aldi, Tees Bay Retail Park, Hartlepool	4.1%	6.4% (£2.6m)
Sainsbury's Local, Station Lane, Seaton Carew	-	3.3% (£1.4m)
Farmfoods, Catcote Road, Hartlepool	-	2.8% (£1.1m)
Lidl, Jesmond Gardens, Hartlepool	-	1.3% (£0.5m)
Local Centres		
Local Centres, Hartlepool Total	45%	26.5% (£10.8m)

- 12.14 The results indicate that the town centre continues to perform a prominent top-up based function. The growth in the market share which independent convenience

²⁹ Other destinations at Middleton Grange Shopping Centre

stores secure is particularly positive for the wider vitality, viability and overall diversity of the town centre.

- 12.15 The main foodstores outside of the town centre PSA perform a more limited top-up shopping function. However, the Aldi stores in particular have secured additional market share since 2009.
- 12.16 The prominence of the top-up shopping function of local centres is highlighted by the c. 26.5% market share in 2014; this does however represent a decrease on the c. 45% market share identified in 2009.

Inflow (From Outside Borough)

- 12.17 Given that top-up shopping is highly localised, it is expected that the main convenience retail destinations in the borough attract extremely limited amounts of top-up expenditure from residents in the Peterlee (c. £1.4m) and Billingham (c. £0.7m) catchment zones. These minor inflows may reflect travel-to-work patterns.

Overall Top-Up Food Retention

- 12.18 The town centre retains 14.4% (£5.9m) of top-up expenditure arising within the PCA (zones 1 – 3). The Morrison's and Asda stores to the north of the town centre attract a further 9.7% (£4.0m) and 12.5% (£5.1m) respectively.
- 12.19 Overall, 97.7% of the top-up food shopping expenditure of residents in the PCA is retained within Hartlepool Borough; the 2.3% (£0.9m) of top-up expenditure leakage from the PCA to destinations outside of the borough is likely to primarily be attributable to travel-to-work patterns.

iii) Overall Food Shopping Patterns (Main Food and Top-Up Food Combined)

Primary Catchment Area (Survey Zones 1, 2 and 3)

- 12.20 The overall convenience expenditure pot in the PCA (Table 3a, Appendix 2) is c. £163.4m (2014); this is projected to rise to £169.9m by 2019 and £187.0m in 2029 (£23.6m increase over period 2014 – 2029).
- 12.21 Taking the main and top-up food market shares together, the survey (Table 6, Appendix 2) identifies that the existing convenience provision within Hartlepool Borough retains a total of 98.9% (£161.6m) of convenience expenditure arising within the PCA.
- 12.22 The overall town centre convenience market share is 6.1% (£9.9m) with the main foodstore destinations (Asda at Marina Way most prominent) in Hartlepool retaining a further c. 84% (£136.7m). Local centres in the borough retain a further 8.0% (£13.0m).

12.23 The main individual store destinations in Hartlepool Borough are as follows:

Table 12.4 – Overall Food Destinations Market Share

Destination/Foodstore	2014 Study PCA
Hartlepool Town Centre	
M&S, Middleton Grange Shopping Centre	1.5% (£2.4m)
Iceland, Middleton Grange Shopping Centre	1.1% (£1.7m)
Tesco Express, York Road	0.5% (£0.8m)
Heron Foods, Middleton Grange Shopping Centre	0.2% (£0.4m)
Other, Hartlepool Town Centre	2.8% (£4.5m)
Main Foodstores Destinations (Non Town Centre PSA)	
Morrison's, Clarence Road, Hartlepool	13.1% (£21.3m)
Asda, Marina Way, Hartlepool	34.1% (£55.8m)
Tesco Extra, Belle Vue Way, Hartlepool	19.2% (£31.3m)
Aldi, Dunston Road, Hartlepool	7.8% (£12.7m)
Aldi, Tees Bay Retail Park, Hartlepool	6.3% (£10.3m)
Farmfoods, Catcote Road, Hartlepool	1.2% (£2.0m)
Lidl, Jesmond Gardens, Hartlepool	1.1% (£1.9m)
Sainsbury's Local, Station Lane, Seaton Carew	0.8% (£1.4m)
Local Centres	
Local Centres, Hartlepool Total	8.0% (£13.0m)
Other	
Other, Hartlepool Borough	1.2% (£2.0m)
Hartlepool Borough Total	98.9% (£161.6m)

12.24 Given the high retention levels for both main food and top-up shopping, there is minimal expenditure leakage (c. 1.1% / £1.8m) from the PCA to destinations outside of Hartlepool Borough.

iv) Foodstore Trading Performance

12.25 The trading performance of mainstream foodstores in Hartlepool can be calculated by firstly establishing the expected company benchmark (company average sales

density (£/m²) applied against the net sales floorspace) and comparing this against the turnover figure derived survey results (Table 7, Appendix 2).

- 12.26 This comparative exercise identifies a mixed performance across the main foodstores in Hartlepool, as follows:

Table 12.5 – Main Foodstore Trading Performance Assessment

Destination/Foodstore	Benchmark	Survey Total	Difference
Hartlepool Town Centre			
M&S, Middleton Grange Shopping Centre	£6.9m	£2.6m	-£4.3m
Iceland, Middleton Grange Shopping Centre	£2.5m	£2.5m	-
Tesco Express, York Road	£2.6m	£0.8m	-£1.8m
Main Foodstores Destinations (Non Town Centre PSA)			
Morrison's, Clarence Road, Hartlepool	£38.4m	£26.8m	-£11.5m
Asda, Marina Way, Hartlepool	£51.4m	£68.8m	+£17.5m
Tesco Extra, Belle Vue Way, Hartlepool	£36.6m	£31.3m	-£5.3m
Aldi, Dunston Road, Hartlepool	£4.9m	£13.5m	+£8.7m
Aldi, Tees Bay Retail Park, Hartlepool	£4.6m	£10.7m	+£6.1m
Lidl, Jesmond Gardens, Hartlepool	£2.1m	£2.0m	-

- 12.27 The analysis indicates that there is considerable variance in the performance of the main foodstores. Whilst the Asda and two respective Aldi stores are significantly overtrading, the Morrison's and Tesco Extra stores are under-performing. The Asda overtrading may be explained by the significant inflow it draws from the Peterlee catchment; there are extremely limited inflows to the other main foodstores.
- 12.28 The under-performance of the Morrison's and to a lesser extent Tesco Extra is attributable in part to a wider national decline as shoppers continue to seek value without compromising on quality. The strong performance of Aldi reflects this.
- 12.29 With respect to convenience provision within the town centre PSA, whilst the survey-derived turnover identifies the M&S and Tesco Express stores as trading below expected benchmark, it is likely that these stores benefit from additional incidental trade from town centre visitors (e.g. lunchtime spend) not picked up by the household survey. Furthermore, the survey findings identify that an additional £4.2m of the top up food expenditure from the PCA is spent (generically) in Hartlepool town centre. It is therefore likely that existing top-up orientated town centre convenience provision is trading viably.

v) Convenience Goods Capacity Review

12.30 The baseline capacity modelling exercise (Table 8b, Appendix 2), assuming a constant market share and taking account of projected population and expenditure growth, as well as trading efficiency increases, generates the following floorspace requirement³⁰ for the town centre and town as a whole over the study period to 2029:

Table 12.6 – Convenience Goods Capacity

Mainstream Retail ³¹	2019 m ² (net)	2024 m ² (net)	2029 m ² (net)
Hartlepool Town Centre – Baseline	165	350	500
Hartlepool Borough – Baseline	795	1,660	2,380

12.31 As the table highlights, the capacity identified in Hartlepool town centre, based on the centre's existing market share, is insufficient to support any substantive new convenience retail development over the study period.

12.32 In terms of borough-wide capacity (projecting forward the survey-derived turnover of all retail provision in the borough), the assessment identifies a requirement for c. 2,380 m² net convenience sales floorspace by 2029; this would ordinarily be sufficient to support a medium sized foodstore depending on type of operator.

12.33 However, this capacity figure does not take account of the following existing convenience commitments:

- **PROPOSED REPLACEMENT ALDI STORE;** extant planning permission³² for the replacement of the existing Aldi store at the out-of-centre Tees Bay Retail Park with a new c. 1,000 m² net Aldi discount foodstore on an edge-of-centre site to the south east (c. 200 metres) of Hartlepool town centre PSA.
- **ICELAND;** it has recently been announced (September 2014) that the operator will open a new store at the out-of-centre Tees Bay Retail Park (open Class A1 retail planning permission across the site).

12.34 With respect to the proposed relocation of Aldi, it is understood that this is dependent on securing an alternative operator for the existing unit and in any event the uplift in floorspace / turnover relative to the existing store is extremely limited and would not materially impact upon the reported capacity position or overall strategy going

³⁰ Rounded to nearest 5 metre floorspace increments

³¹ Mainstream Retailer is Asda, Morrison's, Sainsbury's and Tesco; Sales Density of £12,000/m² utilised

³² LPA ref. H/2010/0057

forward. Likewise the Iceland store would have an imperceptible impact on trading patterns (as per the existing in-centre store which secures a relatively limited turnover).

12.35 Overall, whilst NPPF is categorical in requiring local planning authorities to meet identified needs in full, it is considered in this instance that there is no overriding requirement for the Council to proactively plan for a new foodstore location in the borough over the short to medium term period of the emerging Local Plan given that:

- The vitality and viability of the town centre is not underpinned by its convenience function (sub-regional comparison orientated shopping destination).
- There is no potential for market share enhancement given the significantly high levels of convenience retention (c. 98% retention).
- There is no overriding qualitative deficiency in convenience provision in the town with mainstream retailers (Asda, Morrison's and Tesco Extra), limited assortment discounters (Aldi and Lidl), frozen food specialists (Iceland and Heron) and local independents all represented. There is effective choice to local residents and competition between retailers.
- The relocation of M&S to Anchor Retail Park includes a Simply Food outlet and would address any qualitative deficiency at the 'quality' end of the convenience market in the town.
- Whilst the Asda and Aldi stores are substantially overtrading, the assessment identifies that over mainstream foodstores, particularly Morrison's and Tesco Extra, are substantially under-performing.
- The Asda overtrading position is likely to decrease over time should a new mainstream foodstore in Peterlee come forward and reverse some of the existing inflow which the store currently draws.
- Whilst the existing mainstream foodstores in the town (Asda, Morrison's and Tesco Extra) are all located outside of the town centre PSA, they are not too physically detached and are able to facilitate linked shopping trips.

12.36 Therefore, drawing the above quantitative and qualitative conclusions together, it is our view that there is no need for additional floorspace and this position should be reviewed again during the plan period (informed by a future update to this study).

13. COMPARISON RETAIL ANALYSIS

- 13.1 In contrast to convenience shopping patterns which tend to be more localised in nature, comparison shopping is destination based with shoppers prepared to travel further to shop for clothing, fashion and personal items; these sectors are therefore key drivers and the primary determinants in choice of destination. Expenditure is therefore more mobile and less restricted to a local catchment or particular centre.
- 13.2 As previously detailed in the sub-regional overview section of the report, whilst the existing comparison (non-food) retail offer in Hartlepool is commensurate with its sub-regional status, the town actually serves a constrained catchment given its coastal location and proximity / accessibility to sub-regional retail destinations in Teesside (Middlesbrough and Teesside Shopping Park) and beyond (Sunderland, Newcastle and Metro Centre).

Overall Comparison Goods Market Share

Primary Catchment Area (Survey Zones 1, 2 and 3)

- 13.3 The total comparison expenditure pot (Table 3, Appendix 3) within the PCA (Zones 1, 2 and 3) is projected to rise from c. £232.7m in 2014 to £263.1m in 2019 and £356.4m by 2029 (£124.7m increase to 2029).
- 13.4 The overall comparison goods market share and expenditure assessment (Table 4, Appendix 3) identifies that Hartlepool town centre retains 38.9% (£90.5m) of all comparison goods expenditure arising within the PCA (survey zones 1 – 3). Retail warehousing provision (Anchor, High Point and Tees Bay retail parks) and mainstream foodstores outside of the defined town centre PSA secure a further 17.4% (£40.5m) and 9.7% (£22.7m) of the comparison goods expenditure respectively.
- 13.5 Overall, the Hartlepool Borough retains 67.4% (£156.8m) of comparison expenditure arising within its primary catchment. This is a relatively positive performance having regard to the current retail offer and competition from surrounding destinations.
- 13.6 The table below details changes in market share patterns of the main comparison retail destinations since the 2009 Study.

Table 13.1 – Comparison Goods Destinations Market Share

Destination	2009 Study PCA	2014 Study PCA
Hartlepool Borough		
Hartlepool Town Centre	46.1%	38.9% (£90.5m)
Anchor/High Point Retail Parks, Marina Way, Hartlepool	5.5%	12.1% (£28.2m)
Tees Bay Retail Park, Hartlepool	2.9%	5.3% (£12.3m)
Asda, Marina Way, Hartlepool	6.9%	7.0% (£16.3m)
Other Main Foodstores, Hartlepool ³³	6.3%	2.8% (£6.4m)
Total Hartlepool Borough	69.3%	67.4% (£156.8m)
Outside Hartlepool Borough		
Teesside Shopping Park, Stockton-on-Tees	3.9%	8.4% (£19.4m)
Middlesbrough Town Centre	13.6%	7.5% (£17.4m)
Porttrack Retail Parks (incl. B&Q), Stockton-on-Tees	1.5%	4.1% (£9.6m)
Metro Centre / Retail Parks, Gateshead	2.2%	4.0% (£9.2m)

13.7 The table notably highlights that the town centre market share has fallen from c. 46% in 2009 to c. 39%; this is due to a combination of factors, including:

- The increasing competition from retail parks (Anchor/High Point and Tees Bay); this reflects the evolution of the parks from traditional bulky retail warehouses to more 'high street' style destinations (Boots and Next especially). The recent announcement of M&S' relocation from the town centre to Anchor Retail Park will further increase competition.
- The increase in the range and quality of non-food goods within large foodstores. The Asda and Tesco Extra stores in particular have a significant non-food offer (clothing) which directly competes with lower order (discount orientated) comparison retailers.

13.8 With respect to competing destinations outside of the PCA, whilst the increase in the comparison market share which Teesside Shopping Park secures is notable, this may be reflective of its increasing attraction at the expense of Middlesbrough town centre.

³³ Morrison's Clarence Road and Tesco Extra Belle Vue Way

Inflow (From Outside Borough)

- 13.9 Hartlepool also attracts significant comparison goods inflows from the Peterlee and Billingham catchment zones (zones 4 and 5) as follows:

Table 13.2 – Comparison Goods Leakage Destinations Market Share

Destination	2009 Study Peterlee (Zone 4)	2014 Study Peterlee (Zone 4)	2009 Study Billingham (Zone 5)	2014 Study Billingham (Zone 5)
Hartlepool Borough				
Hartlepool Town Centre	19.1%	25.6% (£27.4m)	4.5%	3.7% (£4.0m)
Anchor/High Point Retail Parks, Hartlepool	2.5%	4.6% (£4.9m)	0.5%	0.2% (£0.2m)
Tees Bay Retail Park, Hartlepool	0.9%	2.1% (£2.3m)	1.3%	0.4% (£0.4m)
Asda, Marina Way, Hartlepool	1.9%	2.5% (£2.6m)	1.3%	1.4% (£1.5m)
Other Main Foodstores, Hartlepool	1.1%	0.2% (£0.2m)	0.5%	0.0% (£0.0m)
Total Hartlepool Borough	26.8%	35.1% (£37.4m)	8.8%	5.8% (£6.2m)

- 13.10 The survey results identify that inflow from the Peterlee zone has actually increased from c. 19% in 2009 to 25% in 2014; there is no specific reason as to why the market share has increased but may reflect qualitative deficiencies in comparison retail provision in Peterlee (predominantly orientated towards discount non-food operators).
- 13.11 The inflows from the Billingham zone remain relatively low and reflect the proximity / access to Middlesbrough and Teesside Shopping Park in particular.

Individual Comparison Goods Market Share

- 13.12 There is significant variance in market share retention levels for specific types of comparison (non-food) goods. The table below presents a summary of the retention levels of Hartlepool town centre and thereafter the borough as a whole for each individual comparison goods category.

Table 13.3 – Comparison Goods Categories Hartlepool Market Share

Comparison Goods Category	2014 Hartlepool Town Centre	2014 Hartlepool Borough
Clothing, Shoes & Accessories	38.7% (£29.1m)	48.1% (£36.1m)
Furniture, Carpets & Household Textiles	38.2% (£10.9m)	55.0% (£15.7m)
DIY & Decorating Goods	18.1% (£1.0m)	90.5% (£4.9m)
Major Household Appliances	29.2% (£1.2m)	92.8% (£3.6m)
Electrical Goods	29.9% (£5.9m)	94.1% (£18.6m)
Household & Personal Goods	47.5% (£12.2m)	73.9% (£18.9m)
Books, CDs & DVDs	40.5% (£5.2m)	90.3% (£11.7m)
Health, Beauty & Chemist Goods	51.6% (£14.5m)	92.4% (£26.0m)
Recreational Goods	32.4% (£8.8m)	57.3% (£15.6m)
Gardening & Pet Products	29.3% (£1.8m)	92.9% (£5.7m)

- 13.13 The highest town centre market shares are for health, beauty & chemist items and household & personal goods at 51.6% and 47.5%, respectively. Conversely, the low market shares are for bulky orientated comparison goods such as DIY and decorating (18.1%), major household appliances (29.2%), gardening & pet products (29.3%) and electrical goods (32.4%).
- 13.14 As a whole, the borough retains a substantial quantum of expenditure in the majority of comparison goods categories with the notable exception of clothing (c. 50% leakage from the catchment).

Clothing and Shoes

- 13.15 As previously detailed, comparison shopping is destination-based with shoppers prepared to travel further to undertake shopping for clothing and fashion items in particular; this sector is the key determinants in shoppers' choice of destination.
- 13.16 Therefore, detailed analysis of the changes in shopping patterns in the clothing, shoes & accessories comparison goods category and the overall performance of Hartlepool town centre since the 2009 Study is summarised below.

Table 13.4 – Clothes and Shoes Goods Destinations Market Share

Destination	2009 Study PCA	2014 Study PCA
Hartlepool Borough		
Hartlepool Town Centre	45.4%	38.7% (£29.1m)
Main Foodstores, Hartlepool	4.4%	5.7% (£4.3m)
Anchor/High Point Retail Parks, Hartlepool	3.1%	3.6% (£2.7m)
Hartlepool Borough Total	53%	48.1% (£36.1m)
Outside Hartlepool Borough		
Middlesbrough Town Centre	29%	16.0% (£12.0m)
Teesside Shopping Park, Stockton-on-Tees	3.7%	12.0% (£9.0m)
Metro Centre / Retail Parks, Gateshead	2.8%	8.4% (£6.3m)
Newcastle City Centre	4.8%	4.4% (£3.3m)
Dalton Park Outlet, Murton	1.8%	4.3% (£3.3m)

- 13.17 The survey results indicate that the town centre market share has significantly decreased from c. 45% in 2009 to 39% at present. Whilst this is partially attributable to increasing competition from retail parks and foodstores in the town, there has been an overall increase in leakage from the borough to competing destinations.
- 13.18 The increasing competition from Teesside Shopping Park (to both Hartlepool and Middlesbrough), which accommodates a significant number of national fashion retailers and is highly accessible from the A66 arterial route, is particularly noticeable. Likewise, there has been a significant increase in the market share which the Metro Centre draws from the Hartlepool PCA; this may be attributable to the higher order fashion offer available at the Metro Centre and reflective of the ongoing national trade for retailers to increasingly locate in larger centres capable of serving regional catchments at the expense of smaller centres.
- 13.19 The pending closure and relocation of the M&S store in Middleton Grange to Anchor Retail Park is likely to further decrease the market share performance of the town centre for clothing and fashion goods. Whilst TJ Hughes has recently announced that it is to open a new c. 3,500 m² store in Middleton Grange, this will not qualitatively enhance the town's fashion retail offer.

Inflow (From Outside Borough)

- 13.20 The inflows which Hartlepool secures from catchment zones outside of the borough are set out below, the most substantial being from the Peterlee zone (Zone 4):

Table 13.5 – Clothes and Shoes Goods Leakage Destinations Market Share

Destination/Foodstore	2009 Study Peterlee (Zone 4)	2014 Study Peterlee (Zone 4)	2009 Study Billingham (Zone 5)	2014 Study Billingham (Zone 5)
Hartlepool Town Centre	30.5%	34.0% (£11.6m)	10.1%	6.5% (£2.2m)
Asda, Marina Way, Hartlepool	1.4%	0.0% (£0.0m)	0%	0.0% (£0.0m)
Anchor/High Point Retail Parks, Hartlepool	0.7%	3.2% (£1.1m)	0%	0.0% (£0.0m)
Other Main Foodstores, Hartlepool	0.3%	0.0% (£0.0m)	0%	0.0% (£0.0m)
Hartlepool Borough Total	32.6%	37.3% (£12.7m)	10.1%	6.5% (£2.2m)

- 13.21 Contrary to the decrease in clothing market share from within the PCA, the town centre has actually increased in its market share from the Peterlee catchment since 2009 (c. 3.5% increase); this is not attributable to any specific improvement in the town centre offer. The inflow from the Billingham zone has however decreased since 2009.

Comparison Goods Capacity Review

- 13.22 The baseline capacity modelling exercise (Tables 17a and 17b, Appendix 3), assuming a constant market share and taking account of projected population and expenditure growth, as well as trading efficiency increases, generates the following floorspace requirement³⁴ across Hartlepool Borough over the study period:

Table 13.6 – Comparison Goods Capacity

Comparison Retail Floorspace Requirement	2019 m ² (net)	2024 m ² (net)	2029 m ² (net)
Hartlepool Town Centre – Baseline	760 m ²	2,640 m ²	4,560 m ²
Hartlepool Borough – Baseline	1,250 m²	4,335 m²	7,495 m²

- 13.23 The capacity review indicates that there is limited quantitative need for additional comparison retail provision within Hartlepool in the first five years of the Local Plan

³⁴ Rounded to nearest 5 metre floorspace increments

period. There is however more substantive capacity identified in the medium to long term (2029).

- 13.24 As with our convenience retail recommendations, whilst NPPF directs local planning authorities to meet identified needs in full, it is considered in this instance that there is no active requirement for the Council to proactively plan for new comparison retail provision in the town.
- 13.25 It is clear from the market share analysis and particularly on-site floorspace surveys that there has been a significant contraction in the comparison retail offer and associated performance of the town centre PSA since 2009. The floorspace survey in particular identifies that there is a significant quantum of vacant retail floorspace in the town centre PSA (c. 14,360 m² gross).
- 13.26 Whilst the increase in vacancies may in part be reflective of the adverse economic conditions since 2009, there are a number of prominent vacancies within Middleton Grange Shopping Centre in particular. This is particularly striking given that a significant proportion of vacant floorspace within the town centre PSA is modern retail floorplates which accord with current retailer requirements rather than sub-standard secondary accommodation. The relocation of M&S from Middleton Grange to the out-of-centre Anchor Retail Park will further exacerbate this position (notwithstanding recent TJ Hughes announcement to occupy a c. 3,500 m² unit in Middleton Grange).
- 13.27 Consequently, whilst the study identifies a significant need for new comparison provision in the latter phases of the emerging Local Plan period, given the amount of vacancies within the town centre at present, there is no need or requirement in our view for quantitative expansion in the comparison retail offer in the town.
- 13.28 The overriding policy emphasis for the emerging Local Plan, which will be further informed by the forthcoming Regeneration Masterplan and Retail Revival Strategy in particular, should solely be on physical and associated qualitative-based enhancements to the town centre PSA.
- 13.29 The physical constraints of the town centre PSA, and particularly Middleton Grange, are already widely acknowledged and will need to be fully appraised and addressed through the Regeneration Masterplan. The effective integration of the internalised shopping mall with the wider town centre PSA to create a permeable and attractive shopping destination will be required; the Council as freeholder of the shopping centre therefore has a critical role to play with its relevant public and private sector partners to facilitate appropriate regeneration of this part of the town centre.
- 13.30 It will also be necessary through the Retail Revival Strategy to determine the overall scale of comparison retail provision which the town centre can realistically sustain in both economic and commercial terms. There has clearly been a significant

contraction in the comparison retail offer since 2009 and the impending relocation of M&S will further undermine the commercial attractiveness and 'critical mass' of quality fashion retailers within the town centre (as the key determinant of visitors choice of destination). There is however evidence of some latent interest in the centre with the recent attraction of TJ Hughes to occupy a c. 3,500 m² unit within Middleton Grange; whilst this is extremely positive, it further reinforces the discount orientated offer within the town centre.

- 13.31 The commercial requirements of retailers currently represented within the town centre need to be tested through the Retail Revival Strategy as a short-term priority in order to ensure that key anchors do not follow M&S and gravitate to less central sites given the lack of appropriate accommodation within the PSA.
- 13.32 Likewise, testing the demand of retailers not presently represented in Hartlepool will be crucial. However, within this context, it must be recognised at the outset that it may be difficult to secure the necessary profile of comparison retailers (high quality fashion retailers) needed to deliver a positive step-change in the performance and profile of the town centre given:
- The town has a constrained catchment due to its coastal location and close proximity / accessibility to Teesside.
 - The town faces significant competition from Teesside (Middlesbrough and Teesside Shopping Park) and beyond (Tyneside). There are potentially 'overlapping' catchments (i.e. retailers with existing representation at Teesside Shopping Park for example may consider Hartlepool to be too close).
 - The socio-demographic profile of the area (particularly within the immediate urban area).
- 13.33 Subject to these detailed exercises then a final development strategy and policy framework for the town centre can be constructed. The overall strategy does however need to be balanced between enhancing mainstream comparison provision whilst maintaining and fostering a vital and viable independent retail offer.

INDEPENDENT RETAILING

- 13.34 Whilst the household telephone survey does not pick up in sufficient detail the existing quantitative market share secured by independent provision in the town, it is clear that the independent offer is viable. York Road is a traditional high street and accommodates a range of independent retailers as well as services.
- 13.35 The recent Government reports on the future of high streets and in particular the independent retail offer recognises that outside of the existing planning system, the

critical measures required to maintain independent representation in the town centre are political and commercial-based determinants such as:

- Physical improvements to the shopping environment (public realm works including lighting, paving and street furniture).
- Enhancements to the existing markets through investment in new market stalls and attractions (i.e. specialist events).
- Continuing to positively promote the town centre independent offer (in both the local area and wider sub-region).
- Maintaining the effective town centre management team through appropriate forward funding.
- Introducing appropriate financial mechanisms (i.e. tax concessions) to sustain independent operators.

- 13.36 The Council should therefore seek to encourage diversification of the retail offer by achieving a mix of uses and unit configurations which are attractive to existing or start-up independents as well as national multiples. The Regeneration Masterplan will identify the necessary physical (public realm) interventions.

OUT-OF-CENTRE PROVISION

- 13.37 Given the ongoing regeneration priorities for the town centre, it is our view, as supported by the capacity modelling outputs, that there is no need or justification for additional out-of-centre convenience and comparison retail provision through the emerging Local Plan period.
- 13.38 In relation to existing retail park locations, the Council should seek, where appropriate (and possible), to effectively manage the existing mix of comparison retail uses by preventing a 'drift' towards open comparison retail use (as per the announced M&S relocation to Anchor Retail Park). The diversification of traditional retail warehouse parks to accommodate 'high street' style comparison retailers has significant potential to undermine the vitality of the town centre going forward (absorbing latent demand and attracting existing retailers away from the PSA).
- 13.39 However, unlike other centres, the retail park provision in Hartlepool is located in relatively close proximity to the town centre and facilitates linked shopping trips. Whilst there is a significant degree of physical separation due to the current strategic road infrastructure, the Regeneration Masterplan and Retail Revival Strategy should identify opportunities to improve connectivity and permeability.

- 13.40 The retail parks are an important interface between the town centre PSA and the tourist attractions focused around the Marina (Maritime Experience etc.) and encouraging the private sector to deliver physical and environmental improvements would be beneficial.

14. LEISURE ASSESSMENT

- 14.1 This section reviews the existing leisure facilities, focusing in particular on the cinema, gym/health and fitness and evening economy provision (restaurants and bars). In order to inform the assessment, we have drawn upon the results of the household telephone survey exercise, which sought to establish where residents regularly visit for leisure activities.
- 14.2 Having established the principal leisure destinations for local residents, the surveys also asked what improvements to the quality and range of leisure facilities would persuade households to visit Hartlepool town centre more often. The main suggested improvements to leisure facilities inform a wider qualitative-based assessment of leisure provision.

Leisure Patterns

- 14.3 The quantum of available leisure expenditure (as per specific leisure activity) within the PCA is summarised below:

Table 14.1 – Leisure Categories Expenditure

Leisure Category	Average Expenditure per Person (£ per annum) PCA	Total Expenditure (£m per annum) PCA	UK Average Expenditure per Person (£ per annum) PCA
Restaurants/Cafes	£342	£31.6m	£470
Alcoholic Drinks	£244	£22.5m	£243
Cinema	£15	£1.3m	£17
Theatre / Concerts	£28	£2.6m	£35
Recreation and Sporting	£61	£5.7m	£110

- 14.4 Hartlepool retains a significant proportion of residents within the PCA for most leisure activities, as follows:
- **CINEMA:** 40.5% of respondents within the PCA³⁵ regularly visit the cinema. The vast majority of these people (92.1%) visit the Vue cinema in Hartlepool most frequently. A limited number of local residents visit cinemas in a variety of other locations including the Cineworld at Middlesbrough Leisure Park (2.8%), Showcase

³⁵ PCA comprises zones 1 (North Hartlepool), 2 (South Hartlepool) and 3 (Hartlepool Villages).

Cinema at Teesside Shopping & Leisure Park in Stockton-on-Tees (2.6%) and the Odeon Cinema at the Metro Centre in Gateshead (2.5%).

- **INDOOR SPORTS / HEALTH & FITNESS:** a total of 17.0% of respondents within PCA regularly use gym facilities. Of these residents, 34.0% regularly use the gym or health and fitness activities at Mill House Leisure Centre on Raby Road and 29.0% use Lifestyle Fitness on Harbour Walk. A further 14.1% visit Brierton Sports Centre on Catcote Road. Other regularly used facilities include Fit4less by Mayfield Park (3.6%), Headland Sports Hall on Union Street (3.5%) and Fitness Connection on Brenda Road (2.1%).
- **RESTAURANTS:** nearly two-thirds (60.3%) of PCA respondents regularly visit restaurants. A significant proportion (64.3%) of these respondents who eat out regularly visit restaurants in Hartlepool town centre. The most popular alternative destination is Hartlepool Marina (11.1%), followed by Seaton Carew (4.6%).
- **SOCIALISING:** a total of 52.8% of respondents within the PCA regularly visit pubs and clubs. The main destination is Hartlepool town centre (77.3%), followed by Hartlepool Marina and Seaton Carew (both 4.8%).
- **CULTURAL:** 40.2% of respondents in the PCA regularly visit arts and cultural facilities. Of these residents, the greatest percentage (24.8%) said they visit facilities generally within Hartlepool town centre itself and a further 6.8% specifically use the Town Hall Theatre in Hartlepool. Beyond this, 12.8% of respondents said they visit the Empire Theatre in Sunderland and 11.1% visit Newcastle City Centre. A further 9.9% visit The Theatre Royal in Newcastle and 8% travel to London.

Qualitative Improvements

- 14.5 Residents were asked about what improvements to the leisure and entertainment offer in Hartlepool town centre they would like to see. The main suggestion (16.4%) was for an improved range of places to eat. Other popular suggestions were improved music/theatre provision (13.4%), improved play areas for children (12.0%), and improved youth/young adult facilities (11.8%).

Leisure Capacity

- 14.6 On the basis of the survey results and on-site fieldwork, it is clear that there are no significant and overriding deficiencies in the leisure offer within Hartlepool. Whilst the Vue cinema is edge-of-centre and physically detached from the town centre primary shopping area (PSA), it is not too distant as to prevent linked trips between both destinations. Improvements to connectivity between the town centre and the

commercial leisure and tourist (Marina, Maritime Experience and Trincomalee Wharf) will however need to be assessed through the Regeneration Masterplan exercise.

- 14.7 Whilst there a range of independent restaurants located at the Marina, it is noticeable that the national chain restaurant offer within the immediate vicinity of the existing Vue cinema and also the wider town centre is currently limited aside from a Pizza Hut restaurant and pub-chain operators such as Brewers Fayre and the Travellers Rest (Flaming Grill franchise within a public house).
- 14.8 It is usual in our experience for a selection of national chain family-orientated restaurants to be located within or immediately adjacent to a similar cinema facility in order to provide a genuine family orientated focus for the evening and weekend leisure offer (increase dwell time etc.).
- 14.9 The lack of restaurant provision was recognised within the household survey results which identified that an improved range of places to eat was most popular improvement suggested by local residents.
- 14.10 On this basis, it is our view that there is a potential opportunity to enhance the national-chain restaurant offer in the vicinity of the existing cinema and wider town centre. The Regeneration Masterplan and Retail Revival Strategy should therefore actively seek to establish if there is prospective commercial interest from mainstream operators to locate in the town and confirm the appropriate scale and format of provision so as to inform the identification of potentially suitable site opportunities.
- 14.11 In terms of the evening economy offer in the wider town centre (Church Street area etc.), appropriate planning and licencing policies should continue to be applied to avoid the over-concentration of leisure uses which would be detrimental to town centre viability and surrounding residential amenity.
- 14.12 With respect to existing leisure centre provision, there is no overriding deficiency or dissatisfaction identified in the respective survey exercises. The future strategy for public leisure centre provision within the town should be determined by a separate strategy review exercise.

15. STUDY RECOMMENDATIONS

- 15.1 The study has been commissioned to assess the future need for new retail and leisure provision within the borough. The study provides a comprehensive evidence base to inform the preparation of a new replacement Local Plan and is informed by robust primary research including a household telephone survey, in-centre shopper survey, retailer business survey and floorspace surveys (town centre and local centres).
- 15.2 The recommendations arising from the study are also to inform the emerging Regeneration Masterplan and Retail Revival Strategy which has been commissioned by the Council to provide a long-term vision for the future development and regeneration of Hartlepool town centre and the Waterfront Marina area.
- 15.3 Given that this report is intended to inform the preparation of the Regeneration Masterplan and Retail Revival Strategy, the study recommendations in the first instance focus on the planning policies which should be developed through the new replacement Local Plan process:

- **CONVENIENCE RETAIL;** there is no quantitative or qualitative requirement for the Council to allocate any sites over the emerging plan period. The town has an appropriate network of foodstores with no overriding deficiency in provision.
- **COMPARISON RETAIL;** whilst a quantitative capacity has been identified for new retail provision over the medium to long term period of the replacement Local Plan, there is no requirement for the Council to allocate any sites over the emerging plan period. The policy focus should be on consolidation of the centre rather than further quantitative expansion given the extent of vacancies and requirement to address current physical constraints of the town centre PSA.

There is no need or justification for out-of-centre provision given the identified issues within the town centre and potential to absorb latent retail demand.

- **LEISURE;** there are no significant and overriding deficiencies in the commercial leisure offer. However, appropriate policies to promote / enhance the evening economy offer (particularly family orientated food and drink facilities) should be promoted (in accordance with NPPF tests).
- **LOCAL CENTRES;** the existing network of centres should be retained. It is recommended that policies are developed in respect of new local centres associated with potential strategic residential sites to control the nature (quantum of floorspace, range of uses etc.) of provision which is delivered.

- **RETAIL AND TOWN CENTRE DEVELOPMENT POLICY;** in accordance with NPPF, existing policies should be updated / proposed which specifies that:
 - Main town centre uses will be supported within the defined primary shopping (retail) area (PSA) and;
 - Proposals for main town centre uses outside of the defined PSA will be subject to the relevant NPPF retail policy tests (sequential and impact on investment and in-centre viability / trade).
- **TOWN CENTRE BOUNDARY POLICIES;** it is recommended that the existing town centre boundaries are reviewed as there is a requirement to consolidate the physical extent of the town centre. The adopted town centre boundary is drawn relatively widely and extends beyond existing (considerable) physical boundaries including the railway line to the north and Stockton Street to the east.
- **PRIMARY SHOPPING AREA;** existing policy should be reviewed to recognise that the PSA should be the focus for all main town centre uses rather than just retail uses. Securing viable uses for existing vacant floorspace is an important policy requirement over the replacement Local Plan period.
- **FRONTAGE POLICIES;** given that the continuing national policy direction towards supporting the re-use of existing retail units within town centre locations to non-retailing activities³⁶ (i.e. residential or wider commercial uses), it recommended that the Council undertake a review of the adequacy and relevance of existing defined shopping frontage designations within the town centre.

However, any frontage policies relating to evening economy uses (Classes A3 – A5 in particular) should be maintained and strengthened where appropriate given the potential social and environmental issues arising from a concentration of these uses.

- **IMPACT THRESHOLD;** it is recommended that the Council construct a local floorspace threshold given that the 'default' NPPF threshold of 2,500 m². As a guide for the Council, it may be that defining a minimum local floorspace threshold of 200 m² net is appropriate on the basis that:
 - There has been a significant increase in small format convenience stores operated by the mainstream retailers (Asda, Morrison's (M-Local), Tesco (Express) and Sainsbury's (Local)); the average size of these smaller format stores is c. 370 m² (3,000 sq. ft) gross. Such stores serve top-up convenience

³⁶ *Greater flexibilities for change of use* (August 2013)

shopping needs and could impact upon the existing top-up shopping function of the local centres in particular.

- With respect to the average size of individual units within the town centre, the Experian Goad survey³⁷ details the following floorspace composition:

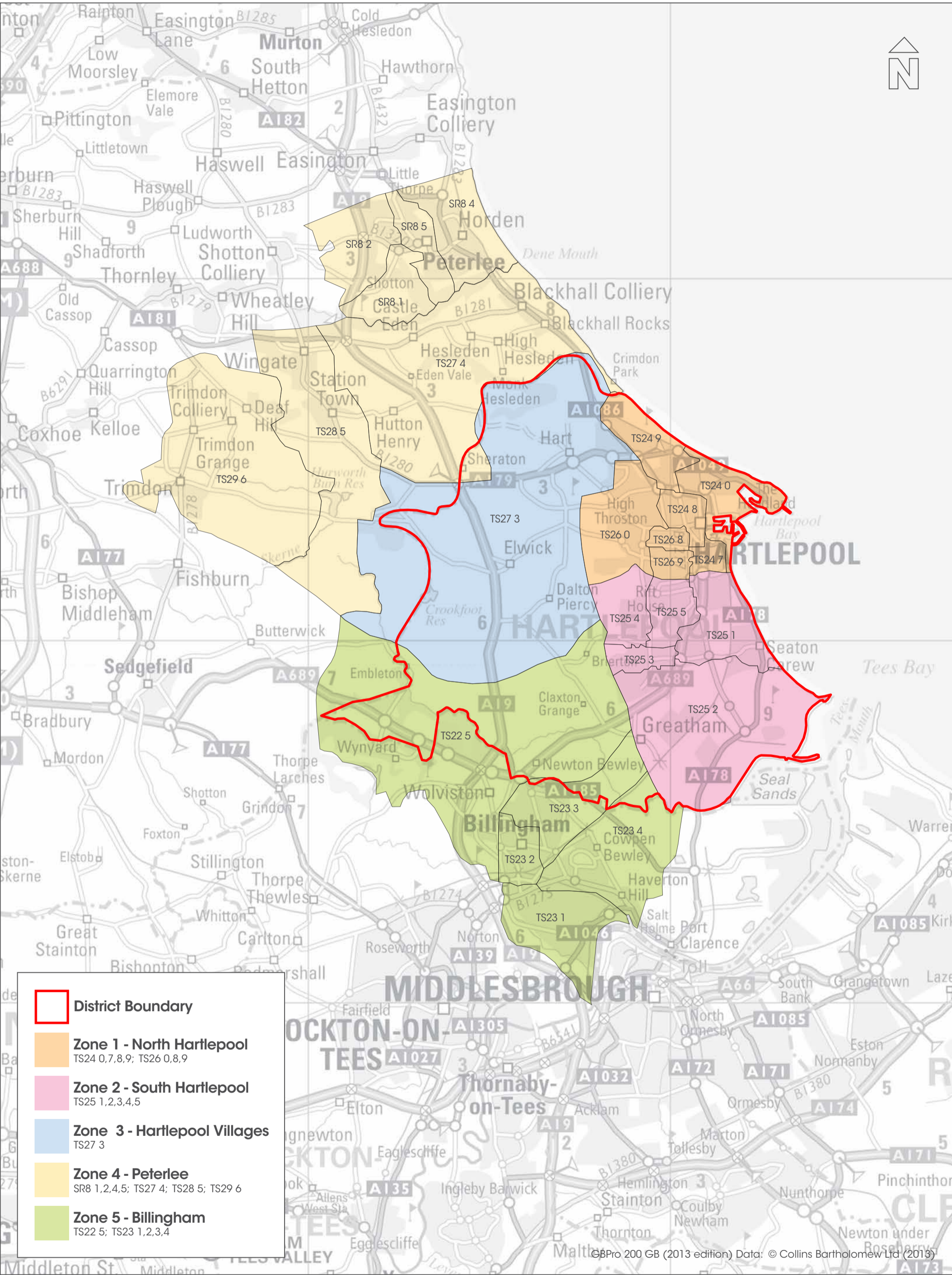
DISTRIBUTION OF OUTLETS BY FLOORSPACE	HARTLEPOOL	
	NO. OUTLETS	% OUTLETS
< 1,000 sq. ft (93 sq. m)	113	29.9
1,000 sq. ft (93 sq. m) - 2,499 sq. ft (232 sq. m)	186	49.2
2,500 sq. ft (232 sq. m) - 4,999 sq. ft (464 sq. m)	48	12.7
5,000 sq. ft (464 sq. m) - 9,999 sq. ft (929 sq. m)	17	4.5
> 10,000 sq. ft (929 sq. m)	14	3.7

As the table shows, the majority of units within the town centre are below 232 m² (gross). On this basis and allied to the fact that there are identified vacancies of a similar scale in prominent locations within the town centre, a minimum local floorspace threshold of 200 m² net for assessment may be appropriate.

- **MONITORING;** the NPPF requires Local Planning Authorities (LPAs) to undertake continuous monitoring of their plans and policies, assessing whether the policies in local development schemes are being achieved. Future (annual) monitoring activity by the Council should specifically include:
 - The floorspace and use composition of the town centre;
 - A schedule of planning permissions granted for retail and leisure proposals in the borough (adopting a minimum floorspace threshold may be appropriate);
 - Retail and leisure commitments and proposals in the competing centres in the wider sub-region (of a scale to materially influence sub-regional shopping patterns); and
 - Development opportunity sites.

³⁷ Experian Goad centre surveys are based on Experian's own interpretation of the true extent of retailing within a centre rather than the primary shopping area (PSA) or wider town centre boundary as defined in adopted Local Plan policy.

APPENDIX 1



Hartlepool Town Centre Masterplan
Catchment Plan



APPENDIX 2

Hartlepool Borough Council
Convenience Assessment (2014)

TABLE 1A - SURVEY AREA POPULATION PROJECTIONS

Year		Zone 1 North Hartlepool Persons	Zone 2 South Hartlepool Persons	Zone 3 Hartlepool Villages Persons	Primary Catchment Area Total Persons	Zone 4 Peterlee Persons	Zone 5 Billingham Persons	Overall Catchment Area Total Persons
Population Projections	2012	47,611	38,738	5,302	91,651	46,605	39,052	177,308
	2014	47,975	39,022	5,340	92,337	47,186	39,665	179,188
	2019	48,928	39,793	5,440	94,161	48,575	41,172	183,908
	2024	49,792	40,466	5,537	95,795	49,828	42,535	188,158
	2029	50,357	40,891	5,605	96,853	50,823	43,440	191,116

TABLE 1B - SURVEY AREA POPULATION GROWTH

Period		Zone 1 North Hartlepool	Zone 2 South Hartlepool	Zone 3 Hartlepool Villages	Primary Catchment Area Total	Zone 4 Peterlee	Zone 5 Billingham	Overall Catchment Area Total
Population Growth (Persons)	2012 - 2014	364	284	38	686	581	613	1,880
	2014-2019	953	771	100	1,824	1,389	1,507	4,720
	2014-2024	1,817	1,444	197	3,458	2,642	2,870	8,970
	2014-2029	2,382	1,869	265	4,516	3,637	3,775	11,928
Population Growth (%)	2012 - 2014	0.8%	0.7%	0.7%	0.7%	1.2%	1.6%	1.1%
	2014-2019	2.0%	2.0%	1.9%	2.0%	2.9%	3.8%	2.6%
	2014-2024	3.8%	3.7%	3.7%	3.7%	5.6%	7.2%	5.0%
	2014-2029	5.0%	4.8%	5.0%	4.9%	7.7%	9.5%	6.7%

NOTES:

1. Post 2011 Census based ONS mid year population estimates (2012) and projections (2014, 2019, 2024 and 2029) were sourced from Experian via Micromarketer Online.

Hartlepool Borough Council

Convenience Assessment (2014)

TABLE 2 - CONVENIENCE EXPENDITURE PER CAPITA FORECASTS

Year		Zone 1 North Hartlepool £ per person	Zone 2 South Hartlepool £ per person	Zone 3 Hartlepool Villages £ per person	Zone 4 Peterlee £ per person	Zone 5 Billingham £ per person
Convenience Expenditure	2012	£1,812	£1,826	£2,104	£1,760	£1,839
	2014	£1,796	£1,810	£2,085	£1,744	£1,822
	2019	£1,856	£1,870	£2,155	£1,803	£1,883
	2024	£1,941	£1,956	£2,254	£1,885	£1,970
	2029	£2,018	£2,033	£2,343	£1,960	£2,048
Convenience Expenditure minus SFT	2012	£1,774	£1,788	£2,060	£1,723	£1,800
	2014	£1,747	£1,761	£2,029	£1,697	£1,773
	2019	£1,782	£1,795	£2,069	£1,730	£1,808
	2024	£1,846	£1,860	£2,143	£1,793	£1,873
	2029	£1,907	£1,921	£2,214	£1,852	£1,935

NOTES:

1. 2012 convenience expenditure per person data were sourced from Experian via Micromarketer Online and are in 2012 prices.
2. The 2012 convenience expenditure per person data were projected forward to the base year and forecast years using the growth forecasts provided by Experian in Retail Planner Briefing Note 11 (October 2013) as summarised below:

Year	Convenience Expenditure Growth per Annum (%)
2012-2014	-0.5%
2014-2019	0.7%
2019-2024	0.9%
2024-2029	0.8%

3. Deductions for spending on Special Forms of Trading (SFT) are based on the estimates provided by Experian in Retail Planner Briefing Note 11 (October 2013) as summarised below:

Year	Convenience Expenditure Spent on SFT (%)
2012	2.1%
2014	2.7%
2019	4.0%
2024	4.9%
2029	5.5%

Hartlepool Borough Council

Convenience Assessment (2014)

TABLE 3A - TOTAL CONVENIENCE EXPENDITURE AND EXPENDITURE GROWTH (MINUS SFT)

Year		Zone 1 North Hartlepool £m	Zone 2 South Hartlepool £m	Zone 3 Hartlepool Villages £m	Primary Catchment Area Total £m	Zone 4 Peterlee £m	Zone 5 Billingham £m	Overall Catchment Area Total £m
Total Expenditure (minus SFT)	2012	£84.46	£69.25	£10.92	£164.63	£80.30	£70.31	£315.24
	2014	£83.82	£68.71	£10.83	£163.37	£80.08	£70.34	£313.78
	2019	£87.17	£71.44	£11.25	£169.86	£84.05	£74.44	£328.36
	2024	£91.90	£75.27	£11.87	£179.03	£89.33	£79.68	£348.04
	2029	£96.02	£78.57	£12.41	£186.99	£94.12	£84.06	£365.18
Total Expenditure (minus SFT) Growth	2012 - 2014	-£0.64	-£0.54	-£0.09	-£1.27	-£0.22	£0.03	-£1.46
	2014-2019	£3.34	£2.73	£0.42	£6.50	£3.98	£4.11	£14.58
	2014-2024	£8.08	£6.56	£1.03	£15.67	£9.25	£9.34	£34.26
	2014-2029	£12.19	£9.86	£1.58	£23.63	£14.04	£13.72	£51.40

NOTES:

1. Expenditure Growth derived from Population Projections (Table 1) * Expenditure per Capita (minus SFT) (Table 2)

TABLE 3B - MAIN FOOD CONVENIENCE EXPENDITURE AND EXPENDITURE GROWTH

Year		Zone 1 North Hartlepool £m	Zone 2 South Hartlepool £m	Zone 3 Hartlepool Villages £m	Primary Catchment Area Total £m	Zone 4 Peterlee £m	Zone 5 Billingham £m	Overall Catchment Area Total £m
Total Expenditure (minus SFT)	2012	£63.34	£51.94	£8.19	£123.47	£60.23	£52.73	£236.43
	2014	£62.87	£51.53	£8.13	£122.52	£60.06	£52.75	£235.34
	2019	£65.38	£53.58	£8.44	£127.40	£63.04	£55.83	£246.27
	2024	£68.93	£56.45	£8.90	£134.27	£67.00	£59.76	£261.03
	2029	£72.01	£58.93	£9.31	£140.25	£70.59	£63.05	£273.88
Total Expenditure (minus SFT) Growth	2012 - 2014	-£0.48	-£0.41	-£0.07	-£0.95	-£0.17	£0.02	-£1.09
	2014-2019	£2.51	£2.05	£0.31	£4.87	£2.98	£3.08	£10.93
	2014-2024	£6.06	£4.92	£0.77	£11.75	£6.94	£7.00	£25.69
	2014-2029	£9.14	£7.40	£1.18	£17.72	£10.53	£10.29	£38.55

NOTES:

1. 75% of total convenience expenditure is assumed to be spent on main food shopping

TABLE 3C - TOP-UP FOOD CONVENIENCE EXPENDITURE AND EXPENDITURE GROWTH

Year		Zone 1 North Hartlepool £m	Zone 2 South Hartlepool £m	Zone 3 Hartlepool Villages £m	Primary Catchment Area Total £m	Zone 4 Peterlee £m	Zone 5 Billingham £m	Overall Catchment Area Total £m
Total Expenditure (minus SFT)	2012	£21.11	£17.31	£2.73	£41.16	£20.08	£17.58	£78.81
	2014	£20.96	£17.18	£2.71	£40.84	£20.02	£17.58	£78.45
	2019	£21.79	£17.86	£2.81	£42.47	£21.01	£18.61	£82.09
	2024	£22.98	£18.82	£2.97	£44.76	£22.33	£19.92	£87.01
	2029	£24.00	£19.64	£3.10	£46.75	£23.53	£21.02	£91.29
Total Expenditure (minus SFT) Growth	2012 - 2014	-£0.16	-£0.14	-£0.02	-£0.32	-£0.06	£0.01	-£0.36
	2014-2019	£0.84	£0.68	£0.10	£1.62	£0.99	£1.03	£3.64
	2014-2024	£2.02	£1.64	£0.26	£3.92	£2.31	£2.33	£8.56
	2014-2029	£3.05	£2.47	£0.39	£5.91	£3.51	£3.43	£12.85

NOTES:

1. 25% of total convenience expenditure is assumed to be spent on top-up food shopping

Hartlepool Borough Council
Convenience Assessment (2014)

TABLE 4 - MAIN FOOD MARKET SHARE AND EXPENDITURE 2014

Destination		Zone 1 North Hartlepool	Zone 2 South Hartlepool	Zone 3 Hartlepool Villages	Primary Catchment Area Total	Zone 4 Peterlee	Zone 5 Billingham	Overall Catchment Area Total
HARTLEPOOL BOROUGH								
Hartlepool Town Centre								
Heron Foods, Middleton Grange, Hartlepool Town Centre	% £m	0.5% £0.33	0.0% £0.00	0.0% £0.00	0.3% £0.33	0.0% £0.00	0.0% £0.00	0.1% £0.33
Iceland, Middleton Grange, Hartlepool Town Centre	% £m	1.2% £0.79	0.8% £0.42	0.0% £0.00	1.0% £1.20	1.3% £0.80	0.0% £0.00	0.9% £2.00
M&S, Middleton Grange, Hartlepool Town Centre	% £m	1.9% £1.17	1.7% £0.85	1.4% £0.12	1.7% £2.14	0.0% £0.00	0.0% £0.00	0.9% £2.14
Tesco Express, York Road, Hartlepool Town Centre	% £m	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Other, Hartlepool Town Centre	% £m	0.5% £0.33	0.0% £0.00	0.0% £0.00	0.3% £0.33	0.0% £0.00	0.7% £0.36	0.3% £0.69
Hartlepool Town Centre Total	% £m	4.2% £2.63	2.5% £1.27	1.4% £0.12	3.3% £4.01	1.3% £0.80	0.7% £0.36	2.2% £5.17
Main Edge-of-Centre Foodstores								
Morrisons, Clarence Road, Hartlepool	% £m	16.3% £10.22	12.3% £6.34	9.8% £0.80	14.2% £17.35	6.8% £4.10	2.1% £1.12	9.6% £22.57
Main Edge-of-Centre Foodstores Total	% £m	16.3% £10.22	12.3% £6.34	9.8% £0.80	14.2% £17.35	6.8% £4.10	2.1% £1.12	9.6% £22.57
Main Out-of-Centre Foodstores								
Aldi, Dunston Road, Hartlepool	% £m	10.3% £6.45	1.6% £0.84	20.1% £1.63	7.3% £8.92	1.3% £0.80	0.0% £0.00	4.1% £9.72
Aldi, Tees Bay Retail Park, Hartlepool	% £m	1.5% £0.93	13.1% £6.76	0.0% £0.00	6.3% £7.69	0.0% £0.00	0.7% £0.36	3.4% £8.05
Asda, Marina Way, Hartlepool	% £m	52.8% £33.18	27.1% £13.96	43.6% £3.55	41.4% £50.69	17.5% £10.49	4.0% £2.09	26.9% £63.26
Farmfoods, Catcote Road, Hartlepool	% £m	0.7% £0.45	0.5% £0.27	1.4% £0.12	0.7% £0.84	0.0% £0.00	0.0% £0.00	0.4% £0.84
Lidl, Jesmond Gardens, Hartlepool	% £m	1.5% £0.96	0.7% £0.37	0.0% £0.00	1.1% £1.33	0.0% £0.00	0.0% £0.00	0.6% £1.33
Sainsburys Local, Station Lane, Seaton Carew	% £m	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Tesco Extra, Belle Vue Way, Hartlepool	% £m	12.3% £7.71	38.0% £19.57	12.9% £1.05	23.1% £28.33	0.0% £0.00	0.0% £0.00	12.0% £28.33
Main Out-of-Centre Foodstores Total	% £m	79.0% £49.69	81.1% £41.77	78.1% £6.34	79.8% £97.80	18.8% £11.29	4.6% £2.45	47.4% £111.54
Local Centres								
Brierton Lane Local Centre	% £m	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Brus Corner Local Centre	% £m	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Catcote Road Local Centre	% £m	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Chatham Road - Rabby Road Local Centre	% £m	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Elizabeth Way Local Centre	% £m	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Fens Local Centre	% £m	0.0% £0.00	2.1% £1.06	0.0% £0.00	0.9% £1.06	0.0% £0.00	0.0% £0.00	0.5% £1.06
Jutland Road Local Centre	% £m	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
King Oswy Drive Local Centre	% £m	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Sainsbury's, Middle Warren Local Centre	% £m	0.0% £0.00	0.0% £0.00	4.5% £0.36	0.3% £0.36	0.0% £0.00	0.9% £0.48	0.4% £0.85
Other, Middle Warren Local Centre	% £m	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Murray Street Local Centre	% £m	0.0% £0.00	0.0% £0.00	2.1% £0.17	0.1% £0.17	0.0% £0.00	0.0% £0.00	0.1% £0.17
Northgate Local Centre	% £m	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Northgate/ Durham Street Local Centre	% £m	0.5% £0.33	0.0% £0.00	0.0% £0.00	0.3% £0.33	0.0% £0.00	0.0% £0.00	0.1% £0.33
Owton Manor East Local Centre	% £m	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Owton Manor West Local Centre	% £m	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Oxford Road Local Centre	% £m	0.0% £0.00	0.5% £0.27	0.0% £0.00	0.2% £0.27	0.0% £0.00	0.0% £0.00	0.1% £0.27
Raby Road/ Hart Lane Corner Local Centre	% £m	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Stockton Road/ Spring Garden Road Local Centre	% £m	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Wiltshire Way Local Centre	% £m	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Wynyard Road Local Centre	% £m	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Local Centres Total	% £m	0.5% £0.33	2.6% £1.34	6.5% £0.53	1.8% £2.20	0.0% £0.00	0.9% £0.48	1.1% £2.68
Other, Hartlepool Borough								
Other, Hartlepool Borough	% £m	0.0% £0.00	0.5% £0.27	0.0% £0.00	0.2% £0.27	0.0% £0.00	0.0% £0.00	0.1% £0.27
Other, Hartlepool Borough Total	% £m	0.0% £0.00	0.5% £0.27	0.0% £0.00	0.2% £0.27	0.0% £0.00	0.0% £0.00	0.1% £0.27
HARTLEPOOL BOROUGH TOTAL	% £m	100.0% £62.87	98.9% £50.98	95.8% £7.78	99.3% £121.63	27.0% £16.19	8.4% £4.41	60.4% £142.24
OUTSIDE HARTLEPOOL BOROUGH								
Asda, The Causeway, Billingham	% £m	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	11.7% £6.18	2.6% £6.18
Tesco, Leeholme Road, Billingham	% £m	0.0% £0.00	0.0% £0.00	2.2% £0.18	0.1% £0.18	0.0% £0.00	30.8% £16.25	7.0% £16.43
Aldi, Castle Dene Centre, Bede Way, Peterlee	% £m	0.0% £0.00	0.0% £0.00	2.1% £0.17	0.1% £0.17	9.3% £5.57	0.0% £0.00	2.4% £5.73
Asda, Surtrees Road, Peterlee	% £m	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	39.7% £23.82	0.0% £0.00	10.1% £23.82
Sainsbury's, Salters Lane, Sedgfield	% £m	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	5.1% £3.05	1.0% £0.52	1.5% £3.57
Asda, Portrack Lane, Stockton-on-Tees	% £m	0.0% £0.00	0.5% £0.27	0.0% £0.00	0.2% £0.27	0.0% £0.00	20.2% £10.66	4.6% £10.94
Tesco Extra, Durham Road, Stockton-On-Tees	% £m	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.9% £0.51	8.7% £4.61	2.2% £5.12
Other, Outside Hartlepool Borough	% £m	0.0% £0.00	0.5% £0.27	0.0% £0.00	0.2% £0.27	18.2% £10.92	19.2% £10.12	9.1% £21.32
OUTSIDE HARTLEPOOL BOROUGH TOTAL	% £m	0.0% £0.00	1.1% £0.55	4.2% £0.34	0.7% £0.89	73.0% £43.87	91.6% £48.34	39.6% £93.10
OVERALL TOTAL	% £m	100.0% £62.87	100.0% £51.53	100.0% £8.13	100.0% £122.52	100.0% £60.06	100.0% £52.75	100.0% £235.34

NOTES:
1. The expenditure is calculated by multiplying the total main food expenditure in 2014 for each zone (minus SFT, Table 3B) by the market share.
2. The 'Primary Catchment Area Total' and 'Overall Total' market shares are calculated by dividing the primary catchment/overall area expenditure retained by each destination by the total primary catchment/overall area expenditure.

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TABLE 5 - TOP-UP FOOD MARKET SHARE AND EXPENDITURE 2014

Destination		Zone 1 North Hartlepool	Zone 2 South Hartlepool	Zone 3 Hartlepool Villages	Primary Catchment Area Total	Zone 4 Peterlee	Zone 5 Billingham	Overall Catchment Area Total
HARTLEPOOL BOROUGH								
Hartlepool Town Centre								
Heron Foods, Middleton Grange, Hartlepool Town Centre	% £m	0.0% £0.00	0.0% £0.00	1.9% £0.05	0.1% £0.05	0.0% £0.00	0.0% £0.00	0.1% £0.05
Iceland, Middleton Grange, Hartlepool Town Centre	% £m	1.8% £0.38	0.9% £0.16	0.0% £0.00	1.3% £0.53	0.0% £0.00	0.0% £0.00	0.7% £0.53
M&S, Middleton Grange, Hartlepool Town Centre	% £m	0.0% £0.00	1.8% £0.30	0.0% £0.00	0.7% £0.30	0.9% £0.18	0.0% £0.00	0.6% £0.48
Tesco Express, York Road, Hartlepool Town Centre	% £m	1.6% £0.33	2.8% £0.49	0.0% £0.00	2.0% £0.81	0.0% £0.00	0.0% £0.00	1.0% £0.81
Other, Hartlepool Town Centre	% £m	13.0% £2.72	7.3% £1.25	8.3% £0.23	10.3% £4.20	2.2% £0.45	0.8% £0.14	6.1% £4.78
Hartlepool Town Centre Total	% £m	16.4% £3.43	12.7% £2.19	10.2% £0.28	14.4% £5.89	3.1% £0.62	0.8% £0.14	8.5% £6.66
Main Edge-of-Centre Foodstores								
Morrisons, Clarence Road, Hartlepool	% £m	11.2% £2.35	8.0% £1.38	9.3% £0.25	9.7% £3.98	1.3% £0.26	0.0% £0.00	5.4% £4.23
Main Edge-of-Centre Foodstores Total	% £m	11.2% £2.35	8.0% £1.38	9.3% £0.25	9.7% £3.98	1.3% £0.26	0.0% £0.00	5.4% £4.23
Main Out-of-Centre Foodstores								
Aldi, Dunston Road, Hartlepool	% £m	15.4% £3.22	0.9% £0.16	16.2% £0.44	9.3% £3.81	0.0% £0.00	0.0% £0.00	4.9% £3.81
Aldi, Tees Bay Retail Park, Hartlepool	% £m	2.6% £0.55	11.0% £1.89	7.2% £0.20	6.4% £2.63	0.0% £0.00	0.0% £0.00	3.4% £2.63
Asda, Marina Way, Hartlepool	% £m	18.4% £3.87	6.5% £1.12	4.0% £0.11	12.5% £5.10	1.3% £0.26	1.1% £0.19	7.1% £5.55
Farmfoods, Catcote Road, Hartlepool	% £m	0.0% £0.00	6.6% £1.13	0.0% £0.00	2.8% £1.13	0.0% £0.00	0.0% £0.00	1.4% £1.13
Lidl, Jesmond Gardens, Hartlepool	% £m	1.8% £0.38	0.0% £0.00	5.3% £0.14	1.3% £0.52	0.0% £0.00	1.1% £0.19	0.9% £0.71
Sainsburys Local, Station Lane, Seaton Carew	% £m	0.0% £0.00	7.9% £1.36	0.0% £0.00	3.3% £1.36	0.0% £0.00	0.0% £0.00	1.7% £1.36
Tesco Extra, Belle Vue Way, Hartlepool	% £m	4.8% £1.01	11.0% £1.90	2.5% £0.07	7.3% £2.97	0.0% £0.00	0.0% £0.00	3.8% £2.97
Main Out-of-Centre Foodstores Total	% £m	43.0% £9.02	43.9% £7.55	35.3% £0.96	42.9% £17.52	1.3% £0.26	2.2% £0.38	23.1% £18.16
Local Centres								
Brierton Lane Local Centre	% £m	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Brus Corner Local Centre	% £m	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Catcote Road Local Centre	% £m	1.3% £0.27	4.7% £0.82	0.0% £0.00	2.7% £1.08	0.0% £0.00	0.0% £0.00	1.4% £1.08
Chatham Road - Rabby Road Local Centre	% £m	1.6% £0.33	0.0% £0.00	0.0% £0.00	0.8% £0.33	0.0% £0.00	0.0% £0.00	0.4% £0.33
Elizabeth Way Local Centre	% £m	0.0% £0.00	4.3% £0.74	0.0% £0.00	1.8% £0.74	0.0% £0.00	0.0% £0.00	0.9% £0.74
Fens Local Centre	% £m	0.0% £0.00	11.7% £2.00	1.9% £0.05	5.0% £2.05	0.0% £0.00	0.0% £0.00	2.6% £2.05
Jutland Road Local Centre	% £m	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
King Oswy Drive Local Centre	% £m	2.3% £0.49	0.0% £0.00	0.0% £0.00	1.2% £0.49	0.0% £0.00	0.0% £0.00	0.6% £0.49
Sainsbury's, Middle Warren Local Centre	% £m	3.6% £0.75	2.4% £0.41	30.6% £0.83	4.9% £2.00	1.3% £0.26	0.0% £0.00	2.9% £2.25
Other, Middle Warren Local Centre	% £m	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Murray Street Local Centre	% £m	2.8% £0.59	0.0% £0.00	7.3% £0.20	1.9% £0.79	0.0% £0.00	0.0% £0.00	1.0% £0.79
Northgate Local Centre	% £m	1.3% £0.27	0.0% £0.00	0.0% £0.00	0.7% £0.27	0.0% £0.00	0.0% £0.00	0.3% £0.27
Northgate/ Durham Street Local Centre	% £m	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Owton Manor East Local Centre	% £m	0.0% £0.00	0.6% £0.11	0.0% £0.00	0.3% £0.11	0.0% £0.00	0.0% £0.00	0.1% £0.11
Owton Manor West Local Centre	% £m	0.0% £0.00	1.5% £0.25	0.0% £0.00	0.6% £0.25	0.0% £0.00	0.0% £0.00	0.3% £0.25
Oxford Road Local Centre	% £m	0.0% £0.00	3.6% £0.61	0.0% £0.00	1.5% £0.61	0.0% £0.00	0.0% £0.00	0.8% £0.61
Raby Road/ Hart Lane Corner Local Centre	% £m	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Stockton Road/ Spring Garden Road Local Centre	% £m	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Wiltshire Way Local Centre	% £m	8.9% £1.87	1.0% £0.16	2.5% £0.07	5.1% £2.10	0.0% £0.00	0.0% £0.00	2.7% £2.10
Wynyard Road Local Centre	% £m	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Local Centres Total	% £m	21.8% £4.57	29.8% £5.11	42.3% £1.15	26.5% £10.83	1.3% £0.26	0.0% £0.00	14.1% £11.08
Other, Hartlepool Borough								
Other, Hartlepool Borough	% £m	4.3% £0.89	4.7% £0.81	0.0% £0.00	4.2% £1.70	0.0% £0.00	1.2% £0.20	2.4% £1.90
Other, Hartlepool Borough Total	% £m	4.3% £0.89	4.7% £0.81	0.0% £0.00	4.2% £1.70	0.0% £0.00	1.2% £0.20	2.4% £1.90
HARTLEPOOL BOROUGH TOTAL	% £m	96.6% £20.25	99.2% £17.03	97.1% £2.63	97.7% £39.91	7.0% £1.39	4.1% £0.73	53.6% £42.03
OUTSIDE HARTLEPOOL BOROUGH								
Asda, The Causeway, Billingham	% £m	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	15.1% £2.66	3.4% £2.66
Tesco, Leeholme Road, Billingham	% £m	0.0% £0.00	0.0% £0.00	2.9% £0.08	0.2% £0.08	0.0% £0.00	9.6% £1.69	2.3% £1.77
Aldi, Castle Dene Centre, Bede Way, Peterlee	% £m	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	9.1% £1.82	0.0% £0.00	2.3% £1.82
Asda, Surtrees Road, Peterlee	% £m	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	15.7% £3.14	0.0% £0.00	4.0% £3.14
Sainsbury's, Salters Lane, Sedgfield	% £m	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	1.3% £0.26	0.0% £0.00	0.3% £0.26
Asda, Portrack Lane, Stockton-on-Tees	% £m	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	3.1% £0.55	0.7% £0.55
Tesco Extra, Durham Road, Stockton-On-Tees	% £m	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Other, Outside Hartlepool Borough	% £m	3.4% £0.70	0.8% £0.15	0.0% £0.00	2.1% £0.85	67.0% £13.42	68.0% £11.95	33.4% £26.22
OUTSIDE HARTLEPOOL BOROUGH TOTAL	% £m	3.4% £0.70	0.8% £0.15	2.9% £0.08	2.3% £0.93	93.0% £18.63	95.9% £16.86	46.4% £36.41
OVERALL TOTAL	% £m	100.0% £20.96	100.0% £17.18	100.0% £2.71	100.0% £40.84	100.0% £20.02	100.0% £17.58	100.0% £78.45

NOTES:

1. The expenditure is calculated by multiplying the total top up food expenditure in 2014 for each zone (minus SFT, Table 3C) by the market share.
2. The 'Primary Catchment Area Total' and 'Overall Total' market shares are calculated by dividing the primary catchment/overall area expenditure retained by each destination by the total primary catchment/overall area expenditure.

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TABLE 6 - OVERALL CONVENIENCE FOOD MARKET SHARE AND EXPENDITURE 2014

Destination		Zone 1 North Hartlepool	Zone 2 South Hartlepool	Zone 3 Hartlepool Villages	Primary Catchment Area Total	Zone 4 Peterlee	Zone 5 Billingham	Overall Catchment Area Total
HARTLEPOOL BOROUGH								
Hartlepool Town Centre								
Heron Foods, Middleton Grange, Hartlepool Town Centre	% £m	0.4% £0.33	0.0% £0.00	0.5% £0.05	0.2% £0.38	0.0% £0.00	0.0% £0.00	0.1% £0.38
Iceland, Middleton Grange, Hartlepool Town Centre	% £m	1.4% £1.16	0.8% £0.57	0.0% £0.00	1.1% £1.73	1.0% £0.80	0.0% £0.00	0.8% £2.54
M&S, Middleton Grange, Hartlepool Town Centre	% £m	1.4% £1.17	1.7% £1.15	1.1% £0.12	1.5% £2.44	0.2% £0.18	0.0% £0.00	0.8% £2.62
Tesco Express, York Road, Hartlepool Town Centre	% £m	0.4% £0.33	0.7% £0.49	0.0% £0.00	0.5% £0.81	0.0% £0.00	0.0% £0.00	0.3% £0.81
Other, Hartlepool Town Centre	% £m	3.6% £3.06	1.8% £1.25	2.1% £0.23	2.8% £4.53	0.6% £0.45	0.7% £0.50	1.7% £5.47
Hartlepool Town Centre Total	% £m	7.2% £6.05	5.0% £3.46	3.6% £0.39	6.1% £9.90	1.8% £1.43	0.7% £0.50	3.8% £11.83
Main Edge-of-Centre Foodstores								
Morrisons, Clarence Road, Hartlepool	% £m	15.0% £12.56	11.2% £7.72	9.7% £1.05	13.1% £21.33	5.4% £4.36	1.6% £1.12	8.5% £26.80
Main Edge-of-Centre Foodstores Total	% £m	15.0% £12.56	11.2% £7.72	9.7% £1.05	13.1% £21.33	5.4% £4.36	1.6% £1.12	8.5% £26.80
Main Out-of-Centre Foodstores								
Aldi, Dunston Road, Hartlepool	% £m	11.5% £9.67	1.4% £0.99	19.1% £2.07	7.8% £12.73	1.0% £0.80	0.0% £0.00	4.3% £13.53
Aldi, Tees Bay Retail Park, Hartlepool	% £m	1.8% £1.48	12.6% £8.64	1.8% £0.20	6.3% £10.32	0.0% £0.00	0.5% £0.36	3.4% £10.68
Asda, Marina Way, Hartlepool	% £m	44.2% £37.05	21.9% £15.08	33.7% £3.65	34.1% £55.78	13.4% £10.74	3.2% £2.28	21.9% £68.81
Farmfoods, Catcote Road, Hartlepool	% £m	0.5% £0.45	2.0% £1.40	1.1% £0.12	1.2% £1.97	0.0% £0.00	0.0% £0.00	0.6% £1.97
Lidl, Jesmond Gardens, Hartlepool	% £m	1.6% £1.34	0.5% £0.37	1.3% £0.14	1.1% £1.85	0.0% £0.00	0.3% £0.19	0.7% £2.04
Sainsburys Local, Station Lane, Seaton Carew	% £m	0.0% £0.00	2.0% £1.36	0.0% £0.00	0.8% £1.36	0.0% £0.00	0.0% £0.00	0.4% £1.36
Tesco Extra, Belle Vue Way, Hartlepool	% £m	10.4% £8.72	31.2% £21.47	10.3% £1.12	19.2% £31.31	0.0% £0.00	0.0% £0.00	10.0% £31.31
Main Out-of-Centre Foodstores Total	% £m	70.0% £58.71	71.8% £49.31	67.4% £7.30	70.6% £115.32	14.4% £11.55	4.0% £2.83	41.3% £129.69
Local Centres								
Brierton Lane Local Centre	% £m	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Brus Corner Local Centre	% £m	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Catcote Road Local Centre	% £m	0.3% £0.27	1.2% £0.82	0.0% £0.00	0.7% £1.08	0.0% £0.00	0.0% £0.00	0.3% £1.08
Chatham Road - Raby Road Local Centre	% £m	0.4% £0.33	0.0% £0.00	0.0% £0.00	0.2% £0.33	0.0% £0.00	0.0% £0.00	0.1% £0.33
Elizabeth Way Local Centre	% £m	0.0% £0.00	1.1% £0.74	0.0% £0.00	0.5% £0.74	0.0% £0.00	0.0% £0.00	0.2% £0.74
Fens Local Centre	% £m	0.0% £0.00	4.5% £3.07	0.5% £0.05	1.9% £3.12	0.0% £0.00	0.0% £0.00	1.0% £3.12
Jutland Road Local Centre	% £m	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
King Oswy Drive Local Centre	% £m	0.6% £0.49	0.0% £0.00	0.0% £0.00	0.3% £0.49	0.0% £0.00	0.0% £0.00	0.2% £0.49
Sainsbury's, Middle Warren Local Centre	% £m	0.9% £0.75	0.6% £0.41	11.0% £1.19	1.4% £2.36	0.3% £0.26	0.7% £0.48	1.0% £3.10
Other, Middle Warren Local Centre	% £m	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Murray Street Local Centre	% £m	0.7% £0.59	0.0% £0.00	3.4% £0.37	0.6% £0.96	0.0% £0.00	0.0% £0.00	0.3% £0.96
Northgate Local Centre	% £m	0.3% £0.27	0.0% £0.00	0.0% £0.00	0.2% £0.27	0.0% £0.00	0.0% £0.00	0.1% £0.27
Northgate/ Durham Street Local Centre	% £m	0.4% £0.33	0.0% £0.00	0.0% £0.00	0.2% £0.33	0.0% £0.00	0.0% £0.00	0.1% £0.33
Owton Manor East Local Centre	% £m	0.0% £0.00	0.2% £0.11	0.0% £0.00	0.1% £0.11	0.0% £0.00	0.0% £0.00	0.0% £0.11
Owton Manor West Local Centre	% £m	0.0% £0.00	0.4% £0.25	0.0% £0.00	0.2% £0.25	0.0% £0.00	0.0% £0.00	0.1% £0.25
Oxford Road Local Centre	% £m	0.0% £0.00	1.3% £0.89	0.0% £0.00	0.5% £0.89	0.0% £0.00	0.0% £0.00	0.3% £0.89
Raby Road/ Hart Lane Corner Local Centre	% £m	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Stockton Road/ Spring Garden Road Local Centre	% £m	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Wiltshire Way Local Centre	% £m	2.2% £1.87	0.2% £0.16	0.6% £0.07	1.3% £2.10	0.0% £0.00	0.0% £0.00	0.7% £2.10
Wynyard Road Local Centre	% £m	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Local Centres Total	% £m	5.8% £4.90	9.4% £6.45	15.5% £1.68	8.0% £13.03	0.3% £0.26	0.7% £0.48	4.4% £13.77
Other, Hartlepool Borough								
Other, Hartlepool Borough	% £m	1.1% £0.89	1.6% £1.08	0.0% £0.00	1.2% £1.97	0.0% £0.00	0.3% £0.20	0.7% £2.17
Other, Hartlepool Borough Total	% £m	1.1% £0.89	1.6% £1.08	0.0% £0.00	1.2% £1.97	0.0% £0.00	0.3% £0.20	0.7% £2.17
HARTLEPOOL BOROUGH TOTAL	% £m	99.2% £83.12	99.0% £68.02	96.1% £10.41	98.9% £161.55	22.0% £17.58	7.3% £5.14	58.7% £184.27
OUTSIDE HARTLEPOOL BOROUGH								
Asda, The Causeway, Billingham	% £m	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	12.6% £8.84	2.8% £8.84
Tesco, Leeholme Road, Billingham	% £m	0.0% £0.00	0.0% £0.00	2.3% £0.25	0.2% £0.25	0.0% £0.00	25.5% £17.95	5.8% £18.20
Aldi, Castle Dene Centre, Bede Way, Peterlee	% £m	0.0% £0.00	0.0% £0.00	1.5% £0.17	0.1% £0.17	9.2% £7.38	0.0% £0.00	2.4% £7.55
Asda, Surtrees Road, Peterlee	% £m	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	33.7% £26.96	0.0% £0.00	8.6% £26.96
Sainsbury's, Salters Lane, Sedgfield	% £m	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	4.1% £3.31	0.7% £0.52	1.2% £3.83
Asda, Portrack Lane, Stockton-on-Tees	% £m	0.0% £0.00	0.4% £0.27	0.0% £0.00	0.2% £0.27	0.0% £0.00	15.9% £11.21	3.7% £11.48
Tesco Extra, Durham Road, Stockton-On-Tees	% £m	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.6% £0.51	6.6% £4.61	1.6% £5.12
Other, Outside Hartlepool Borough	% £m	0.8% £0.70	0.6% £0.42	0.0% £0.00	0.7% £1.12	30.4% £24.34	31.4% £22.08	15.1% £47.54
OUTSIDE HARTLEPOOL BOROUGH TOTAL	% £m	0.8% £0.70	1.0% £0.69	3.9% £0.42	1.1% £1.82	78.0% £62.50	92.7% £65.20	41.3% £129.51
OVERALL TOTAL	% £m	100.0% £83.82	100.0% £68.71	100.0% £10.83	100.0% £163.37	100.0% £80.08	100.0% £70.34	100.0% £313.78

NOTES:
1. The total convenience food expenditure is calculated as the sum of the main food (Table 4) and top up expenditure (Table 5).
2. The convenience food market shares are calculated by dividing the expenditure retained by each destination by the total convenience food expenditure.

TABLE 7 - MAIN FOODSTORES PERFORMANCE ANALYSIS 2014

Destination	Floorspace (Net) (sqm)	Net Convenience Ratio (%)	Net Convenience Floorspace (sqm)	Benchmark' Sales Density (£/m2)	'Benchmark' Store Turnover (£)	Survey-derived Turnover (£)	Trading Performance
HARTLEPOOL BOROUGH							
Hartlepool Town Centre							
Iceland, Middleton Grange, Hartlepool Town Centre	347	97.1%	337	£7,313	£2.47	£2.54	£0.07
M&S, Middleton Grange, Hartlepool Town Centre	650	95.4%	620	£11,119	£6.90	£2.62	-£4.28
Tesco Express, York Road, Hartlepool Town Centre	253	90.0%	228	£11,619	£2.64	£0.81	-£1.83
Other, Hartlepool Town Centre	4,352	100.0%	4,352	-	-	£5.47	-
Hartlepool Town Centre Total	5,603	-	5,537	-	£12.01	£11.44	-£6.04
Main Edge/Out-of-Centre Foodstores							
Aldi, Dunston Road, Hartlepool	697	72.2%	503	£9,704	£4.88	£13.53	£8.65
Aldi, Tees Bay Retail Park, Hartlepool	650	72.2%	470	£9,704	£4.56	£10.68	£6.12
Asda, Marina Way, Hartlepool	5,743	67.0%	3,847	£13,350	£51.36	£68.81	£17.45
Lidl, Jesmond Gardens, Hartlepool	800	72.8%	582	£3,524	£2.05	£2.04	-£0.01
Morrisons, Clarence Road, Hartlepool	3,728	80.0%	2,982	£12,857	£38.35	£26.80	-£11.54
Tesco Extra, Belle Vue Way, Hartlepool	4,842	65.0%	3,147	£11,619	£36.57	£31.31	-£5.26
Main Edge/Out of Centres Foodstores Total	15,112	-	11,532	-	£137.76	£153.17	£15.41
Local Centres							
Sainsbury's, Middle Warren Local Centre	594	72.2%	429			£3.10	
Other, Local Centres						£10.67	
Local Centres Total	7,763	100.0%	7,763	-	-	£13.77	-

NOTES:

1. Net floorspace sourced from IGD for all destinations except from other, Hartlepool town centre, Lidl at Jesmond Gardens and Sainsburys at Middlewarren. Net floorspace of other, Hartlepool town centre calculated from the gross floorspace sourced from Experian Goad data, assuming a net to gross ratio of 80%. Net floorspace of Lidl at Jesmond Gardens and Sainsbury's at Middlewarren sourced from the respective planning application material for the stores.

2. Floorspace Mix (Convenience / Comparison) based on Verdict and GVA judgement.

TABLE 8A - HARTLEPOOL TOWN CENTRE CONVENIENCE CAPACITY

Convenience Goods				
	2014	2019	2024	2029
Overall Catchment Area Total Expenditure (Zones 1-5)	£313.8m	£328.4m	£348.0m	£365.2m
Hartlepool Town Centre Retention Level	12.3%	12.3%	12.3%	12.3%
Retained Expenditure	£38.6m	£40.4m	£42.8m	£45.0m
Turnover of Stores in Hartlepool Town Centre	£38.6m	£38.4m	£38.5m	£38.7m
Residual Capacity	£0.0m	£2.1m	£4.3m	£6.3m
Sales Density (Mainstream Operator)	£12,502/sq.m	£12,415/sq.m	£12,464/sq.m	£12,527/sq.m
Capacity for New Floorspace (sq.m net)	0	166	348	499
Capacity for New Floorspace (sq.m gross)	0	238	497	713

TABLE 8B - HARTLEPOOL BOROUGH CONVENIENCE CAPACITY

Convenience Goods				
	2014	2019	2024	2029
Overall Catchment Area Total Expenditure (Zones 1-5)	£313.8m	£328.4m	£348.0m	£365.2m
Hartlepool Borough Retention Level	58.7%	58.7%	58.7%	58.7%
Retained Expenditure	£184.3m	£192.8m	£204.4m	£214.5m
Turnover of Stores in Hartlepool Borough	£184.3m	£183.0m	£183.7m	£184.6m
Residual Capacity	£0.0m	£9.8m	£20.7m	£29.8m
Sales Density (Mainstream Operator)	£12,502/sq.m	£12,415/sq.m	£12,464/sq.m	£12,527/sq.m
Capacity for New Floorspace (sq.m net)	0	793	1,658	2,380
Capacity for New Floorspace (sq.m gross)	0	1,133	2,369	3,400

NOTES:

- Overall Catchment Area Total Expenditure - the total convenience expenditure of residents of Zones 1-5, excluding SFT, as set out in Table 3A.
- Retention Level - the total market share of stores in Hartlepool town centre (including the edge-of-centre Morrisons store)/Borough, drawn from the overall catchment area. The market share of Hartlepool town centre/Borough remains constant at 12.3%/58.7% in each of the forecast years in this scenario.
- Retained Expenditure - the product of the total overall catchment area expenditure and the retention level of Hartlepool town centre/Borough.
- Turnover of stores - the turnover of stores in Hartlepool town centre/Borough that is derived from the overall catchment area expenditure. The turnover of stores is allowed to grow between 2014 and 2029 to account for sales density growth at the rates set out below (source: Experian Retail Planner 11 (October 2013) / GVA Research):

Year	Convenience Sales Density Growth per Annum (%)
2014-2019	-0.1%
2019-2024	0.1%
2024-2029	0.1%

- Residual capacity - the total retained expenditure minus the turnover of stores.
- Sales Density (Mainstream Operator) - assumed sales density for converting the residual capacity (£m) to a floorspace capacity (sqm). The sales density of £12,502/sq.m in 2014 is the average sales density of the 'Big 4' supermarket operators (Tesco, Asda, Sainsbury's and Morrisons) and is allowed to grow at the sales density rates set out above.
- Capacity for New Floorspace - the residual capacity divided by the sales density estimate. 70% gross to net ratio assumed.

APPENDIX 3

Hartlepool Borough Council Comparison Assessment (2014)

TABLE 1A - SURVEY AREA POPULATION PROJECTIONS

Year		Zone 1 North Hartlepool Persons	Zone 2 South Hartlepool Persons	Zone 3 Hartlepool Villages Persons	Primary Catchment Area Total Persons	Zone 4 Peterlee Persons	Zone 5 Billingham Persons	Overall Total Persons
Population Projections	2012	47,611	38,738	5,302	91,651	46,605	39,052	177,308
	2014	47,975	39,022	5,340	92,337	47,186	39,665	179,188
	2019	48,928	39,793	5,440	94,161	48,575	41,172	183,908
	2024	49,792	40,466	5,537	95,795	49,828	42,535	188,158
	2029	50,357	40,891	5,605	96,853	50,823	43,440	191,116

TABLE 1B - SURVEY AREA POPULATION GROWTH

Period		Zone 1 North Hartlepool	Zone 2 South Hartlepool	Zone 3 Hartlepool Villages	Primary Catchment Area Total	Zone 4 Peterlee	Zone 5 Billingham	Overall Total
Population Growth (Persons)	2012 - 2014	364	284	38	686	581	613	1,880
	2014-2019	953	771	100	1,824	1,389	1,507	4,720
	2014-2024	1,817	1,444	197	3,458	2,642	2,870	8,970
	2014-2029	2,382	1,869	265	4,516	3,637	3,775	11,928
Population Growth (%)	2012 - 2014	0.8%	0.7%	0.7%	0.7%	1.2%	1.6%	1.1%
	2014-2019	2.0%	2.0%	1.9%	2.0%	2.9%	3.8%	2.6%
	2014-2024	3.8%	3.7%	3.7%	3.7%	5.6%	7.2%	5.0%
	2014-2029	5.0%	4.8%	5.0%	4.9%	7.7%	9.5%	6.7%

NOTES:

1. ONS based population estimates and projections were sourced from Experian via Micromarketer Online.

Hartlepool Borough Council

Comparison Assessment (2014)

TABLE 2 - COMPARISON EXPENDITURE PER CAPITA FORECASTS

		Zone 1 North Hartlepool £ per person	Zone 2 South Hartlepool £ per person	Zone 3 Hartlepool Villages £ per person	Zone 4 Peterlee £ per person	Zone 5 Billingham £ per person
Expenditure (£ per person)	2012	£2,657	£2,613	£3,717	£2,423	£2,877
	2014	£2,805	£2,759	£3,924	£2,558	£3,037
	2019	£3,239	£3,186	£4,532	£2,954	£3,507
	2024	£3,744	£3,682	£5,238	£3,415	£4,054
	2029	£4,311	£4,240	£6,031	£3,932	£4,668
Expenditure minus SFT (£ per person)	2012	£2,378	£2,339	£3,327	£2,169	£2,575
	2014	£2,480	£2,439	£3,469	£2,261	£2,685
	2019	£2,750	£2,705	£3,847	£2,508	£2,978
	2024	£3,149	£3,097	£4,405	£2,872	£3,410
	2029	£3,621	£3,561	£5,066	£3,302	£3,921

NOTES:

1. 2012 comparison expenditure per person data were sourced from Experian via Micromarketer Online and are in 2012 prices.
2. The 2012 comparison expenditure per person data were projected forward to the base year and forecast years using the growth forecasts provided by Experian in Retail Planner Briefing Note 11 (October 2013) as summarised below:

Year	Comparison Expenditure Growth per Annum (%)
2012-2014	2.7%
2014-2019	2.9%
2019-2024	2.9%
2024-2029	2.9%

3. Deductions for spending on Special Forms of Trading (SFT) are based on the estimates provided by Experian in Retail Planner Briefing Note 11 (October 2013) as summarised below:

Year	Comparison Expenditure Spent on SFT (%)
2012	10.5%
2014	11.6%
2019	15.1%
2024	15.9%
2029	16.0%

Hartlepool Borough Council Comparison Assessment (2014)

TABLE 3 - TOTAL COMPARISON EXPENDITURE AND EXPENDITURE GROWTH (MINUS SFT)

	Zone 1 North Hartlepool £m	Zone 2 South Hartlepool £m	Zone 3 Hartlepool Villages £m	Primary Catchment Area Total £m	Zone 4 Peterlee £m	Zone 5 Billingham £m	Overall Total £m
Total Expenditure (minus SFT)							
2012	£113.22	£90.59	£17.64	£221.45	£101.07	£100.56	£423.07
2014	£118.96	£95.16	£18.52	£232.65	£106.70	£106.50	£445.85
2019	£134.56	£107.62	£20.93	£263.11	£121.82	£122.60	£507.54
2024	£156.79	£125.31	£24.39	£306.50	£143.09	£145.03	£594.61
2029	£182.36	£145.63	£28.40	£356.39	£167.84	£170.34	£694.57
Total Expenditure (minus SFT) Growth							
2012 - 2014	£5.74	£4.57	£0.89	£11.20	£5.64	£5.95	£22.78
2014-2019	£15.59	£12.46	£2.40	£30.46	£15.12	£16.10	£61.69
2014-2024	£37.83	£30.15	£5.87	£73.85	£36.38	£38.53	£148.76
2014-2029	£63.40	£50.47	£9.87	£123.74	£61.14	£63.84	£248.72

NOTES:

1. The comparison goods expenditure is calculated by multiplying the population data (Table 1) by the comparison goods expenditure per person (minus SFT, Table 2).

TABLE 4 - OVERALL COMPARISON GOODS MARKET SHARE AND EXPENDITURE 2014

Destination	Zone 1 North Hartlepool	Zone 2 South Hartlepool	Zone 3 Hartlepool Villages	Primary Catchment Area Total	Zone 4 Peterlee	Zone 5 Billingham	Survey Area Total
HARTLEPOOL BOROUGH							
Hartlepool Town Centre							
Hartlepool Town Centre	38.7% £46.08	40.2% £38.29	33.2% £6.15	38.9% £90.52	25.6% £27.35	3.7% £3.98	27.3% £121.85
Hartlepool Town Centre Total	38.7% £46.08	40.2% £38.29	33.2% £6.15	38.9% £90.52	25.6% £27.35	3.7% £3.98	27.3% £121.85
Hartlepool Retail Parks							
Anchor Retail Park, Marina Way, Hartlepool	12.1% £14.37	9.0% £8.60	5.5% £1.02	10.3% £23.98	4.5% £4.83	0.2% £0.21	6.5% £29.02
High Point Retail Park, Marina Way, Hartlepool	0.8% £0.91	2.7% £2.58	3.8% £0.71	1.8% £4.20	0.0% £0.05	0.0% £0.03	1.0% £4.28
Tees Bay Retail Park, Hartlepool	4.6% £5.51	6.4% £6.07	3.9% £0.73	5.3% £12.32	2.1% £2.28	0.4% £0.39	3.4% £14.99
Hartlepool Retail Parks Total	17.5% £20.79	18.1% £17.25	13.3% £2.46	17.4% £40.50	6.7% £7.16	0.6% £0.63	10.8% £48.29
Main Edge/Out-of-Centre Foodstores							
Asda, Marina Way, Hartlepool	9.7% £11.51	3.9% £3.74	5.4% £1.00	7.0% £16.25	2.5% £2.63	1.4% £1.49	4.6% £20.36
Morrisons, Clarence Road, Hartlepool	0.3% £0.38	0.2% £0.18	0.0% £0.00	0.2% £0.56	0.1% £0.10	0.0% £0.00	0.1% £0.66
Tesco Extra, Belle Vue Way, Hartlepool	1.8% £2.12	3.8% £3.65	0.5% £0.10	2.5% £5.87	0.1% £0.10	0.0% £0.00	1.3% £5.97
Main Edge/Out-of-Centre Foodstores Total	11.8% £14.01	8.0% £7.57	5.9% £1.10	9.7% £22.67	2.6% £2.83	1.4% £1.49	6.1% £26.99
Local Centres Total							
Local Centres	0.7% £0.79	1.8% £1.76	0.1% £0.01	1.1% £2.56	0.1% £0.11	0.0% £0.00	0.6% £2.67
Local Centres Total	0.7% £0.79	1.8% £1.76	0.1% £0.01	1.1% £2.56	0.1% £0.11	0.0% £0.00	0.6% £2.67
Other, Hartlepool Borough							
Other, Hartlepool Borough	0.0% £0.03	0.5% £0.46	0.0% £0.00	0.2% £0.49	0.0% £0.00	0.1% £0.07	0.6% £1.05
Other, Hartlepool Borough Total	0.0% £0.03	0.5% £0.46	0.0% £0.00	0.2% £0.49	0.0% £0.00	0.1% £0.07	0.6% £1.05
HARTLEPOOL BOROUGH TOTAL	68.7% £81.70	68.6% £65.33	52.5% £9.72	67.4% £156.75	35.1% £37.44	5.8% £6.16	44.9% £200.35
OUTSIDE HARTLEPOOL BOROUGH							
Billingham Town Centre	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	18.5% £19.66	4.4% £19.66
Dalton Park Outlet Shopping Centre, Murton	2.1% £2.46	1.7% £1.57	1.3% £0.24	1.8% £4.27	3.2% £3.38	0.9% £0.96	1.9% £8.62
Durham City Centre	0.4% £0.48	0.0% £0.00	1.3% £0.24	0.3% £0.73	2.5% £2.66	0.1% £0.08	0.8% £3.47
Dragonville / Dragon Lane/ Durham City Retail Parks, Durham	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	2.1% £2.23	0.0% £0.00	0.5% £2.23
Metro Centre / Retail Parks, Gateshead	2.9% £3.48	4.4% £4.15	8.5% £1.57	4.0% £9.20	4.0% £4.29	2.2% £2.34	3.6% £15.83
Middlesbrough Town Centre	6.0% £7.16	7.8% £7.44	15.3% £2.83	7.5% £17.43	2.3% £2.45	21.2% £22.63	9.5% £42.50
Newcastle City Centre	3.3% £3.93	0.6% £0.57	5.2% £0.96	2.3% £5.45	3.2% £3.44	1.4% £1.53	2.3% £10.43
Peterlee Town Centre	0.0% £0.00	0.0% £0.00	0.3% £0.06	0.0% £0.06	24.2% £25.79	0.0% £0.00	5.8% £25.85
Sunderland City Centre	0.9% £1.09	0.4% £0.40	0.4% £0.07	0.7% £1.56	4.9% £5.25	0.0% £0.00	1.5% £6.81
Stockton-on-Tees Town Centre	0.8% £0.94	1.2% £1.10	1.0% £0.18	1.0% £2.22	0.2% £0.18	4.8% £5.07	1.7% £7.46
B&Q, Portrack Lane, Stockton-on-Tees	0.1% £0.08	0.1% £0.08	0.5% £0.09	0.1% £0.25	0.2% £0.21	2.7% £2.82	0.7% £3.29
Portrack Lane Retail Parks, Stockton-on-Tees	4.2% £5.01	3.8% £3.61	5.3% £0.98	4.1% £9.60	3.1% £3.35	12.5% £13.34	5.9% £26.29
Teesside Shopping Park, Stockton-on-Tees	8.2% £9.72	9.0% £8.58	6.2% £1.15	8.4% £19.44	8.6% £9.21	25.1% £26.74	12.4% £55.39
Other, Outside Hartlepool Borough	2.5% £2.93	2.5% £2.35	2.3% £0.42	2.5% £5.70	6.4% £6.80	4.9% £5.17	4.0% £17.67
OUTSIDE HARTLEPOOL BOROUGH TOTAL	31.3% £37.27	31.4% £29.83	47.5% £8.80	32.6% £75.91	64.9% £69.26	94.2% £100.34	55.1% £245.50
OVERALL TOTAL	100.0% £118.96	100.0% £95.16	100.0% £18.52	100.0% £232.65	100.0% £106.70	100.0% £106.50	100.0% £445.85

NOTES:

1. The overall comparison goods expenditure is calculated as the sum of the expenditure on each of the comparison goods sub-categories (Tables 7 - 16).
2. The overall comparison goods market shares are calculated by dividing the expenditure retained by each destination by the total overall comparison goods expenditure.

Hartlepool Borough Council

Comparison Assessment (2014)

TABLE 5A - CATEGORIES OF COMPARISON GOODS EXPENDITURE PER PERSON 2012

Comparison Goods Category	Zone 1 North Hartlepool £ per person	Zone 2 South Hartlepool £ per person	Zone 3 Hartlepool Villages £ per person	Primary Catchment Area Average £ per person	Zone 4 Peterlee £ per person	Zone 5 Billingham £ per person	Overall Average £ per person
Clothing, Shoes & Accessories	£858	£850	£1,136	£948	£774	£919	£907
Furniture, Carpets & Household Textiles	£329	£314	£472	£372	£312	£345	£354
DIY & Decorating Goods	£63	£60	£87	£70	£61	£69	£68
Major Household Appliances	£45	£44	£60	£50	£39	£44	£46
Electrical Goods	£224	£219	£355	£266	£202	£249	£250
Household & Personal Goods	£285	£294	£432	£337	£238	£317	£313
Books, CDs & DVDs	£147	£143	£222	£171	£134	£167	£163
Chemist Goods	£324	£313	£450	£362	£297	£360	£349
Recreational Goods	£315	£306	£396	£339	£302	£324	£329
Gardening & Pet Products	£67	£70	£107	£81	£64	£83	£78
Total Comparison Spend (£)	£2,657	£2,613	£3,717	£2,996	£2,423	£2,877	£2,857

TABLE 5B - CATEGORIES OF COMPARISON GOODS EXPENDITURE WEIGHTINGS

Comparison Goods Category	Zone 1 North Hartlepool %	Zone 2 South Hartlepool %	Zone 3 Hartlepool Villages %	Primary Catchment Area Average %	Zone 4 Peterlee %	Zone 5 Billingham %	Survey Area Average %
Clothing, Shoes & Accessories	32.3%	32.5%	30.6%	31.6%	31.9%	31.9%	31.8%
Furniture, Carpets & Household Textiles	12.4%	12.0%	12.7%	12.4%	12.9%	12.0%	12.4%
DIY & Decorating Goods	2.4%	2.3%	2.3%	2.3%	2.5%	2.4%	2.4%
Major Household Appliances	1.7%	1.7%	1.6%	1.7%	1.6%	1.5%	1.6%
Electrical Goods	8.4%	8.4%	9.6%	8.9%	8.3%	8.7%	8.7%
Household & Personal Goods	10.7%	11.3%	11.6%	11.2%	9.8%	11.0%	11.0%
Books, CDs & DVDs	5.5%	5.5%	6.0%	5.7%	5.5%	5.8%	5.7%
Chemist Goods	12.2%	12.0%	12.1%	12.1%	12.3%	12.5%	12.2%
Recreational Goods	11.9%	11.7%	10.7%	11.3%	12.5%	11.3%	11.5%
Gardening & Pet Products	2.5%	2.7%	2.9%	2.7%	2.6%	2.9%	2.7%
Total Comparison Spend (£)	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

NOTES:

1. 2012 expenditure per person data for each category of comparison goods were sourced from Experian via Micromarketer Online.
2. The categories of comparison goods expenditure weightings are calculated by dividing the 2012 expenditure on each category of comparison goods by the total comparison goods expenditure.

Hartlepool Borough Council
Comparison Assessment (2014)

TABLE 6A - CATEGORIES OF COMPARISON GOODS TOTAL EXPENDITURE (MINUS SFT) 2014

Comparison Goods Category	Zone 1	Zone 2	Zone 3	Primary Catchment Area Total	Zone 4	Zone 5	Overall Total
	North Hartlepool £m	South Hartlepool £m	Hartlepool Villages £m		Peterlee £m	Billingham £m	
Clothing, Shoes & Accessories	£38.42	£30.96	£5.66	£75.03	£34.08	£34.02	£143.13
Furniture, Carpets & Household Textiles	£14.73	£11.44	£2.35	£28.52	£13.74	£12.77	£55.03
DIY & Decorating Goods	£2.82	£2.19	£0.43	£5.44	£2.69	£2.55	£10.68
Major Household Appliances	£2.01	£1.60	£0.30	£3.92	£1.72	£1.63	£7.26
Electrical Goods	£10.03	£7.98	£1.77	£19.77	£8.89	£9.22	£37.89
Household & Personal Goods	£12.76	£10.71	£2.15	£25.62	£10.49	£11.73	£47.84
Books, CDs & DVDs	£6.58	£5.21	£1.11	£12.90	£5.90	£6.18	£24.98
Chemist Goods	£14.51	£11.40	£2.24	£28.15	£13.08	£13.33	£54.55
Recreational Goods	£14.10	£11.14	£1.97	£27.22	£13.30	£11.99	£52.51
Gardening & Pet Products	£3.00	£2.55	£0.53	£6.08	£2.82	£3.07	£11.97
Total Comparison Spend (£)	£118.96	£95.16	£18.52	£232.65	£106.70	£106.50	£445.85

TABLE 6B - CATEGORIES OF COMPARISON GOODS TOTAL EXPENDITURE (MINUS SFT) 2019

Comparison Goods Category	Zone 1	Zone 2	Zone 3	Primary Catchment Area Total	Zone 4	Zone 5	Overall Total
	North Hartlepool £m	South Hartlepool £m	Hartlepool Villages £m		Peterlee £m	Billingham £m	
Clothing, Shoes & Accessories	£43.45	£35.01	£6.40	£84.86	£38.91	£39.16	£162.93
Furniture, Carpets & Household Textiles	£16.66	£12.93	£2.66	£32.25	£15.69	£14.70	£62.64
DIY & Decorating Goods	£3.19	£2.47	£0.49	£6.15	£3.07	£2.94	£12.16
Major Household Appliances	£2.28	£1.81	£0.34	£4.43	£1.96	£1.88	£8.26
Electrical Goods	£11.34	£9.02	£2.00	£22.36	£10.16	£10.61	£43.13
Household & Personal Goods	£14.43	£12.11	£2.43	£28.97	£11.98	£13.51	£54.46
Books, CDs & DVDs	£7.44	£5.89	£1.25	£14.58	£6.74	£7.12	£28.44
Chemist Goods	£16.41	£12.89	£2.53	£31.83	£14.93	£15.34	£62.11
Recreational Goods	£15.95	£12.60	£2.23	£30.79	£15.18	£13.81	£59.78
Gardening & Pet Products	£3.39	£2.88	£0.60	£6.88	£3.22	£3.54	£13.63
Total Comparison Spend (£)	£134.56	£107.62	£20.93	£263.11	£121.82	£122.60	£507.54

TABLE 6C - CATEGORIES OF COMPARISON GOODS TOTAL EXPENDITURE (MINUS SFT) 2024

Comparison Goods Category	Zone 1	Zone 2	Zone 3	Primary Catchment Area Total	Zone 4	Zone 5	Overall Total
	North Hartlepool £m	South Hartlepool £m	Hartlepool Villages £m		Peterlee £m	Billingham £m	
Clothing, Shoes & Accessories	£50.63	£40.76	£7.45	£98.85	£45.70	£46.33	£190.88
Furniture, Carpets & Household Textiles	£19.41	£15.06	£3.10	£37.57	£18.42	£17.39	£73.39
DIY & Decorating Goods	£3.72	£2.88	£0.57	£7.17	£3.60	£3.48	£14.25
Major Household Appliances	£2.66	£2.11	£0.39	£5.16	£2.30	£2.22	£9.68
Electrical Goods	£13.22	£10.50	£2.33	£26.05	£11.93	£12.55	£50.53
Household & Personal Goods	£16.82	£14.10	£2.83	£33.75	£14.07	£15.98	£63.80
Books, CDs & DVDs	£8.67	£6.86	£1.46	£16.99	£7.91	£8.42	£33.32
Chemist Goods	£19.12	£15.01	£2.95	£37.08	£17.54	£18.15	£72.77
Recreational Goods	£18.59	£14.68	£2.60	£35.86	£17.83	£16.33	£70.03
Gardening & Pet Products	£3.95	£3.36	£0.70	£8.01	£3.78	£4.18	£15.98
Total Comparison Spend (£)	£156.79	£125.31	£24.39	£306.50	£143.09	£145.03	£594.61

TABLE 6D - CATEGORIES OF COMPARISON GOODS TOTAL EXPENDITURE (MINUS SFT) 2029

Comparison Goods Category	Zone 1	Zone 2	Zone 3	Primary Catchment Area Total	Zone 4	Zone 5	Overall Total
	North Hartlepool £m	South Hartlepool £m	Hartlepool Villages £m		Peterlee £m	Billingham £m	
Clothing, Shoes & Accessories	£58.89	£47.37	£8.68	£114.94	£53.61	£54.41	£222.96
Furniture, Carpets & Household Textiles	£22.58	£17.50	£3.61	£43.69	£21.61	£20.43	£85.72
DIY & Decorating Goods	£4.32	£3.34	£0.66	£8.33	£4.23	£4.09	£16.64
Major Household Appliances	£3.09	£2.45	£0.46	£6.00	£2.70	£2.61	£11.31
Electrical Goods	£15.37	£12.21	£2.71	£30.29	£13.99	£14.74	£59.03
Household & Personal Goods	£19.56	£16.39	£3.30	£39.25	£16.50	£18.77	£74.51
Books, CDs & DVDs	£10.09	£7.97	£1.70	£19.76	£9.28	£9.89	£38.92
Chemist Goods	£22.24	£17.44	£3.44	£43.12	£20.57	£21.31	£85.01
Recreational Goods	£21.62	£17.05	£3.03	£41.70	£20.92	£19.18	£81.80
Gardening & Pet Products	£4.60	£3.90	£0.82	£9.32	£4.43	£4.91	£18.66
Total Comparison Spend (£)	£182.36	£145.63	£28.40	£356.39	£167.84	£170.34	£694.57

NOTES:

1. The comparison good expenditure on each category of comparison goods is calculated by multiplying the total comparison goods expenditure (Table 3) by the expenditure weighting for each category of comparison goods (Table 5B).

Hartlepool Borough Council
Comparison Assessment (2014)

TABLE 7 - CLOTHING, SHOES AND ACCESSORIES MARKET SHARE AND EXPENDITURE 2014

Destination	Zone 1 North Hartlepool	Zone 2 South Hartlepool	Zone 3 Hartlepool Villages	Primary Catchment Area Total	Zone 4 Peterlee	Zone 5 Billingham	Survey Area Total
HARTLEPOOL BOROUGH							
Hartlepool Town Centre							
Hartlepool Town Centre	38.6% £14.83	41.2% £12.77	25.9% £1.46	38.7% £29.06	34.0% £11.60	6.5% £2.22	30.0% £42.87
Hartlepool Town Centre Total	38.6% £14.83	41.2% £12.77	25.9% £1.46	38.7% £29.06	34.0% £11.60	6.5% £2.22	30.0% £42.87
Hartlepool Retail Parks							
Anchor Retail Park, Marina Way, Hartlepool	1.5% £0.56	2.9% £0.89	0.0% £0.00	1.9% £1.45	3.2% £1.10	0.0% £0.00	1.8% £2.55
High Point Retail Park, Marina Way, Hartlepool	0.0% £0.00	3.3% £1.03	4.2% £0.24	1.7% £1.27	0.0% £0.00	0.0% £0.00	0.9% £1.27
Tees Bay Retail Park, Hartlepool	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Hartlepool Retail Parks Total	1.5% £0.56	6.2% £1.92	4.2% £0.24	3.6% £2.72	3.2% £1.10	0.0% £0.00	2.7% £3.82
Main Edge/Out-of-Centre Foodstores							
Asda, Marina Way, Hartlepool	7.0% £2.71	2.3% £0.71	3.7% £0.21	4.8% £3.63	0.0% £0.00	0.0% £0.00	2.5% £3.63
Morrisons, Clarence Road, Hartlepool	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Tesco Extra, Belle Vue Way, Hartlepool	1.7% £0.66	0.0% £0.00	0.0% £0.00	0.9% £0.66	0.0% £0.00	0.0% £0.00	0.5% £0.66
Main Edge/Out-of-Centre Foodstores Total	8.8% £3.37	2.3% £0.71	3.7% £0.21	5.7% £4.29	0.0% £0.00	0.0% £0.00	3.0% £4.29
Local Centres Total							
Local Centres	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Local Centres Total	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Other, Hartlepool Borough							
Other, Hartlepool Borough	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Other, Hartlepool Borough Total	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
HARTLEPOOL BOROUGH TOTAL	48.8% £18.75	49.8% £15.40	33.8% £1.91	48.1% £36.07	37.3% £12.70	6.5% £2.22	35.6% £50.98
OUTSIDE HARTLEPOOL BOROUGH							
Billingham Town Centre	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	2.2% £0.76	0.5% £0.76
Dalton Park Outlet Shopping Centre, Murton	4.4% £1.69	4.6% £1.42	2.5% £0.14	4.3% £3.26	7.7% £2.62	1.5% £0.51	4.5% £6.38
Durham City Centre	0.0% £0.00	0.0% £0.00	2.5% £0.14	0.2% £0.14	2.6% £0.87	0.0% £0.00	0.7% £1.01
Dragonville / Dragon Lane/ Durham City Retail Parks, Durham	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Metro Centre / Retail Parks, Gateshead	6.1% £2.33	8.9% £2.76	21.7% £1.23	8.4% £6.32	8.7% £2.96	3.2% £1.08	7.2% £10.37
Middlesbrough Town Centre	14.0% £5.36	16.5% £5.10	26.9% £1.53	16.0% £11.98	4.7% £1.61	38.0% £12.92	18.5% £26.51
Newcastle City Centre	7.0% £2.69	0.9% £0.27	6.6% £0.37	4.4% £3.33	7.0% £2.38	2.0% £0.69	4.5% £6.40
Peterlee Town Centre	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	8.5% £2.89	0.0% £0.00	2.0% £2.89
Sunderland City Centre	2.5% £0.98	0.9% £0.29	0.0% £0.00	1.7% £1.26	11.5% £3.92	0.0% £0.00	3.6% £5.18
Stockton-on-Tees Town Centre	2.4% £0.91	2.0% £0.61	1.7% £0.10	2.2% £1.62	0.0% £0.00	7.3% £2.50	2.9% £4.12
B&Q, Portrack Lane, Stockton-on-Tees	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Portrack Lane Retail Parks, Stockton-on-Tees	0.8% £0.32	0.0% £0.00	0.0% £0.00	0.4% £0.32	0.0% £0.00	1.8% £0.62	0.7% £0.94
Teesside Shopping Park, Stockton-on-Tees	11.7% £4.51	14.1% £4.37	2.5% £0.14	12.0% £9.01	8.2% £2.79	34.0% £11.58	16.3% £23.39
Other, Outside Hartlepool Borough	2.3% £0.88	2.4% £0.74	1.7% £0.10	2.3% £1.71	3.9% £1.34	3.3% £1.13	2.9% £4.19
OUTSIDE HARTLEPOOL BOROUGH TOTAL	51.2% £19.66	50.2% £15.55	66.2% £3.75	51.9% £38.97	62.7% £21.39	93.5% £31.80	64.4% £92.15
OVERALL TOTAL	100.0% £38.42	100.0% £30.96	100.0% £5.66	100.0% £75.03	100.0% £34.08	100.0% £34.02	100.0% £143.13

NOTES:

1. The expenditure is calculated by multiplying the total expenditure (minus SFT) on the relevant category of comparison goods in 2014 for each zone (Table 6A) by the market share.
2. The 'Primary Catchment Area Total' and 'Overall Total' market shares are calculated by dividing the primary catchment/overall area expenditure retained by each destination by the total primary catchment/overall area expenditure.

Hartlepool Borough Council
Comparison Assessment (2014)

TABLE 8 - FURNITURE, CARPETS AND HOUSEHOLD TEXTILES MARKET SHARE AND EXPENDITURE 2014

Destination	Zone 1 North Hartlepool	Zone 2 South Hartlepool	Zone 3 Hartlepool Villages	Primary Catchment Area Total	Zone 4 Peterlee	Zone 5 Billingham	Survey Area Total
HARTLEPOOL BOROUGH							
Hartlepool Town Centre							
Hartlepool Town Centre	41.7% £6.15	35.3% £4.03	30.8% £0.72	38.2% £10.91	17.9% £2.46	7.1% £0.90	25.9% £14.27
Hartlepool Town Centre Total	41.7% £6.15	35.3% £4.03	30.8% £0.72	38.2% £10.91	17.9% £2.46	7.1% £0.90	25.9% £14.27
Hartlepool Retail Parks							
Anchor Retail Park, Marina Way, Hartlepool	1.8% £0.27	2.4% £0.27	0.0% £0.00	1.9% £0.55	0.0% £0.00	0.0% £0.00	1.0% £0.55
High Point Retail Park, Marina Way, Hartlepool	3.1% £0.46	6.5% £0.74	6.1% £0.14	4.7% £1.34	0.0% £0.00	0.0% £0.00	2.4% £1.34
Tees Bay Retail Park, Hartlepool	6.8% £1.00	11.1% £1.27	0.0% £0.00	8.0% £2.28	3.8% £0.52	0.0% £0.00	5.1% £2.79
Hartlepool Retail Parks Total	11.8% £1.73	20.0% £2.29	6.1% £0.14	14.6% £4.16	3.8% £0.52	0.0% £0.00	8.5% £4.68
Main Edge/Out-of-Centre Foodstores							
Asda, Marina Way, Hartlepool	1.1% £0.16	0.0% £0.00	0.0% £0.00	0.6% £0.16	0.0% £0.00	4.5% £0.57	1.3% £0.73
Morrisons, Clarence Road, Hartlepool	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Tesco Extra, Belle Vue Way, Hartlepool	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Main Edge/Out-of-Centre Foodstores Total	1.1% £0.16	0.0% £0.00	0.0% £0.00	0.6% £0.16	0.0% £0.00	4.5% £0.57	1.3% £0.73
Local Centres Total							
Local Centres	1.1% £0.16	1.1% £0.12	0.0% £0.00	1.0% £0.28	0.0% £0.00	0.0% £0.00	0.5% £0.28
Local Centres Total	1.1% £0.16	1.1% £0.12	0.0% £0.00	1.0% £0.28	0.0% £0.00	0.0% £0.00	0.5% £0.28
Other, Hartlepool Borough							
Other, Hartlepool Borough	0.0% £0.00	1.6% £0.18	0.0% £0.00	0.6% £0.18	0.0% £0.00	0.0% £0.00	1.6% £0.36
Other, Hartlepool Borough Total	0.0% £0.00	1.6% £0.18	0.0% £0.00	0.6% £0.18	0.0% £0.00	0.0% £0.00	1.6% £0.36
HARTLEPOOL BOROUGH TOTAL	55.7% £8.20	57.9% £6.62	36.9% £0.87	55.0% £15.69	21.7% £2.98	11.6% £1.48	36.6% £20.14
OUTSIDE HARTLEPOOL BOROUGH							
Billingham Town Centre	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	5.8% £0.74	1.4% £0.74
Dalton Park Outlet Shopping Centre, Murton	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Durham City Centre	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Dragonville / Dragon Lane/ Durham City Retail Parks, Durham	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Metro Centre / Retail Parks, Gateshead	2.1% £0.31	1.1% £0.13	2.8% £0.07	1.8% £0.51	1.0% £0.13	4.5% £0.57	2.2% £1.21
Middlesbrough Town Centre	4.1% £0.61	4.5% £0.52	15.5% £0.36	5.2% £1.49	1.3% £0.18	12.4% £1.58	5.9% £3.25
Newcastle City Centre	3.4% £0.50	0.0% £0.00	2.8% £0.07	2.0% £0.56	4.0% £0.55	2.7% £0.35	2.7% £1.46
Peterlee Town Centre	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	19.7% £2.70	0.0% £0.00	4.9% £2.70
Sunderland City Centre	0.8% £0.11	0.0% £0.00	3.0% £0.07	0.6% £0.18	1.4% £0.19	0.0% £0.00	0.7% £0.38
Stockton-on-Tees Town Centre	0.0% £0.00	3.9% £0.44	2.8% £0.07	1.8% £0.51	1.3% £0.18	1.2% £0.15	1.5% £0.84
B&Q, Portrack Lane, Stockton-on-Tees	0.0% £0.00	0.0% £0.00	2.7% £0.06	0.2% £0.06	0.0% £0.00	2.5% £0.32	0.7% £0.38
Portrack Lane Retail Parks, Stockton-on-Tees	16.3% £2.40	22.6% £2.58	16.6% £0.39	18.8% £5.37	15.1% £2.07	50.9% £6.50	25.3% £13.94
Teesside Shopping Park, Stockton-on-Tees	14.5% £2.13	3.7% £0.42	12.1% £0.29	10.0% £2.84	21.3% £2.92	4.4% £0.57	11.5% £6.33
Other, Outside Hartlepool Borough	3.2% £0.47	6.3% £0.72	4.8% £0.11	4.6% £1.31	13.3% £1.82	4.0% £0.51	6.6% £3.64
OUTSIDE HARTLEPOOL BOROUGH TOTAL	44.3% £6.53	42.1% £4.81	63.1% £1.48	45.0% £12.83	78.3% £10.76	88.4% £11.29	63.4% £34.88
OVERALL TOTAL	100.0% £14.73	100.0% £11.44	100.0% £2.35	100.0% £28.52	100.0% £13.74	100.0% £12.77	100.0% £55.03

NOTES:

1. The expenditure is calculated by multiplying the total expenditure (minus SFT) on the relevant category of comparison goods in 2014 for each zone (Table 6A) by the market share.
2. The 'Primary Catchment Area Total' and 'Overall Total' market shares are calculated by dividing the primary catchment/overall area expenditure retained by each destination by the total primary catchment/overall area expenditure.

Hartlepool Borough Council
Comparison Assessment (2014)

TABLE 9 - DIY AND DECORATING GOODS MARKET SHARE AND EXPENDITURE 2014

Destination	Zone 1 North Hartlepool	Zone 2 South Hartlepool	Zone 3 Hartlepool Villages	Primary Catchment Area Total	Zone 4 Peterlee	Zone 5 Billingham	Survey Area Total
HARTLEPOOL BOROUGH							
Hartlepool Town Centre							
Hartlepool Town Centre	20.2% £0.57	15.7% £0.34	16.0% £0.07	18.1% £0.98	5.1% £0.14	0.8% £0.02	10.7% £1.14
Hartlepool Town Centre Total	20.2% £0.57	15.7% £0.34	16.0% £0.07	18.1% £0.98	5.1% £0.14	0.8% £0.02	10.7% £1.14
Hartlepool Retail Parks							
Anchor Retail Park, Marina Way, Hartlepool	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	1.7% £0.05	0.0% £0.00	0.4% £0.05
High Point Retail Park, Marina Way, Hartlepool	0.0% £0.00	1.4% £0.03	0.0% £0.00	0.6% £0.03	0.0% £0.00	0.0% £0.00	0.3% £0.03
Tees Bay Retail Park, Hartlepool	71.6% £2.02	74.8% £1.63	58.9% £0.26	71.9% £3.91	29.1% £0.78	4.5% £0.12	45.0% £4.81
Hartlepool Retail Parks Total	71.6% £2.02	76.2% £1.67	58.9% £0.26	72.4% £3.94	30.8% £0.83	4.5% £0.12	45.7% £4.89
Main Edge/Out-of-Centre Foodstores							
Asda, Marina Way, Hartlepool	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Morrisons, Clarence Road, Hartlepool	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Tesco Extra, Belle Vue Way, Hartlepool	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Main Edge/Out-of-Centre Foodstores Total	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Local Centres Total							
Local Centres	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Local Centres Total	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Other, Hartlepool Borough							
Other, Hartlepool Borough	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Other, Hartlepool Borough Total	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
HARTLEPOOL BOROUGH TOTAL	91.8% £2.59	91.9% £2.01	74.9% £0.32	90.5% £4.92	35.9% £0.97	5.3% £0.14	56.4% £6.02
OUTSIDE HARTLEPOOL BOROUGH							
Billingham Town Centre	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	2.7% £0.07	0.6% £0.07
Dalton Park Outlet Shopping Centre, Murton	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Durham City Centre	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	6.2% £0.17	0.0% £0.00	1.6% £0.17
Dragonville / Dragon Lane/ Durham City Retail Parks, Durham	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	10.7% £0.29	0.0% £0.00	2.7% £0.29
Metro Centre / Retail Parks, Gateshead	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Middlesbrough Town Centre	0.0% £0.00	0.0% £0.00	2.2% £0.01	0.2% £0.01	0.0% £0.00	0.0% £0.00	0.1% £0.01
Newcastle City Centre	0.0% £0.00	0.0% £0.00	4.4% £0.02	0.3% £0.02	0.0% £0.00	0.0% £0.00	0.2% £0.02
Peterlee Town Centre	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	21.3% £0.57	0.0% £0.00	5.3% £0.57
Sunderland City Centre	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	4.2% £0.11	0.0% £0.00	1.1% £0.11
Stockton-on-Tees Town Centre	0.0% £0.00	0.9% £0.02	2.2% £0.01	0.6% £0.03	0.0% £0.00	3.0% £0.08	1.0% £0.11
B&Q, Portrack Lane, Stockton-on-Tees	1.8% £0.05	3.7% £0.08	5.6% £0.02	2.9% £0.16	5.8% £0.15	53.8% £1.37	15.8% £1.68
Portrack Lane Retail Parks, Stockton-on-Tees	6.4% £0.18	1.5% £0.03	6.5% £0.03	4.5% £0.24	8.5% £0.23	31.7% £0.81	12.0% £1.28
Teesside Shopping Park, Stockton-on-Tees	0.0% £0.00	0.0% £0.00	2.1% £0.01	0.2% £0.01	0.0% £0.00	1.1% £0.03	0.3% £0.04
Other, Outside Hartlepool Borough	0.0% £0.00	1.8% £0.04	2.1% £0.01	0.9% £0.05	7.3% £0.20	2.4% £0.06	2.9% £0.31
OUTSIDE HARTLEPOOL BOROUGH TOTAL	8.2% £0.23	8.1% £0.18	25.1% £0.11	9.5% £0.52	64.1% £1.72	94.7% £2.42	43.6% £4.66
OVERALL TOTAL	100.0% £2.82	100.0% £2.19	100.0% £0.43	100.0% £5.44	100.0% £2.69	100.0% £2.55	100.0% £10.68

NOTES:

1. The expenditure is calculated by multiplying the total expenditure (minus SFT) on the relevant category of comparison goods in 2014 for each zone (Table 6A) by the market share.
2. The 'Primary Catchment Area Total' and 'Overall Total' market shares are calculated by dividing the primary catchment/overall area expenditure retained by each destination by the total primary catchment/overall area expenditure.

Hartlepool Borough Council
Comparison Assessment (2014)

TABLE 10 - MAJOR HOUSEHOLD APPLIANCES MARKET SHARE AND EXPENDITURE 2014

Destination	Zone 1 North Hartlepool	Zone 2 South Hartlepool	Zone 3 Hartlepool Villages	Primary Catchment Area Total	Zone 4 Peterlee	Zone 5 Billingham	Survey Area Total
HARTLEPOOL BOROUGH							
Hartlepool Town Centre							
Hartlepool Town Centre	27.6% £0.56	26.7% £0.43	54.1% £0.16	29.2% £1.15	15.8% £0.27	1.9% £0.03	19.9% £1.45
Hartlepool Town Centre Total	27.6% £0.56	26.7% £0.43	54.1% £0.16	29.2% £1.15	15.8% £0.27	1.9% £0.03	19.9% £1.45
Hartlepool Retail Parks							
Anchor Retail Park, Marina Way, Hartlepool	63.3% £1.27	61.9% £0.99	29.2% £0.09	60.1% £2.35	31.3% £0.54	1.0% £0.02	40.0% £2.91
High Point Retail Park, Marina Way, Hartlepool	0.0% £0.00	2.5% £0.04	2.3% £0.01	1.2% £0.05	0.0% £0.00	0.0% £0.00	0.7% £0.05
Tees Bay Retail Park, Hartlepool	0.8% £0.02	1.9% £0.03	3.3% £0.01	1.4% £0.06	1.0% £0.02	0.0% £0.00	1.0% £0.07
Hartlepool Retail Parks Total	64.0% £1.29	66.4% £1.06	34.8% £0.10	62.8% £2.46	32.2% £0.55	1.0% £0.02	41.7% £3.03
Main Edge/Out-of-Centre Foodstores							
Asda, Marina Way, Hartlepool	0.8% £0.02	0.0% £0.00	0.0% £0.00	0.4% £0.02	0.0% £0.00	0.0% £0.00	0.2% £0.02
Morrisons, Clarence Road, Hartlepool	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Tesco Extra, Belle Vue Way, Hartlepool	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Main Edge/Out-of-Centre Foodstores Total	0.8% £0.02	0.0% £0.00	0.0% £0.00	0.4% £0.02	0.0% £0.00	0.0% £0.00	0.2% £0.02
Local Centres Total							
Local Centres	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Local Centres Total	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Other, Hartlepool Borough							
Other, Hartlepool Borough	0.0% £0.00	1.1% £0.02	0.0% £0.00	0.5% £0.02	0.0% £0.00	0.0% £0.00	1.1% £0.04
Other, Hartlepool Borough Total	0.0% £0.00	1.1% £0.02	0.0% £0.00	0.5% £0.02	0.0% £0.00	0.0% £0.00	1.1% £0.04
HARTLEPOOL BOROUGH TOTAL	92.4% £1.86	94.2% £1.51	88.9% £0.27	92.8% £3.64	48.0% £0.82	2.9% £0.05	62.1% £4.51
OUTSIDE HARTLEPOOL BOROUGH							
Billingham Town Centre	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	8.2% £0.13	1.8% £0.13
Dalton Park Outlet Shopping Centre, Murton	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Durham City Centre	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	1.0% £0.02	0.0% £0.00	0.2% £0.02
Dragonville / Dragon Lane/ Durham City Retail Parks, Durham	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	10.9% £0.19	0.0% £0.00	2.6% £0.19
Metro Centre / Retail Parks, Gateshead	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Middlesbrough Town Centre	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	3.0% £0.05	0.7% £0.05
Newcastle City Centre	1.8% £0.04	0.0% £0.00	6.5% £0.02	1.4% £0.05	1.0% £0.02	1.0% £0.02	1.2% £0.09
Peterlee Town Centre	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	17.9% £0.31	0.0% £0.00	4.2% £0.31
Sunderland City Centre	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Stockton-on-Tees Town Centre	0.0% £0.00	0.0% £0.00	2.3% £0.01	0.2% £0.01	0.0% £0.00	2.7% £0.04	0.7% £0.05
B&Q, Portrack Lane, Stockton-on-Tees	0.0% £0.00	0.0% £0.00	2.3% £0.01	0.2% £0.01	1.4% £0.02	0.0% £0.00	0.4% £0.03
Portrack Lane Retail Parks, Stockton-on-Tees	1.1% £0.02	1.2% £0.02	0.0% £0.00	1.0% £0.04	0.0% £0.00	2.4% £0.04	1.1% £0.08
Teesside Shopping Park, Stockton-on-Tees	4.8% £0.10	4.6% £0.07	0.0% £0.00	4.4% £0.17	14.0% £0.24	75.9% £1.24	22.7% £1.65
Other, Outside Hartlepool Borough	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	5.7% £0.10	3.9% £0.06	2.2% £0.16
OUTSIDE HARTLEPOOL BOROUGH TOTAL	7.6% £0.15	5.8% £0.09	11.1% £0.03	7.2% £0.28	52.0% £0.89	97.1% £1.58	37.9% £2.75
OVERALL TOTAL	100.0% £2.01	100.0% £1.60	100.0% £0.30	100.0% £3.92	100.0% £1.72	100.0% £1.63	100.0% £7.26

NOTES:

1. The expenditure is calculated by multiplying the total expenditure (minus SFT) on the relevant category of comparison goods in 2014 for each zone (Table 6A) by the market share.
2. The 'Primary Catchment Area Total' and 'Overall Total' market shares are calculated by dividing the primary catchment/overall area expenditure retained by each destination by the total primary catchment/overall area expenditure.

Hartlepool Borough Council
Comparison Assessment (2014)

TABLE 11 - ELECTRICAL GOODS MARKET SHARE AND EXPENDITURE 2014

Destination	Zone 1 North Hartlepool	Zone 2 South Hartlepool	Zone 3 Hartlepool Villages	Primary Catchment Area Total	Zone 4 Peterlee	Zone 5 Billingham	Survey Area Total
HARTLEPOOL BOROUGH							
Hartlepool Town Centre							
Hartlepool Town Centre	28.9% £2.89	28.0% £2.23	44.6% £0.79	29.9% £5.92	13.8% £1.23	0.0% £0.00	18.9% £7.14
Hartlepool Town Centre Total	28.9% £2.89	28.0% £2.23	44.6% £0.79	29.9% £5.92	13.8% £1.23	0.0% £0.00	18.9% £7.14
Hartlepool Retail Parks							
Anchor Retail Park, Marina Way, Hartlepool	55.7% £5.58	53.2% £4.24	31.1% £0.55	52.5% £10.37	22.1% £1.96	2.1% £0.19	33.1% £12.53
High Point Retail Park, Marina Way, Hartlepool	0.0% £0.00	0.0% £0.00	2.8% £0.05	0.3% £0.05	0.0% £0.00	0.0% £0.00	0.1% £0.05
Tees Bay Retail Park, Hartlepool	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	2.6% £0.23	0.0% £0.00	0.6% £0.23
Hartlepool Retail Parks Total	55.7% £5.58	53.2% £4.24	33.9% £0.60	52.7% £10.42	24.7% £2.20	2.1% £0.19	33.8% £12.81
Main Edge/Out-of-Centre Foodstores							
Asda, Marina Way, Hartlepool	7.4% £0.74	5.1% £0.40	4.1% £0.07	6.2% £1.22	2.6% £0.23	3.4% £0.31	4.7% £1.77
Morrisons, Clarence Road, Hartlepool	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Tesco Extra, Belle Vue Way, Hartlepool	3.9% £0.39	8.1% £0.65	0.0% £0.00	5.3% £1.04	1.2% £0.10	0.0% £0.00	3.0% £1.14
Main Edge/Out-of-Centre Foodstores Total	11.3% £1.13	13.2% £1.05	4.1% £0.07	11.4% £2.26	3.8% £0.34	3.4% £0.31	7.7% £2.91
Local Centres Total							
Local Centres	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	1.2% £0.11	0.0% £0.00	0.3% £0.11
Local Centres Total	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	1.2% £0.11	0.0% £0.00	0.3% £0.11
Other, Hartlepool Borough							
Other, Hartlepool Borough	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Other, Hartlepool Borough Total	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
HARTLEPOOL BOROUGH TOTAL	95.8% £9.61	94.4% £7.53	82.6% £1.46	94.1% £18.60	43.5% £3.87	5.5% £0.50	60.6% £22.98
OUTSIDE HARTLEPOOL BOROUGH							
Billingham Town Centre	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	23.6% £2.17	5.7% £2.17
Dalton Park Outlet Shopping Centre, Murton	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Durham City Centre	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	2.9% £0.26	0.9% £0.08	0.9% £0.34
Dragonville / Dragon Lane/ Durham City Retail Parks, Durham	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	11.2% £1.00	0.0% £0.00	2.6% £1.00
Metro Centre / Retail Parks, Gateshead	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.9% £0.08	0.0% £0.00	0.2% £0.08
Middlesbrough Town Centre	0.7% £0.07	1.1% £0.08	3.0% £0.05	1.1% £0.21	0.0% £0.00	6.0% £0.56	2.0% £0.76
Newcastle City Centre	1.0% £0.10	0.0% £0.00	5.8% £0.10	1.0% £0.20	1.2% £0.10	2.1% £0.19	1.3% £0.49
Peterlee Town Centre	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	23.9% £2.12	0.0% £0.00	5.6% £2.12
Sunderland City Centre	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Stockton-on-Tees Town Centre	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	1.9% £0.17	0.5% £0.17
B&Q, Portrack Lane, Stockton-on-Tees	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Portrack Lane Retail Parks, Stockton-on-Tees	1.0% £0.10	0.0% £0.00	0.0% £0.00	0.5% £0.10	0.0% £0.00	4.2% £0.39	1.3% £0.49
Teesside Shopping Park, Stockton-on-Tees	1.5% £0.15	4.5% £0.36	8.6% £0.15	3.4% £0.66	11.0% £0.98	50.2% £4.63	16.6% £6.27
Other, Outside Hartlepool Borough	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	5.4% £0.48	5.7% £0.52	2.6% £1.00
OUTSIDE HARTLEPOOL BOROUGH TOTAL	4.2% £0.42	5.6% £0.45	17.4% £0.31	5.9% £1.17	56.5% £5.02	94.5% £8.71	39.4% £14.91
OVERALL TOTAL	100.0% £10.03	100.0% £7.98	100.0% £1.77	100.0% £19.77	100.0% £8.89	100.0% £9.22	100.0% £37.89

NOTES:

1. The expenditure is calculated by multiplying the total expenditure (minus SFT) on the relevant category of comparison goods in 2014 for each zone (Table 6A) by the market share.
2. The 'Primary Catchment Area Total' and 'Overall Total' market shares are calculated by dividing the primary catchment/overall area expenditure retained by each destination by the total primary catchment/overall area expenditure.

Hartlepool Borough Council
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TABLE 12 - HOUSEHOLD AND PERSONAL ITEMS MARKET SHARE AND EXPENDITURE 2014

Destination	Zone 1 North Hartlepool	Zone 2 South Hartlepool	Zone 3 Hartlepool Villages	Primary Catchment Area Total	Zone 4 Peterlee	Zone 5 Billingham	Survey Area Total
HARTLEPOOL BOROUGH							
Hartlepool Town Centre							
Hartlepool Town Centre	53.0% £6.77	46.3% £4.95	20.4% £0.44	47.5% £12.16	27.7% £2.91	0.0% £0.00	31.5% £15.07
Hartlepool Town Centre Total	53.0% £6.77	46.3% £4.95	20.4% £0.44	47.5% £12.16	27.7% £2.91	0.0% £0.00	31.5% £15.07
Hartlepool Retail Parks							
Anchor Retail Park, Marina Way, Hartlepool	14.6% £1.87	8.2% £0.88	6.8% £0.15	11.3% £2.89	3.6% £0.38	0.0% £0.00	6.8% £3.27
High Point Retail Park, Marina Way, Hartlepool	0.0% £0.00	0.0% £0.00	3.2% £0.07	0.3% £0.07	0.0% £0.00	0.0% £0.00	0.1% £0.07
Tees Bay Retail Park, Hartlepool	1.1% £0.14	6.4% £0.68	0.0% £0.00	3.2% £0.83	0.0% £0.00	0.0% £0.00	1.7% £0.83
Hartlepool Retail Parks Total	15.7% £2.01	14.6% £1.56	9.9% £0.21	14.8% £3.79	3.6% £0.38	0.0% £0.00	8.7% £4.17
Main Edge/Out-of-Centre Foodstores							
Asda, Marina Way, Hartlepool	10.6% £1.35	4.8% £0.51	9.9% £0.21	8.1% £2.07	4.5% £0.47	4.2% £0.49	6.3% £3.03
Morrisons, Clarence Road, Hartlepool	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Tesco Extra, Belle Vue Way, Hartlepool	1.2% £0.15	7.1% £0.76	0.0% £0.00	3.5% £0.91	0.0% £0.00	0.0% £0.00	1.9% £0.91
Main Edge/Out-of-Centre Foodstores Total	11.7% £1.50	11.8% £1.27	9.9% £0.21	11.6% £2.98	4.5% £0.47	4.2% £0.49	8.2% £3.94
Local Centres Total							
Local Centres	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Local Centres Total	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Other, Hartlepool Borough							
Other, Hartlepool Borough	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Other, Hartlepool Borough Total	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
HARTLEPOOL BOROUGH TOTAL	80.5% £10.28	72.7% £7.78	40.3% £0.87	73.9% £18.93	35.8% £3.76	4.2% £0.49	48.4% £23.17
OUTSIDE HARTLEPOOL BOROUGH							
Billingham Town Centre	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	32.5% £3.81	8.0% £3.81
Dalton Park Outlet Shopping Centre, Murton	0.0% £0.00	1.4% £0.15	4.6% £0.10	1.0% £0.25	4.8% £0.50	3.9% £0.45	2.5% £1.20
Durham City Centre	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	1.7% £0.17	0.0% £0.00	0.4% £0.17
Dragonville / Dragon Lane/ Durham City Retail Parks, Durham	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	4.4% £0.46	0.0% £0.00	1.0% £0.46
Metro Centre / Retail Parks, Gateshead	2.8% £0.36	6.5% £0.69	8.9% £0.19	4.9% £1.25	7.0% £0.74	4.8% £0.56	5.3% £2.55
Middlesbrough Town Centre	5.4% £0.68	11.5% £1.23	16.7% £0.36	8.9% £2.27	5.3% £0.55	27.2% £3.20	12.6% £6.02
Newcastle City Centre	2.2% £0.28	1.5% £0.16	17.5% £0.38	3.2% £0.82	1.6% £0.16	1.5% £0.17	2.4% £1.16
Peterlee Town Centre	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	25.5% £2.68	0.0% £0.00	5.6% £2.68
Sunderland City Centre	0.0% £0.00	1.1% £0.11	0.0% £0.00	0.4% £0.11	3.9% £0.41	0.0% £0.00	1.1% £0.52
Stockton-on-Tees Town Centre	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	7.2% £0.84	1.8% £0.84
B&Q, Portrack Lane, Stockton-on-Tees	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Portrack Lane Retail Parks, Stockton-on-Tees	4.2% £0.54	3.2% £0.35	7.8% £0.17	4.1% £1.06	3.2% £0.34	4.1% £0.48	3.9% £1.88
Teesside Shopping Park, Stockton-on-Tees	1.2% £0.15	1.1% £0.11	0.0% £0.00	1.0% £0.26	5.2% £0.55	9.4% £1.11	4.0% £1.92
Other, Outside Hartlepool Borough	3.7% £0.47	1.1% £0.11	4.3% £0.09	2.6% £0.67	1.7% £0.17	5.3% £0.62	3.1% £1.47
OUTSIDE HARTLEPOOL BOROUGH TOTAL	19.5% £2.49	27.3% £2.92	59.8% £1.29	26.1% £6.69	64.2% £6.73	95.8% £11.25	51.6% £24.67
OVERALL TOTAL	100.0% £12.76	100.0% £10.71	100.0% £2.15	100.0% £25.62	100.0% £10.49	100.0% £11.73	100.0% £47.84

NOTES:

1. The expenditure is calculated by multiplying the total expenditure (minus SFT) on the relevant category of comparison goods in 2014 for each zone (Table 6A) by the market share.
2. The 'Primary Catchment Area Total' and 'Overall Total' market shares are calculated by dividing the primary catchment/overall area expenditure retained by each destination by the total primary catchment/overall area expenditure.

Hartlepool Borough Council
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TABLE 13 - BOOKS, CDS AND DVDS MARKET SHARE AND EXPENDITURE 2014

Destination	Zone 1 North Hartlepool	Zone 2 South Hartlepool	Zone 3 Hartlepool Villages	Primary Catchment Area Total	Zone 4 Peterlee	Zone 5 Billingham	Survey Area Total
HARTLEPOOL BOROUGH							
Hartlepool Town Centre							
Hartlepool Town Centre	43.8% £2.88	40.3% £2.10	22.2% £0.25	40.5% £5.22	30.5% £1.80	7.7% £0.47	30.0% £7.50
Hartlepool Town Centre Total	43.8% £2.88	40.3% £2.10	22.2% £0.25	40.5% £5.22	30.5% £1.80	7.7% £0.47	30.0% £7.50
Hartlepool Retail Parks							
Anchor Retail Park, Marina Way, Hartlepool	0.0% £0.00	2.1% £0.11	0.0% £0.00	0.8% £0.11	0.0% £0.00	0.0% £0.00	0.4% £0.11
High Point Retail Park, Marina Way, Hartlepool	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Tees Bay Retail Park, Hartlepool	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Hartlepool Retail Parks Total	0.0% £0.00	2.1% £0.11	0.0% £0.00	0.8% £0.11	0.0% £0.00	0.0% £0.00	0.4% £0.11
Main Edge/Out-of-Centre Foodstores							
Asda, Marina Way, Hartlepool	44.3% £2.91	32.3% £1.68	28.4% £0.31	38.1% £4.91	5.7% £0.34	1.9% £0.11	21.5% £5.36
Morrisons, Clarence Road, Hartlepool	1.4% £0.09	0.0% £0.00	0.0% £0.00	0.7% £0.09	0.0% £0.00	0.0% £0.00	0.4% £0.09
Tesco Extra, Belle Vue Way, Hartlepool	0.0% £0.00	18.4% £0.96	9.1% £0.10	8.2% £1.06	0.0% £0.00	0.0% £0.00	4.2% £1.06
Main Edge/Out-of-Centre Foodstores Total	45.6% £3.00	50.7% £2.64	37.5% £0.41	47.0% £6.06	5.7% £0.34	1.9% £0.11	26.1% £6.51
Local Centres Total							
Local Centres	2.7% £0.18	1.5% £0.08	0.0% £0.00	2.0% £0.26	0.0% £0.00	0.0% £0.00	1.0% £0.26
Local Centres Total	2.7% £0.18	1.5% £0.08	0.0% £0.00	2.0% £0.26	0.0% £0.00	0.0% £0.00	1.0% £0.26
Other, Hartlepool Borough							
Other, Hartlepool Borough	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Other, Hartlepool Borough Total	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
HARTLEPOOL BOROUGH TOTAL	92.1% £6.06	94.6% £4.93	59.7% £0.66	90.3% £11.65	36.2% £2.14	9.5% £0.59	57.5% £14.37
OUTSIDE HARTLEPOOL BOROUGH							
Billingham Town Centre	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	33.5% £2.07	8.3% £2.07
Dalton Park Outlet Shopping Centre, Murton	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Durham City Centre	0.0% £0.00	0.0% £0.00	9.1% £0.10	0.8% £0.10	7.9% £0.47	0.0% £0.00	2.3% £0.57
Dragonville / Dragon Lane/ Durham City Retail Parks, Durham	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Metro Centre / Retail Parks, Gateshead	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	2.8% £0.17	0.0% £0.00	0.7% £0.17
Middlesbrough Town Centre	4.2% £0.28	5.4% £0.28	31.3% £0.35	7.0% £0.90	1.9% £0.11	25.2% £1.56	10.3% £2.58
Newcastle City Centre	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	1.9% £0.11	0.5% £0.11
Peterlee Town Centre	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	29.6% £1.74	0.0% £0.00	7.0% £1.74
Sunderland City Centre	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	7.1% £0.42	0.0% £0.00	1.7% £0.42
Stockton-on-Tees Town Centre	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	3.7% £0.23	0.9% £0.23
B&Q, Portrack Lane, Stockton-on-Tees	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Portrack Lane Retail Parks, Stockton-on-Tees	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	2.5% £0.15	7.7% £0.48	2.5% £0.63
Teesside Shopping Park, Stockton-on-Tees	3.7% £0.24	0.0% £0.00	0.0% £0.00	1.9% £0.24	6.5% £0.38	7.7% £0.48	4.4% £1.10
Other, Outside Hartlepool Borough	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	5.4% £0.32	10.7% £0.66	3.9% £0.98
OUTSIDE HARTLEPOOL BOROUGH TOTAL	7.9% £0.52	5.4% £0.28	40.3% £0.45	9.7% £1.25	63.8% £3.76	90.5% £5.59	42.5% £10.60
OVERALL TOTAL	100.0% £6.58	100.0% £5.21	100.0% £1.11	100.0% £12.90	100.0% £5.90	100.0% £6.18	100.0% £24.98

NOTES:

1. The expenditure is calculated by multiplying the total expenditure (minus SFT) on the relevant category of comparison goods in 2014 for each zone (Table 6A) by the market share.
2. The 'Primary Catchment Area Total' and 'Overall Total' market shares are calculated by dividing the primary catchment/overall area expenditure retained by each destination by the total primary catchment/overall area expenditure.

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TABLE 14 - CHEMIST GOODS MARKET SHARE AND EXPENDITURE 2014

Destination	Zone 1 North Hartlepool	Zone 2 South Hartlepool	Zone 3 Hartlepool Villages	Primary Catchment Area Total	Zone 4 Peterlee	Zone 5 Billingham	Survey Area Total
HARTLEPOOL BOROUGH							
Hartlepool Town Centre							
Hartlepool Town Centre	49.2% £7.14	53.2% £6.07	58.8% £1.32	51.6% £14.53	19.3% £2.52	1.7% £0.23	31.7% £17.28
Hartlepool Town Centre Total	49.2% £7.14	53.2% £6.07	58.8% £1.32	51.6% £14.53	19.3% £2.52	1.7% £0.23	31.7% £17.28
Hartlepool Retail Parks							
Anchor Retail Park, Marina Way, Hartlepool	23.6% £3.43	10.6% £1.21	10.7% £0.24	17.3% £4.88	4.9% £0.64	0.0% £0.00	10.1% £5.52
High Point Retail Park, Marina Way, Hartlepool	0.0% £0.00	1.8% £0.21	5.3% £0.12	1.2% £0.33	0.0% £0.00	0.0% £0.00	0.6% £0.33
Tees Bay Retail Park, Hartlepool	0.0% £0.00	1.8% £0.21	0.0% £0.00	0.7% £0.21	0.0% £0.00	0.0% £0.00	0.4% £0.21
Hartlepool Retail Parks Total	23.6% £3.43	14.2% £1.62	16.0% £0.36	19.2% £5.41	4.9% £0.64	0.0% £0.00	11.1% £6.05
Main Edge/Out-of-Centre Foodstores							
Asda, Marina Way, Hartlepool	13.8% £2.01	0.9% £0.10	8.4% £0.19	8.2% £2.29	6.5% £0.85	0.0% £0.00	5.8% £3.14
Morrisons, Clarence Road, Hartlepool	0.0% £0.00	1.6% £0.18	0.0% £0.00	0.6% £0.18	0.7% £0.10	0.0% £0.00	0.5% £0.28
Tesco Extra, Belle Vue Way, Hartlepool	3.0% £0.44	9.4% £1.07	0.0% £0.00	5.4% £1.51	0.0% £0.00	0.0% £0.00	2.8% £1.51
Main Edge/Out-of-Centre Foodstores Total	16.9% £2.45	11.8% £1.35	8.4% £0.19	14.2% £3.99	7.2% £0.95	0.0% £0.00	9.0% £4.93
Local Centres Total							
Local Centres	2.5% £0.37	13.0% £1.48	0.0% £0.00	6.6% £1.85	0.0% £0.00	0.0% £0.00	3.4% £1.85
Local Centres Total	2.5% £0.37	13.0% £1.48	0.0% £0.00	6.6% £1.85	0.0% £0.00	0.0% £0.00	3.4% £1.85
Other, Hartlepool Borough							
Other, Hartlepool Borough	0.0% £0.00	2.0% £0.23	0.0% £0.00	0.8% £0.23	0.0% £0.00	0.0% £0.00	2.0% £0.45
Other, Hartlepool Borough Total	0.0% £0.00	2.0% £0.23	0.0% £0.00	0.8% £0.23	0.0% £0.00	0.0% £0.00	2.0% £0.45
HARTLEPOOL BOROUGH TOTAL	92.3% £13.39	94.3% £10.75	83.3% £1.87	92.4% £26.00	31.4% £4.11	1.7% £0.23	55.6% £30.34
OUTSIDE HARTLEPOOL BOROUGH							
Billingham Town Centre	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	57.4% £7.65	14.0% £7.65
Dalton Park Outlet Shopping Centre, Murton	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Durham City Centre	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	2.1% £0.27	0.0% £0.00	0.5% £0.27
Dragonville / Dragon Lane/ Durham City Retail Parks, Durham	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	1.1% £0.14	0.0% £0.00	0.3% £0.14
Metro Centre / Retail Parks, Gateshead	0.0% £0.00	1.3% £0.14	3.9% £0.09	0.8% £0.23	1.6% £0.21	1.0% £0.13	1.0% £0.56
Middlesbrough Town Centre	0.0% £0.00	0.9% £0.10	7.7% £0.17	1.0% £0.27	0.0% £0.00	9.0% £1.20	2.7% £1.46
Newcastle City Centre	2.2% £0.33	0.0% £0.00	0.0% £0.00	1.2% £0.33	1.7% £0.23	0.0% £0.00	1.0% £0.55
Peterlee Town Centre	0.0% £0.00	0.0% £0.00	2.7% £0.06	0.2% £0.06	46.4% £6.07	0.0% £0.00	11.2% £6.13
Sunderland City Centre	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Stockton-on-Tees Town Centre	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	6.2% £0.82	1.5% £0.82
B&Q, Portrack Lane, Stockton-on-Tees	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Portrack Lane Retail Parks, Stockton-on-Tees	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	2.7% £0.36	0.7% £0.36
Teesside Shopping Park, Stockton-on-Tees	1.2% £0.17	0.0% £0.00	0.0% £0.00	0.6% £0.17	2.6% £0.34	16.2% £2.16	4.9% £2.67
Other, Outside Hartlepool Borough	4.3% £0.62	3.6% £0.41	2.5% £0.06	3.9% £1.09	13.2% £1.72	5.9% £0.79	6.6% £3.60
OUTSIDE HARTLEPOOL BOROUGH TOTAL	7.7% £1.12	5.7% £0.65	16.7% £0.38	7.6% £2.15	68.6% £8.97	98.3% £13.10	44.4% £24.22
OVERALL TOTAL	100.0% £14.51	100.0% £11.40	100.0% £2.24	100.0% £28.15	100.0% £13.08	100.0% £13.33	100.0% £54.55

NOTES:

1. The expenditure is calculated by multiplying the total expenditure (minus SFT) on the relevant category of comparison goods in 2014 for each zone (Table 6A) by the market share.
2. The 'Primary Catchment Area Total' and 'Overall Total' market shares are calculated by dividing the primary catchment/overall area expenditure retained by each destination by the total primary catchment/overall area expenditure.

Hartlepool Borough Council
Comparison Assessment (2014)

TABLE 15 - RECREATIONAL GOODS MARKET SHARE AND EXPENDITURE 2014

Destination	Zone 1 North Hartlepool	Zone 2 South Hartlepool	Zone 3 Hartlepool Villages	Primary Catchment Area Total	Zone 4 Peterlee	Zone 5 Billingham	Survey Area Total
HARTLEPOOL BOROUGH							
Hartlepool Town Centre							
Hartlepool Town Centre	24.0% £3.39	42.2% £4.70	37.2% £0.73	32.4% £8.82	29.6% £3.93	0.0% £0.00	24.3% £12.75
Hartlepool Town Centre Total	24.0% £3.39	42.2% £4.70	37.2% £0.73	32.4% £8.82	29.6% £3.93	0.0% £0.00	24.3% £12.75
Hartlepool Retail Parks							
Anchor Retail Park, Marina Way, Hartlepool	9.4% £1.32	0.0% £0.00	0.0% £0.00	4.9% £1.32	0.0% £0.00	0.0% £0.00	2.5% £1.32
High Point Retail Park, Marina Way, Hartlepool	0.0% £0.00	1.8% £0.20	0.0% £0.00	0.7% £0.20	0.0% £0.00	0.0% £0.00	0.4% £0.20
Tees Bay Retail Park, Hartlepool	9.9% £1.39	11.8% £1.32	14.1% £0.28	11.0% £2.99	3.1% £0.42	1.8% £0.22	6.9% £3.63
Hartlepool Retail Parks Total	19.3% £2.72	13.6% £1.52	14.1% £0.28	16.6% £4.51	3.1% £0.42	1.8% £0.22	9.8% £5.15
Main Edge/Out-of-Centre Foodstores							
Asda, Marina Way, Hartlepool	9.8% £1.38	1.7% £0.18	0.0% £0.00	5.8% £1.57	5.3% £0.70	0.0% £0.00	4.3% £2.27
Morrisons, Clarence Road, Hartlepool	1.6% £0.22	0.0% £0.00	0.0% £0.00	0.8% £0.22	0.0% £0.00	0.0% £0.00	0.4% £0.22
Tesco Extra, Belle Vue Way, Hartlepool	3.4% £0.48	0.0% £0.00	0.0% £0.00	1.7% £0.48	0.0% £0.00	0.0% £0.00	0.9% £0.48
Main Edge/Out-of-Centre Foodstores Total	14.8% £2.08	1.7% £0.18	0.0% £0.00	8.3% £2.27	5.3% £0.70	0.0% £0.00	5.7% £2.97
Local Centres Total							
Local Centres	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Local Centres Total	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Other, Hartlepool Borough							
Other, Hartlepool Borough	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Other, Hartlepool Borough Total	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
HARTLEPOOL BOROUGH TOTAL	58.0% £8.19	57.4% £6.40	51.4% £1.01	57.3% £15.60	38.0% £5.06	1.8% £0.22	39.7% £20.87
OUTSIDE HARTLEPOOL BOROUGH							
Billingham Town Centre	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	13.8% £1.66	3.2% £1.66
Dalton Park Outlet Shopping Centre, Murton	5.4% £0.76	0.0% £0.00	0.0% £0.00	2.8% £0.76	2.0% £0.27	0.0% £0.00	2.0% £1.03
Durham City Centre	3.4% £0.48	0.0% £0.00	0.0% £0.00	1.8% £0.48	2.1% £0.28	0.0% £0.00	1.5% £0.77
Dragonville / Dragon Lane/ Durham City Retail Parks, Durham	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Metro Centre / Retail Parks, Gateshead	3.4% £0.48	3.7% £0.42	0.0% £0.00	3.3% £0.89	0.0% £0.00	0.0% £0.00	1.7% £0.89
Middlesbrough Town Centre	1.1% £0.15	1.2% £0.14	0.0% £0.00	1.1% £0.29	0.0% £0.00	12.8% £1.53	3.5% £1.82
Newcastle City Centre	0.0% £0.00	1.2% £0.14	0.0% £0.00	0.5% £0.14	0.0% £0.00	0.0% £0.00	0.3% £0.14
Peterlee Town Centre	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	43.1% £5.73	0.0% £0.00	10.9% £5.73
Sunderland City Centre	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	1.5% £0.20	0.0% £0.00	0.4% £0.20
Stockton-on-Tees Town Centre	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
B&Q, Portrack Lane, Stockton-on-Tees	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	2.5% £0.30	0.6% £0.30
Portrack Lane Retail Parks, Stockton-on-Tees	10.3% £1.45	5.6% £0.62	20.1% £0.40	9.1% £2.47	4.0% £0.53	26.5% £3.18	11.8% £6.18
Teesside Shopping Park, Stockton-on-Tees	15.8% £2.23	29.1% £3.24	28.5% £0.56	22.1% £6.03	7.3% £0.97	38.9% £4.67	22.2% £11.66
Other, Outside Hartlepool Borough	2.6% £0.36	1.8% £0.20	0.0% £0.00	2.1% £0.56	2.0% £0.27	3.7% £0.44	2.4% £1.27
OUTSIDE HARTLEPOOL BOROUGH TOTAL	42.0% £5.92	42.6% £4.75	48.6% £0.96	42.7% £11.62	62.0% £8.24	98.2% £11.77	60.3% £31.64
OVERALL TOTAL	100.0% £14.10	100.0% £11.14	100.0% £1.97	100.0% £27.22	100.0% £13.30	100.0% £11.99	100.0% £52.51

NOTES:

1. The expenditure is calculated by multiplying the total expenditure (minus SFT) on the relevant category of comparison goods in 2014 for each zone (Table 6A) by the market share.
2. The 'Primary Catchment Area Total' and 'Overall Total' market shares are calculated by dividing the primary catchment/overall area expenditure retained by each destination by the total primary catchment/overall area expenditure.

TABLE 16 - GARDEN AND PET PRODUCTS MARKET SHARE AND EXPENDITURE 2014

Destination	Zone 1 North Hartlepool	Zone 2 South Hartlepool	Zone 3 Hartlepool Villages	Primary Catchment Area Total	Zone 4 Peterlee	Zone 5 Billingham	Survey Area Total
HARTLEPOOL BOROUGH							
Hartlepool Town Centre							
Hartlepool Town Centre	30.5% £0.91	26.0% £0.66	37.9% £0.20	29.3% £1.78	17.8% £0.50	3.4% £0.10	19.9% £2.39
Hartlepool Town Centre Total	30.5% £0.91	26.0% £0.66	37.9% £0.20	29.3% £1.78	17.8% £0.50	3.4% £0.10	19.9% £2.39
Hartlepool Retail Parks							
Anchor Retail Park, Marina Way, Hartlepool	1.9% £0.06	0.0% £0.00	0.0% £0.00	0.9% £0.06	5.6% £0.16	0.0% £0.00	1.8% £0.21
High Point Retail Park, Marina Way, Hartlepool	15.2% £0.46	13.2% £0.34	14.9% £0.08	14.3% £0.87	1.8% £0.05	0.9% £0.03	7.9% £0.95
Tees Bay Retail Park, Hartlepool	31.3% £0.94	36.2% £0.92	34.9% £0.19	33.7% £2.05	11.0% £0.31	1.8% £0.06	20.2% £2.42
Hartlepool Retail Parks Total	48.4% £1.45	49.4% £1.26	49.8% £0.27	48.9% £2.98	18.5% £0.52	2.8% £0.08	29.9% £3.58
Main Edge/Out-of-Centre Foodstores							
Asda, Marina Way, Hartlepool	7.7% £0.23	6.0% £0.15	0.0% £0.00	6.3% £0.38	1.2% £0.03	0.0% £0.00	3.5% £0.42
Morrisons, Clarence Road, Hartlepool	2.2% £0.07	0.0% £0.00	0.0% £0.00	1.1% £0.07	0.0% £0.00	0.0% £0.00	0.6% £0.07
Tesco Extra, Belle Vue Way, Hartlepool	0.0% £0.00	8.2% £0.21	0.0% £0.00	3.4% £0.21	0.0% £0.00	0.0% £0.00	1.7% £0.21
Main Edge/Out-of-Centre Foodstores Total	9.9% £0.30	14.1% £0.36	0.0% £0.00	10.8% £0.66	1.2% £0.03	0.0% £0.00	5.8% £0.69
Local Centres Total							
Local Centres	2.8% £0.08	2.8% £0.07	2.0% £0.01	2.8% £0.17	0.0% £0.00	0.0% £0.00	1.4% £0.17
Local Centres Total	2.8% £0.08	2.8% £0.07	2.0% £0.01	2.8% £0.17	0.0% £0.00	0.0% £0.00	1.4% £0.17
Other, Hartlepool Borough							
Other, Hartlepool Borough	0.9% £0.03	1.7% £0.04	0.0% £0.00	1.2% £0.07	0.0% £0.00	2.2% £0.07	4.8% £0.21
Other, Hartlepool Borough Total	0.9% £0.03	1.7% £0.04	0.0% £0.00	1.2% £0.07	0.0% £0.00	2.2% £0.07	4.8% £0.21
HARTLEPOOL BOROUGH TOTAL	92.5% £2.78	94.1% £2.40	89.7% £0.48	92.9% £5.65	37.5% £1.06	8.3% £0.26	58.2% £6.96
OUTSIDE HARTLEPOOL BOROUGH							
Billingham Town Centre	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	19.0% £0.58	4.9% £0.58
Dalton Park Outlet Shopping Centre, Murton	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Durham City Centre	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	5.3% £0.15	0.0% £0.00	1.2% £0.15
Dragonville / Dragon Lane/ Durham City Retail Parks, Durham	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	5.6% £0.16	0.0% £0.00	1.3% £0.16
Metro Centre / Retail Parks, Gateshead	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Middlesbrough Town Centre	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	1.2% £0.04	0.3% £0.04
Newcastle City Centre	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Peterlee Town Centre	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	34.2% £0.97	0.0% £0.00	8.1% £0.97
Sunderland City Centre	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00
Stockton-on-Tees Town Centre	0.9% £0.03	1.0% £0.02	0.0% £0.00	0.9% £0.05	0.0% £0.00	7.6% £0.23	2.4% £0.29
B&Q, Portrack Lane, Stockton-on-Tees	0.9% £0.03	0.0% £0.00	0.0% £0.00	0.5% £0.03	1.2% £0.03	27.2% £0.84	7.5% £0.90
Portrack Lane Retail Parks, Stockton-on-Tees	0.0% £0.00	0.0% £0.00	0.0% £0.00	0.0% £0.00	1.3% £0.04	15.5% £0.48	4.3% £0.51
Teesside Shopping Park, Stockton-on-Tees	1.4% £0.04	0.0% £0.00	0.0% £0.00	0.7% £0.04	1.3% £0.04	9.4% £0.29	3.1% £0.37
Other, Outside Hartlepool Borough	4.2% £0.13	5.0% £0.13	10.3% £0.06	5.1% £0.31	13.8% £0.39	11.7% £0.36	8.8% £1.06
OUTSIDE HARTLEPOOL BOROUGH TOTAL	7.5% £0.22	5.9% £0.15	10.3% £0.06	7.1% £0.43	62.5% £1.76	91.7% £2.82	41.8% £5.01
OVERALL TOTAL	100.0% £3.00	100.0% £2.55	100.0% £0.53	100.0% £6.08	100.0% £2.82	100.0% £3.07	100.0% £11.97

NOTES:

1. The expenditure is calculated by multiplying the total expenditure (minus SFT) on the relevant category of comparison goods in 2014 for each zone (Table 6A) by the market share.

2. The 'Primary Catchment Area Total' and 'Overall Total' market shares are calculated by dividing the primary catchment/overall area expenditure retained by each destination by the total primary catchment/overall area expenditure.

TABLE 17A - **HARTLEPOOL TOWN CENTRE** COMPARISON CAPACITY

Comparison Goods				
	2014	2019	2024	2029
Overall Catchment Area Total Expenditure (Zones 1-5)	£445.9m	£507.5m	£594.6m	£694.6m
Hartlepool Town Centre Retention Level	27.3%	27.3%	27.3%	27.3%
Retained Expenditure	£121.9m	£138.7m	£162.5m	£189.8m
Turnover of Stores in Hartlepool Town Centre	£121.9m	£135.3m	£149.6m	£165.1m
Residual Capacity	£0.0m	£3.4m	£12.9m	£24.7m
Sales Density	£4,000/sq.m	£4,442/sq.m	£4,910/sq.m	£5,421/sq.m
Capacity for New Floorspace (sq.m net)	0	762	2,638	4,557
Capacity for New Floorspace (sq.m gross)	0	1,088	3,768	6,510

TABLE 17B - **HARTLEPOOL BOROUGH** COMPARISON CAPACITY

Comparison Goods				
	2014	2019	2024	2029
Overall Catchment Area Total Expenditure (Zones 1-5)	£445.9m	£507.5m	£594.6m	£694.6m
Hartlepool Borough Retention Level	44.9%	44.9%	44.9%	44.9%
Retained Expenditure	£200.4m	£228.1m	£267.2m	£312.1m
Turnover of Stores in Hartlepool Borough	£200.4m	£222.5m	£245.9m	£271.5m
Residual Capacity	£0.0m	£5.6m	£21.3m	£40.6m
Sales Density	£4,000/sq.m	£4,442/sq.m	£4,910/sq.m	£5,421/sq.m
Capacity for New Floorspace (sq.m net)	0	1,252	4,337	7,493
Capacity for New Floorspace (sq.m gross)	0	1,789	6,195	10,704

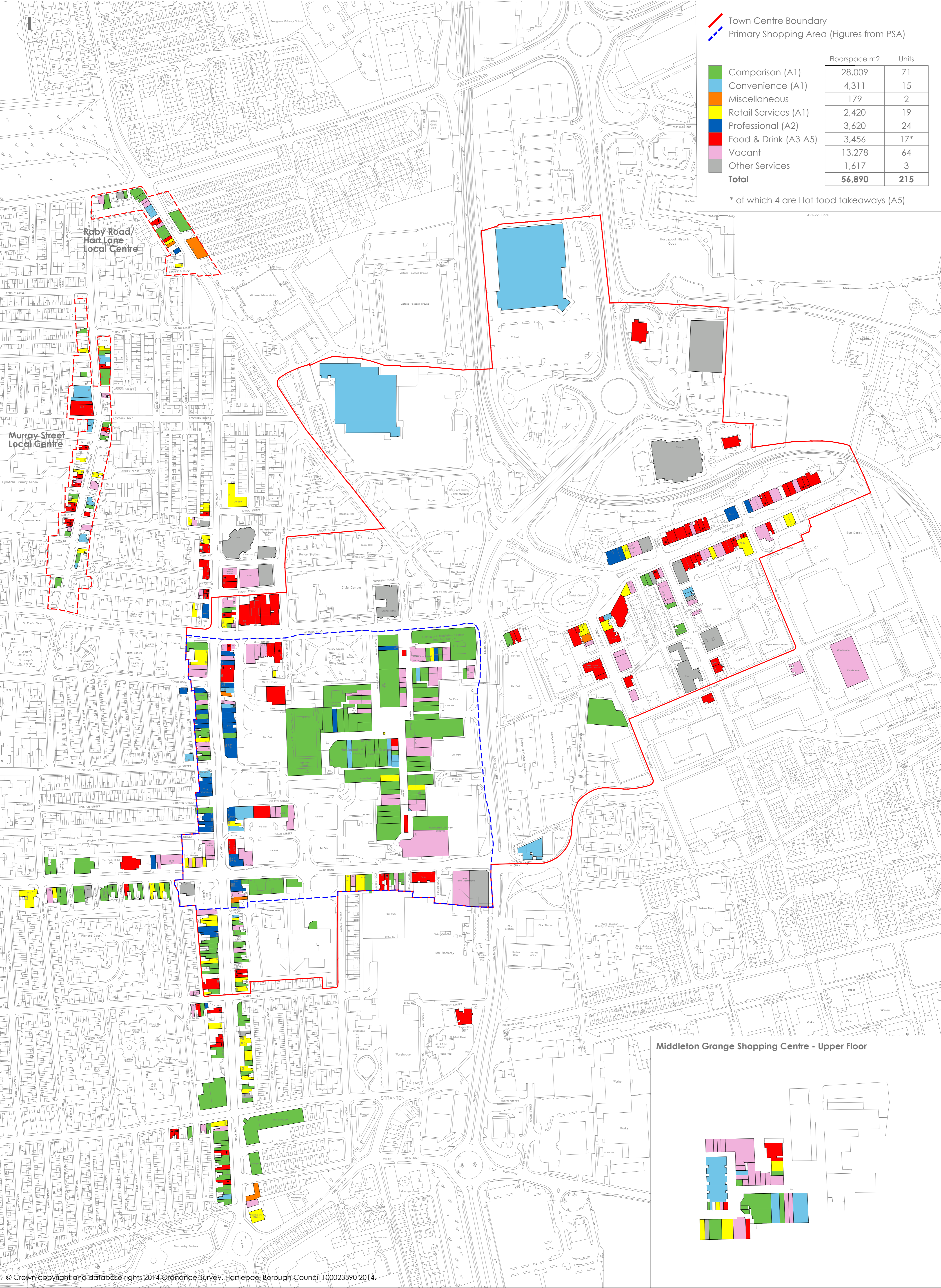
NOTES:

- Overall Catchment Area Total Expenditure - the total convenience expenditure of residents of Zones 1-5, excluding SFT, as set out in Table 3A.
- Retention Level - the total market share of stores in Hartlepool town centre/Borough, drawn from the overall catchment area. The market share of Hartlepool town centre/Borough remains constant at 27.3%/44.9% in each of the forecast years in this scenario.
- Retained Expenditure - the product of the total overall catchment area expenditure and the retention level of Hartlepool town centre/Borough.
- Turnover of stores - the turnover of stores in Hartlepool town centre/Borough that is derived from the overall catchment area expenditure. The turnover of stores is allowed to grow between 2014 and 2029 to account for sales density growth at the rates set out below (source: Experian Retail Planner 11 (October 2013) / GVA Research):

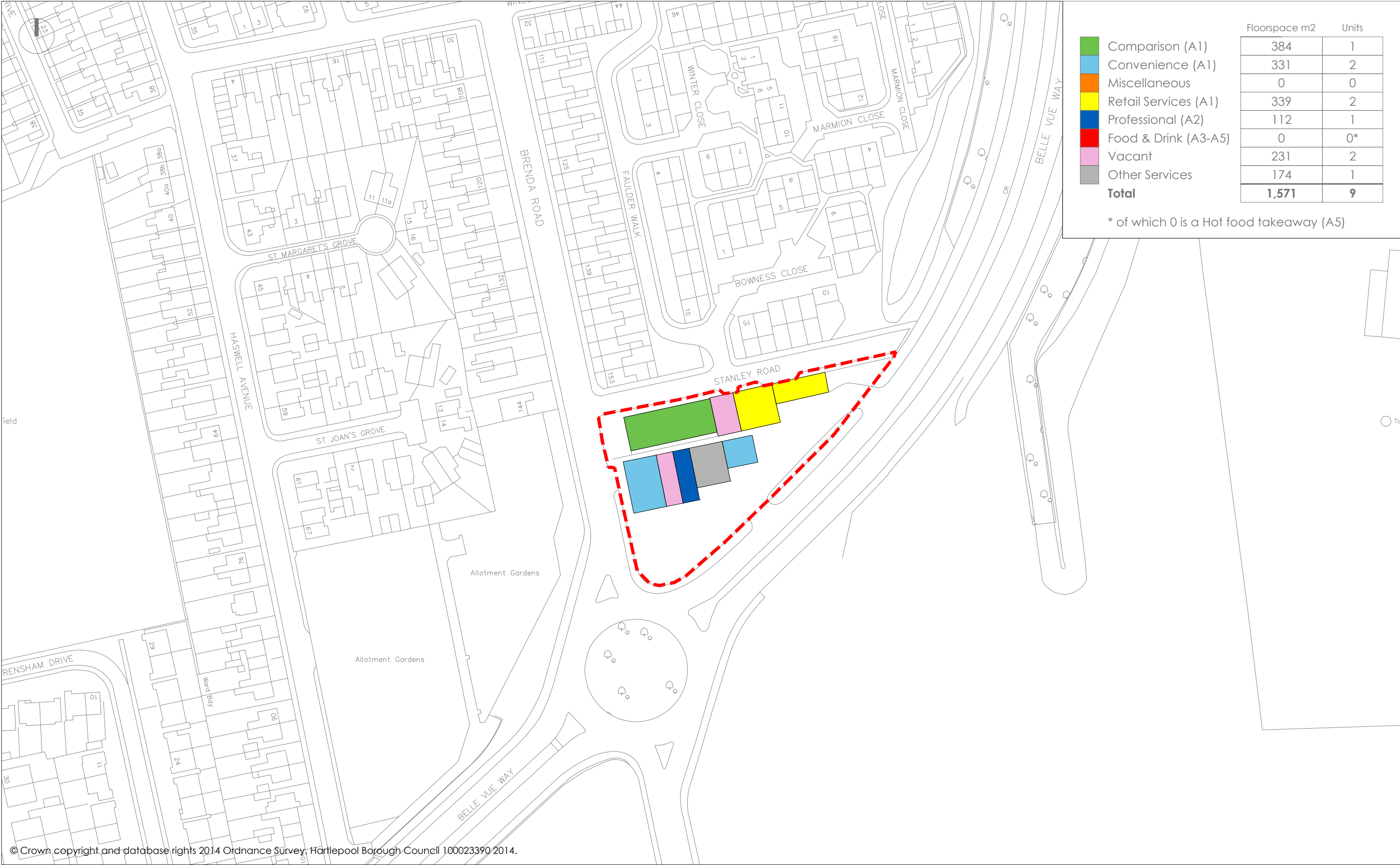
Year	Comparison Sales Density Growth per Annum (%)
2014-2019	2.1%
2019-2024	2.0%
2024-2029	2.0%

- Residual capacity - the total retained expenditure minus the turnover of stores.
- Sales Density - assumed sales density for converting the residual capacity (£m) to a floorspace capacity (sqm). The sales density of £4,000/sq.m in 2014 is 4 based on GVA professional judgement having regard to the characteristics of the town centre and is allowed to grow at the sales density rates set out above to account for improvements in floorspace efficiency.
- Capacity for New Floorspace - the residual capacity divided by the sales density estimate. 70% gross to net ratio assumed.

APPENDIX 4

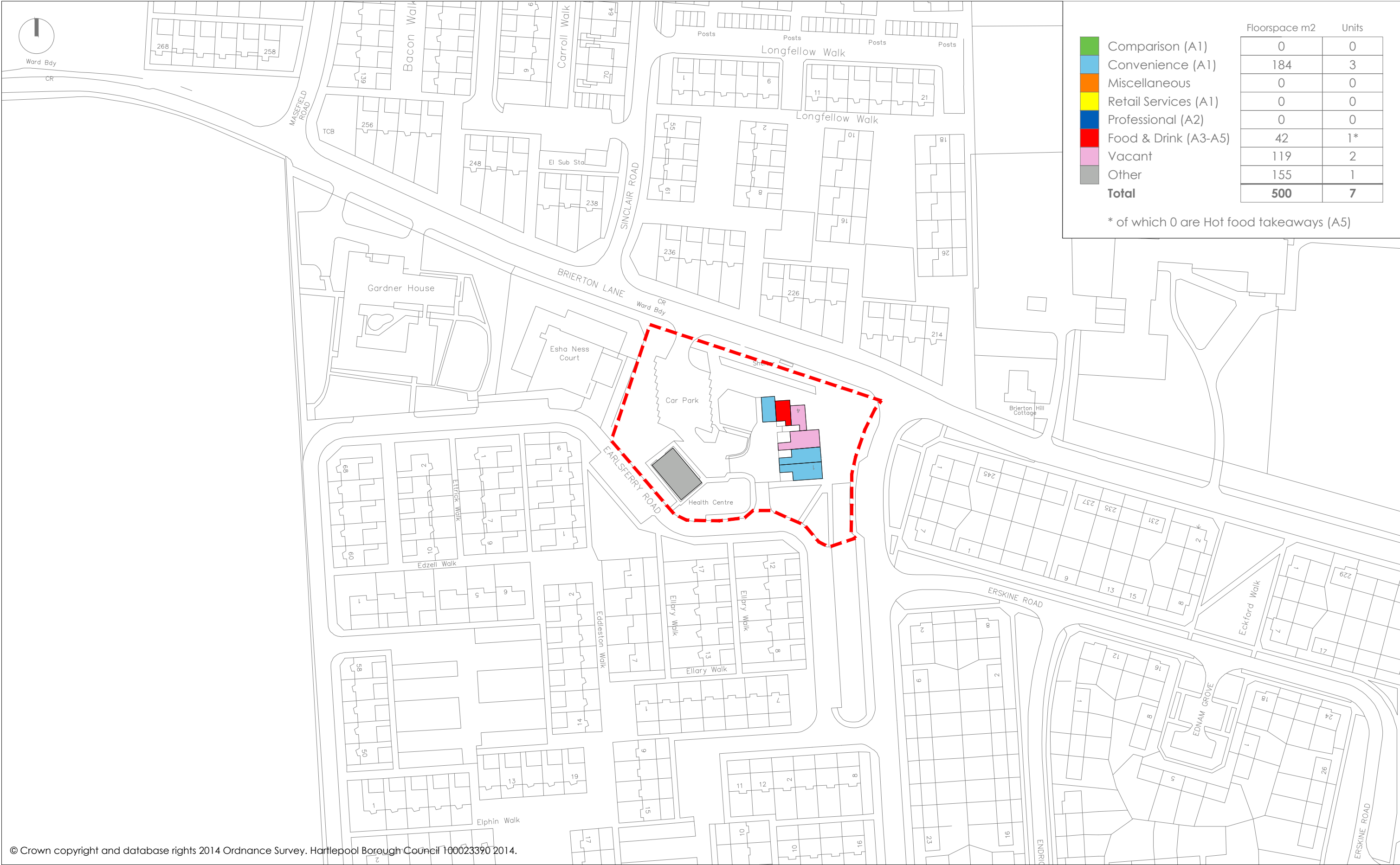


APPENDIX 5



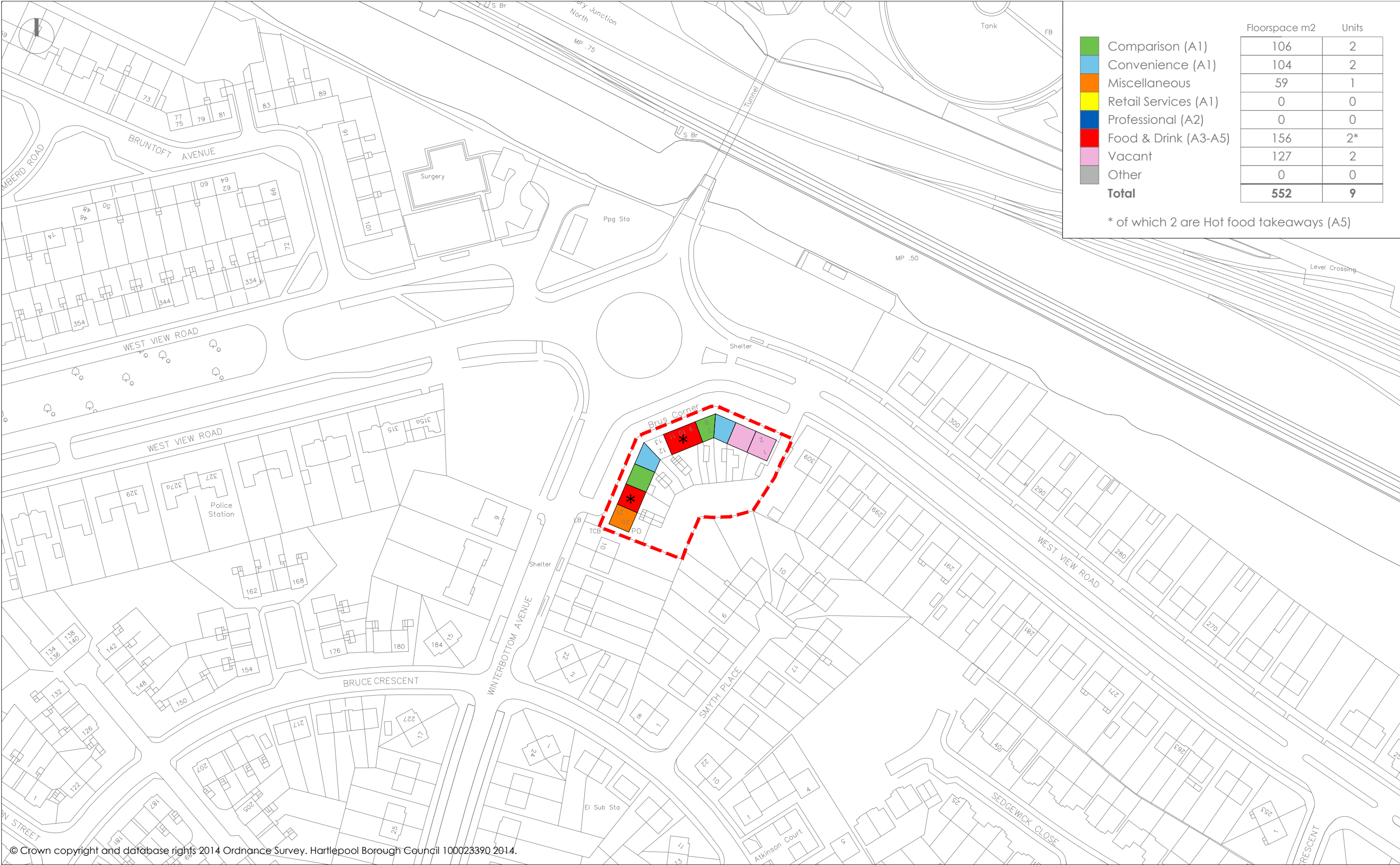
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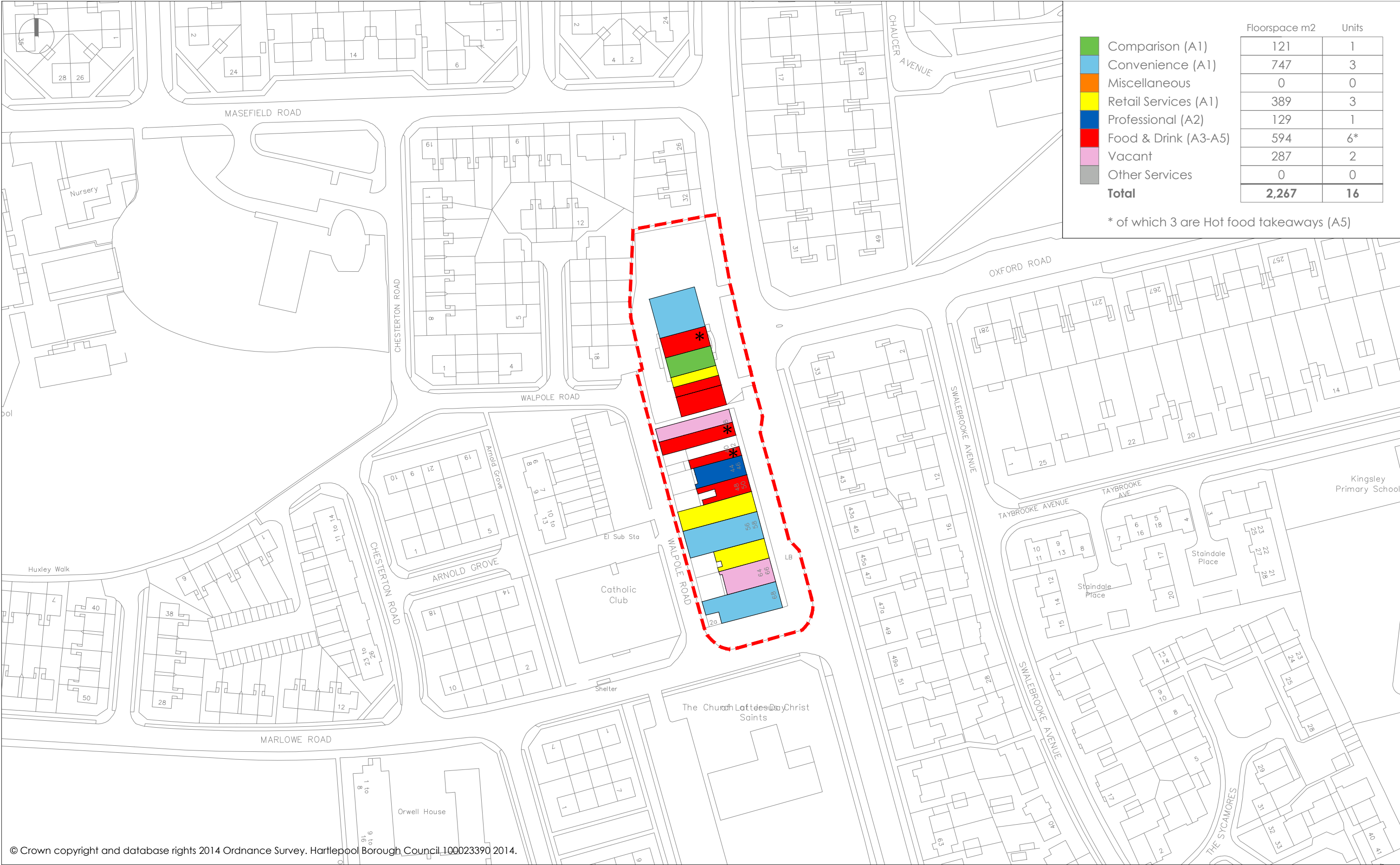


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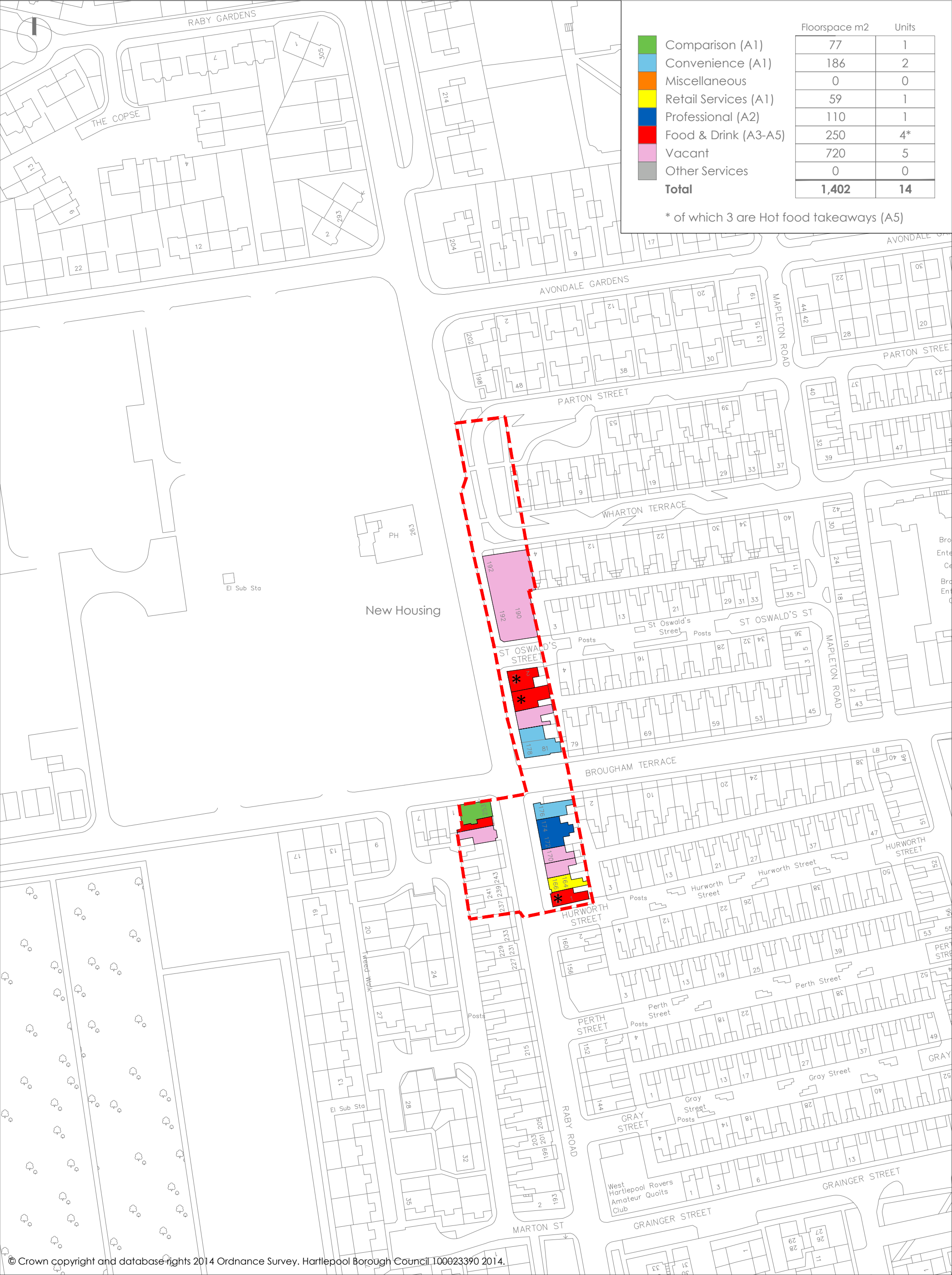




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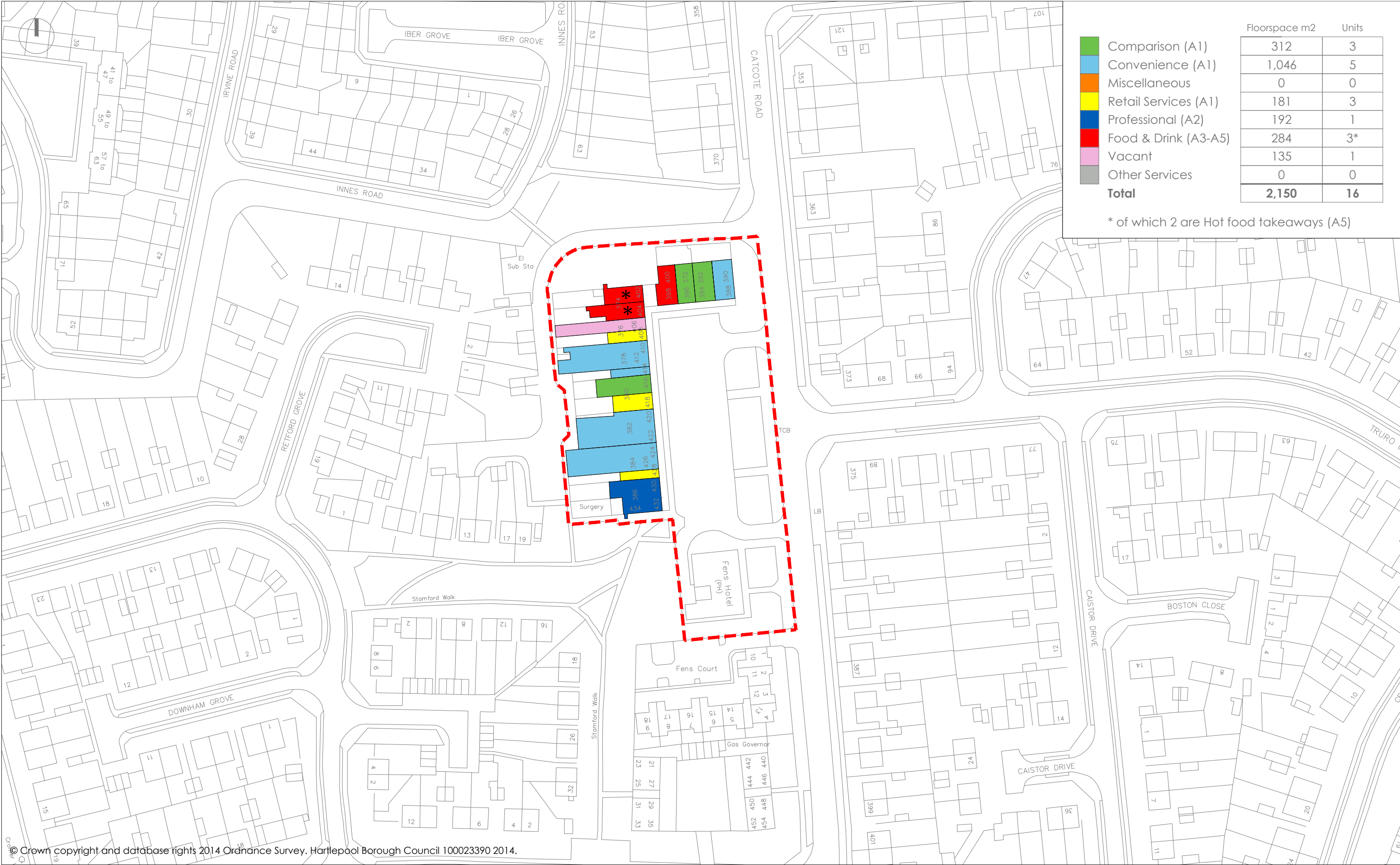


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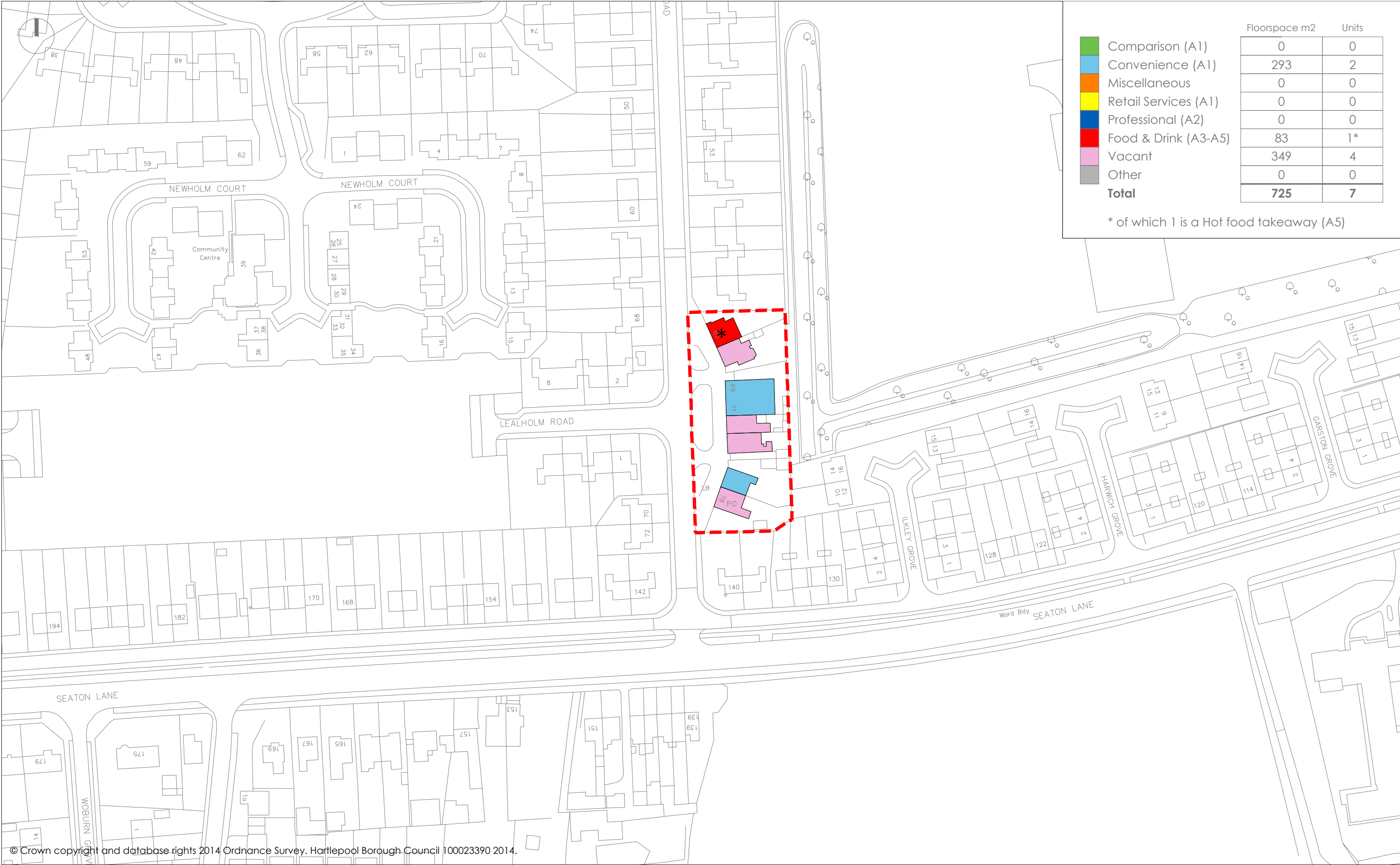


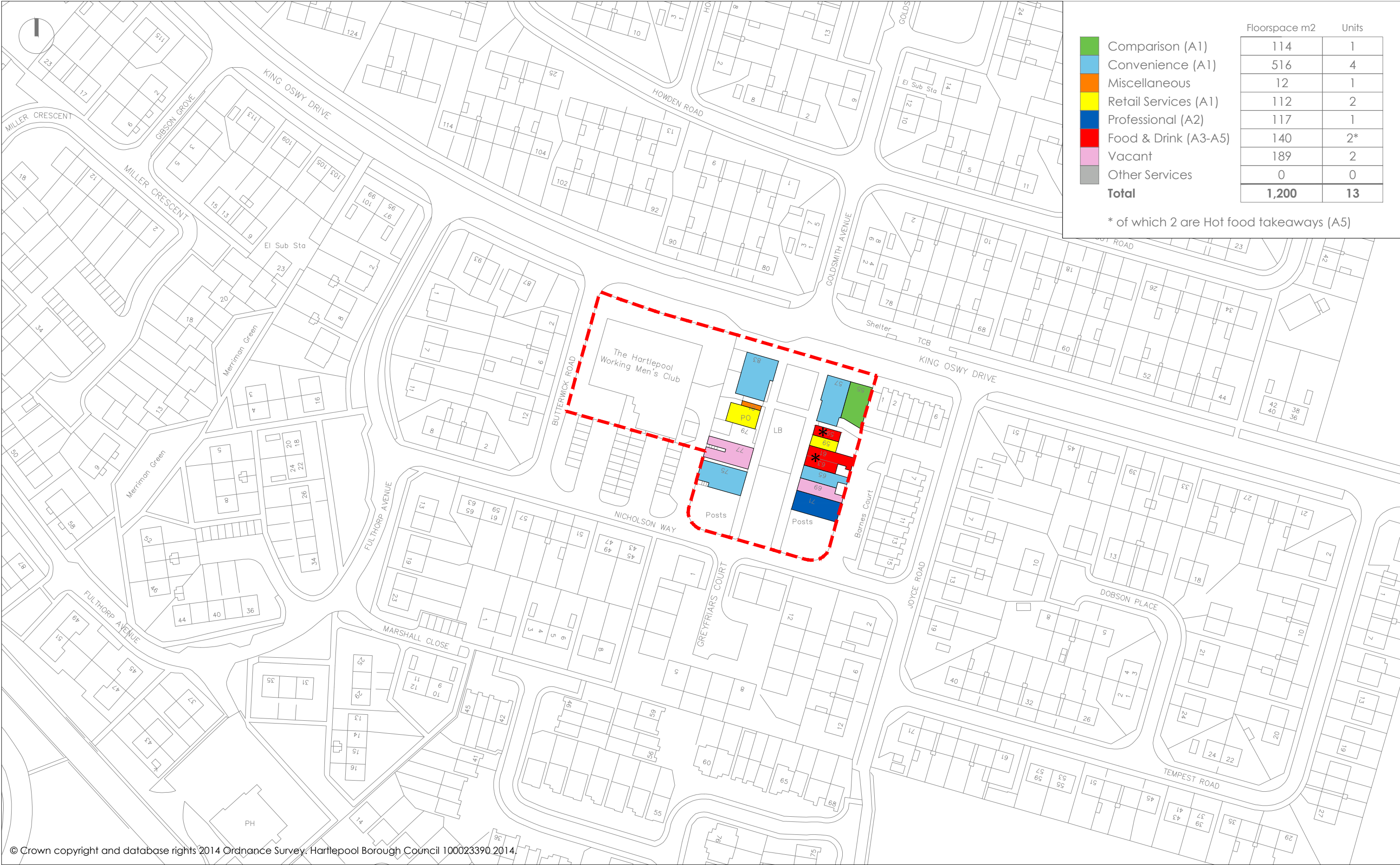


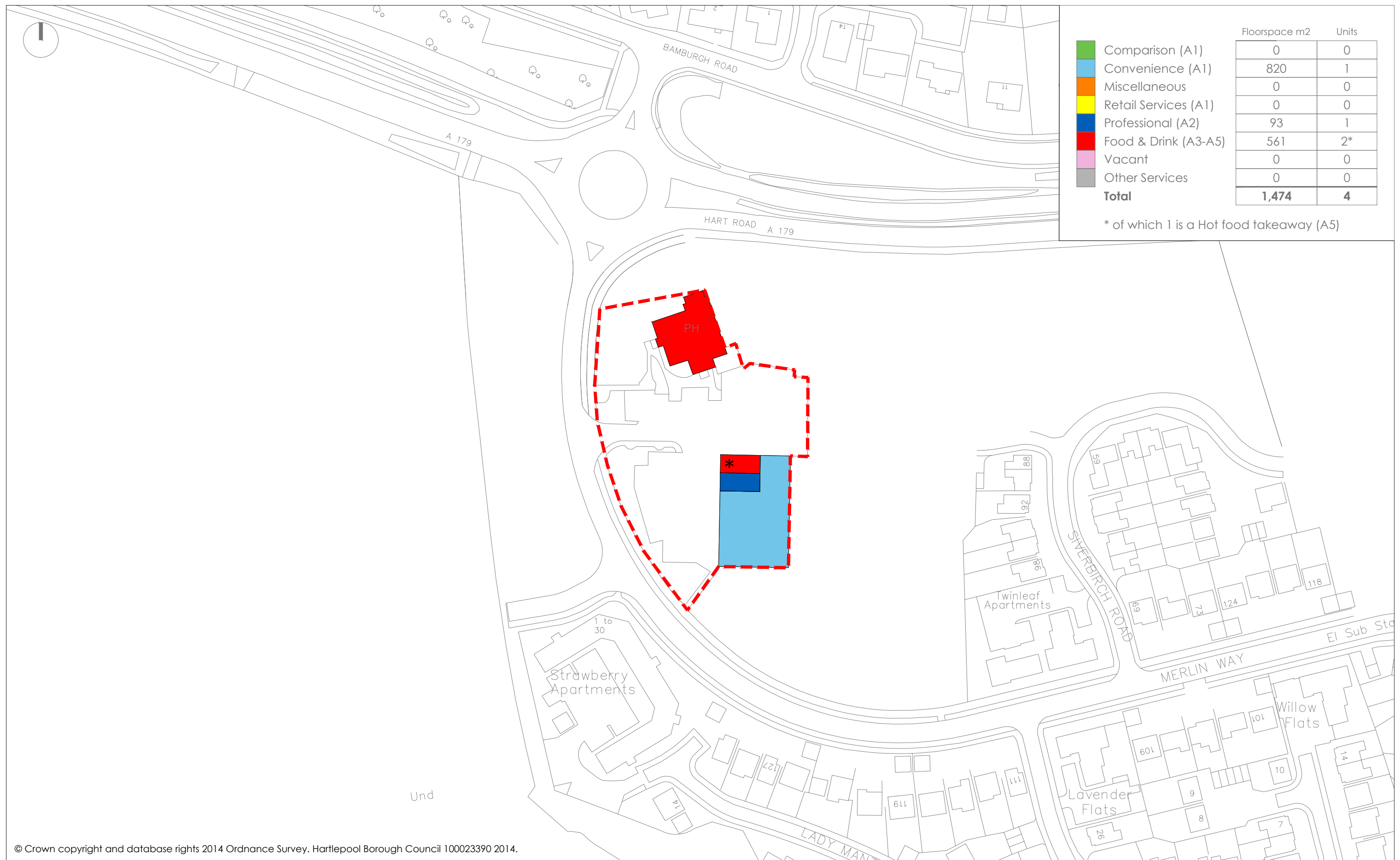
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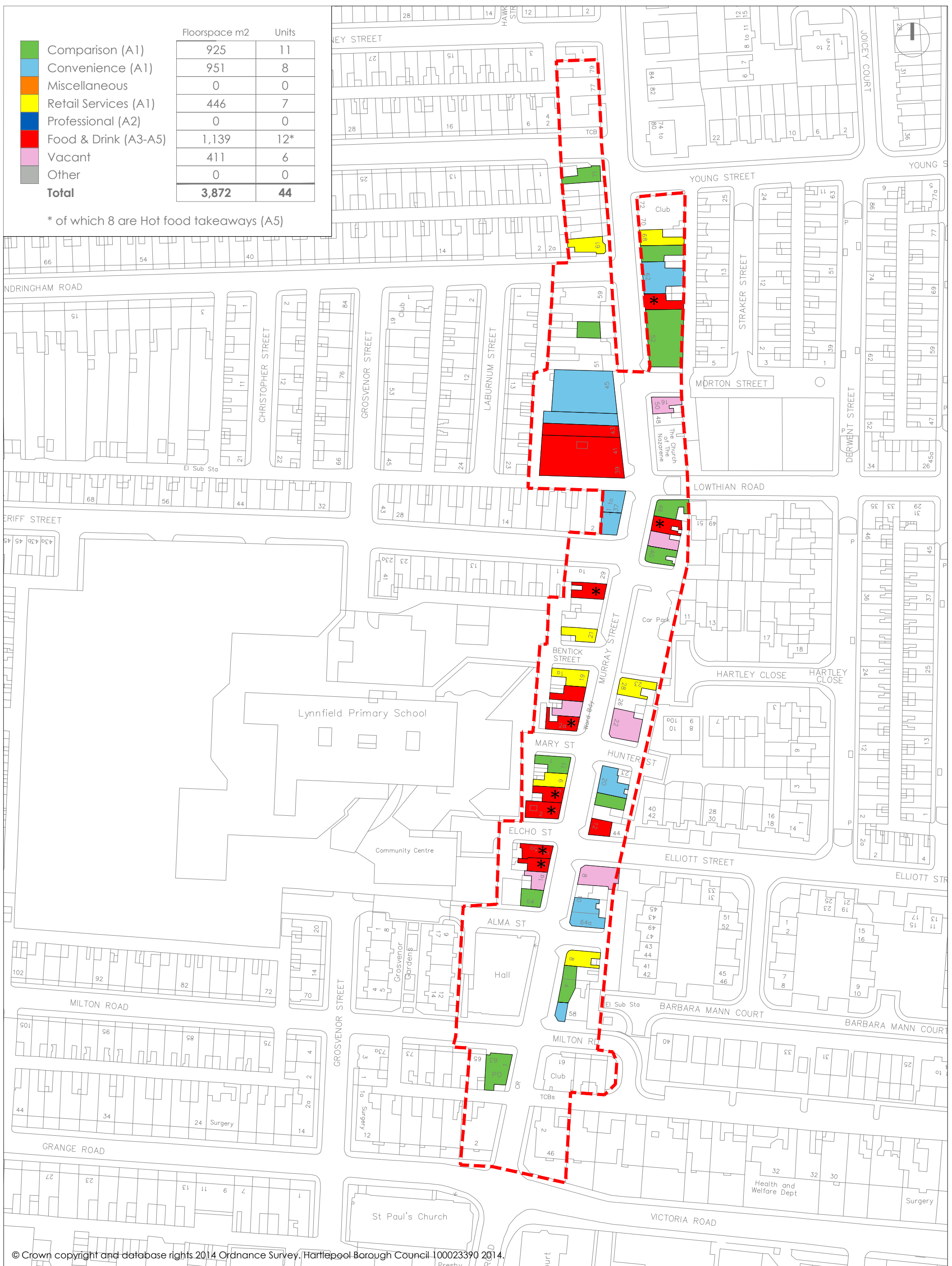
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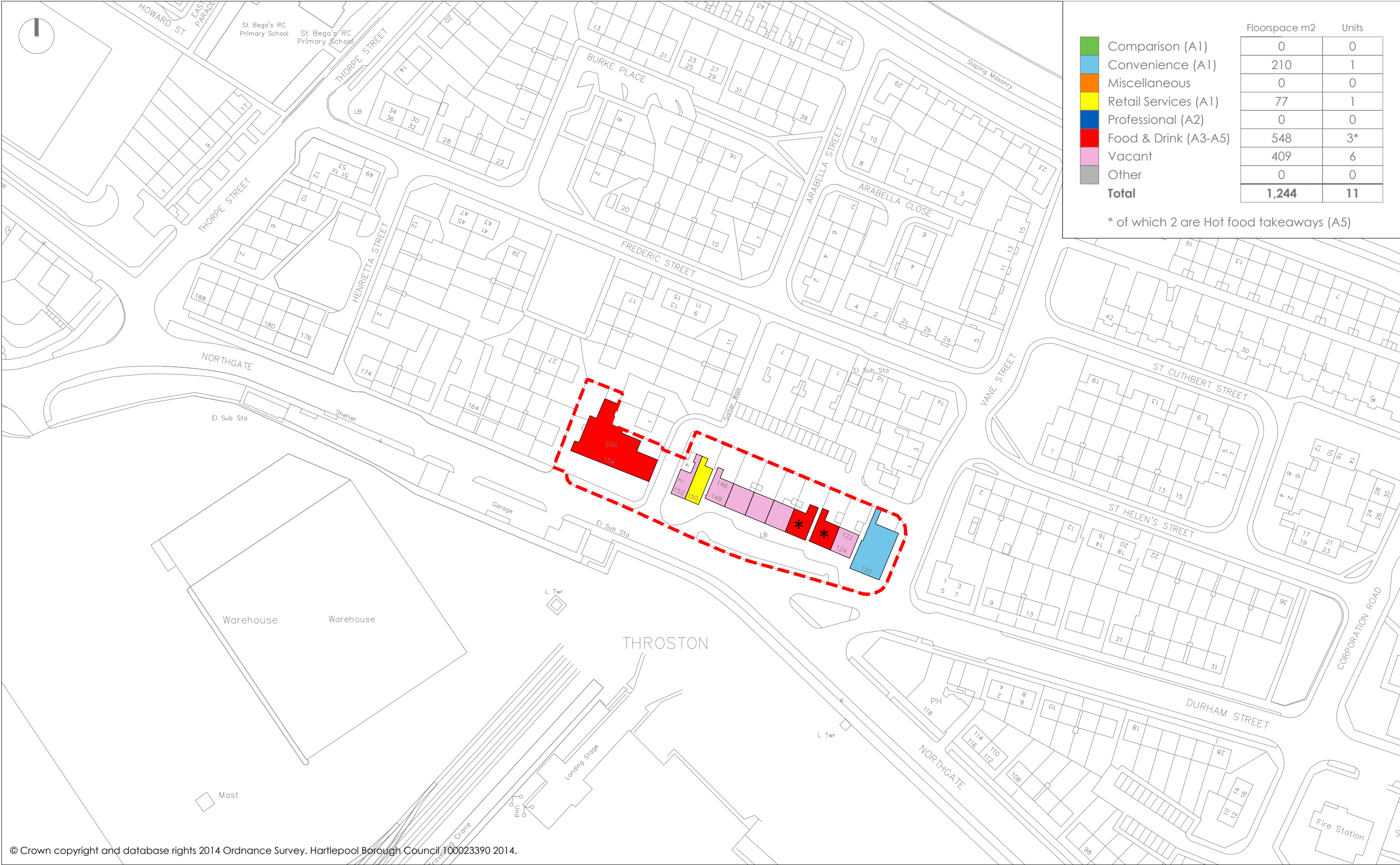


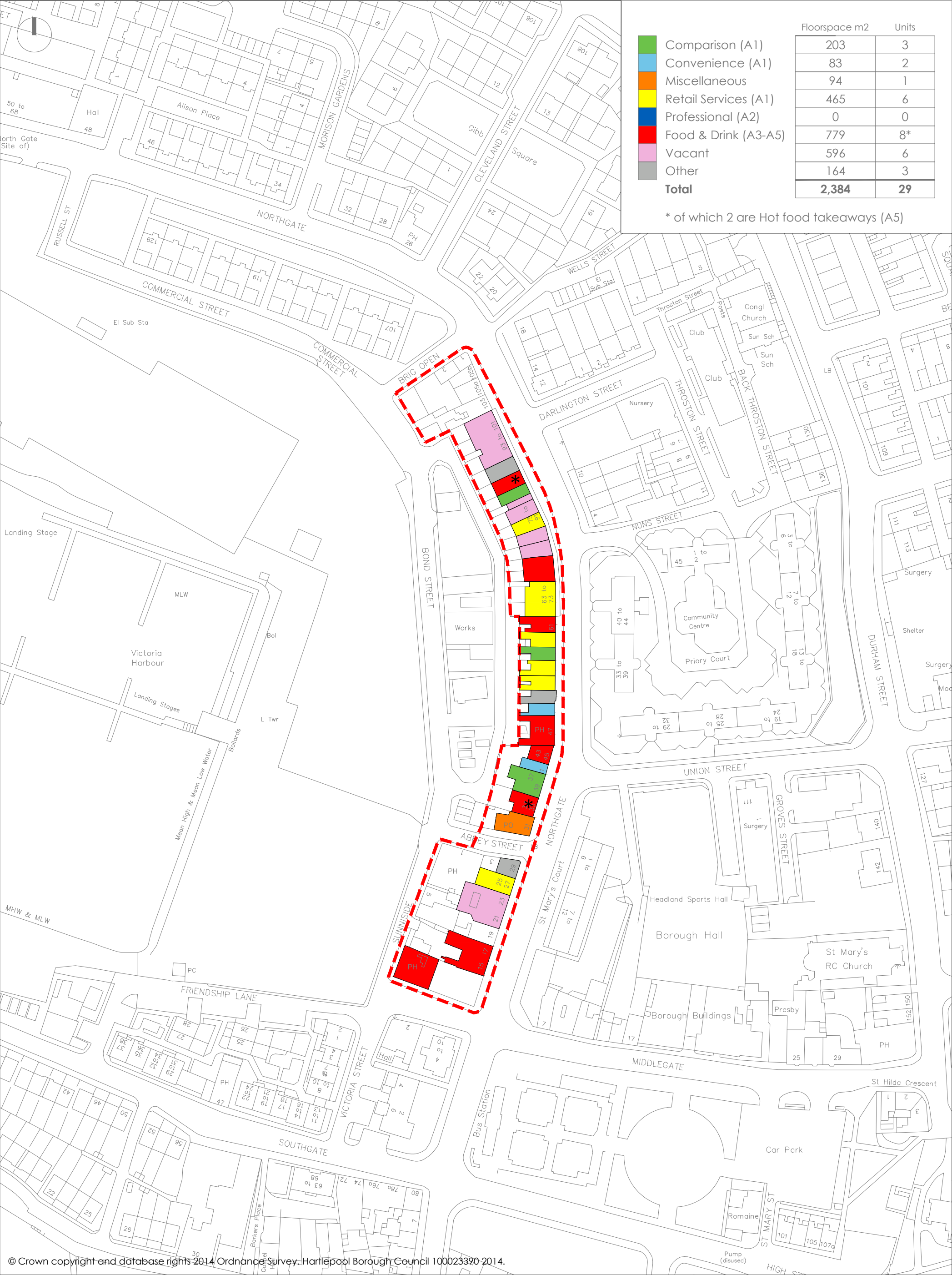


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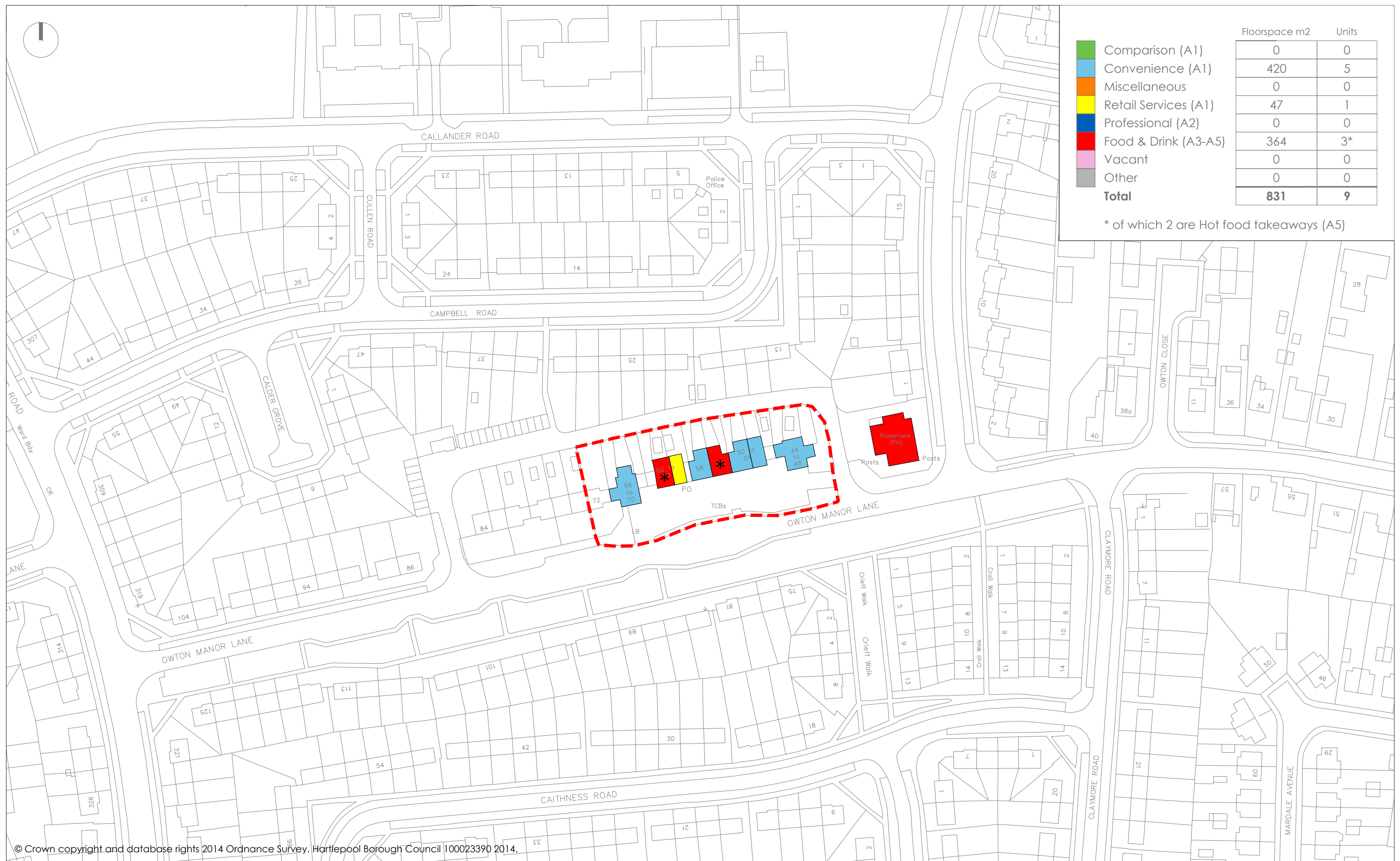


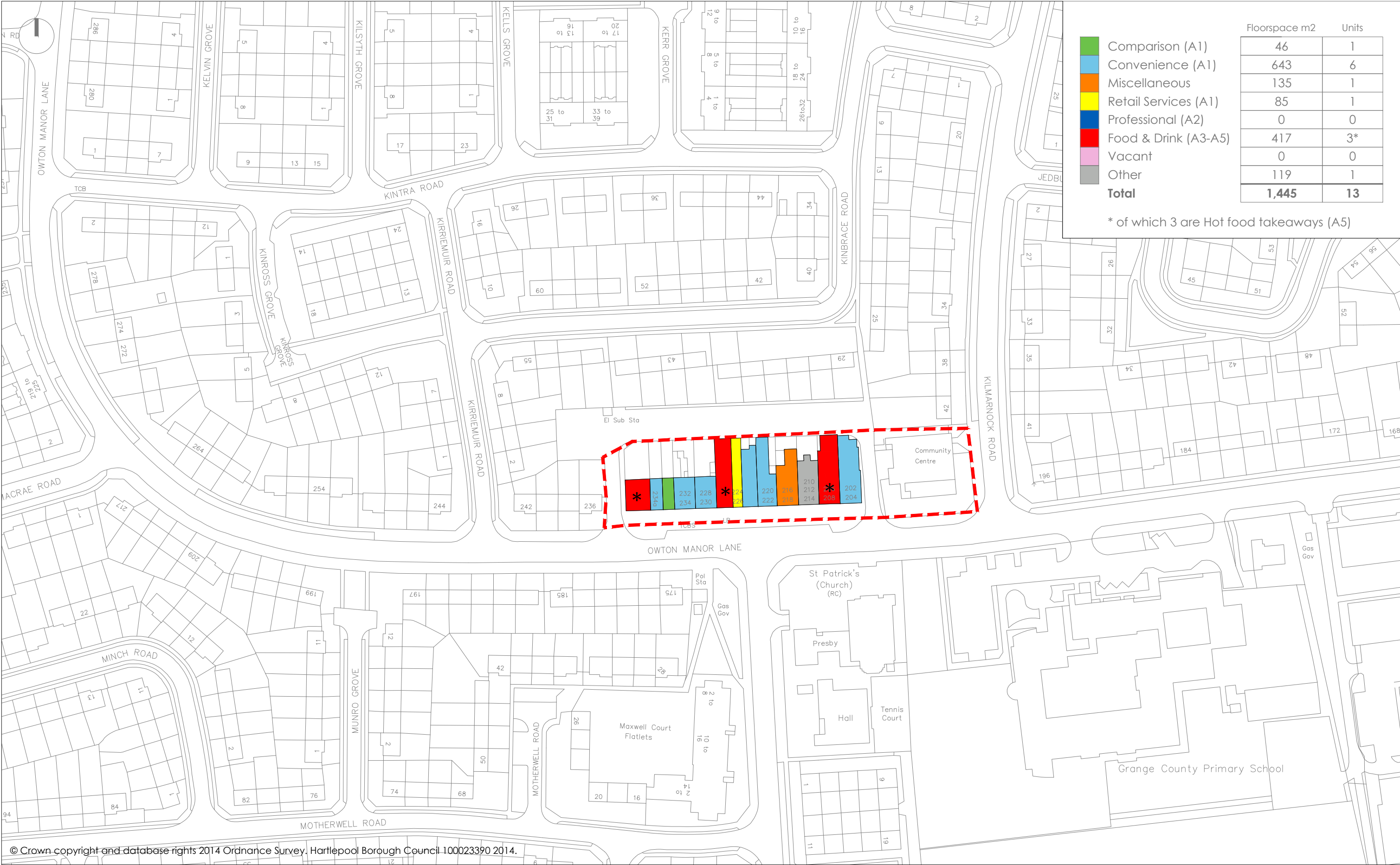
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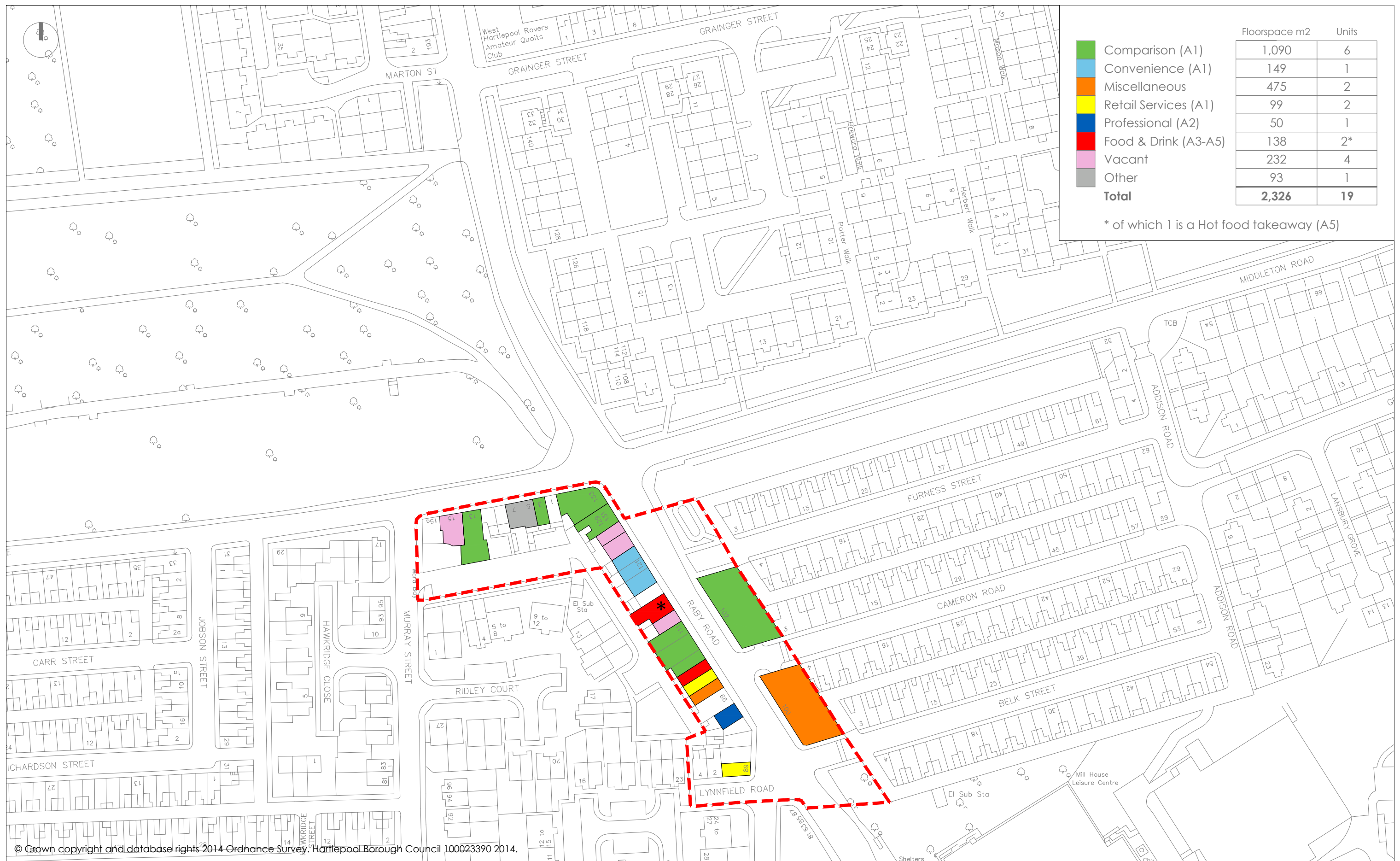


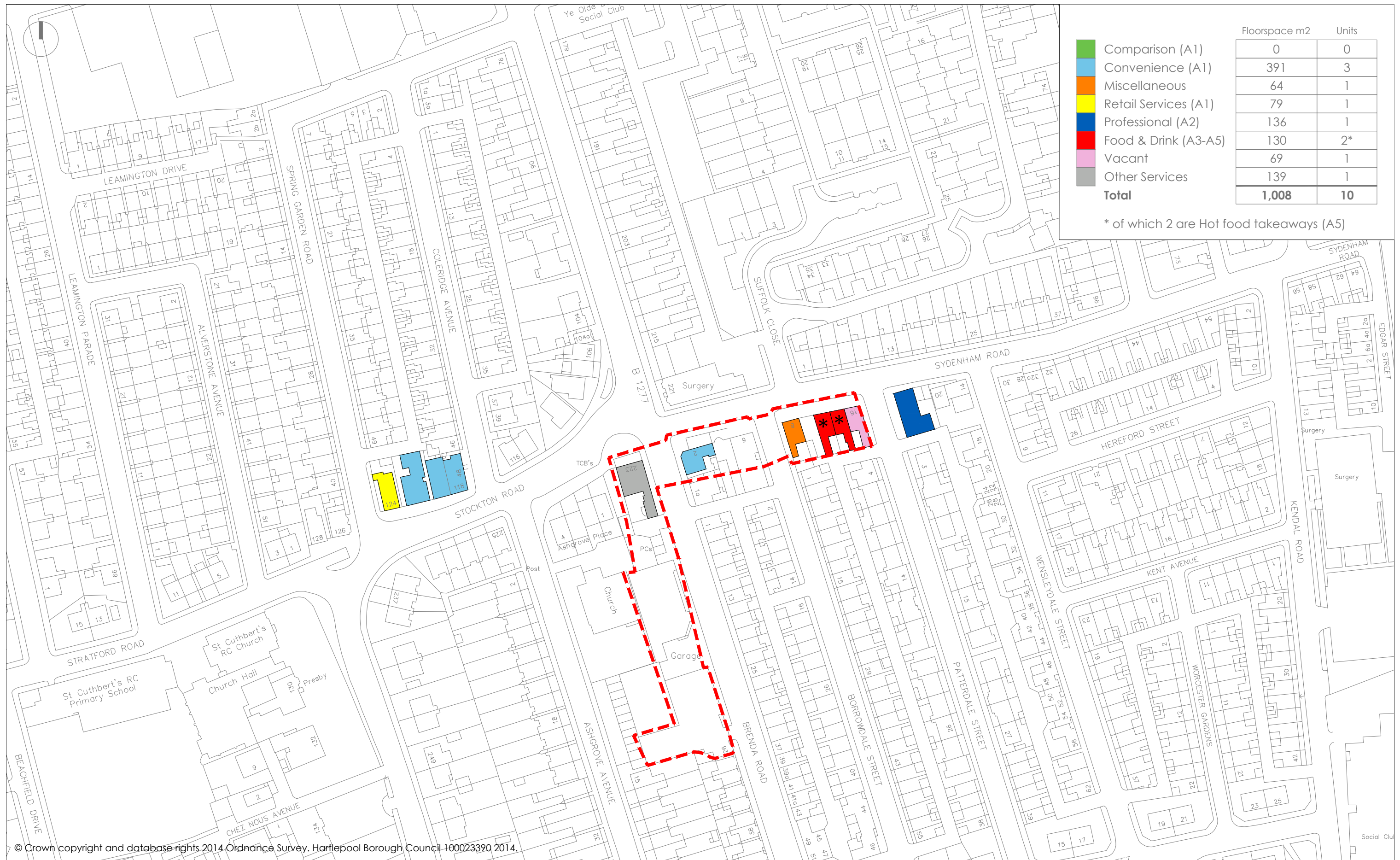


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APPENDIX 6

Mosaic UK groups and types

Group A: Alpha Territory



Piers and Imogen

3.54% of UK households (Types 1-4)

Alpha Territory people are the most wealthy and influential individuals in the UK. They have risen to positions of power in the private and public sectors, whether as owners of their own businesses, as bankers in the city, as senior managers in industry or as top lawyers, surgeons or civil servants, as well as a small but influential cadre of celebrities in sport, the arts and entertainment.

An increasingly large proportion of this group are wealthy foreign nationals. Some are top executives employed by international companies, others wealthy entrepreneurs, increasingly from Russia and the Middle East, who find Britain a convivial location in which to manage their business interests.

Alpha Territory neighbourhoods are concentrated in London, in particular the fashionable inner suburbs of South Kensington, Islington and Notting Hill. They are also common in prime residential areas such as Surrey and the Chilterns, and in the semi rural commuter belt of Britain's largest regional centres. They reside in quite different types of housing, in smart private flats in inner London, town houses in Georgian squares in Bath or Edinburgh's new town, or in large properties common to the outskirts of the UK's big cities.

Alpha Territory people are likely to purchase bespoke luxury items such as expensive brands of jewellery, cars, kitchens and furniture. They are most likely to pay for private education and healthcare, and to employ staff to clean their homes, tutor their children, and maintain their gardens.

If not found on their own private yacht, then they are most likely to be seen in the business or first class cabins of airlines, to holiday in their own foreign property and to enjoy the service of exclusive hotels and restaurants.

Adept at managing their complex business affairs, they work long hours, and many rely on specialist investment, tax and legal advisers for advice rather than being influenced by conventional advertising. They also have an extensive network of personal contacts with whom they confer on personal as well as business affairs. This group can be reached through media such as the financial press, leading business publications and through sponsorship of major sporting events to which many may be invited by friends and business partners.

Group B: Professional Rewards



Graham and Carolyn

8.23% of UK households (Types 5-10)

Professional Rewards are the UK's executive and managerial classes. Often in their 40s, 50s or 60s, some may be owners of small or medium sized businesses whilst others will have risen to senior positions in large multi-national organisations.

These people have significant equity in their own homes. With incomes from their investments as well as from employment, their affluence means they are often paying a higher rate of tax.

Professional Rewards are usually married and are living in spacious family homes with children, many of whom will be at university or finding their feet in successful careers. Professional Rewards neighbourhoods are found in residential areas in the outer suburbs of large cities or in semi-rural dormitory villages from where their occupants often travel to work by car.

The house is likely to be detached, have four or more bedrooms, is well maintain and equipped, and surrounded by property of a similar style. Tastes in clothing and furniture are generally conservative, with preferences for good taste over ostentation. Professional Rewards people will shop at retail stores where service is a key component of the overall proposition. They seek value for money rather than the lowest prices and will pay a premium for brands renowned for quality and reliability. This group are a good market for specialist grocery products rather than basic essentials, and will be more comfortable making personal requests at the supermarket delicatessen and fish counters rather than purchasing own label discount brands.

Professional Rewards people rely on national media, particularly quality national newspapers, to obtain the information they need to achieve the highest return on their investments consistent with security. This is a population that is influenced by evidence rather than "hard sell" and deliberates carefully before purchasing high ticket items.

Many people in this group are owners of a second home, whether in Britain or overseas, where they will take multiple holidays throughout the year. Others will stay in hotels or rent attractive country cottages. A significant number of older people will be considering a cruise or will have plans for a long-haul holiday to see family and friends. This group will provide regular and knowledgeable audiences for theatres and concert halls.

Group C: Rural Solitude



Aled and Gwyneth

4.40% of UK households (Types 11-15)

Rural Solitude contains people who live in small villages, isolated farmhouses or cottages where farming and tourism are the mainstays of the economy. These neighbourhoods are sufficiently remote from major centres of population not to have become commuter dormitories, and are characterised by a traditional country way of life with a strong sense of community.

The population includes farmers, people employed in businesses that support the farming industry, the retired who have opted for a slower pace of life and locally born people who work in low-paid or middle income jobs in local market towns. A high proportion of the population is married or, if single, widowed.

Rural Solitude neighbourhoods are found in the rural areas of South West England, East Anglia, mid and central Wales, the North Pennines, the Lake District and Scotland.

Owner-occupation is common, with a few residents renting from private landlords. Houses are usually spacious, detached and surrounded by gardens, and though unemployment is low the lower wage rates typical in these areas result in modest levels of disposable income. A problem for many younger residents is the high ratio of house prices to local incomes due to the influx of retired people and the purchase of second homes.

Few households have access to mains gas, and many rely on oil fired central heating, whilst limited public transport results in high motoring costs.

The traditional weekly visit to the local market town is now replaced by a weekly visit to its principal supermarket where residents purchase basic non food items as well as mainstream brands. There is also a strong preference for organics and foods grown by local suppliers, and people also spend on their gardens, many of which are used to grow fruit and vegetables.

People in Rural Solitude have traditionally been loyal users of mail order companies and, despite poor access to broadband communications, are willing users of internet as well as call centres.

Much leisure time is spent on country pursuits, fishing, walking, sailing, bird-watching and visiting local historic homes and gardens. The church is an important social focus for many residents along with activities organised by the local community.

Group D: Small Town Diversity



Dennis and Sheila

8.75% of UK households (Types 16-19)

Small Town Diversity people live in medium sized and smaller towns in neighbourhoods of older housing where there is relatively little change in the population from one year to the next. This group of people have strong roots in their local community, have friends and family who live nearby and are likely to live the rest of their lives in the same community.

Although Small Town Diversity people are more likely to be in their retirement years, these neighbourhoods are quite diverse in terms of age distribution and types of household. Some people are quite well off whilst others have to be careful to make ends meet, but you are unlikely to find people at either extreme of the income distribution. A significant number are self employed.

The more affluent residents are owners of successful local businesses, the least well off are young school-leavers who rent small flats over shops in the centre of town. A key characteristic of these people is that they live in communities, small enough for houses of different ages and styles to exist in close proximity and where council estates, if they do exist, are small in scale.

Small Town Diversity neighbourhoods are most common in the South West of England, East Anglia and the East Midlands.

Incomes are relatively low, restricted by the wage rates offered by employers in these locations. However, tastes have an emphasis on home improvement, gardening, motoring and holidays overseas. By contrast relatively less than average is spent on tobacco and alcohol, eating out and entertainment.

For many of these people their social networks are dominated by friends and family, and the focus of leisure is meeting up with friends in homes and gardens, in pubs at meetings of local associations and sharing trips to visit sites local of historical or environmental interest.

Generally unresponsive to aspirational advertising, and disparaging of large business, Small Town Diversity residents would prefer, if they could, to engage with small scale organisations that were more responsive to the personal circumstances of individual citizens.

Group E: Active Retirement



Aubrey and Iris

4.34% of UK households (Types 20-23)

Active Retirement neighbourhoods contain people aged over 65 whose children have grown up and, on retirement, have decided to live in a community among people of similar ages and incomes.

Most of these people, have paid-off their mortgage, sold their property and used the proceeds to purchase a smaller property. Many of these homes are bungalows or country cottages. Others will be living in private blocks of flats in suburban locations.

The move to Active Retirement is an opportunity to downsize to a more manageable property. For those moving to a rural or coastal location it is a chance to make a new start, establish new friendships, and engage in new leisure activities. However some older retired people, especially those living in coastal resorts will be struggling to maintain their homes in the face of failing health and rising utility bills.

Active Retirement people are likely to have an occupational pension accompanied by savings accumulated during their working lives. Some may have sufficient income to maintain a car and indulge in overseas holidays, particularly cruises.

With a surfeit of consumer durables and furniture from their previous homes they spend less on garden equipment, DIY, furniture, white goods and home entertainment products, and more on services such as taxis, cleaning and gardening. Social networks are centred on the bowls or golf club.

Shopping centres which serve these neighbourhoods often contain outlets which meet the demands for specialist foods and drink, hair salons, estate agents and legal services.

Active Retirement people are infrequent users of consumer credit and, when they pay by credit card, they are likely to pay off the balance promptly. They are people of a generation that understands the benefit of paying by direct debit but are less conversant with the opportunities provided by the internet for home shopping and banking.

Leisure activities include reading newspapers and books, solving puzzles and crosswords, knitting and looking after grandchildren. People in this group enjoy short trips to properties of historic interest and the more recently retired are often vigorous walkers and naturalists. Walking the dog and managing the garden are an important means of keeping in good physical condition.

Group F: Suburban Mindsets



Surinder and Bina

11.18% of UK households (Types 24-28)

Suburban Mindsets are mostly married people of middle age, living together with their children in family houses. These homes are typically semi-detached houses that were popular during the inter war years or during the period between 1945 and 1960.

Suburban Mindsets are predominantly middle class or skilled working class individuals looking for a comfortable house in which to bring up a family, one which is affordable, accessible to where they work and relatively free of social problems. Some commute to city office jobs from quite affluent suburbs whilst others earn good wages from manufacturing jobs working in large assembly plants located close to where they live.

The most common feature of these people is their industriousness. Whilst some Suburban Mindsets have modest incomes, very few people are without a job, suffer long term sickness or claim benefit. People in this group value their independence, rely on their own judgement, rather than social or community attitudes, and do not necessarily get involved with their local community.

Much of this group's personal wealth is tied up in their property, of which they are justly proud and many of them are likely to rely on their own skills rather than those of local tradesmen to maintain their homes and gardens.

Suburban Mindset people have unpretentious tastes and are among the most likely to purchase mainstream brands and to shop at nationally known retail chains. They are responsive to advertising that illustrates value for money as well as endorsements from satisfied users.

These people are financially stable. They have established accounts with mainstream banks and are at the stage in their lives where many are able to take advantage of ISA allowances and to build up worthwhile deposits in monthly savings accounts. Many of these individuals like to plan ahead to minimise their exposure to financial uncertainty, and secure their future. Readership of mid-market national tabloid newspapers is popular amongst this group, and they are also more likely to respond to advertisements in regional newspapers, to direct marketing, telephone marketing and door-to-door selling.

Group G: Careers and Kids



Jonathan and Nicola

5.78% of UK households (Types 29-33)

Careers and Kids people are young couples, married or living with their partner whose lives are focused on the needs of their growing children and the creation of a comfortable family home. These people are well-educated and established in a technical, junior or middle management career, in which they benefit from the prospect of future career development.

Careers and Kids neighbourhoods consist of new purpose-built family housing located on the outer edge of a large city or town, often equipped with a modern primary school, shopping centre and health clinic. Homes and gardens are not spacious but are well equipped. Careers and Kids people are influenced not just by value for money but by ethical and environmental considerations. As experienced users of technology at work, these consumers take a particular interest in the functionality of digital products such as durables, cameras or entertainment systems.

Residents in this group place a high value on material possessions. To some extent this reflects a stage in their life, when investing in new homes requires substantial expenditure on appliances. With steady incomes from two working parents this expense is usually affordable, but those who do not plan carefully often find themselves over-extended on their credit. Other than through employee pension schemes, few people are yet in a position to make significant savings for their retirement.

Living very often in new communities on the city edge, Careers and Kids people rely on their cars to shop at modern out-of-town retail centres.

A higher proportion of their spending will be at national retail chains from which they are likely to purchase brands associated with innovation and technical excellence.

With both parents juggling busy working lives, Careers and Kids people are frequent users of internet and the telephone for banking and online shopping. Just as people will drive to shop together as a family, the family and the car are the focus of much leisure activity, with trips initially to parks, theme parks and the seaside and, for those with older children, to cinemas, leisure centres and sporting venues.

Group H: New Homemakers



Lukas and Keeley

**5.91% of UK households
(Types 34-37)**

New Homemakers live in homes which are likely to have been built only in the last five years. These homes can take a variety of forms: small well appointed flats in new brown field inner city locations suitable for young, single people, many of whom rent from private landlords; small starter homes designed for people on average incomes; mixes of flats and houses in larger new developments where local councils have required developers to include some affordable housing alongside more luxurious homes.

Such developments cater for the growing number of single person households. Some residents are young single professionals who prefer living in a well equipped, purpose built flat to sharing an older divided house; young people on middle incomes who rent a flat whilst sub-letting the second bedroom to a friend; older people down sizing into modern accommodation and young couples just starting a family.

Most residents have a ready income from a secure position working for a large private or public sector organisation.

The small kitchens in many of these homes and the difficulties of managing food for a single person, means that eating out is popular. Residents are also likely to order fast food from local take away and cook ready prepared meals bought from the local convenience store or a major supermarket chain.

Most residents own a car which is used for visits to the gym or the local cinema. Time is also spent at local pubs and clubs, especially where this neighbourhood occurs close to the centres of large provincial cities.

New Homemakers rely on searching the internet search for information and advice about products and services. For the many who lack knowledge of local suppliers it is often simpler to buy over the telephone or via the internet. This is a generation that is increasingly influenced by the growth of 'viral' marketing and for which there is an increasing demand for information to be sent via text messaging rather than direct mail.

Learning how to use financial products, surviving on a budget and managing debts are concerns for many in this group. It is a market for which many suppliers can productively convert to direct debit as a means of payment and for email as a means of billing.

Group I: Ex-Council Community



Aaron and Isabel

**8.67% of UK households
(Types 38-41)**

Ex-council Community neighbourhoods are populated by people who are practical and enterprising, rather than well-educated, who have created a comfortable lifestyle for themselves through their own hard work. Many live on pleasant well-built council estates where a large proportion of the residents have exercised their right to buy.

Some residents in this type of neighbourhood remain tenants of the council but a large number are owner occupiers. Some of the owner occupiers will have been former tenants who exercised their right to buy whilst others will have bought freeholds from former council tenants. People live in communities with a fair mix of incomes and occupations where there is a mutual respect for each other and very little anti-social behaviour.

Residents tend to live in the more economically successful regions of the country where wage rates are high and workers are less vulnerable to redundancy. As a result these neighbourhoods are more common in the South East of England and in Scotland than in northern industrial cities and in smaller centres and market towns than in London and other large provincial centres.

Ex-Council Community people value the concepts of self reliance and responsibility, and are confident in their ability to manage their affairs without support from the state, the wider community or from immediate family. Neighbourhoods of this sort are characterised by informal community networks, often centred around family and former school friends.

Households are well equipped with the comforts and appliances of modern living, but may purchase basic models or discount brands. Value for money retail chains and supermarkets are also an important attraction. Significant amounts of time are spent in household improvements, and where greater technical expertise is required it is often sourced from within the informal economy. Television and the home computer are seen as primary sources of entertainment.

Within this group you will find a range of attitudes towards finance between older residents, who are cautious and careful savers, and younger residents, who are more prone to maximise their exposure to credit. Relatively few people bank or purchase over the internet even though historically these have been fertile neighbourhoods for home shopping and mail order.

Group J: Claimant Cultures



Jimmy and Shelley

**5.16% of UK households
(Types 42-44)**

Claimant Cultures are some of the most disadvantaged people in the UK including significant numbers who have been brought up in families that have a history of dependency on the state for their welfare. Residents in this group are surrounded by others who find it a struggle to make ends meet, and whose children are unlikely to achieve any sort of educational attainment. Many work in semi-skilled jobs on modest salaries, others may be unemployed, sick or raising children on their own.

Claimant Cultures people can be found in large, low rise estates of terraced and semi detached houses, often on the periphery of large provincial cities, such as Liverpool, Hull and Middlesbrough, which have struggled against declining demand for low skilled labour. High levels of unemployment on these estates are exacerbated by low levels of car ownership and by residents' reliance on public transport for shopping and travel to work. In addition to the economic disadvantages faced by consumers in these areas, they are also most likely to be subjected to high levels of social deprivation and anti-social behaviour.

Consumers spend disproportionate amounts of their modest incomes on alcohol and tobacco as well as on the lottery and betting, and much of the remainder on food and other household necessities. Poor accessibility to shops means that residents frequently find it difficult to get access quality fresh produce which results in poor diet and health. When they do visit the shops these are people who are willing to purchase established, mainstream brands.

Money management tends to be on a weekly basis, and whilst budgets can cope with the daily necessities they are often undermined by larger items such as payment for phone or utility bills. Relatively little is spent on consumer durables, on homes and gardens, and few people can afford to travel abroad. Acquisition of consumer products is made more difficult by the tendency for consumers not to qualify for credit and purchases are frequently second hand.

Readership of tabloid newspapers is popular, and television is the primary source of entertainment, but most residents are unfamiliar with IT and use of the internet is low. Most of these areas have poor access to community services such as pubs, leisure facilities, and community centres.

Group K: Upper Floor Living



Jamal and Chantel

5.18% of UK households (Types 45-49)

Upper Floor Living people are on limited incomes and rent small flats from local councils or housing associations. Typically these people are young single people or young adults sharing a flat. They may also be single people of older working age or even pensioners.

Upper Floor Living neighbourhoods are most common in inner London, Scotland and, to a lesser extent, large provincial cities in the north of England.

Quite a few of the larger blocks that these people live in have turned out to be less attractive places to live than their architects and planners had originally envisaged. As a result many of them are hard to let.

Not necessarily living in housing of their own choice, many residents are disadvantaged by living among neighbours who suffer high levels of vulnerability. On the other hand, in those parts of London where money has been invested in the renovation of these blocks, some of the flats have been sold to private owners and can prove attractive to young professionals as an alternative to buying a flat in a more modern block a long commute away from their jobs in central London.

Consumers in this type generally do not have a lot of money to spend, and with limited incomes much effort is devoted to the achievement of basic necessities. Convenience food is purchased on a daily basis from local discount stores, and alcohol and cigarettes consumes a much higher proportion of the household budget.

Little money is spent on the purchase of large household appliances or electronic equipment and many households do not have access to a personal computer. Readership of tabloid newspapers and watching TV is popular. If funds are available, time is spent in the pub, going to the cinema or clubs.

Limited incomes and the challenges faced by budgets means that people in this group tend not to qualify for a credit card and some do not have a current account. This makes cash an important medium of exchange.

This is a group of people that is characterised by a culture of dependency and has no family or community structures to provide a sense of social cohesion.

Group L: Elderly Needs



Henry and Violet

5.96% of UK households (Types 50-53)

Elderly Needs are pensioners whose faculties are now fading and who can no longer easily manage the responsibility of looking after a house and garden. This group contains a large number of older pensioners, typically in their 70s, 80s and even 90s, who are no longer as physically active as they once were.

Some members of this group may at one time have had well paid jobs but the majority are people who, on account of their low incomes, could never realistically look forward other than to a state pension. Those members of the group who years ago benefited from the sale of a family home and who still enjoy some form of private pension have also found their retirement incomes reduced by inflation.

Elderly Needs are found in a mix of different types of accommodation. These range from nursing homes and sheltered accommodation serviced by a resident warden, to homes designed for semi-independent older people, such as modest bungalows on a council estate. These neighbourhoods are scattered throughout the country but with notable concentrations in the UK's principal coastal retirement destinations, in Northern industrial cities and in Scotland.

A key characteristic of this group is its lack of familiarity with information technology and its dependency for information on television and daily newspapers rather than the internet.

Many people continue to shop in local neighbourhood centres, and groceries are purchased in small amounts on a regular basis from local independents that they trust.

A critical problem confronted by many members of this group is the difficulty they have in identifying best value for money from the proliferating number of options offered by suppliers. As a result many people maintain their loyalty to well-established brands that they may have bought for many years rather than switching to new and unfamiliar products.

They respond to direct mail or national newspaper advertising with clearly stated benefits and testimonials rather than heavy lifestyle content.

The principal interests of this group tend to be food, grandchildren and socialising with old and trusted friends. Those who can do so enjoy reading or walking the dog. Knitting and bingo are commonly cited as leisure activities.

Group M: Industrial Heritage



Lyndon and Thelma

**7.40% of UK households
(Types 54-56)**

Industrial Heritage people are traditional and conservative, living in communities that historically have been dependent on mines, mills and assembly plants for their livelihood. Most of these people are married and are approaching retirement age. Their children have left them in a family home larger than they really need and their mortgage is nearly paid off.

Whilst many people in this group work in offices and shops, a large proportion still earn their incomes through manual and craft skills.

These are socially responsible people who would consider that they come from a working class background. They live in the same community as the one in which they were born and have saved carefully and conscientiously to repay their mortgages and loans on time.

Industrial Heritage neighbourhoods are scattered over those parts of the United Kingdom whose period of most rapid growth was during the late industrial revolution, South Wales, the coal fields of the East Midlands and South Yorkshire, the Pennine fringes and the North East of England.

Despite living in cohesive local communities, many of these people are highly dependent on cars for shopping and to get to work. They frequent new out-of-town retail parks developed on former brown field sites and shop as much in large national retail chains as in small independents. They frequently buy on price rather than range or value and are loyal to trusted, popular products and brands. These people are careful with their money. They avoid getting into debt and save small amounts of money on a regular basis.

Industrial Heritage consumers prefer traditional sales approaches and promotions that emphasize value for money. They are responsive to door-to-door distribution and addressed mail, and are frequent readers of mid-market tabloid newspapers. Many know how to use the internet and have access to broadband but are infrequent users.

Leisure time is often spent with family relations or in the pub, or watching sport on television. Holidays are often taken in the United Kingdom, touring with a caravan or using bed and breakfasts, enjoying traditional English fare.

Group N: Terraced Melting Pot



Raja and Shazia

**7.02% of UK households
(Types 57-60)**

Terraced Melting Pot people work in relatively menial, routine occupations and are poorly educated. The majority are young, some still single, others living with a partner with children of nursery and primary school age. These people live close to the centres of small towns or, in London, in areas developed prior to 1914.

Terraced Melting Pot neighbourhoods tend to be densely packed terraced housing some of which is owner occupied, the rest rented, sometimes from a residential landlord. Such houses were traditionally built for the workforce of nineteenth century mines, mills and factories and today provide a relatively cheap entry point into the housing market for those who do not qualify for social housing.

Convenient though many of these houses are, residents have to contend with a variety of environmental problems such as noise and pollution. In London, a key advantage for many residents in this group is being part of a community of people of similar ethnic or religious origin.

Despite their small size, Terraced Melting Pot homes tend to be poorly maintained. The focus for residents is often to spend their time and money outside the home, whether in the pubs and clubs of small town centres or in the restaurants and cafes which characterise the many High Roads of inner London.

Many residents in these neighbourhoods belong to groups that have recently arrived in the UK and local shops provide access to products and services important to particular minorities.

These might include services for those who need to keep in touch with people back home such as mobile phone calling cards, foreign language newspapers, or cheap flights abroad. Communication is often by informal networks whereby newcomers come to learn from more established residents where to obtain the best products and services. In addition, many recent migrants come from communities in which buying from owners of local business is as much a social activity as an economic transaction and much more natural than using remote channels such as mail order, telephone hotlines or internet web sites.

The leisure activities that are favoured by people in this group centre on social networking in restaurants and pubs.

Group O: Liberal Opinions



Johan and Freya

**8.48% of UK households
(Types 61-67)**

Liberal Opinions are young, professional, well educated people, cosmopolitan in their tastes, liberal in their views, who enjoy the vibrancy and diversity of inner city living. These neighbourhoods also contain a high proportion of the country's students living in term-time accommodation, whether in halls of residence or shared accommodation.

Popular occupations include jobs in journalism, politics, entertainment and the arts, as well as fashion and design, university education and the internet. As a result these neighbourhoods can be found in inner London, inner areas of large provincial cities such as Edinburgh and Cardiff, and in towns with popular universities.

People in this group are characterised by a tendency to postpone making permanent commitments to partners or having children. This results in a very high proportion of young, childless, single people, which reflects itself in a high demand for small but smart rented flats, many of which experience a rapid turnover of tenants.

Such neighbourhoods also attract foreign-born students, many of whom are living and working in London for a limited period, which further contributes to the diversity of these areas. Brands that promote a multi-cultural image are popular with a target group that tends to be well-travelled and has an international orientation. Likewise these people demand a high degree of ethical and environment responsibility from organisations they engage with.

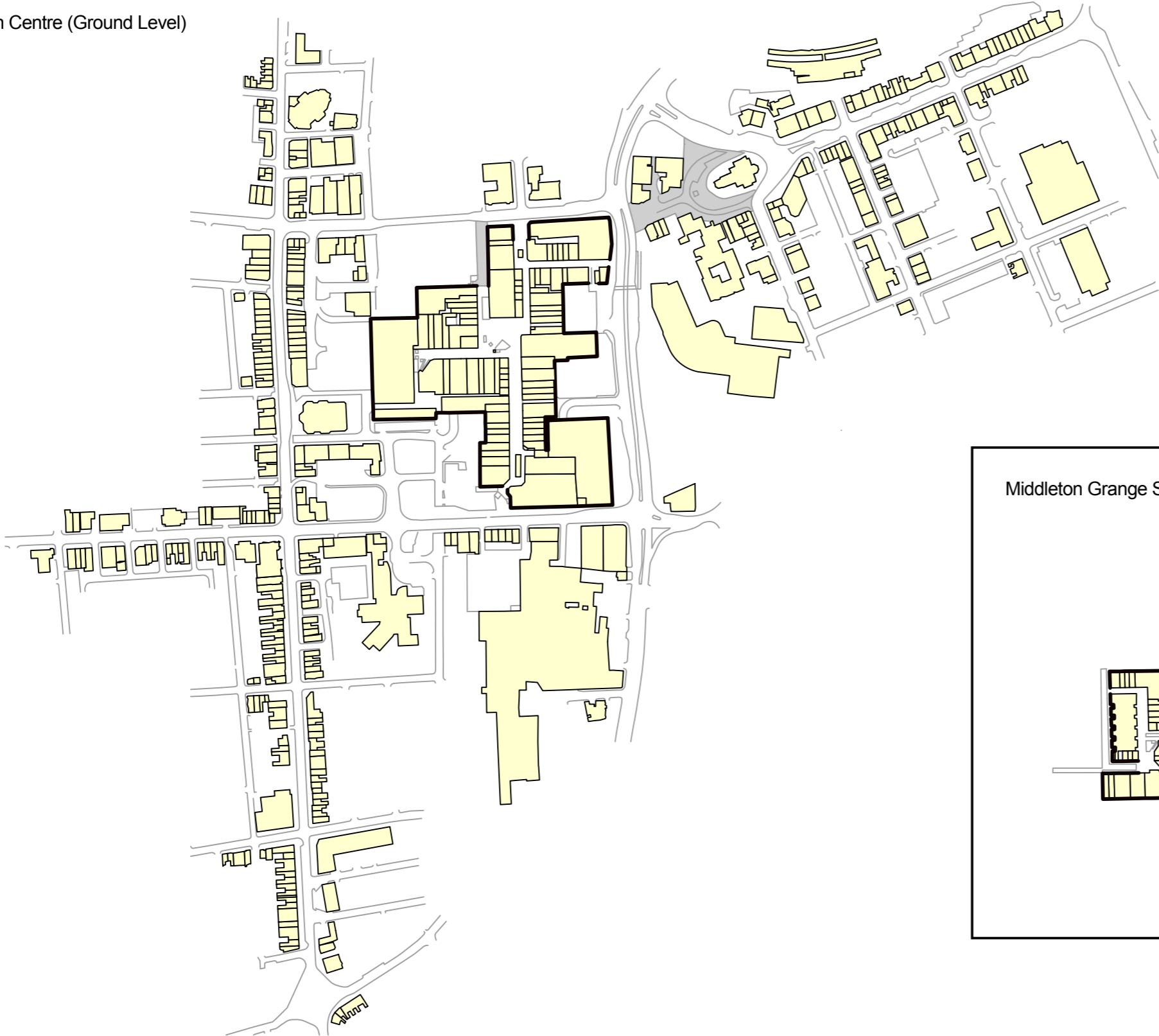
Consumers in this group are well read, have a keen interest in environmental and humanitarian issues and enjoy the arts. Quality national newspapers are popular, and the internet is an important source of information. Most members of the group bank and purchase goods using on-line channels.

Liberal Opinions people tend, as a rule, to spend more of their income on services and less on products than most other groups.

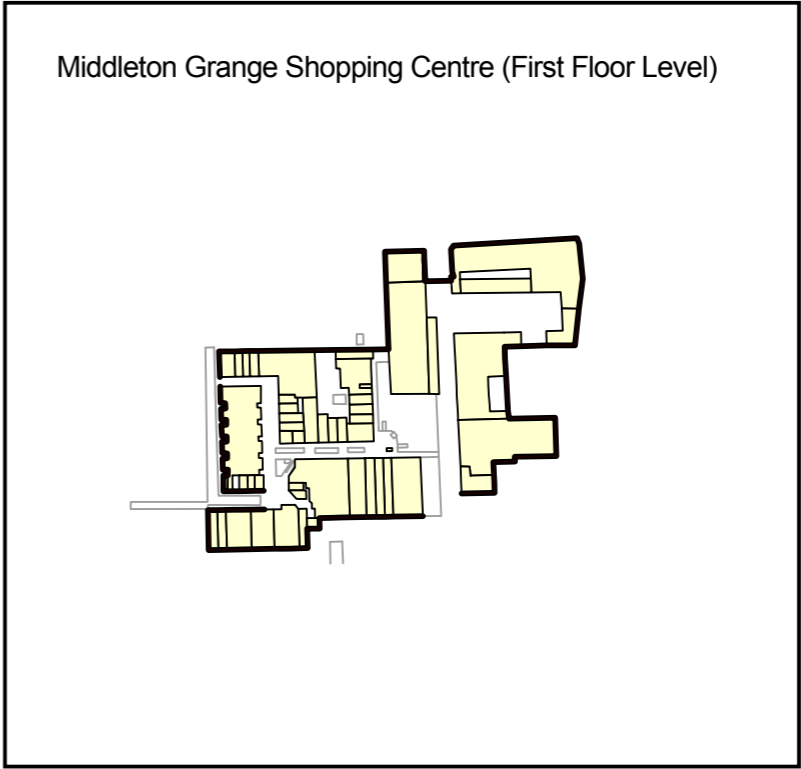
Those living alone in small flats often eat out, visit the cinema and the theatre, and attend museums, exhibitions and public lectures. By contrast, these people are at an age when a large proportion of their incomes are not being spent on consumer durables. Key exceptions to this rule are small, high value equipment such as computers and cameras and small items for the kitchen.

APPENDIX 7

Hartlepool Town Centre (Ground Level)



Middleton Grange Shopping Centre (First Floor Level)



250 metres