Stockton on Tees
Town Centres Uses Study
2016

Stockton-on-Tees
BOROUGH COUNCIL

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Planning. Design. Economics.

This document is formatted for double sided printing.

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1.0 Introduction

Scope of Report

1.1 Nathaniel Lichfield & Partners (NLP) has been commissioned by Stockton on Tees Borough Council (SBC) to prepare a Town Centre Uses Needs Study. This study seeks to provide a robust and credible evidence base to inform the development of policy within the Council's new Local Plan. It takes into account the most up to date information in relation to population and expenditure, as well as a new survey of household shopping patterns undertaken by NEMS Market Research.

1.2 The study includes:

- a qualitative analysis of the existing retail and leisure facilities across the Borough, including a review of the function of each of the main centres, their catchment areas and the relationship between the centres;
- a quantitative and qualitative assessment of the need for new retail and all other town centre uses (with the exception of offices, arts/cultural uses and hotels) within the Borough;
- consideration of whether and where the identified qualitative and quantitative needs for new retail and other town centre uses can be accommodated within existing centres; and
- recommendations on an appropriate planning policy strategy for the future role, function and development of existing centres in Stockton (including advice on a minimum threshold for undertaking impact assessments).

Report Structure

1.3 The Report is structured as follows:

- Section 2.0 of this report describes the existing retail and leisure hierarchy in Stockton;
- Section 3.0 assesses the quantitative and qualitative need for new retail floorspace in the Borough;
- Section 4.0 assesses the need for other town centre uses in the Borough;
- Section 5.0 includes consideration of where the needs identified above can be accommodated; and
- Section 6.0 provides the recommendations on an appropriate planning policy strategy for Stockton and the future role of centres.

2.0 Existing Retail and Leisure Hierarchy

Policy Requirements

2.1 The National Planning Policy Framework (NPPF) states (at paragraph 23) that planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. It confirms that Local Plans should recognise town centres as the heart of their communities and pursue policies which support their vitality and viability. They should also define a network and hierarchy of centres that is resilient to anticipated future economic changes.

2.2 The Planning Practice Guidance (PPG) places emphasis on developing strategies for town centres that are appropriate and realistic to the role of centres in the hierarchy. Town centre strategies should be based on the current state of a centre and opportunities to meet development needs (in full). These town centre strategies should seek to support the town centre vitality and viability, and assess if changes to the role and hierarchy of centres are appropriate.

2.3 The remainder of this section provides an overview of the shopping hierarchy in Stockton Borough, including a summary of the current role and function of the existing main centres, taking into account both the NPPF and the PPG.

Overview of Existing Centres

2.4 Stockton is located in the North East of England in the Tees Valley sub-region. It is bounded by Darlington to the west, Durham and Hartlepool to the north, Middlesbrough to the east, and Hambleton to the south.

2.5 Policy CS5 of the Stockton-on-Tees Core Strategy Development Plan Document (DPD), which was adopted in March 2010, confirms that Stockton Town Centre is main shopping centre in the Borough. The document identified a need to bring forward new retail development which improves the quality and range of the offer in the centre, and support the creation of specialist roles for the centre.

2.6 The Core Strategy also confirms that the town centre is supported by Billingham, Thornaby and Yarm District Centres. Whilst smaller in scale, they provide a range of facilities, including a range of shops, services and community uses, which meet day to day needs. The document states that priority will be given to regeneration initiatives in Thornaby and Yarm, and that proposals which support Yarm's specialist niche role will be supported.

2.7 Billingham Green, Myton Way (Ingley Barwick), High Newham Court and Norton High Street are all defined as Local Centres. Along with a number of Neighbourhood Centres (which do not have any status in NPPF terms), they generally contain a more limited range of uses which serve their respective local catchment areas. Some of these comprise purpose built developments and others have grown organically over time.

2.8 The Core Strategy recognises the roles played by the out-of-centre destinations at Teesside Park and Portrack Lane. These are both popular retail and leisure locations, containing a wide range of national multiples, and have sub-regional catchment areas, extending well beyond the Borough. However, comparison between this and past studies has identified that their growth has impacted upon the market share of comparison goods (i.e. non-food) retail expenditure achieved by Stockton Town Centre in particular - which has decreased from around 24% in 2011 to 17% in 2016 In this context, Policy CS5 states that whist no additional town centre use proposals will be encouraged in these locations, any such proposals which do emerge will be dealt with in line with national policy.

2.9 Javelin's Venuescore database ranks the UK's top 2,500 plus retail destinations, including town centres, malls, retail warehouse parks and factory outlet centres. Each destination is given a weighted score for the number of multiple retailers present, and the score attached to each retailer is weighted depending on their overall impact on shopping patterns.

2.10 The scores achieved by existing centres within the Borough, as well as other centres in the surrounding areas, are shown in Table 2.1.

Table 2.1 Venuescore Rankings of Main Centres in Stockton and Surrounding Area

Centre	UK Rank (2013)	Venuescore	Location Grade
Leeds	4	642	Major City
Newcastle Upon Tyne Centre	12	458	Major City
York	27	324	Major Regional
Middlesbrough	58	235	Major Regional
Darlington	60	233	Major Regional
Sunderland	88	201	Regional
Durham	150	156	Regional
Stockton–on-Tees	171	142	Sub-Regional
Hartlepool	219	116	Sub-Regional
Redcar	246	105	Sub-Regional
Teesside Shopping Park	262	100	Sub-Regional
Northallerton	332	84	Sub-Regional

Source: Javelin's Venuescore UK Shopping Index 2015/2016

2.11 Figure 2.1 indicates that Stockton Town Centre (classed as Sub-Regional Centre) comes above some of the other main town centres in the Tees Valley, including Hartlepool and Redcar. It also lies above Teesside Shopping Park , which may reflect the fact that, whilst it contains a smaller quantum of comparison retail floorspace, it contains a much higher number of operators. However, it lies below Middlesbrough and Darlington (both Major Regional Centres), as well as other centres in the surrounding area such as Durham City and Sunderland (Regional Centres), in the rankings.

2.12 A summary of existing levels of convenience and comparison retail floorspace in each of the main centres in the Borough, as well as the main out of centre destinations, is also provided in Table 2.2 below. An Existing Centres plan is also located at **Appendix 1**.

Table 2.2 Summary of Units and Retail Floorspace by Centre

Centre	Total Number of Convenience and Comparison Uses	Convenience Goods Floorspace (sqm net)	Comparison Goods Floorspace (sqm net)	Total Retail Floorspace (sqm net)
Stockton Town Centre	164	6,489	30,228	36,718
Billingham District Centre	35	3,173	7,634	10,807
Thornaby District Centre	24	5,458	7,105	12,562
Yarm District Centre	51	1,652	3,801	5,453
Sub-total (Main Centres)	**274**	**16,772**	**48,768**	**65,539**
Norton Local Centre	32	1,929	1,549	3,477
Ingleby Barwick Local Centre	4	1,834	1,045	2,879
Portrack Lane	53	3790	66265	70,055
Teesside Park	43	3645	51935	55,580
Total	**406**	**27,970**	**169,561**	**197,530**

2.13 The above table helps to illustrate the significant difference between the quantum of retail floorspace provided in Stockton Town Centre and that within the three District Centres. It also illustrates the fact that, whilst Yarm is by far the smallest of the three district centres in retail floorspace terms, it has a higher number of convenience and comparison uses – reflecting the smaller unit sizes found in this centre. Conversely, Thornaby has the largest quantum of floorspace within these three centres, but the smallest number of units, reflecting the larger format units available in this centre.

2.14 In addition, the table highlights the significant scale of the two main out of centre destinations – including Portrack Lane and Teesside Park – both of which provide significantly more floorspace than the town centre. This in turn reflects the significant influence of these destinations upon wider shopping patterns in the Borough, as well as the draw which they have from areas outside of Stockton.

Review of Existing Centres

Stockton Town Centre

Role and Function

2.15 Stockton Town Centre is located at the heart of the Borough, on the western bank of the River Tees, and is the largest existing defined centre in the Borough. It contains around 37,000 sqm net retail floorspace (including around 7,000 sqm convenience goods floorspace and 30,000 sqm comparison goods floorspace). Whilst its influence varies across the different study zones (see Section 3.0), it also contains a wide range of other commercial and community uses that serve residents across the Borough.

2.16 The Town Centre and Primary Shopping Area has historically focused upon the High Street which runs from north to south through the centre, and is one of the widest in the UK. The High Street contains expansive paved areas, interspersed with bus lanes/stops and short-stay parking areas, along with the Town Hall and the Shambles Indoor Market. There is also a traditional outdoor market held every Wednesday, Friday and Saturday on High Street, adjacent to the Town Hall.

2.17 There are also two purpose-built, privately owned shopping centres adjacent to the High Street, as follows:

- **Wellington Square:** an attractive outdoor, pedestrianised shopping mall located on the west side of the High Street, bounded by Bishopton Lane to the north and Dovecot Street to the south. The centre opened in 2001 and includes around 17,000 sqm gross retail floorspace in generally larger format uses, along with decked car parking at its northern end. The centre is occupied primarily by higher order comparison retailers, as well as a Lidl supermarket and some food and drink outlets. It is understood that Lidl have recently signed a 12 month extension to their lease, which will allow them time to consider alterative locations, although they have indicated that they have an interest in retaining a town centre presence;

- **The Castlegate Centre:** located on the eastern side of the High Street, further to the south of Wellington Square. The centre was constructed in the early 1970s and includes units which both face directly on to the High Street and are internal to the mall itself, as well as a multi-storey car park. It contains a mix of convenience and comparison retailing, including a number of operators at the 'value' end of the market.

2.18 There are also a number of streets running off, or parallel to, the High Street, including Church Road, Bishopton Lane, Dovecot Street and Prince Regent Street. These streets contain a wider mix of uses, including not only retail, but also a range of food and drink operators, and other commercial and community uses. Whilst not within the centre boundary, the area to the west of Prince Regent Street also contains some retail and food and drink uses (e.g. cafes, takeaways and bars), interspersed with offices and various car repair businesses

Figure 2.1 High Street, Stockton Town Centre

Mix of Uses

2.19 The current mix of ground floor commercial uses within Stockton Town Centre, based on the latest Council survey in March 2016, is summarised in Table 2.3.

Table 2.3 Use Summary Table - Stockton Town Centre

Use Type	Number of Units	Percentage of Units
Convenience Retail	33	7.9%
Comparison Retail	133	32.0%
Service	153	36.8%
Miscellaneous	3	0.7%
Vacant	94	22.9%
Total	**416**	**100.0%**

2.20 The percentage of convenience (i.e. food) retail uses in the centre is around 8%, which is similar, although slightly below the national average (9% as at June 2015). The main provision comprises Lidl, Asda and Iceland supermarkets, along with a Marks & Spencer foodhall, although there are also a range of smaller, specialist uses. There are no food superstores located within the centre.

Figure 2.2 Wellington Square Shopping Centre

2.21 32% of ground floor uses comprise comparison goods (non-food) retailers, which is below the national average (38%). This contains a variety of national multiples operators, including Marks & Spencer, New Look, Topshop, Superdry, JD Sports, Debenhams, River Island, Peacocks, Vision Express, Vodaphone and WH Smith. It also contains a range of shops, both chains and independent stores, which cater for the value end of the market, including Wilkos, B&M Bargains, Card Factory, Poundland and Poundworld.

2.22 The most significant proportion of uses in the centre are service uses (37%). This includes a wide variety of occupiers, including banks/financial services, travel agents, public houses, cafes, takeaways and hairdressers. The evening economy within the centre is focused upon various eating and drinking establishments clustered around the Georgian Theatre (to the east of the High Street) as well as to the west of Prince Regent Street, and various public houses on High Street itself. A traditional outdoor market is held on the High Street every Wednesday, Friday and Saturday.

2.23 Other uses which help to attract visitors to the centre include the Georgian Theatre, Stockton Central Library, the Arc (arts/cultural centres/theatre/comedy) and the Globe Theatre (currently being refurbished). Stockton Riverside College and Durham University Queens Campus are also located just beyond the defined Town Centre. In addition, there are emerging proposals for a Hampton by Hilton on land at Church Road, as part of the wider Northshore development.

Vacancy Rate

2.24 The unit vacancy rate in the centre is currently 22.9% (or 94 units), which is almost twice the national average (12.0%). Whilst this vacancy rate does not appear to have increased recently, it has been consistently high for a number of years. It reflects a number of factors, including the size of the centre, the suitability (or otherwise) of such units to meet modern requirements, levels of demand for premises in the centre, and its attractiveness to shoppers and operators more generally.

Figure 2.3 Vacant Units, High Street

2.25 The vacant units are generally spread around the centre, although there are several on the High Street, as well as those within the Shambles Indoor Market, on Norton Road and in the two main shopping centres. Despite their more modern and larger floorplate nature, there are currently eleven units vacant located within the Wellington Shopping Centre, as well as a number of units vacant (five) in the Castlegate Centre, most of which are at the southern end.

Environmental Quality

2.26 The environmental quality in Stockton Town Centre is varied. The majority of the centre, including most of the High Street and some of the adjoining streets, although excluding the two main shopping centres, is located within a Conservation Area. More attractive buildings on or around the High Street include Stockton Parish Church, the Town Hall, and the properties at Finkle Street and Green Dragon Yard, where historic alleys lead off the high-street to the east. These contrast with other, more modern and/or poorer quality developments, particularly those to the northern and southern ends of High Street and/or on the periphery of the centre.

Figure 2.4 Environmental Improvements, Stockton Town Centre

2.27 There has been a wide-ranging programme of streetscape improvements implemented on the High Street, which have resulted in a good quality public realm. This includes extensive pedestrianised areas, new street furniture and also a central water fountain, which serves as a focal/gathering point for shoppers/visitors. Multi-coloured floor lighting has helped to brighten the alleys to the east of the High Street and there is also space designed to accommodate events, markets and other cultural activities.

2.28 Businesses in Stockton Town Centre have recently voted in favour of establishing a Business Improvement District (BID) for the centre. The money raised as part of this initiative is intended to be used to support a range of projects and activities aimed at generating more footfall and trade in the town centre, which could include further environmental improvements. There are also proposals to enhance the evening economy, including a Food & Drink Week and the Alive After Five initiative, which will comprise a co-ordinated programme of regular events, live music and entertainment.

Accessibility

2.29 There are just under 20 bus stops on the High Street, which link the town centre with a variety of residential areas within both Stockton itself and surrounding areas. Stockton Railway Station is located to the north-west of the centre, on Bishopton Lane, and connects the centre to towns in the surrounding area such as Thornaby, Billingham, Middlesbrough, Hartlepool and Seaton Carew.

2.30 A number of approach roads, including the A1046 Portrack Lane, the A139 Norton Road, the A177 and Yarm Lane and help to ensure that the town centre is conveniently accessible by private car from outlying parts of Stockton. There are a number of public and privately operated car parks in the centre, including those serving the Wellington Square and Castlegate Shopping Centres, and a variety of other long and short stay facilities on the edge of the centre. A number of car parks allow shoppers to park for free for the first hour.

2.31 Whilst the overall size of the centre, and the length of the High Street in particular, means that visitors often need to walk long distances in between different shops, pedestrian routes within the centre are generally safe and convenient – partly as a result of the recent pedestrian improvements.

Summary

2.32 Stockton Town Centre contains a reasonable range of retail and service uses - including both national multiples and independent traders - which serve residents of Stockton itself and other parts of the Borough. Although it is the largest centre in the Borough, the proportion of comparison retailers is below the national average, and it contains a large number of stores aimed at the value end of the market. In addition, whilst there is a generally good range of convenience retailing, there are no food superstores.

2.33 The centre contains a number of other commercial and community/cultural uses which help to attract people the centre, including the ARC, and there are emerging proposals for a new hotel. The recently approved BID could also provide a boost to the centre, by providing additional funding to support new projects which help to attract visitors and enhancing the shopping environment and evening economy more generally. These initiatives will be complemented by the refurbishment of the Globe Theatre which, when complete, will help to not only attract visitors but also generate trade for food and drink uses in the centre.

2.34 However, the centre faces a number of significant challenges. These include its overall size and the significant proportion of vacant units – including within primary shopping areas, such as the Wellington Square Shopping Centre. As covered in later sections, both the convenience and comparison retail sectors within the centre are under-performing, and face strong competition from out-of-centre destinations, most particularly Teesside Park.

Billingham District Centre

Role and Function

2.35 Billingham District Centre is located around 5km to the north-east of Stockton Town Centre and primarily meets the retail and service needs of residents Billingham itself. It comprises a purpose-built and privately owned shopping precinct, constructed in the 1960s, which contains a range of retail and other commercial uses, along with a number of freestanding developments, including the Billingham Forum leisure/entertainment complex.

Mix of Uses

2.36 The current mix of uses within the centre is summarised in Table 2.4 below.

Table 2.4 Use Summary Table - Billingham District Centre

Use Type	Number of Units	Percentage of Units
Convenience Retail	9	10.5%
Comparison Retail	26	30.2%
Service	27	31.4%
Miscellaneous	1	1.2%
Vacant	23	26.7%
Total	**86**	**100%**

2.37 The majority of ground floor commercial uses in Billingham District Centre are either comparison retail or service uses, which both account for around 30%/31% of the total uses. There are a number of comparison national multiples in the centre, including Boyes, M&Co, Card Factory, B&M Bargains, Boots and Argos, as well as a range of local and independent operators. Service uses include a number of banks, estate agents, takeaways and travel agents.

Figure 2.5 Queensway

2.38 Around 11% of the uses in the centre are in convenience retail use. Such uses include a recently opened, freestanding Aldi store (990 sqm net floorspace) at the junction of Moreland Avenue with The Causeway (on the site in the former Billingham Arms Hotel in April 2016), along with Asda (800 sqm net) and Iceland (320 sqm net) supermarkets – all of which appear to be trading strongly at the current time. There is also a limited range of other, smaller traders, including Fulton and Heron frozen foods stores, a newsagents, and bakery. Billingham hosts a traditional market every Monday and Friday, with a range of stalls selling, inter alia, cards and accessories, fruit and vegetables, other groceries, clothing, watches, batteries and e-cigarettes.

2.39 In addition, there are a number of other community and leisure uses in Billingham District Centre. These include the Billingham Forum leisure/entertainment complex, which incorporates a theatre, swimming pool, ice rink and sports halls. In January 2015, a new library and customer service centre opened on at the site of the centre's former art gallery and Council offices, and a new Wetherspoons public house opened at the western end of the centre, underneath Queensway House.

Vacancy Rate

2.40 The current unit vacancy rate (around 27%) is currently over twice the national average (12.0%). However, whilst there are a number of empty units dispersed across the centre, this rate is heavily influenced by a cluster of vacancies over two levels at the western end of the centre, underneath and in close proximity to Queensway House. These vacancies detract from the appearance of this part of the centre, and also impact upon footfall and perceptions of safety, particularly on the upper levels.

Figure 2.6 Vacant Units, Queensway

Environmental Quality

2.41 Whilst the general appearance of the centre reflects the period within which it was built, it is generally well maintained and has benefitted from investment in the quality of the public realm. This has included a range of street furniture, a band stand, planted areas and 'The Family' statue, which forms a focal point for the square.

2.42 The exterior of the centre - including various service yards and the rear of existing retail units which face onto Kingsway and Queensway - is less attractive, and the clusters of vacant units on the western end also detract from the shopping environment. However, new developments such as the Aldi foodstore and the library/customer service centre have also enhanced the appearance elsewhere in the centre.

Figure 2.7 Asda/Adjacent Shop Units, Billingham District Centre

Accessibility

2.43 Billingham District Centre is well connected via public transport, with nine bus stops located along 'The Causeway', which forms a logical northern boundary of the centre. Given its pedestrianised nature, it is easily navigable on foot and well connected to the surrounding areas by a network of footways.

2.44 A range of bus services are provided, connecting the centre to other parts of Billingham, as well as surrounding areas such as Stockton/Norton and Middlesbrough. There are also several car parks in and around the town centre, including a multi-storey car park on the south side of Queensway and other areas of surface parking.

Summary

2.45 In summary, household surveys confirm that its catchment area is focused upon Billingham itself, and the centre attracts limited trade from areas further afield. The centre has a reasonable range of retail and service uses, including a number of national multiples. These facilities are supplemented by other community and leisure uses, such as Billingham Forum and the library/customer service centre, which provide additional reasons for people to visit.

2.46 The unit vacancy rate is over twice the national average, with significant clusters at the western end of the centre which detract from its overall attractiveness. However, Billingham has seen recent investment in the form of both public realm improvements and developments, such as the new Aldi. The new Aldi foodstore will help to bolster its convenience retail role and generate linked trips with other facilities in the centre.

Thornaby District Centre

Role and Function

2.47 Thornaby District Centre is located around 3 km to the south east of Stockton Town Centre and meets the day to day shopping and service needs of Thornaby and the immediate surrounding areas, including Ingleby Barwick. It comprises the modern, purpose-built Pavilion shopping centre, along with freestanding Asda and Lidl foodstores, and adjacent surface car parking.

Figure 2.8 Vale House and Wrightson House, Pavilion Shopping Centres

Mix of Uses

2.48 The current mix of uses in the centre are summarised in Table 2.5.

Table 2.5 Use Summary Table - Thornaby District Centre

Use Type	Number of Units	Percentage of Units
Convenience Retail	7	18.4%
Comparison Retail	17	44.7%
Service	10	26.3%
Miscellaneous	1	2.6%
Vacant	3	7.9%
Total	**38**	**100.0%**

2.49 The most significant proportion of uses within the centre comprise comparison retail (45% or 17 units). These include range of national multiples – a number of which are located in the new units recently created - such as Boots, Shoezone, Home Bargains, Card Factory, New Look, Poundstretcher, Poundworld and Wilkos.

2.50 Convenience retailing accounts of 18% of uses (seven units), and includes the Asda superstore (comprising c. 4,600 sqm net floorspace), the Lidl supermarket (1,300 sqm net) - at the southern and northern ends of the centre respectively - along with Fulton Foods, Iceland and Cooplands bakery. Planning permission has also been granted for a new Aldi store on land at the junction of Tedder Avenue and Allensway, to the south of the centre.

2.51 Service uses account for 26% of the total number of ground floor units, and include Halifax and Barclays banks, and food and drink outlets such as KFC, Café Sphere and Subway. Adjacent to the shopping centre itself, there is a public house, a healthcare centre and an office building on the western side of the centre. In addition, there is open space for a small market – open every Thursday - at the heart of the centre and a McDonald's drive-thru restaurant and Asda petrol filling station (with kiosk) also recently opened on land to the east of Allensway.

Vacancy Rate

2.52 The vacancy rate is low at 7.9% (just three units) and the centre was generally busy at the time of the NLP visit in April 2016. This reflects the current performance of the centre and, in particular, the success of the recent Pavilion Shopping Centre development. This has helped to provide new accommodation more suitable to modern occupiers, replacing older, more outdated and less attractive floorspace.

Environmental Quality

2.53 The older parts of the centre (including Wrightson House) are more dated and The Golden Eagle hotel, which is largely redundant, along with the vacant former NPower building and other offices along Allensway, also impact upon the overall environmental quality. However, the newer parts – including Vale House and St Peter's House, which were built in the last decade along with the Lidl supermarket – are modern in appearance and provide an attractive shopping environment. Together, these developments help to form a north-south pedestrianised walkway linking Asda with Lidl, which benefits from glass canopies and a range of street furniture.

Figure 2.9 St Peters House

Accessibility

2.54 Extensive free car parking (for up to three hours) at the northern and southern ends of the centre, along with bus stops along Mitchell Avenue and Trenchard Avenue, help to ensure it is conveniently accessibility by a range of modes of transport The mall between Asda and Lidl helps to link the various shops and services, and a network of footways links the centre to the surrounding residential areas. A new bus stop and associated public realm improvements have also been provided adjacent to Lidl, in order to further enhance accessibility around the centre.

Summary

2.55 Overall, Thornaby District Centre provides a modern, attractive pedestrianised environment, which has benefited significantly from the Pavilion Shopping Centre redevelopment. Alongside the new Lidl store at the northern end, this development has helped to boost the centre's convenience and comparison goods retail roles. The centre has a low vacancy rate and provides a range of retail and service uses – including a strong food shopping offer – which are both conveniently accessible and meet the needs of local residents in this part of the Borough.

Yarm District Centre

Role and Function

2.56 Yarm District Centre is located in the south of the Borough, just over 6 km from Stockton Town Centre, and within a peninsula on the southern bank of the River Tees. Providing an attractive and historic shopping environment, the whole centre is designated as part of a conservation area, and the commercial frontages follow the traditional built pattern of the north-south aligned High Street.

2.57 In addition to meeting the day to day needs of local residents in Yarm and nearby settlements, such as Eaglescliffe and Kirklevington, the centre also attracts visitors from beyond the local area. As such, it performs niche roles, including a range of independent retail and food and drink uses, supplemented by national multiples such as Sainsbury’s, Boots, Bang and Olufson, Boyes, Café Nero and Costa.

Figure 2.10 Shop Units, High Street, Yarm

Mix of Uses

2.58 A breakdown of the uses within the centre is included in Table 2.6.

Table 2.6 Use Summary Table - Yarm District Centre

Use Type	Number of Units	Percentage of Units
Convenience Retail	10	9.4%
Comparison Retail	41	38.7%
Service	48	45.3%
Miscellaneous	1	0.9%
Vacant	6	5.7%
Total	**106**	**100.0%**

2.59 The most significant proportion of uses within the centre are service uses (45%), which include a range of primarily independent bars/café//restaurants, as well as hair/beauty salons, banks and estate agents. Indeed, the evening economy performs a significant role in maintaining the overall vibrancy of the centre, with food and beverage uses attracting customers from across the Borough as a whole. It also impacts upon the availability of accommodation for other commercial operators seeking to gain representation.

2.60 Comparison retail uses comprise 39% of total in the centre and, again, include a range of niche/independent operators, including those selling clothing and footwear and furniture/furnishings, as well as florists, jewellers and opticians. Convenience retailing accounts for 9% of all uses and facilities include small Sainsbury’s (770 sqm net) and Spa (250 sqm net) supermarkets, and a number of smaller traders meeting specialist/top-up needs, including a bakery, butcher, confectioner, deli and fishmongers.

Figure 2.11 Market Stalls, Yarm

Vacancy Rate

2.61 At around 6%, the proportion of vacant units is around half the national average. This reflects the popularity and strength of the centre in performing the above roles, as well as the demand from operators for premises in the centre.

Environmental Quality

2.62 The quality of the built environment is high, with the Georgian architecture and wider streetscape having been well preserved, resulting in a broadly consistent style, scale and massing of shops. The Town Hall, which was built in 1710, creates a focal point for the high street and an area for community events. A Farmers' Market is held in Yarm on the second Sunday of every month, offering a variety of specialist foods and products.

2.63 Notwithstanding the above, the quality of the built environment in the centre, and its physically constrained nature, means that there is little opportunity for expansion. Although there are two parcels of land at the southern end of the centre, on the western side of High Street, these are small in scale. One of these sites (13 High Street) has planning permission for residential development and other benefits from permission for residential and bistro uses (having been previously refused permission for a hotel/bistro).

Accessibility

2.64 High Street forms part of the A67 which runs north-south through Yarm and there are four bus stops located on the centre. Whilst the centre often suffers from traffic congestion and there is strong demand for on-street spaces, works have been undertaken to improve pedestrian crossings and provide new car parking behind High Street. Along with a new charging system, these improvements have helped to free up more customer/visitor parking on High Street itself.

Summary

2.65 Overall, Yarm District Centre is performing strongly, with a low vacancy rate and attractive and historic shopping environment. Whilst there are no larger food supermarket/superstores in the centre, it contains a good range of specialist/independent retail and food and drink uses which help to extend its role beyond that of purely meeting day to day needs. The evening economy, in particular, performs a significant role and helps to attract visitors from across the Borough. The centre does, however, face challenges in terms of accommodating future development/investment and ensuring that it remains attractive in the face of significant traffic congestion at busy times.

Other Centres

2.66 As set out above, the adopted Core Strategy defines Billingham Green, Myton Way (Ingleby Barwick), High Newham Court and Norton High Street are all defined as Local Centres. These centres generally contain a more limited range of retail and service uses which serve their respective local catchment areas although, as set out below, Norton and Ingleby Barwick offer a wider range of facilities than the other local centres.

Norton Local Centre

2.67 Norton Local Centre is located just under 2 km to the north of Stockton Town Centre, in the northern part of Stockton. The centre is situated within a Conservation Area and stretches along the B1274 High Street from an area of open space in the north to its junction with the A193 Norton Road in the south. It primarily meets the day to day needs of residents in Norton itself, although the range of uses it contains helps to attract some trade from further afield.

Table 2.7 Use Summary Table – Norton Local Centre

Use Type	Number of Units	Percentage of Units
Convenience Retail	8	10.5%
Comparison Retail	24	31.6%
Service	42	55.3%
Miscellaneous	1	1.3%
Vacant	1	1.3%
Total	**76**	**100.0%**

2.68 The majority of uses within the centre are in service use (55%), reflecting both its role in meeting day to day needs, but also the provision of a range of independent food and drink uses. Around 32% of uses are comparison retailing, with 11% being in convenience retail use. Whilst the majority of units are independents – including a reasonable range of specialist comparison retail operators - there are also a number of national multiples, including a Co-op supermarket (comprising 1,600 sqm net), as well as Tesco Express, Boots, Costa, Johnsons and Greggs.

2.69 As with Yarm, the evening economy performs an important role within the centre, with visitors being attracted from across the northern parts of the Borough. A number of restaurants and pubs/bars have recently opened in the centre, including the Highland Laddie (JD Wetherspoons), Head of Steam, Café Lilli, 12 Harland Place and Canteen and Cocktails.

2.70 Just one ground floor shop unit currently stands vacant, reflecting the current health of the centre. The grass verges, mature trees and built heritage help to provide an attractive environment. A pedestrian crossing connecting shops on the two sides of High Street to the south, although there is a significant walking distance between the northern and southern ends of the centre. On-street parking is provided at various points on High Street and Leven Road, and there is also customer parking located adjacent to the Co-op supermarket.

Ingleby Barwick Local Centre

2.71 Ingleby Barwick Local Centre is located around 5 km south of Stockton Town Centre and 3 km to the south-west of Thornaby District Centre. The centre was designed to serve the day to day service needs of the new residential population being created in the area. It comprises a freestanding Tesco foodstore (2,600 sqm net), along with a parade of smaller shops, and a number of freestanding uses.

Table 2.8 Use Summary Table - Ingleby Barwick

Use Type	Number of Units	Percentage of Units
Convenience Retail	1	8.3%
Comparison Retail	3	25.0%
Service	8	66.7%
Miscellaneous	0	0%
Vacant	0	0%
Total	**12**	**100.0%**

2.72 In addition to Tesco, there are three small comparison retail uses (a DIY/hardware store, opticians and chemist), along with a range of service uses (including a number of hot food takeaways). There is also a public house, bookmakers, dental clinic, veterinary surgery and Bannatynes gym.

2.73 There are currently no vacant units in the centre and the most significant scope for redevelopment lies to the immediate east of the Tesco store, where there is an extant planning permission for an extension**.** There are also emerging proposals for a new swimming pool/leisure centre, library and customer service centre, on land to the west of the centre, linked to the existing All Saints Academy.

Other Existing Provision

Teesside Park

2.74 Teesside Park is a modern retail park development located around 2.5 km south-east of Stockton Town Centre and accessed from the A66. It contains a wide range of comparison retail uses (comprising around 52,000 sqm net floorspace) which attract trade from not only across the Borough but also surrounding local authority areas, such as Middlesbrough.

2.75 Whilst the nature of the goods sold in the retail park were originally focused on bulky goods, the nature of the park has 'softened' over time, with more non-bulky operators having opened over the past 10-years. At the time of the study, the centre was in the process of a facelift which will further alter the appearance of the centre . Operators include Next (incorporating an extension to accommodate the Next@Home offer), Marks & Spencer, Outfit, TK Maxx, Moss Bros, Schuh, Clinton, Toys R Us, Hobbycraft and Sports Direct. It also contains a 3,800 sqm net Morrison superstore, plus a Marks & Spencer foodhall of c. 800 sqm net, and a number of food and drink outlets, such as Pizza Express, McDonalds, Chiquitos, Costa, Frankie and Benny's and Greggs.

Figure 2.12 Teesside Shopping Park

2.76 To the north-east of Teesside Shopping Park are a number of leisure uses, including Showcase Cinemas, Hollywood Bowl and Rainbow Casino. This area is linked to the main retail park and, whilst it falls within the Middlesbrough local authority boundary, it attracts significant custom from within Stockton Borough.

Portrack Lane

2.77 There is a large cluster of trade and retail warehouse parks dispersed along the A1046 Portrack Lane, starting from around 1 km to the east of Stockton Town Centre. This includes Portrack Retail Park, Mandale Retail Park, Southside Retail Park, Portrack Trade Park and Lustrum Avenue.

2.78 These developments contain a wide range of predominantly bulky goods retail operators, as well as quasi-retail/trade counter-type businesses, which attract trade from both Stockton and the surrounding areas – benefitting from their location just off the A19. They include operators such as B&Q, Dunelm Mill, SCS, Furniture Village, Wickes, Linthorpe Beds, Go Outdoors, Suite World and Discount Tiles. There is also a c. 5,000 sqm net Asda superstore.

Figure 2.13 Asda, Portrack Lane

Other Provision

2.79 There also a number of other medium and large sized foodstores in the Borough, which meet the convenience retail needs of different parts of the Borough. As illustrated on Existing Foodstores drawing at **Appendix 2**, these include:

- Tesco Extra at Durham Road, which is located around 4km to the north-west of Stockton Town Centre and comprises around 7,800 sqm net floorspace (with mezzanine floorspace having recently been converted to a gym);
- Sainsbury's, Whitehouse Farm, which is located around 2km to the west of the town centre, and comprises c. 2,300 sqm net floorspace;
- Tesco at Leeholme Road, Billingham, around 500m to the east of Billingham District Centre, and comprising 3,300 sqm net floorspace;
- Tesco at Eaglescliffe, around 750m north of Yarm District Centre, and comprising 1,300 sqm net;
- Aldi in Norton, around 2 km to the north-west of Stockton Town Centre, and comprising 960 sqm net floorspace; and
- Aldi in Yarm Lane Neighbourhood Centre, around 300m from the boundary of Stockton Town Centre, and comprising c. 900sqm net floorspace.

2.80 There are also a number of smaller supermarkets dispersed across the Borough, including those located within neighbourhood centres.

Figure 2.14 Tesco, Leeholme Road, Billingham

2.81 In addition, Bridge Road Park is located to the immediate south of Stockton Town Centre, separated by Bridge Road itself. The retail park consists of three large buildings and a central car park, and occupiers include Halfords, Matalan and Home Bargains.

Committed and Proposed Developments

2.82 There are also a range of developments in the Borough which are committed in planning terms and have been factored-in to the capacity assessments covered later in this study. Convenience and comparison goods commitments are summarised in Table 2.9 (below), and include a number of new/extensions to existing foodstores – such as those at Wellington Square Yarm Road, Tedder Avenue and Ingleby Barwick – new retail warehousing at Portrack Lane, and smaller scale shops to meet the needs of existing/planned new communities. However, as explained further above/below, some of these schemes, including the approved Lidl and Tesco extension schemes at Wellington Square and Ingleby Barwick respectively, are unlikely to proceed, and certainly not in their approved form.

Table 2.9 Committed Retail Developments in Stockton Borough

Development	Net Convenience Floorspace (sqm)	Net Comparison Goods Floorspace (sqm)
Lidl, Wellington Square (extension)	417	n/a
North Shore	572	945
Nifco, Yarm Road	1139	285
Norton Road	195	n/a
Aldi, The Causeway, Billingham	690	300

Development	Net Convenience Floorspace (sqm)	Net Comparison Goods Floorspace (sqm)
Tesco, Ingleby Barwick (extension)	403	1280
Ingleby Barwick Village 6	375	375
Unit 9, Teesside Industrial Estate	163	304
Allens West	175	n/a
Wynyard Village	233	n/a
Wynyard Park	88	88
Lustrum Avenue	n/a	1624
Adj. to Portrack Retail Park	n/a	1562
Aldi, Tedder Avenue, Thornaby	1003	251
Little Maltby Farm	500	500
Total	**5,953**	**7,513**

Source: SBC Planning Application Data

Summary

2.83 The Borough of Stockton contains a number of centres which perform a variety of roles and functions, and different (and sometimes overlapping) geographical catchments. Stockton Town Centre serves the Borough as a whole, with Billingham, Thornaby and Yarm District Centres all serving more localised catchment areas focused upon their respective settlements. There is also a range of local and neighbourhood centres although, with the exception of Norton and Ingleby Barwick, these generally only meet the day to day needs of the immediate surrounding residential areas.

2.84 All of the main centres contain a mix of national multiples and local traders, although the comparison retail offer in Stockton Town Centre is orientated towards mid-market and value shopping. Thornaby has benefited from the redevelopment of the main shopping centre, including larger format non-food retail units and a new Lidl store, and Billingham has also experienced investment in a new Aldi and community uses. Furthermore, whilst it has a more limited food shopping role, Yarm is an attractive centre with a significant proportion of independent/specialist retail and food and drink uses, helping to attract visitors from outside of its immediate catchment area.

2.85 The unit vacancy levels in these centres vary, with Stockton and Billingham having vacancy rates at around/above twice the national average, and Thornaby and Yarm being much lower. Along with the unit vacancy rate, the size of Stockton Town Centre presents both challenges and opportunities, as does the limited scope for development in/on the edge of Yarm District Centre and the purpose-built nature of Billingham District Centre. Stockton, in particular, would benefit from further investment which helps to enhance the range and quality of its comparison retail offer, in the face of competition from out-of-centre destinations, such as Teesside Park.

2.86 All of these above issues are considered in more detail in the following sections of this report.

3.0 Retail Need

Trends in Town Centres and Retailing

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

3.2 Whilst some sectors are experiencing a resurgence, particularly value retailing, the recent economic downturn had a significant impact on town centres and the retail sector. A large number of national operators have failed, including Comet, HMV, JJB Sports, Woolworths, MFI, Borders, Game, La Senza and Habitat. This has left voids within centres and a challenge for all stakeholders to attract new operators to anchor their centres. Many town centre development schemes have been delayed, which has affected the ability of centres to meet the needs of their catchments and compete with other, stronger centres, as well as internet shopping, and pressure from out-of-town retail.

3.3 Whilst the large food store operators have seen a reduction in growth and have significantly curtailed any expansion plans, the discount sector is thriving. Both Aldi and Lidl have significantly expanded their store estate in the last year (by around 11% and 5% respectively), whilst the majority of other operators increased their floorspace by between 3%-5%, with Tesco growing by just 1%. These trends have been reflected locally in Stockton Borough, where a number of proposals for new discount foodstores recently have come forward and/or been implemented.

3.4 Comparison retailers have also responded to market conditions. The bulky goods warehouse sector has seen some rationalisation, leading to voids on retail warehouse parks and proposals to extend the range of goods sold to non-bulky goods. Indeed, many traditional high street retailers are now seeking large out-of-centre stores - for example Next, Boots and TK Maxx – and indeed a number of these stores are found at Teesside Park, as the range of operators there has gradually re-orientated towards the non-bulky sector.

3.5 Within town centres, many multiple comparison retailers have changed their format and have increasingly sought larger modern shop units (e.g. over 200 sqm). Whilst there has been an increasing polarisation of activity into the larger regional and sub-regional centres, the Pavilion Shopping Centre development in Thornaby includes a number of larger units which have successfully attracted national operators.

3.6 Most of the main centres – including Stockton, Billingham and Thornaby - now include non-food discount operators, such as Wilkos, Home Bargains, B&M and Poundworld. The charity shop sector has also grown steadily over the past 20 years, with such shops occupying shop premises vacated during the recession. Indeed, in some cases, charity shops can afford higher rents than small independent occupiers because of business rate discounts.

3.7 Careful consideration should be given to the appropriate level of expenditure growth to be adopted as part of the retail capacity assessment. Projecting expenditure levels forward based on trends is not always appropriate, particularly given the fluctuating economic conditions over the period since 2008 and the structural changes in the retail sector. Nevertheless, the study will need to take a long term view for the plan period, which recognises the cyclical nature of growth and the need to plan positively, as required by the National Planning Policy Framework (NPPF). Changes in population, growth in turnover efficiency and home shopping/internet sales will all need to be considered.

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

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

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

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

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

3.13 As set out above, the food and beverage sector has been resurgent in recent years, bucking the recent economic downturn. It is also constantly evolving, with business models continually developing and new concepts emerging. Indeed, around 19 million UK adults now dine out at least once a week, having risen from 17 million in 2012. The recent increase in eating out is down to a variety of reasons, including:

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

3.14 The cinema sector has also been resurgent in recent years. Indeed, between 2007 and 2013, UK cinema admissions increased by 6%, despite the impact of the economic downturn over the same period. New cinema technologies such as e-ticketing systems, mobile tickets, 4D cinemas and growth in the number of 3D and IMAX films have helped to increase admission numbers and box office revenues. Furthermore, the combination of ‘freebie’ incentives and targeted advertising has huge potential to encourage return trips and a further boost in cinema-going numbers.

3.15 Existing leisure formats are evolving and new ones emerging. There has been a significant increase in the number of trampoline centres across the country including, in Stockton, Jump 360 (off Portrack Lane). Other emerging activities include climbing centres, for example Clip n Climb (also off Portrack Lane), as well as class-based health and fitness facilities - which promote group exercises, combined with nutritional advice, as a means of helping people improve their fitness and general wellbeing. Along with more established sectors, including indoor adventure playgrounds/soft play areas, such uses have helped broaden the overall range of leisure pursuits available to local families.

3.16 The growth in these and other leisure sectors brings with it great opportunities. These include:

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

3.17 It is important that any future planning strategy for Stockton Town Centre grasps these opportunities, seeking to provide additional reasons for people to visit and to extend dwell time. This is not least given the fact that there is just one cinema screen in Stockton Borough (the ARC on Dovecot Street) and a relatively limited choice of family-orientated restaurants.

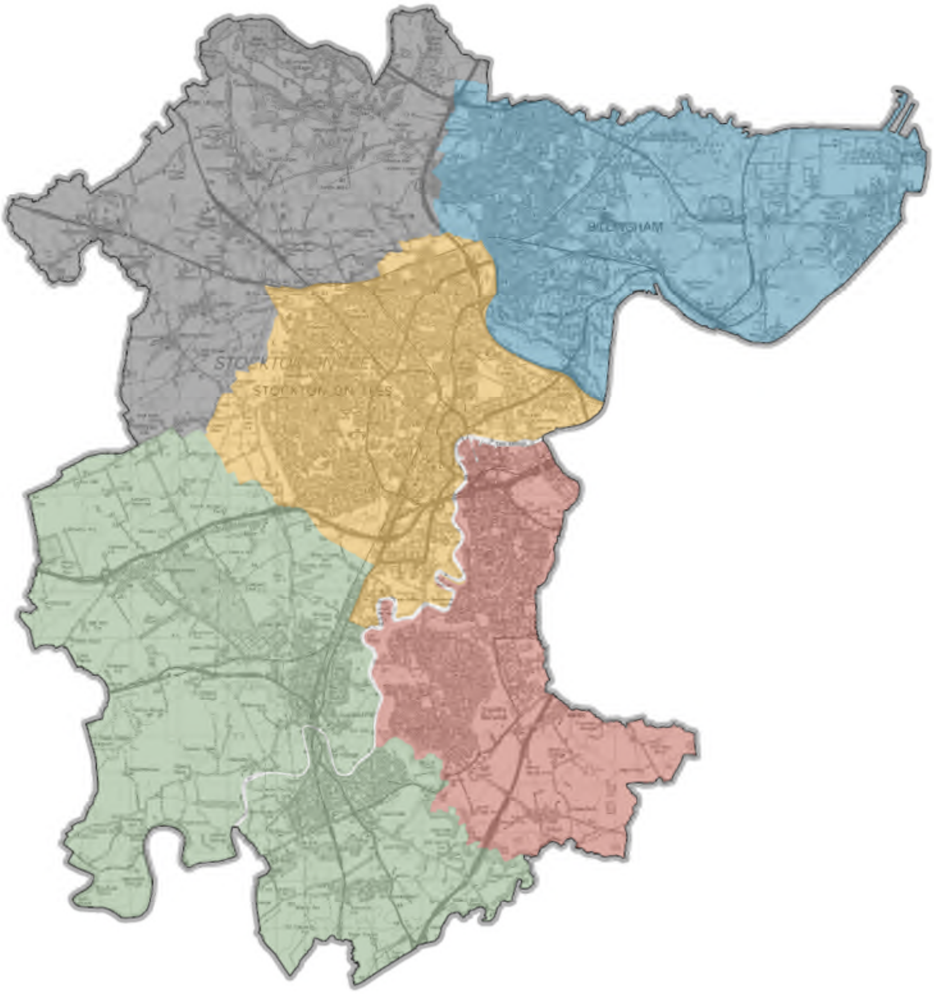
3.18 The study will need to take a long term view for the plan period, which recognises the cyclical nature of growth and the need to plan positively, as required by the National Planning Policy Framework (NPPF). Population and expenditure forecasts, as well as current and projected participation rates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

Study Area

3.19 The quantitative assessment of the need for additional retail floorspace is based on a defined Study Area that equates to Stockton Borough and includes five zones, as shown on the Household Survey Zones Plan at at **Appendix 3.** A total of 700 household surveys were undertaken across these zones in March, which helped to establish existing shopping and leisure patterns across the Borough. The number of surveys undertaken in each zone are as follows:

- Zone 1 – Stockton – 200 surveys
- Zone 2 – Billingham – 150 surveys
- Zone 3 – Thornaby/Ingleby Barwick– 150 surveys
- Zone 4 – Yarm/Eaglescliffe – 100 surveys
- Zone 5 – Rural North West - 100 surveys

Figure 3.1 Household Survey Zones



3.20 Zones 1 to 4 are focused upon Stockton Town Centre and the three defined District Centres in the Borough, Zone 5 comprises the rural north-western parts of the Borough, outwith the main settlements, including the Wynyard area, where there is significant new housing planned. The definition of these zones allows a finer-grained assessment of these areas, where shopping patterns are likely to be broadly similar.

3.21 Whilst the previous Stockton Retail Study Update was based on slightly different zones, this was to ensure consistency with a previous study, undertaken jointly with Middlesbrough Council. This new study brings with it the opportunity to define new zones which more closely take into account local spending patterns and the distribution of existing centres and residential population in Stockton.

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

Retail Capacity

Population and Expenditure

3.23 The Borough's population between 2012 and 2032 is set out in Table 1 in **Appendices 2 and 3** and is based on projections provided by ORS who are preparing a separate Strategic Housing Market Assessment (SHMA) for the Council. This table illustrates that the population of the Borough is projected to grow significantly, from 196,351 in 2016 to 213,578 in 2032 – growth of around 17,200 persons or 9%.

3.24 The estimation of the population of the Borough as a whole in 2012 by ORS has been broken down across the five zones, based on information obtained from Experian, which is in turn based on the 2011 Census. Going forwards, population levels across the different zones over the period to 2032 also take into account information from the Council in respect of the likely distribution of planned new housing development.

3.25 Table 2 in **Appendices 4 and 5** sets out the forecast growth in spending per head for convenience and comparison goods within each zone in the study area up to 2032. This is based upon estimated spending per capita in 2014 provided by Experian, as well as the forecast growth rates set out in their Briefing Note 13 (October 2015). In line with the above Briefing Note, a proportion of the available expenditure per capita in each year has been deducted to reflect expenditure via non-store retail sales (e.g. catalogue shopping, vending machines sales, internet purchases etc.) – making an allowance for those internet sales which still go through physical retail stores.

3.26 Total expenditure in these categories is illustrated in Table 3. As a consequence of growth in population, convenience goods spending within the study area is forecast to increase by 8% (£28m) between 2016 and 2032, from £365m to £394m. Comparison goods spending is forecast to increase more significantly between 2016 and 2032 (by around 74%/£456m), from £607m in 2016 to £1,062m in 2032 (all in 2014 prices).

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

Current Shopping Patterns

Convenience Goods

3.28 The results of the household shopping survey relating to main and top-up food and grocery shopping have been weighted and combined to estimate existing convenience goods shopping patterns across the study area. The estimates of market share or penetration within each zone are shown in Table 4 in

Appendix 4, based on a 70/30 split between main and top up food shopping. A summary of the market shares achieved by the main stores across the Borough (by zone, in percentage terms) is also shown in Table 3.1 below.

Table 3.1 Convenience Goods Market Shares of Main Foodstores

Store	Zone 1 Stockton	Zone 2 Billingham	Zone 3 Thornaby /Ingleby Barwick	Zone 4 Yarm/ Eaglescliffe	Zone 5 Rural North West
Tesco, Durham Road	16.9%	3.3%	0.9%	2.3%	23.8%
Asda, Portrack Lane	14.8%	7.2%	3.5%	2.2%	8.9%
Sainsbury's, Whitehouse Farm	11.0%	0.2%	0.2%	1.4%	5.5%
Aldi, Norton	9.2%	6.9%	0.3%	1.1%	6.1%
Aldi, Yarm Lane	5.5%	0.3%	1.7%	2.4%	0.8%
Morrisons, Teesside Park	4.6%	2.7%	5.8%	5.8%	4.0%
Co-op, Norton	3.3%	0.2%	0.0%	0.0%	0.3%
Lid, Wellington Square	1.5%	0.2%	0.3%	0.5%	1.9%
Asda, Allensway, Thornaby	1.2%	0.0%	24.0%	2.4%	0.0%
Tesco, Eaglescliffe	1.1%	0.4%	0.0%	16.6%	0.5%
Aldi, Healaugh Park	0.9%	0.0%	6.1%	18.6%	0.3%
Tesco, Leeholme Road, Billingham	0.8%	34.2%	0.0%	0.5%	7.0%
Tesco, Ingleby Barwick	0.8%	0.2%	25.2%	9.9%	0.3%
Asda, The Causeway, Billingham	0.4%	17.6%	0.0%	0.0%	2.1%
Lidl, Thornaby District Centre	0.3%	0.0%	10.5%	0.2%	0.0%

Source: NEMS Household Surveys (March 2016)

3.29 Table 4 (**Appendix 4**) indicates the proportion of convenience goods expenditure within each zone retained within the Borough ranges from around 84% (Zone 5 – Rural North West) to 96% (Zone 1 - Stockton). These high levels of retention reflect the extent to which food shopping needs are, in overall terms, being met across the Borough. Those zones with the highest proportion of spending which is retained within them comprise Stockton (83%) and Thornaby/Ingleby Barwick (78%). Zone 5 is estimated to retain just 7% of its own spending – reflecting the limited range of provision in this zone and its rural character.

3.30 The level of convenience goods expenditure attracted to shops/stores in the Borough in 2016 is estimated to be £442m, as shown in Table 5, **Appendix 4**. This includes estimates of inflow of expenditure from beyond the study area (£98m), which takes into account the relative accessibility of some stores and centres – most notably Asda at Portrack Lane and Thornaby, and Morrisons at Teesside Park - to adjoining local authority areas, including Middlesbrough.

3.31 The total benchmark (i.e. expected/company average) turnover of identified existing convenience sales floorspace within Stockton Borough is £398m (Table 9, **Appendix 4**). This suggests that convenience goods retail sales floorspace in the Borough is collectively trading above average, by around £45m (11%).

Table 3.2 Trading Performance of Main Foodstores

Store	Under/Over Benchmark Turnover (£m)	Under/Over Benchmark Turnover (%)
Aldi, Norton	£15.63	188%
Aldi, Healaugh Park	£10.95	136%
Tesco, Ingleby Barwick	£16.30	80%
Aldi, Yarm Lane	£5.59	72%
Lidl, Thornaby District Centre	£4.71	59%
Morrisons, Teesside Park	£4.93	17%
Tesco, Eaglescliffe	£1.42	12%
Asda, Portrack Lane	£4.77	11%
Tesco, Leeholme Road	£0.65	3%
Sainsbury's, Whitehouse Farm	-£0.42	-2%
Tesco, Durham Road	-£5.53	-12%
Asda, Thornaby	-£6.00	-14%
Lidl, Wellington Square	-£2.09	-37%

Source: NLP Capacity Assessment

3.32 As illustrated in Table 3.2, above, with the exception of Lidl in Wellington Square, which is likely to close/relocate in the early part of the plan period, existing Aldi and Lidl foodstores in the Borough are all estimated to be performing very strongly, at between around 60% and 190% above their benchmark (i.e. company average) turnover levels. This reflects the national trend towards both the fragmentation of main food shopping trips – with a significant proportion of people either substituting or supplementing their first choice store – and the increase in popularity of the discount operators in particular. Larger foodstore operators are experiencing more mixed fortunes, with the only such store performing at a level significantly above its benchmark being Tesco in Ingleby Barwick.

Comparison Goods

3.33 A summary of existing comparison goods shopping patterns is shown in Table 3.3. These are again based on the results of the household telephone shopping surveys in respect of the different types of non-food goods, which have been weighted on the basis of the national average spending levels and then combined.

Table 3.3 Comparison Goods Market Shares of Main Destinations

Centre/Facility	Zone 1 Stockton	Zone 2 Billingham	Zone 3 Thornaby/Ingleby Barwick	Zone 4 Yarm/Eaglescliffe	Zone 5 Rural North West
Stockton Town Centre	27.4%	6.3%	11.1%	7.8%	10.7%
Billingham District Centre	0.6%	25.3%	0.0%	0.2%	4.6%
Thornaby District Centre	0.8%	0.0%	17.8%	1.6%	0.0%
Yarm District Centre	0.4%	0.1%	1.1%	12.5%	1.0%
Portrack Lane	11.7%	8.9%	9.5%	7.5%	10.3%
Teesside Retail Park	28.3%	24.6%	33.9%	31.1%	30.9%
Bridge Road Retail Park	0.6%	0.4%	0.1%	0.8%	0.0%
Out of Centre Foodstores	9.2%	6.3%	1.6%	2.2%	8.4%

3.34 Table 4 (**Appendix 5**) indicates the proportion of comparison goods expenditure within each zone that is spent within Stockton Borough ranges from around 67%/68% (Yarm/Eaglescliffe and Rural North West) to 82% (Stockton). The retention of comparison goods expenditure is generally lower than for convenience goods. This reflects the propensity of customers to do food and grocery shopping locally, as opposed to non-food shopping, where customers are more likely to shop around and/or travel longer distances to visit larger centres that have more choice.

3.35 The estimated comparison goods expenditure currently attracted by shopping facilities within the Borough is £764m in 2016, as shown in Table 5. This includes estimates of inflow from beyond the Study Area, which are estimated to be around £300m. This significant level of inflow reflects a range of factors, including the proximity/accessibility of out-of-centre destinations such as Teesside Park and Portrack Lane to adjoining areas, as well as the range and quality of provision they contain.

3.36 Stockton Town Centre is currently estimated to be achieving a comparison goods turnover in the order of £114m, which is significantly lower than its benchmark turnover (£136m). The proportion of spending it attracts from each of the different zones varies, ranging from 27% in the Stockton zone to 6% in the Billingham zone. Even when considered in terms of the Borough as a whole, the centre attracts only around 16% of all available comparison goods expenditure. As set out further below, in order to accommodate any quantitative capacity identified, it will be important to facilitate a step change in the offer of the centre, including through attracting operators of a scale and nature not currently represented there.

3.37 The above analysis is sensitive to assumptions made in relation to the quantum of floorspace provided by the centre, as well as its benchmark (i.e. expected/company average) level of turnover, and should therefore be treated with a degree of caution. However, it reflects a number of factors, including the attractiveness of provision within the centre, relative to other destinations. Such destinations including retail warehousing facilities at Teesside Park and Portrack Lane - which respectively attract 30% and 10% of comparison spending from the across the Borough as a whole.

3.38 On the basis of the survey information, facilities at Teesside Park are achieving a level of comparison goods turnover (£400m) which is significantly in excess of its benchmark (£208m). The nature of the operators and goods on offer at the park have evolved significantly since it was first built, and it now includes a wide range of predominantly non-bulky, high street-type retailers, which has contributed to its overall attractiveness to shoppers. It is also estimated to draw a significant proportion of its trade from outside of Stockton Borough (over 50%).

Convenience Retail Capacity

3.39 Based on current market shares of available expenditure being maintained, the level of convenience goods expenditure available to existing stores and centres at 2021, 2026 and 2032 is shown at Tables 6, 7 and 8 in **Appendix 4.** It is then summarised and compared to the benchmark turnover of existing stores/centres in Table 9.

3.40 Convenience expenditure available to shopping facilities in the District is expected to increase from £442m in 2016 to £470m in 2032, as compared to the total benchmark turnover of such facilities, which is estimated to be £396m. This reflects a number of factors - including both significant population growth and the performance of existing foodstores across the Borough – and indicates that there is currently around £45m residual expenditure capacity available to support committed and new convenience goods retail floorspace in the Borough.

3.41 Commitments in Stockton Borough are summarised in Table 10, and are forecast to have a total convenience goods retail turnover potential of £53m, taking into account information provided by the Council and the respective applicants. The most significant of these commitments comprise those for a new Lidl store on the Nifco site at Yarm Road (£8.8m), new Aldi stores at The Causeway, Billingham (£8.0m – which has opened since the household surveys were undertaken) and Tedder Avenue, Thornaby (£11.6m), and a Discount Food Warehouse off Portrack Lane (£6.2m). A number of smaller scale developments have also been approved which are aimed at serving existing or planned new communities.

3.42 As set out in Table 11 at Appendix 4 (and summarised in Table 3.4 below), after subtracting the benchmark turnover of both existing and committed floorspace from available expenditure, there is not forecast to be any convenience goods expenditure capacity in 2021 across the Borough. However, as a result of further growth in population, there is forecast to be capacity in the order of £9m by 2026 and £21m by 2032.

Table 3.4 Summary of Convenience Goods Expenditure Capacity 2016 to 2032

Area	2016	2021	2026	2032
Zone 1 - Stockton	2.4	-13.8	-7.9	-2.0
Zone 2 - Billingham	2.6	-5.3	-4.9	-4.6
Zone 3 - Thornaby/Ingleby Barwick	24.8	6.3	10.0	13.6
Zone 4 – Yarm/Eaglescliffe	15.3	11.1	12.8	14.6
Zone 5 - Rural North West	0.0	-1.1	-1.0	-0.8
Total	**45.2**	**-2.8**	**8.9**	**20.7**

3.43 Looking at the individual zones, the most significant proportions of the forecast capacity in 2032 relate to the Thornaby/Ingleby Barwick and Yarm/Eaglescliffe zones (£14m and £15m by 2032) – with the other zones having a deficit of expenditure. However, this again assumes that the current market shares of available expenditure being achieved by facilities within each of these zones will be maintained.

3.44 The capacity identified across the Borough, and within the different zones, has been converted to potential new floorspace estimates in Table 12, based on an assumed average sales density figure of £11,000 per sqm – which is the average turnover of the main national foodstore operators (including Aldi and Lidl). This table illustrates that, after allowing for commitments, the identified convenience goods capacity could potentially support 1,883 sqm net/2,691 sqm gross new floorspace across the Borough over the period to 2032. This level of capacity could theoretically support up to two medium sized supermarkets or, possibly, one superstore (depending on the nature and scale of operator demand).

3.45 Whilst the above figures assume that all existing commitments come forward, this is unlikely to happen in practice. For example, whilst there is a planning permission for an extension to Tesco at Ingleby Barwick (£4.5m), and this is factored-in to Table 10, it is understood that this is unlikely to proceed. It is therefore possible that the quantum of new floorspace which can be supported could, in practice, be greater than set out above.

Comparison Retail Capacity

3.46 Whilst lower than for convenience goods, the household survey indicates that the Borough's retention of comparison goods expenditure is still relatively high (77% overall). This reflects the range and choice of stores located within the Borough, including both those located within existing centres and out-of-centre provision, such as that at Portrack Lane and Teesside Park.

3.47 Although future improvements to provision in Stockton could help to claw back some additional expenditure leakage from the Borough District, this could in turn be limited by major developments in neighbouring authorities. A more realistic objective would be for Stockton Town Centre to maintain – and in the medium to long terms increase – its market share of comparison goods spending in the face of competition from out-of-centre destinations within the Borough, most notably Teesside Park**.**

3.48 Based on the baseline population projections, available comparison goods expenditure has been projected forward to 2021, 2026 and 2032 in Tables 6, 7 and 8 in **Appendix 5**. As summarised in Table 11, comparison goods expenditure available to facilities within the Borough is expected to increase from around £764m in 2016 to £887m in 2021, £1,068m in 2026 and £1,338m in 2032.

3.49 Comparison goods retail commitments are summarised in Table 10 of **Appendix 5**. These include retail warehousing developments at Portrack Lane, non-food elements within foodstores approved at Yarm Road, Billingham, Thornaby and Ingleby Barwick, as well as a number of smaller scale developments. The total turnover of committed comparison goods retail floorspace is forecast to be £29.5m.

3.50 There are also a number of units at Teesside Park that benefit from Certificates of Lawfulness for the insertion of mezzanine floors. The potential new floorspace which could be created as a result of such mezzanine floors has not been specifically factored-in to this assessment. However, should any or all of this floorspace come forward, it could reduce the level of comparison goods expenditure capacity identified further below.

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

3.52 As illustrated in Table 11 (summarised in Table 3.5 below), after allowing for existing commitments there is forecast to be comparison goods capacity of around £14m in 2021 across the Borough as a whole, increasing to £104m by

2026 and £252m by 2032. Table 12 illustrates that such capacity could potentially support floorspace of around 3,000 sqm net/4,500 sqm gross in 2021, 23,000 sqm net/33,000 sqm gross in 2026 and 56,000 sqm net/80,000 sqm gross in 2032. Any new floorspace should be directed to sites within existing centres, in the first instance, in line with the sequential approach set out in the NPPF.

Table 3.5 Summary of Comparison Goods Expenditure Capacity 2016-2032

Area	2016	2021	2026	2032
Stockton Town Centre	0.00	6.44	20.32	43.06
Billingham District Centre	0.00	-1.15	1.29	5.49
Thornaby District Centre	0.00	1.89	6.17	13.25
Yarm District Centre	0.00	1.37	4.00	8.25
Portrack Lane	0.00	-3.59	7.72	26.55
Teesside Retail Park	0.00	23.17	72.46	153.13
Stockton Retail Park	0.00	0.19	0.59	1.25
Out of Centre Foodstores	0.00	1.12	6.31	14.86
Other Stores/Centres	0.00	-15.63	-15.23	-14.07
Total	**0.00**	**13.81**	**103.64**	**251.77**

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

Qualitative Need

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

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

3.55 All of these factors are taken into account in the qualitative need assessment of existing facilities in Stockton set out below.

Convenience Retail

3.56 The household survey results indicate that most residents in the study area undertake both a main shopping trip and top-up shopping trips. Main shopping trips are generally made once a week or less often, and the household survey identified that 85% of respondents travel to do their main food shopping by car (either as a driver or passenger). The availability of a wide range of products and free car parking are important requirements for main or bulk food shopping trips. Large supermarkets or superstores are the usual destination for these types of shopping trip.

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

3.58 Against this background, and as shown on the Existing Foodstores drawing at **Appendix 2**, there are six large foodstores, comprising over 2,500 sqm net sales area. These include:

- Tesco Extra, at Durham Road (7,829 sqm net);
- Asda at Portrack Lane (5,040 sqm net);
- Asda in Thornaby District Centre (4,600 sqm net);
- Morrisons at Teesside Park (3,846 sqm net);
- Tesco at Leeholme Road, Billingham (3,260sqm net); and
- Tesco in Ingleby Barwick Local Centre (2,620 sqm net).

3.59 There are also a number of other supermarkets which help to meet both main and top-up food shopping needs. These include Sainsbury's stores at Whitehouse Farm and High Street (Yarm), Tesco at Eaglescliffe and Asda in Billingham District Centre. They also include Lidl stores in Wellington Square (Stockton Town Centre), Thornaby District Centre, existing/committed Aldi stores at Yarm Lane, Darlington Lane (Norton), Healaugh Park (Yarm) and Tedder Avenue (Thornaby), and Marks & Spencer foodhalls in Stockton Town Centre and at Teesside Park. These larger and medium sized stores are supported by a range of smaller supermarkets and convenience stores within the Borough, including Tesco Express, Sainsbury's Local, Asda, Iceland, Farmfoods and Co-op stores.

3.60 Overall, the Borough benefits from a good range and choice of foodstore provision, with all of the main operators represented. The only zones without a large store (over 2,500 sqm net) are Zones 4 (Yarm/Eaglescliffe) and 5 (Rural North West). As set out above, on the basis of existing market shares, there is forecast to be around £11m capacity to support new convenience retail floorspace in the Yarm zone in 2021, increasing to c. £15m by 2032. Over the plan period, and when considering this area in isolation, these levels of capacity could support up to two new medium sized supermarkets or, possibly, one superstore.

3.61 Such provision would help to enhance the existing range and choice of stores in this zone, the largest of which (Tesco at Eaglescliffe) comprises just 1,300 sqm net floorspace. However, as explained in Section 5.0, there are limited opportunities in/on the edge of Yarm District Centre to accommodate new retail development. If new provision is to come forward in this area, it may therefore be necessary to consider alternative locations, following the sequential approach to site selection set out in the NPPF.

3.62 On the basis of existing market shares, there is no expenditure capacity forecast to support new convenience retail floorspace in the Rural North West zone, reflecting the more limited levels of population in this area. Notwithstanding this, however, it will be important to ensure that existing and any future new residential development in this zone is served by a range of facilities which meet day to day shopping needs, thereby reducing the need to travel.

3.63 As set out above, the capacity figures identified in this study are based upon the current market shares of available expenditure achieved by existing facilities in each zone being maintained. It is possible that new provision could result in re-balancing of expenditure flows in some areas, meeting qualitative needs, and achieving economic, regeneration and/or sustainability benefits. In this context, it is also helpful to consider the range of stores within the main centres in the Borough, and whether new provision could meet currently unmet needs and/or deliver wider economic and regeneration objectives, including in respect of Stockton Town Centre.

3.64 Provision in the town centre is focused on smaller supermarkets/foodhalls, including Marks & Spencer, Asda, Iceland and Farmfoods. Although permission was granted around ten years ago for a new superstore of around 5,600 sqm gross at the southern end of the Castlegate Shopping Centre, this development did not come forward. Although the scope for such development is likely to be limited by the extent and nature of operator demand – which is focused upon the discount sector - there could, therefore, be scope for additional foodstore development as part of the ongoing regeneration of this centre. This would also help to capture some of the spending currently flowing to out-of-centre facilities.

3.65 Billingham District Centre includes a small Asda supermarket and a recently opened Aldi, although there could also be regeneration benefits in seeking to attract new provision to the centre. Thornaby District Centre benefits from an Asda superstore and a Lidl supermarket, with permission also having been recently granted for a new Aldi store on land to the south of the centre at Tedder Avenue. Whilst provision is more limited in Yarm, as set out above, opportunities for new development in and around the existing district centre are constrained by the surrounding built form, as well as the River Tees.

3.66 Changes in shopping patterns in Stockton – which reflect wider national trends – have seen an increase in popularity in the discount foodstore sector, demand which has been met, in part, by the development of new Lidl and Aldi stores in Thornaby and Stockton. As set out above, with the exception of Lidl at Wellington Square in Stockton, all of these existing stores are performing strongly, at levels significantly above their company averages. There could, therefore, be scope for additional store development in the discount sector, to help alleviate any overtrading in existing facilities, meet the gaps in provision identified above and deliver wider regeneration objectives.

Comparison Retail

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

3.68 Stockton Town Centre is the largest centre in the Borough and is a focal point within the local community for a range of retail, service and other commercial and community uses. Based on the latest available information from the Council, it contains approximately 30,000 sqm net comparison goods retail floorspace. However, the nature of such provision in the centre is such that the range and choice in some sub-sectors is more limited than would be expected in other centres of a similar scale.

3.69 As illustrated in Table 3.6, below, when compared against the national average (provided by Goad), the quantum of clothing and footwear retailers (as a proportion of the total number of comparison goods retailers) is significantly below the national average (15%, or 20 no., as opposed to 25%). The proportion of booksellers/arts/crafts/stationers is also around 4% lower than the national average. Conversely, the proportion of variety/department/catalogue retailers (by 7%) and electricity/gas/music/photography retailers (4%) are all above the national average.

Table 3.6 Comparison Goods Sub-Sectors within Stockton Town Centre

Comparison Goods Sub Sector	Stockton Town Centre		National Average	Difference
		Percentage of Uses	Percentage of Uses	Percentage of Uses
Clothing & Footwear	20	15.0%	25.1%	-10.1%
Furniture, carpets and textiles	11	8.3%	8.5%	-0.2%
Booksellers, arts, crafts and stationers	7	5.3%	9.3%	-4.0%
Electrical, gas, music and photography	17	12.8%	8.6%	4.1%
DIY, hardware and homewares	6	4.5%	6.5%	-2.0%

				-2.6%
Vehicle accessories	1	0.8%	0.5%	0.2%
Chemists, drug stores and opticians	10	7.5%	10.2%	-2.7%
Variety, department and catalogue	11	8.3%	1.6%	6.7%
Florists, nurserymen and seedsmen	3	2.3%	2.2%	0.1%
Toys, hobby, cycle and sport	7	5.3%	6.1%	-0.9%
Jewellers	10	7.5%	5.0%	2.5%
Charity/second-hand	12	9.0%	9.1%	0.0%
Other comparison retailers	15	11.3%	2.4%	8.9%
	133	**100.0%**	**100.0%**	

Source: SBC Surveys and NLP Analysis

3.70 The range of comparison goods retailers in the centre is also reflected in the Venuescore rankings summarised in Section 2.0, which show that Stockton falls well below other comparable centres in the north-east such as Darlington, Sunderland and Durham City. The proportion of comparison goods uses in the centre (32%) is also significantly lower than the national average (37%).

3.71 The three district centres in the Borough also contain a reasonable range of comparison retail uses, although the quantum of floorspace they provide is much smaller, reflecting their level in the retail hierarchy. In summary:

- Billingham has a range of national and independent comparison goods operators which meet more basic and day to day needs, although it would benefit from investment which helps to extend this range of uses, and national multiple representation in particular;
- whilst the number of uses there is more limited, the recent redevelopment in Thornaby has provided more modern floorplates which has enabled the centre to accommodate a number of national operators, providing a boost to the wider centre; and
- whilst the majority of uses are small in scale, Yarm includes a significant proportion of niche/specialist independent retailers (e.g. clothing/footwear, childrenswear, jewellers, florists) – helping attract visitors from beyond its immediate local catchment area.

3.72 In addition to the above, as illustrated on the plan at **Appendix 1**, out-of-centre destinations in Stockton perform a significant role in meeting the comparison goods retail needs of local residents. These destinations include:

- Teesside Shopping Park, which is located around 2.5km to the east of Stockton Town Centre. Although originally a predominantly bulky goods destination, it has evolved over time to include a wide range of non-bulky operators, and comprises around 52,000 sqm net comparison goods retail floorspace;

- Portrack Lane, also to the east of the town centre, where there are several retail parks and a large number of freestanding units, incorporating a wide range of primarily bulky operators. In total, these facilities provide around 66,000 net sqm comparison goods retail floorspace; and
- Bridge Road Retail Park, which is located immediately to the south of the town centre, and comprises around 6,700 sqm net floorspace in units occupied by Intersport, Matalan, Wynsors, Home Bargains and Halfords.

3.73 As a result of the range of operators it now contains, Teesside Park now attracts around 30% of comparison goods expenditure generated within the Borough. This is almost twice that currently achieved by Stockton Town Centre, and does not take into account the significant trade which the park attracts from outside of the Borough (estimated to be over 50% of its total turnover).

3.74 Teesside Park is likely to continue to remain an attractive option for shoppers both within and beyond the Borough. However, it should be an aspiration of the Council in the medium to long term to seek to increase the market share of Stockton Town Centre relative to Teesside Park, by enhancing the range and choice of retailers in the Town Centre.

3.75 In order to attract more higher order retailers to the centre, it is likely to be necessary to facilitate a step change in the centre's offer, and therefore its attractiveness to both shoppers and operators. It will also require a co-ordinated strategy to both identify operators not currently represented in the centre, including larger format stores, and encourage them to take occupation of existing and any planned new developments. Other enhancements to the wider offer of the centre, including any new leisure uses brought forward, will help to create the climate whereby this strategy can be achieved.

Summary

3.76 The levels of convenience and comparison goods retail expenditure capacity forecast to arise over the Local Plan period in Stockton Borough are summarised in Table 3.7 below.

Table 3.7 Summary of Borough-Wide Retail Expenditure Capacity 2021-2032 (After Commitments)

		2021	2026	2032
Convenience Goods Retail	£m	-2.8	8.9	20.7
	Sqm Net	-254	813	1,883
Comparison Goods Retail	£m	13.8	103.6	251.8
	Sqm Net	3,069	23,032	55,948

Source: NLP Capacity Assessments August 2016

3.77 Across the Borough as a whole, whilst there is not forecast to be any convenience goods expenditure capacity in the short term (i.e. to 2021), there is forecast to be capacity over the period to 2026 (£9m) and 2032 (£21m). On the basis that existing market shares are maintained, the majority of the capacity identified relates to the Thornaby and Yarm zones, reflecting both the performance of existing stores in these zones as well as forecast population growth.

3.78 In qualitative terms, whilst the Borough benefits from a good range of convenience retail provision overall, the Yarm area, in particular, does not currently benefit from any large foodstores Alternatively, new foodstore development in Stockton Town Centre would bring regeneration and economic benefits to the centre and help to re-balance existing shopping patterns within the Borough.

3.79 In relation to comparison goods, there is likely to be significant scope – in theoretical terms - for new floorspace over the plan period. Even if based simply on expenditure growth, there is forecast to be capacity of £252m by 2032. In qualitative terms, the priority in the medium to long term should be to seek to increase the market share of Stockton Town Centre relative to Teesside Park, through a co-ordinated strategy which seeks to enhance the range and choice of retailers in the centre. There may also be scope to enhance the range of provision within Billingham District Centre.

4.0 # Need for Other Town Centre Uses

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

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

Cinemas

4.3 There are no national cinema chains in Stockton Borough itself, with the only such facility being the ARC at Dovecot Street, on the edge of Stockton Town Centre. This is an arts and cultural venue with one 130-seat auditorium, which which shows a range of films, including new releases, during the day and evening. As shown in Table 4.1, below, it attracts around 12% and 10% of those visiting cinemas in Zones 1 (Stockton) and 4 (Yarm/Eaglescliffe) respectively, although much smaller proportions (less than 3%) from the other zones.

Table 4.1 Cinema Market Shares

Area	Zone 1 Stockton	Zone 2 Billingham	Zone 3 Thornaby /Ingleby Barwick	Zone 4 Yarm/Eaglescliffe	Zone 5 Rural North West
Stockton Borough (ARC, Dovecot Street)	11.9%	0.0%	1.4%	10.4%	2.4%
Other Destinations					
Showcase, Teesside Leisure Park	50.7%	43.6%	47.2%	47.9%	54.8%
Cineworld, Marton Road, Middlesbrough	34.3%	32.7%	47.2%	37.5%	26.2%
Vue, Marina Way, Hartlepool	0.0%	21.8%	1.4%	2.1%	7.1%
Other Cinemas	3.0%	1.8%	2.8%	2.1%	9.5%
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

4.4 Although immediately adjacent to the boundary with Stockton and indeed the wider Teesside Shopping Park, the Showcase Cinema at Teesside Leisure Park is located within the Middlesbrough local authority area. As shown in Table 4.1, this cinema attracts between 43% and 55% of visits from the different study area zones, and is therefore the most popular cinema for residents of Stockton Borough. Between 26% and 47% of cinema users in the different zones use the Cineworld at Marton Road, also in Middlesbrough, with much smaller proportions using other facilities in the surrounding areas.

4.5 **Appendix 6** to this report includes a quantitative assessment of the capacity to support additional cinema provision in Stockton Borough. The national average visitation rate (2.8 trips per annum) has been applied to the Borough's estimated population in order to forecast the total number of cinema trips generated in the Borough. As set out in Table 2 of Appendix 5, it is forecast that the Borough's population will generate 549,784 cinema trips in 2016, increasing to 566,134 in 2021, 581,659 in 2026 and 598,018 in 2032.

4.6 In contrast, the household survey results suggest that just c. 41,000 cinema trips in 2016 will be attracted to the ARC in Stockton Town Centre (allowing for 10% inflow from beyond the Borough), as illustrated by Table 4. On this basis, only 7% of all cinema visits by residents of Stockton Borough are made to cinema facilities within the Borough. This is likely to reflect a range of factors, although particularly the limited number and range of films that the ARC facility is able to show, as well as its technological capabilities.

4.7 Based on the national average population per cinema screen (47,000 people per screen) and per cinema seat (232 people per seat), the trips made to facilities in Stockton (i.e. the ARC) equate to around 1 screen or circa 180 seats. As ARC has just one screen, and assuming that existing market shares are maintained, then this assessment indicates that supply is broadly in balance with cinema demand in Stockton.

4.8 However, it is also relevant to consider whether there is scope to increase the Borough's existing market share of cinema trips from its existing low level. Whilst the Showcase cinema at Teesside Park will continue to attract trade from Stockton, there may be merit in seeking to attract new cinema provision to a site in/on the edge of Stockton Town Centre. This would help to enhance the availability of such provision to residents across the Borough as a whole and attract additional visitors to the centre.

4.9 In this context, an additional assessment has been undertaken based upon the assumption that the proportion of cinema trips by residents of Stockton which are made to facilities in the Borough can be increased to 50%. Under this scenario, it is estimated that 332,232 trips would be made to cinemas in Stockton by 2032, which equates to seven screens and 1,400 seats in 2016 respectively.

4.10 The scale of any additional provision which can be supported will ultimately depend upon the extent to which the market share of facilities within the

Borough can be increased. This will, in turn, depend on whether any provision is sufficiently attractive to compete effectively with existing facilities outside of the Borough, including the Showcase and Cineworld mentioned above, and whether commercial demand for such provision exists. At present, national operators not represented in the sub-region include Vue, Odeon and Empire. Similarly, some of the smaller, independent chains (for example, Reel and Apollo), are also not present in the area. However, assuming that the existing very low market share (7%) can be increased, there is theoretical capacity to support new cinema screens in Stockton – potentially equating to six additional screens or around 1,300 extra seats.

Tenpin Bowling

4.11 Whist there are no tenpin bowling facilities in Stockton at present, Hollywood Bowl is located at Teesside Leisure Park, immediately adjacent to the Borough. The household survey results suggest that the vast majority of residents within each of the defined study zones which go tenpin bowling (90% or more) visit this facility. No other tenpin bowling alleys attract any significant proportion of residents from within the Borough.

4.12 The national average provision of tenpin bowling facilities equates to one lane per 12,000 people. On this basis, Stockton Borough's population (196,351 in 2016) can theoretically support 16 lanes. Taking into account population growth in the Borough, a further two lanes could be supported by 2032.

4.13 Whilst in Middlesbrough, the existing Hollywood Bowl (26 lanes) lies immediately adjacent to the Borough and the wider Teesside Retail Park – which itself is used by a significant proportion of Stockton's residents for both food and non-food shopping. Whilst it would be desirable to capture a proportion of the Borough's tenpin bowling trips through new facilities in Stockton, the extent to which this can be achieved is likely to be heavily influenced by operator demand.

4.14 Given the location of Hollywood Bowl adjacent to the Stockton/Middlesbrough border, and the large catchment areas which such facilities usually serve, it is helpful to consider whether there is any capacity to support new provision on a wider sub-regional basis. Against this background, the population of both Stockton and Middlesbrough combined (around 345,000) could theoretically support 28 tenpin bowling lanes in total in 2016, increasing to 30 in 2032. However, as this is only slightly larger than the existing Hollywood Bowl, there is not considered to be clear capacity for new provision to justify allocating further provision within the catchment area up to 2032.

Bingo Halls

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

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

4.17 The household survey results indicated that 8.3% of respondents in the study area visit bingo facilities, which is higher than the national average bingo visitation rate of around 5%. As illustrated in Table 4.2, below, around three-quarters of these respondents (74%) indicated that they visit the Mecca facility at Chandlers Wharf, which is on the edge of Stockton Town Centre. Much smaller proportions of respondents indicated that they visit other facilities in surrounding towns, both within the Borough (e.g. Seven Entertainment in Billingham) and other surrounding locations, such as Middlesbrough, Hartlepool and Redcar.

Table 4.2 Main Bingo Destinations for Stockton Residents

Destination of Last Trip	% of Participating Households
Mecca, Chandlers Wharf, Stockton	74.1%
Seven Entertainment, The Causeway, Billingham	6.9%
Mecca, Warrior Retail Park, Hartlepool	5.2%
Thornaby	3.4%
Gala, Longlands Road, Middlesbrough	3.4%
Beacon Bingo, Esplanade, Redcar	3.4%
Billingham Catholic Club, Wolviston Road, Bilingham	1.7%

Source: NEMS Household Survey (March 2016)

4.18 It is estimated that the adult (over 18) population of Stockton on Tees Borough (estimated to be 151,780 in 2016) is likely to generate around 265,000 admissions based on the national participation rate (1.75 trips per adult) – increasing with population growth to around 289,000 in 2032. Based on national average figures (113,000 admissions per club), the Borough's population could in theory support between two and three facilities, assuming all trips are retained within the Borough.

4.19 Although there is already an existing facility at Chandlers Wharf (Mecca), with the closure of the former Gala facility at Teesside Leisure Park, other facilities in the Borough are relatively small in scale. In this context, and given the above-average rate of participation in the Borough, there could be scope for an additional bingo hall facility in Stockton to meet local needs. However, as with the other leisure uses covered above, the potential to bring forward a new bingo hall will depend upon the extent of operator demand for such a facility in the Borough, and whether any locations exist which are commercially attractive.

Health and Fitness Clubs

4.20 Around 25% of respondents to the household telephone survey indicated that they (or their families) visit health/fitness clubs. The survey also indicates that around 90% of these trips to health and fitness facilities are retained within the Borough. Table 4.3 below illustrates the most popular facilities, when considered across the Borough as whole, with around 38% of residents using Active8 (Billingham), David Lloyd (Navigation Way) and Xercise4Less (Durham Road).

Table 4.3 Main Health and Fitness Destinations

Destination of Last Trip	% of Participating Households
Activ8, Billingham Forum	14.6%
David Lloyd Leisure, Navigation Way, Stockton	12.4%
Xercise4Less, Tesco Extra, Durham Road	10.7%
The Splash, Church Road, Stockton	6.7%
Total Fitness, Middlesbrough Road	6.2%
Bannatyne, Myton Road, Stockton	5.1%

Source: NEMS Survey, March 2016

4.21 Looking at the range of provision across the Borough as a whole, Sport England/Active Places data indicates there are 25 health and fitness facilities overall in Stockton. These suites have 2,280 fitness stations in total, as shown in Table 4.4 below.

Table 4.4 Stockton Health and Fitness Clubs

Name	Type	No. Stations
Atom Health & Fitness	Members	21
David Lloyd Club (Teesside)	Members	145
North Shore Academy	Members	34
Parkmore Hotel & Leisure Club	Members	32
Bannatynes Health Club (Ingleby Barwick)	Pay and Play	90
Billingham Forum	Pay and Play	155
Denys World Gym	Pay and Play	50
Northfield Sportsdrome	Pay and Play	30

Name	Type	No. Stations
Oxygym Health And Fitness Club (Billingham)	Pay and Play	95
Queens Campus	Pay and Play	27
Ragworth Neighbourhood Centre	Pay and Play	18
Splash	Pay and Play	65
Src Sports Centre	Pay and Play	25
Thornaby Pavilion	Pay and Play	70
Total Fitness (Teesside)	Pay and Play	200
Trugym Stockton	Pay and Play	60
Xercise4less (Stockton North)	Pay and Play	400
Xercise4less (Stockton South)	Pay and Play	650
Bishopsgarth School	Private	15
Egglescliffe School	Private	12
Grangefield School	Private	12
Hmp Kirklevington Grange	Private	9
Northshore Health Academy	Private	20
Teesside High School	Private	15
Yarm School	Private	30
Total		**2,280**

Source: Sport England/Active Places Data 2016

4.22 As explained in Section 3.0, there are also a number of other, predominantly class-based health and fitness clubs located in the Borough. These include Crossfit, on Teesside Industrial Estate, and planning permission was recently granted for an Elite Physique facility on Preston Farm Industrial Estate. Whilst their business model is less suited to a town centre location, these facilities promote group exercises, combined with nutritional advice, as a means of helping people improve their fitness and general wellbeing.

4.23 Stockton Borough's population is estimated to be 196,351 in 2016, increasing to around 213,578 in 2032. Excluding the class-based facilities mentioned above, the Borough currently has 11.6 fitness stations per 1,000 people (2,280 stations in total, including private use facilities). This level of provision is above the existing north-east average, which equates to 7.6 fitness stations per 1,000 persons.

4.24 The adult population of the Borough (148,730 in 2016) could generate demand for 18,214 public and private gym membership places, based on the national average membership rate (12%). Assuming 90% of members are retained, and based on the national average membership rate, it is estimated that around 16,392 members use facilities in Stockton. This estimate implies that the 25 facilities in the Borough have an average number of users of around 650 per facility, as compared to the national average for such clubs, which is 1,375 members per club. These figures indicate that the supply of gyms and health clubs within Stockton Borough is above the national average. On this basis, there is not considered to be any need to increase the provision of facilities over the study period.

Food and Beverage Uses

Background

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

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

4.27 The key categories for food and beverage offers are:

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

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

Expenditure Capacity

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

4.30 Forecasts of food and beverage expenditure per capita between 2016 and 2032 are shown in Table 2, **Appendix 7**, with total expenditure being shown in Table 3. These figures indicate that the expenditure in the study area for food and beverages consumed away from the home (plus takeaways eaten at home) in the study area is forecast to increase by around £78m (37%), from £210.8m in 2016 to £288.4m in 2032.

4.31 Existing food and beverage expenditure patterns have been modelled based on the household survey results within the study area zones. Base year (2016) penetration rates are shown in Table 4 and expenditure patterns are shown in Table 5. The estimated expenditure currently attracted to facilities within Stockton (also allowing for inflow from beyond the Borough) is £179.5m in 2016.

4.32 The rate of food and beverage expenditure retention in Stockton Borough District is around 73% and it is recommended that this market share should, as a minimum, be maintained. The capacity forecasts set out in **Appendix 7** are based on this approach, and make an allowance for existing facilities to increase their turnover by 1% per annum.

4.33 The level of food and beverage expenditure available to existing facilities has been projected forward to 2032 in Tables 5 to 8, and this available expenditure is compared with the projected turnover of existing facilities in Tables 9. This table indicates that there is forecast to be capacity in the order of £9.5m in 2021, increasing to £20.2m in 2026 and £34.2m in 2032.

4.34 Surplus expenditure has then been converted into floorspace projections in Table 10, using an average sales density of £5,000 per sqm in 2016, again increasing by 1% per annum. As summarised in Table 4.5 below, this indicates that the above levels of capacity could support around 1,800 sqm new food and beverage floorspace in 2021, increasing to 3,700 sqm by 2026 and 5,800 sqm by 2032. A proportion of this floorspace could come forward in the form of new food and beverage uses developed alongside a new leisure-based anchor within/on the edge of Stockton Town Centre.

4.35 A good example is the Feethams development in Darlington Town Centre, which is anchored by a Vue cinema, but also includes operators such as Prezzo, Hungry Horse, Bella Italia and Mango Bean. If similar uses were to be attracted to Stockton, this would help to enhance the range and choice of mid-market, family-orientated restaurants in the centre, improving the evening economy and attracting more visitors generally. There is also scope for new food and beverage uses to facilitate the re-occupation of currently vacant units in Stockton Town Centre.

Table 4.5 Food and Beverage Floorspace Capacity 2016 to 2032 (Sqm)

Area	2021	2026	2032
Stockton	537	1,093	1,742
Billingham	136	282	453
Thornaby	70	141	226
Yarm	555	1,116	1,773
Norton	257	526	839
Ingleby Barwick	63	126	203
Other Destinations	188	378	599
Total	**1,805**	**3,662**	**5,834**

4.36 The levels of capacity identified above are based on the existing market shares of available expenditure achieved by these centres – as identified from the household surveys - being maintained. However, it would be desirable, from a sustainability perspective, to seek to increase the proportion of food and beverage expenditure generated within the Borough which currently is spent in Stockton (73%) over time. Within the Borough, it would also be helpful to re-balance existing patterns of spending on food and drink within the Borough itself, in order to enhance Stockton Town Centre' existing market share. As set out above, this would boost the evening economy in the centre and potentially also relieve some of the pressure for further new developments/changes of uses in Yarm District Centre and Norton Local Centre (where these is limited scope for development).

4.37 The extent to which this can be achieved will depend upon the scale and nature of any new provision which comes forward in future, including whether this enhances the existing range of facilities in the town centre. It may also require a positive planning policy approach to encouraging such new provision within the centre, taking into account other issues, such as impact upon amenity. Should this be possible, however, the levels of floorspace capacity identified for the centre would clearly be higher than set out above.

Summary

4.38 Taking into account national average participation rates and operator requirements for such uses, residents in Stockton Borough are relatively well served by a range of commercial leisure facilities located either within or just beyond the Borough. These include the Showcase Cinema and Hollywood Bowl at Teesside Leisure Park, Cineworld at Marton Road (Middlesbrough) and Mecca Bingo at Chandlers Wharf. There are also a variety of other facilities dispersed across the Borough, including a large number of health and fitness clubs and a range of food and beverage uses, both within and outside of existing centres.

4.39 Whilst there is no clear need for new cinema provision on the basis of existing visitation patterns - which suggest high levels of leakage to in-centre and out-of-centre facilities outside of the Borough - there would appear to be scope to 'claw-back' cinema visits through the development of a new cinema within the Borough, ideally located within/on the edge of Stockton Town Centre. There is no clear need for the development of any new tenpin bowling facilities or health and fitness clubs, although there could be scope to support a new bingo hall, based on national average admission rates. Forecast growth in food and beverage expenditure will be able to support new uses in this sector, which should be directed to existing centres, where suitable and available opportunities exist (and could potentially be developed alongside a new leisure-based anchor in Stockton Town Centre).

4.40 More generally – and given that leisure formats are constantly evolving and new ones emerging - whilst not within the scope of this study, it will be important to direct proposals for other forms of commercial leisure uses which emerge towards existing centres, including Stockton Town Centre, in the first instance. However, it should be recognised that it may be difficult to find opportunities within existing centres which are suitable and viable to accommodate some forms of leisure activity

5.0 Meeting the Need

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

- whether existing development plan allocations can meet the identified needs;
- whether there is a need to allocate new sites which can accommodate new development for one or more retail and commercial leisure uses;
- the criteria to be applied in deciding which sites should be allocated;
- where there is a potential need to plan for the expansion of any existing centres and/or re-define centre boundaries, to support new development in edge of centre locations;
- whether development in out of centre locations will be required; and
- whether new uses can be brought forward as part of, or to complement, regeneration areas and/or planned new residential development.

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

Summary of Identified Needs

5.3 In order to inform the assessment of potential development sites, the table below sets out the quantitative and qualitative needs which have been identified through Sections 3.0 and 4.0 of this report.

Table 5.1 Summary of Identified Needs

Use	Identified Needs
Convenience Retail	Capacity of £21m over period to 2032 (focused on Thornaby and Yarm zones) – equating to up to two medium sized supermarket or Qualitative need for enhanced provision serving Yarm/Eaglescliffe zone and/or potential for new stores in Stockton and Billingham
Comparison Retail	Capacity of £252m over period to 2032 across the Borough, based Need to enhance range and quality of provision in Stockton Town Centre and help claw-back market share from Teesside Park. Also scope to enhance range and quality of provision in Billingham District Centre, including national multiples.

Use	Identified Needs
Cinema	No need for additional cinema provision on the basis of existing visitation patterns – but theoretical scope for six additional screens if
Tenpin Bowling	No need for the development of new tenpin bowling facilities, given existing Hollywood Bowl facility at Teesside Leisure Park, adjacent
Bingo Halls	Potential scope to support one new bingo hall, based on national average admission rates.
Health and Fitness Clubs	No clear need for the development of any new health and fitness clubs, given existing range of provision.
Food and Beverage Uses	Capacity to support around 5,800 sqm new food and beverage floorspace over the period to 2032, which should be directed to

Site Selection Criteria

5.4 In considering the potential of existing allocated and possible new sites to meet the above needs, a review of these sites has been undertaken, taking into account the following factors:

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

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

- Good - development sites that have good prospects for providing additional retail/leisure floorspace, and should be considered for implementation in the short to medium term;

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

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

Review of Sites

5.7 Before considering the need to allocate new sites to meet the identified need for new retail and commercial leisure facilities in Stockton, it is helpful to consider existing allocations in the adopted plan – and the extent to which they could perform a role in meeting these needs.

5.8 Policy S13 of the adopted Local Plan Alteration no. 1 (March 2006) allocates three sites for mixed use development within existing town and district centres, comprising the following:

- Billingham Centre (Policy S13 (i));
- Thornaby Centre (Policy S13 (ii)); and
- East of the Square and South of Church Road, Stockton (Policy S13 (iii)).

5.9 It also allocates land at Allensway, immediately adjoining Thornaby District Centre, for mixed-use development. These have been considered in more detail below, along with other sites identified through discussions with Council Officers.

Stockton Town Centre

5.10 Local Plan Alteration no. 1 allocates land to the east of The Square and south of Church Road, comprising a vacant former garage and hardstanding currently used for temporary car parking and storage of building materials. The site lies within the defined boundary of Stockton Town Centre, and around 200m to the east of the Primary Shopping Areas.

5.11 The site has not come forward for redevelopment so far. However, the site benefits from convenient pedestrian linkages to the High Street, and any scheme which does emerge offers potential to accommodate new uses which re-inforce the retail and/or leisure role of the centre. In this context, it is understood that a national hotel operator (Hampton by Hilton) has expressed interest in the redevelopment of the site. The site may also have potential to accommodate other, complementary town centre uses, such as food and drink.

5.12 Given the site's availability and the current interest in it for hotel development, it is recommended that the existing Local Plan allocation be carried through in any new draft Local Plan document produced by the Council. Consideration should also be given to whether any of the adjacent buildings could be incorporated into the site, should they become available. However, any allocation should be sufficiently flexible to allow the full range of town centre uses and cater for any changes in market demand.

Figure 5.1 Land East of The Square/South of Church Road

5.13 Following discussions with Officers, we have also considered the following sites in Stockton Town Centre:

- Land to the rear of 90 to 101a High Street; and
- Southern Gateway.

5.14 Land to the rear of 90 to 101a High Street currently comprises surface car parking, along with former nightclub uses and a former post office. The site is located behind the main High Street frontage, which includes a number of existing public houses, and a narrow pedestrian walkway is situated in between some of the existing commercial premises. The rest of the site is not prominent in the conservation area, other than from views from West Row to the rear.

5.15 The location of this site to the west of High Street means that any new retail or leisure uses developed here could generate additional footfall for existing facilities in the centre. Such development would also enhance the visual appearance of this part of the centre. On this basis, we would recommend that any allocation on this site should include the full range of town centre uses, in order to maximise flexibility.

Figure 5.2 Land to Rear of 90-101a High Street

5.16 The Southern Gateway site comprises a vacant former hotel, multi storey car parking, shops and other commercial/community uses. It was previously subject to a planning permission granted to the owners of the Castlegate Shopping Centre around ten years ago, for a new foodstore of around 5,600 sqm gross.

5.17 As set out in Section 2.0, the foodstore sector has evolved significantly in the last few years, and there is now very limited demand from operators for large foodstore development in the north-east. Furthermore, given the existing uses on the site, it is unclear as to when it is likely to come forward for development. However, whilst this would need to be confirmed through discussions with commercial agents, the site could accommodate for other uses – for example a discount foodstore and/or commercial leisure uses.

Figure 5.3 Southern Gateway Site

Other Sites

5.18 As set out in Section 3.0, it should be an aspiration of the Council in the medium to long term to seek to increase the market share of Stockton Town Centre, by enhancing the range and choice of retailers within the centre. This is likely to require a step change in the centre's offer, and therefore its attractiveness to both shoppers and operators. This could, in turn, require the assembly of a site capable of accommodating significant new redevelopment for new, larger format operators, which are not currently represented in the centre.

5.19 It is possible that those opportunities considered above could form part of such a site. However, it is important that any site has good pedestrian linkages to the existing High Street and the existing Wellington Square centre, and does not function in isolation of the wider centre. The scale of the existing town centre already creates issues in terms of inter-connectivity and care will be needed to ensure that these issues are not exacerbated.

5.20 In this context, whilst further work would be required in order to establish whether and where such a site could be identified. However, the existing Lidl store, which is likely to be vacated in the near future, could offer potential to accommodate new comparison retail development. The size of the site, as well as its location adjacent to the A1305, which skirts the town centre, could help to make it attractive to larger format comparison operators.

Billingham District Centre

5.21 The allocation in Local Plan Alteration no. 1 covers the majority of the existing defined Billingham District Centre, although excluding the eastern end of the centre, including The Forum leisure/entertainment complex. It reflected the Council's aspiration to facilitate the regeneration of the centre through redevelopment proposals over time which helped to enhance the range, mix and quality of uses. However, it was acknowledged that it would be highly unlikely that any major redevelopment proposals would be implemented within the plan period.

5.22 Against this background, whilst no comprehensive schemes have come forward, there have been smaller-scale developments in parts of the centre. These include a recently opened Aldi foodstore, comprising approximately 1,000 sqm net floorspace on the site of the former Billingham Arms hotel. They have also included a new library and customer service centre to the south of Town Square.

5.23 These developments have helped to regenerate parts of the centre, generating footfall, enhancing the range of uses provided and improving its overall appearance. However, the western end of the centre would still benefit from new investment, particularly the buildings on the south side of Queensway and at West Precinct, helping to counter-balance the new development which has come forward at the heart of the centre. A significant proportion of the vacant units in the centre are located in these areas, and footfall around units on the upper level in particular is relatively low.

Figure 5.4 Units on South Side of Queensway

5.24 Further work would be required to establish the extent to which sites or other opportunities could be assembled which are attractive to new convenience or comparison retail operators. This is particularly the case given the multi-level nature of the western end of the centre, and existence of other (residential and offices) uses, along with car parking, above the vacant shop units.

5.25 The former library and health centre site at the western end of the centre, to the south of The Causeway and western end of Rothbury Street may have potential to accommodate new development. Whilst this site has poor visual linkages with the wider centre, and it is separated, in functional terms, from Queensway by the Queensway House office building, there are pedestrian walkways through West Precinct.

Thornaby District Centre

5.26 The main allocation here covered the whole of the existing defined Thornaby District Centre. It came forward in the form of a comprehensive redevelopment of the northern and eastern parts of the centre (i.e. excluding the existing Asda, Wrightson House, and the offices and health centre fronting Trenchard Avenue).

5.27 The Pavilion Shopping Centre opened in 2009 and incorporates two new blocks on the western side of Allensway, which form a new shopping mall linking Asda with a new Lidl supermarket. It also includes occupiers such as

Wilkinsons, Home Bargains, Greggs, Fulton Foods, KFC, Halifax, Barclays and Ladbrokes.

5.28 The development has helped to re-invigorate the centre, providing modern new accommodation to attract national multiplex operators which has enhanced both its convenience and comparison shopping roles. There are now just three vacant units in the centre.

5.29 Alteration no. 1 also allocated land to the east of Allensway and south of Mitchell Avenue, in Thornaby, for mixed use development. This site has now been developed for a McDonalds drive-thru restaurant and Asda petrol filling station (see below), which complement the other uses which have come forward in the Pavilion Shopping Centre redevelopment. In addition, planning permission was recently granted for a new Aldi store at the junction of Tedder Avenue with Allensway, comprising 1,254 sqm net floorspace. This site lies around 100m to the south of the existing Thornaby District Centre boundary.

Figure 5.5 McDonalds, Allensway

Yarm District Centre

5.30 No sites were allocated in Local Plan Alteration no. 1 within/on the edge of Yarm District Centre for new retail or other town centre uses. This reflects, in part, the tightly constrained nature of this centre and limited availability of land for new development more generally.

5.31 There are two sites at the southern end of the centre, on the western side of High Street (to either side of Bentley Wynd), although they are both small in scale. One of these sites is subject to a current planning application for residential development, although the other benefits from planning permission for a mixed use scheme, including residential uses and a bistro – the latter of which will help to further enhance the centre’s food and drink role.

5.32 Neither of these sites is considered to offer any significant potential to accommodate new town centre uses. It would therefore be necessary to consider the suitability and availability of sites elsewhere in Yarm, subject to commercial demand for provision within the area. In considering such sites, it would be important to have regard to the scale, nature and distribution of planned new housing in this area, as well as the sequential approach to site selection set out in the NPPF.

Ingleby Barwick Local Centre

5.33 Land to the east of Ingleby Barwick Local Centre is subject to planning permission for an extension to the existing anchor store there (Tesco). However, Tesco announced in the press that they were not intending to complete the development.

Figure 5.6 Land East of Tesco, Ingleby Barwick

5.34 Whilst it is unclear as to whether Tesco would make the site available for development, it may have potential to accommodate uses which enhance the vitality and viability of Ingleby Barwick Local Centre. However, further work would be required to establish how the site could be suitably serviced and accessed, given that it is only currently possible to access the site through the existing Tesco car park. It also lacks visual prominence from the main road network, as a result of existing vegetation along Barwick Way.

Summary

5.35 Set out below is a summary the various sites covered above (excluding those which have already been built out). These sites have been assessed against a number of criteria, related to the suitability and availability to help meet the needs identified in Sections 3.0 and 4.0, as well as their likely attractiveness to commercial operators and developers.

Table 5.2 Summary of Existing/Proposed Allocations Sites

Site	East of The Square/ South of Church Road, Stockton	Southern Gateway, Stockton	Rear of 90 101a High Street, Stockton	Lidl Foodstore, Wellington Square, Stockton	Billingham District Centre	Former, Library/Health Centre, Billingham District Centre	Adjacent to Tesco, Ingleby Barwick
Existing Uses/Availability	garage, public car parking, and hardstanding used for temporary/private parking	subject to relocation of existing uses – which hotel, multi storey car parking, shops and other commercial/community	Short to medium term – comprises surface car parking, former nightclub and post office.	Short to medium term – Lidl understood likely to relocate in near future.	term/long term - comprises multitude of community uses, plus car	Short term – library and health centre recently vacated.	Short to medium term – currently comprises open space.
Commercial Potential	Prime site.	Prime site.	Secondary site.	Prime site.	Prime/Secondary site (depending on location within centre).	Prime site.	Secondary site.
Scope for New Floorspace	Large scale.	Large scale.	Medium scale.	Medium scale.	Medium to large scale (depending on site identified).	Small to medium scale.	Large scale.
Potential Constraints	eastern and western parts	Need to relocate various existing uses on site and re-provide/reconfigure existing parking (depending on extent of site).	Lack of visibility and need to improve pedestrian links to difficult and potential need to re-provide	Existing car parking and access road serving shopping centre constrains site to west.	Purpose-built nature of centre likely to complicate both site assembly and Need to relocate existing	functional linkages Shape and size of site may also impact upon form of development	separate vehicular Site availability development does not have significant impact upon Thornaby District
Potential to Meet Needs	development (potentially include a cinema), with other supporting town centre uses (e.g. cinema and/or bingo hall and/or	Discount foodstore, potentially as part of a mixed use scheme with other retail/leisure uses.	Mixed use, including retail and/or food and drink operators.	Comparison retail, potentially alongside leisure/food and drink uses, depending on extent of site.	Range of town centre uses, depending on scale and nature of sites identified, potentially including food retail.	Leisure uses, potentially including family-orientated food and drink facilities.	Retail and/or leisure (including food and drink uses).
Summary	Good	Good	Reasonable	Good.	Reasonable	Good	Reasonable

5.36 The above sites offer potential to meet many of the needs identified above. New development in Stockton Town Centre would bring regeneration and economic benefits centre, and help to re-balance existing shopping patterns. However, the Council may also wish to enhance the range of foodstore provision serving the Yarm area - which does not currently benefit from any large foodstores. Should the Council wish to take the latter approach, then in seeking to identify such a site(s), and in addition to the criteria set out above, it will be important to take into account the following:

- the sequential approach to site selection, as set out at para. 24 of the NPPF;
- whether there are any existing defined centres in this area which offer opportunity for expansion;
- the distribution of existing, committed and proposed new housing developments in the Yarm area;
- the scope for new retail development to contribute to more sustainable patterns of development; and
- likely levels of commercial demand in the sites being considered (from both operators and developers).

5.37 When considered as a whole, the Thornaby/Ingleby Barwick zone is well served by existing and approved convenience retail provision. However, as with the Yarm/Eaglescliffe zone, there is a significant quantum of new housing with planning permission in this area. There is also forecast to be expenditure capacity to support new food retail floorspace in this zone (c. £14m by 2032). In this context, it may also be appropriate to identify opportunities for the provision of new facilities which help to meet day to day shopping needs in this area.

6.0 Future Role of Centres

Retail Hierarchy

6.1 The existing hierarchy of centres in Stockton Borough is set out in Policy CS5 (Town Centres) of the adopted Core Strategy and summarised in the table below. This table also includes Neighbourhood Centres which, although not listed in the Core Strategy, are referred to in Policy CS5 and illustrated on the Proposals Map accompanying Local Plan Alteration no. 1.

Table 6.1 Existing Hierarchy of Centres in Stockton on Tees Borough

Type	Centres	
Town Centre		
District Centre	Billingham Thornaby Yarm	
Local Centre	High Street (Norton) Myton Way (Ingleby Barwick) Billingham Green (Billingham) High Newham Court (Stockton)	
Neighbourhood Centre	Tunstall Avenue (Neasham Avenue, Orchard Parade (Butterfield Drive,	The Clarences (Port Newton Drive (Bassleton

Type	Centres	
	Norton Road (Central) (Norton) Norton Road (South) (Norton) Surrey Road (Norton)	Thorntree Road (Thornaby) Westbury Street (Thornaby) High Street (Wolviston) Healaugh Park (Yarm)

Stockton Town Centre

6.2 Stockton should retain its status as a Town Centre and the main focus for retail, service, leisure and community facilities within the Borough. Whilst it faces a number of challenges – most notably in the face of competition from Teesside Shopping Park (which also includes a number of major leisure uses)– it is by far the largest of the existing shopping/leisure centres in the Borough, with around three times the amount of retail floorspace of the next largest one (Thornaby). Although its influence varies across the different study zones, it is the only one which attracts shoppers and visitors from across the Borough.

6.3 As explained earlier, it should be an aspiration of the Council in the medium to long term to seek to increase the market share of Stockton Town Centre, by delivering a step change in the centre's retail and leisure offer and therefore its overall attractiveness. Whilst the development of new anchor leisure facilities, such as a new hotel and/or cinema, would help to increase footfall, this should ideally be complemented by enhancements to the centre's existing comparison retail offer.

6.4 Should the Council wish to bring forward large-scale new comparison retail development, then it will be important to identify sites which are capable of accommodating such development and are attractive to commercial operators/developers, without exacerbating the issues created by the existing size of the centre. It will also be important to include a positive approach, which provides support for new food and drink and other leisure uses across the centre (including those not specifically covered as part of this study) - subject to satisfying more detailed criteria relating to the potential impact upon amenity and visual appearance.

District Centres

6.5 The role and function of the three district centres in the Borough, along with the scale and nature of retail and service provision they contain, varies. Although Billingham District Centre contains more retail units than Thornaby (35 as opposed to 24), the latter has slightly more retail floorspace (12,562 sqm net as opposed to 10,807 sqm net), primarily as a result of the Asda superstore there. Whilst offering significantly less retail floorspace (5,453 sqm net), Yarm has a much higher number of retail units (51), reflecting the significant proportion of smaller, independent/specialist operators it contains.

6.6 However, all three centres contain a wide range of uses, including not only retail but also services, such as financial/professional services, food and drink and community facilities, such as libraries and health centres. These ranges of facilities ensure that they have catchments which go beyond the immediate surrounding residential areas, serving the north-east, south-east and south-west of the Borough respectively – and indeed Yarm attracts visitors from beyond the Borough as a result of its niche roles. It is therefore considered that they should all be retained as district centres in any replacement new Local Plan.

Local Centres

6.7 In relation to existing defined Local Centres, both High Street (Norton) and Myton Way (Ingleby Barwick) contain a significant quantum of retail floorspace (3,477 sqm net and 2,879 sqm net) relative to their status in the retail hierarchy. They are significantly larger than all of the other local and neighbourhood centres and contain some uses which serve a wider catchment, including comparison retailers and food and beverage uses in Norton, and the Tesco superstore in Ingleby Barwick.

6.8 The majority of uses in both of these centres serve more day to day needs and the range of provision they contain is, in overall terms, consistent with that of a local centre. As levels of population grow in the Ingleby Barwick area through new residential development, the existing local centre is likely to increase in importance as a sustainable focal point for the local community. However, it would be important to ensure that any elevation in the status of this centre does not lead to a significant adverse impact upon existing centres, and particularly Thornaby District Centre.

6.9 We have not undertaken a detailed review of these and the other two defined Local Centres – Billingham Green and High Newham Court - as part of this study. However, as with the currently defined Neighbourhood Centres (see below) it is recommended that further work be undertaken in order to establish whether they warrant retention as Local Centres and/or whether they should be re-classified within the wider retail hierarchy. This study should take into account a review of the existing mix of uses within each of these centres, as well as its wider role and function.

Neighbourhood Centres

6.10 As set out in Table 6.1, the existing development plan defines a large number of Neighbourhood Centres across the Borough. Whilst the term Neighbourhood Centre is not included within the NPPF – which refers only to City/Town, District and Local Centres – these centres nevertheless perform a role in meeting day to day needs of their immediate surrounding residential areas.

6.11 As they do not fall within the definition of Town Centres set out in the NPPF, such centres do not benefit from any specific protection in terms of national policy. However, it is important that the role of these centres in reflected in any future planning policy framework for Stockton. On this basis, and in parallel with a similar review of the current Local Centres, it is recommended that a separate review be undertaken in respect of all of the existing defined Neighbourhood Centres, in order to determine:

a Which should be reclassified as Local Centres; and

b Which should be excluded from the retail hierarchy altogether.

6.12 No definition is provided in either the NPPF or the accompanying Planning Practice Guidance of a Local Centre. However, whilst it no longer forms part of adopted national planning policy, a predecessor to the NPPF (Planning Policy Statement 4: Planning for Sustainable Economic Growth includes the following:

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

6.13 In Annex 2: Glossary, the NPPF also confirms that:

"References to town centres or centres apply to city centres, town centres, district centres and local centres but exclude small parades of shops or purely neighbourhood significance. Unless they are identified as centres in Local Plans, existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres."

6.14 In advance of this review – which should include surveys of all such centres, in order to establish their current mix of uses and overall vitality and viability – it is difficult to provide firm conclusions on which centres would fall into each of these categories. However, it is possible that some currently defined Neighbourhood Centres will be elevated to Local Centre status, reflecting the role and function they currently perform.

Policy Strategy

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

6.16 This means ensuring that policies, inter alia:

- direct new development to town centres, in line with the sequential approach, in order to support their viability and vitality;
- help to ensure that the network and hierarchy of defined centres is resilient to current and anticipated changes in the retail and leisure sector;
- ensure that the approach taken to proposals within primary shopping areas is sufficiently flexible to allow the re-occupation of units which are no longer suitable for operator requirements;
- promote competitive town, district and local centres that provide consumer choice and a diverse retail offer;
- support existing markets and recognise the role that both they and potential new ones can perform in not only meeting local needs but attracting visitors and diversifying the centre's offer as a whole;
- provide sufficient opportunities to meet the scale and nature of the need identified for new retail and commercial leisure uses in the Borough, taking into account operator requirements;
- support proposals for new development which help to enhance the 'digital health' of existing centres (e.g. provision of free wifi, click and collect facilities etc);
- include policies for proposals outwith existing centres, which are not in accordance with the plan, which are in line with the key sequential and impact tests, and help to ensure that needs are met in the most sustainable locations; and
- recognise the relationship between existing/new residential development and the vitality and viability of centres.

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

Site Allocations

6.18 Section 5.0 of this study report provided a review of whether there is a need to allocate sites to meet the identified needs for new retail and commercial leisure uses in Stockton, taking into account allocations in the adopted Local Plan Alteration no. 1.

6.19 As set out above, a significant quantum of the convenience goods identified over the plan period is forecast to be generated in the Yarm/Eaglescliffe and

Thornaby/Ingleby Barwick areas. Should the Council wish to plan to enhance the existing range of provision in this area, then it will be necessary to review the potential options to accommodate such provision, taking into account any opportunities within/on the edge of existing District and Local Centres in this area, in line with the NPPF sequential test.

6.20 However, new development in Stockton Town Centre would bring significant regeneration and economic benefits to this centre, and help to re-balance existing shopping patterns – not least given the current health of the centre and the significant imbalance between in-centre and out-of-centre provision in the Borough. Further consideration should therefore be given to whether some of the convenience retail capacity could be accommodated within/on the edge of this centre.

6.21 In relation to comparison goods retail, there is a need to enhance the range and quality of provision in Stockton Town Centre and help claw-back market share from Teesside Park. In our view, the most appropriate strategy for achieving this would be to identify opportunities to accommodate new larger format operators, which are well connected to the existing High Street and the Wellington Square shopping centre. Whilst the comparison retail focus should be upon the town centre, there is also scope to enhance range and quality of provision in Billingham District Centre, including national multiples.

6.22 In summary, therefore, it is recommended that:

- land east of the Square/South of Church Road, in Stockton Town Centre be allocated for town centre uses, which could potentially include new anchor leisure facilities (e.g. a hotel and/or cinema), along with other supporting town centre uses (e.g. restaurants);
- the Southern Gateway site be allocated for town centre uses, potentially including a new foodstore (most likely to be a discount operator) and/or other retail and leisure uses; and
- the need to support the ongoing regeneration Billingham District Centre be recognised, with areas on the south side of Queensway and at West Precinct, in particular, identified as having the most potential for new development/refurbishment, including for new comparison retail uses.

6.23 In the medium to long term, the Council may also wish to undertake further work in order to establish whether there are any suitable opportunities to accommodate new larger format comparison retailing in Stockton Town Centre – particularly those which are well related to the existing PSA. It may also be necessary to review what opportunities exist to accommodate new foodstore development in the Yarm/Eaglescliffe and Thornaby/Ingleby Barwick zones, having regard to the sequential test set out in the NPPF.

Approach to Centre Boundaries and Frontages

Policy Approach

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

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

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

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

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

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

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

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

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

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

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

Centre Recommendations

6.29 In relation to Stockton Town Centre, it is recommended that the Primary Shopping Area (PSA) be reduced in size from that previously defined in Local Plan Alteration no. 1. This would reflect the more limited proportion of active retail uses in areas at the northern and southern ends of the centre, at Norton Road and Bridge Road, as well as the western end of Dovecot Street. However, it will be important to ensure that the extent of the PSA takes into account any sites in the centre which the Council proposes to allocate for new convenience and comparison retail development.

6.30 In addition, we would propose the removal of any policies which seek to secure a certain proportion of Class A1 retail uses within the PSA (or parts therein). This reflects the current health of the centre, and particularly the need to encourage the re-occupation of currently vacant units, attract new investment and increase levels of footfall more generally. It also reflects recent changes to the General Permitted Development Order (GPDO), which have made it easier to change between A Class uses.

6.31 In order to deal with planning applications which are made for non-retail uses within both the PSA and the wider centre, it is recommended that a criteria based approach be provided. This would require that applicants consider issues relating to not only the potential impact upon amenity and visual appearance, but also that upon the wider vitality and viability of the centre.

6.32 Whilst the boundary defined in the adopted plan reflects the location and extent of the various town centre uses in the centre, the Council may wish to consider amending it at the northern end - excluding land/buildings to the north of Bishopton Lane/west of Norton Road.This would help to provide a slightly more compact centre and, over time, encourage new uses into more central parts and away from the periphery. However, any such benefits would need to be weighed against the potential impact upon wider heritage-related regeneration initiatives, which affect the northern parts of the centre.

6.33 In relation to Yarm District Centre, it will be important to ensure that any revised boundaries reflect the existence (or otherwise) of retail/commercial uses, particularly on the northern and southern fringes of the centre. If any Shopping Frontages are defined in the centre, it will be important to ensure that any related policies provide sufficient flexibility to accommodate non-Class A1 uses which help to enhance the vitality and viability of the centre, without having a significant adverse impact upon either its retail function or wider amenity considerations. Similarly, the approach taken to non-A1 uses in Billingham and Thornaby should also incorporate flexibility to accommodate such uses, where it can be demonstrated that it would not have a significant adverse impact in respect of either amenity or their retail function.

Supporting Independent Businesses

6.34 The importance of supporting independent businesses has increased as a result of the mixed fortunes experienced by national multiple retailers and a large number of failures among such retailers in the last five years or so. It will therefore be essential to take into account the need to create the conditions where such independent businesses can succeed within the borough's main centres - and perform an important role in maintaining their vitality and viability in the face of competition from other destinations, such as Teesside Park, and internet shopping.

6.35 A number of reports have been published in the last few years which have included recommendations on how town centres can be supported against the backdrop of this growing competition. These reports have included the Portas and Grimsey Reviews, which were published in December 2011 and September 2013 respectively. Whilst not all of the recommendations made in these reports have been accepted and/or implemented by the Government, there are a number which could potentially be taken forward in a form appropriate to Stockton Town Centre. They include:

- the creation of 'Town Teams' – strong operational and management teams for high streets (n.b. this role could be adopted by the recently approved BID in Stockton);
- the removal of unnecessary regulations which make it difficult for businesses to adapt, which could be achieved through the creation of Local Development Orders (LDOs);
- the inclusion of the town centre in Neighbourhood Plans
- more pro-active use of Compulsory Purchase Order (CPO) powers to deal with empty shops;
- developing the 'networked high street', which could involve looking at the 'digital health' of the town centre (including wifi hotspots, click and collect facilities, online marketing etc), and how this could be improved and then publicised;
- supporting the relocation of independent shops and services, both to and within the centre; and
- seeking the provision of affordable space within new developments.

6.36 Whilst not all will be appropriate to Stockton Town Centre, a combination of the above could be used to help support existing and potential new operators (including independents) and therefore the vitality and viability of the wider centre.

Impact Threshold

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

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

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

- the current health of Stockton and Billingham District Centres, both of which have unit vacancy rates which are significantly above the national average;

- the scale of convenience goods retail expenditure capacity identified for the Borough as part of this study, which estimated to equate to around 1,900 sqm net/2,700 sqm gross, even by 2032;
- the performance of existing convenience goods retail floorspace;
- the fact that, whilst it increases in the longer term, comparison goods expenditure capacity is forecast to support just 3,000 sqm net/4,400 sqm gross floorspace in the period to 2021;
- the current market share of available comparison goods expenditure in the Borough achieved by Stockton Town Centre (16%), which is around half that of Teesside Park; and
- the potential impact of new convenience and comparison goods retail floorspace proposed in edge/out-of-centre locations upon the ability to attract new operators to the above centres.

6.39 Proposals that significantly exceed the floorspace projections set out in Section 3.0 have the potential to reduce the turnover of existing floorspace, and their impact should be carefully tested on a case by case basis. On this basis, it is considered that the following impact assessment thresholds should be set for Stockton Borough:

- Convenience Goods Retail - 500 sqm net
- Comparison Goods Retail – 1,000 sqm net

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

Implementation and Monitoring

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

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

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

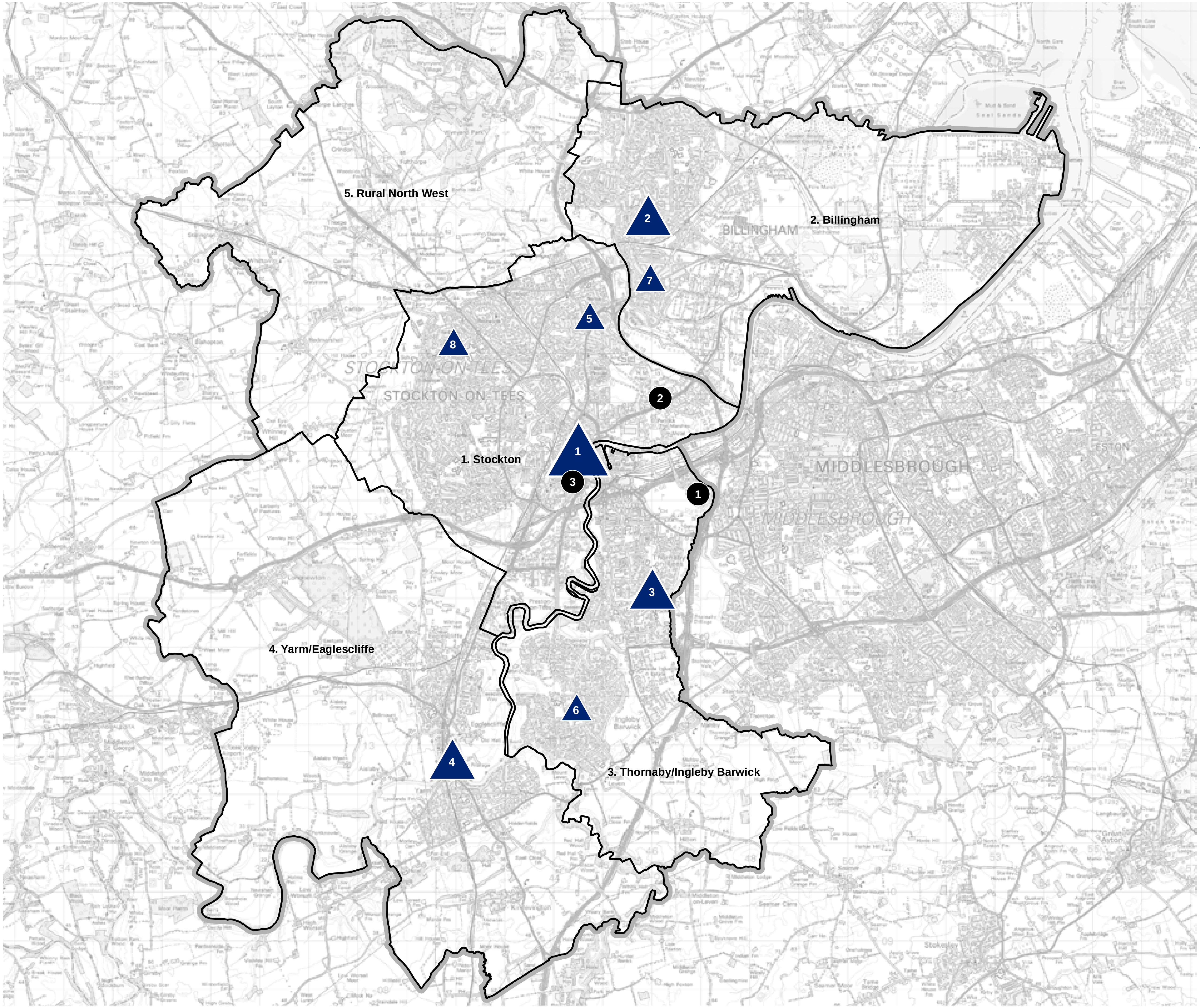
6.42 The recommendations and projections within this study are expected to assist the Council in reviewing development plan policies over the coming years and to assist development control decisions during this period. The study provides a broad overview of the potential need for further retail development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

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

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

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

Appendix 1 Existing Centres Plan



Key

Household Survey Zones (based on LSOAs):

Existing Centres:

1. Stockton Town Centre

District Centre

2 Billingham
3 Thornaby
4 Yarm

Local Centre

5 Norton
6 Ingleby Barwick
7 Billingham Green
8 High Newham Court

Out of Centre Provision:

1 Teesside Park
2 Portrack Lane
3 Bridge Road Retail Park

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Project	Stockton Town Centre Needs Study
Title	Existing Centres
Client	Stockton on Tees Borough Council
Date	12.10.2016
Scale	-
Drawn by	MAR
Drg. No	GIS\22964\01-02

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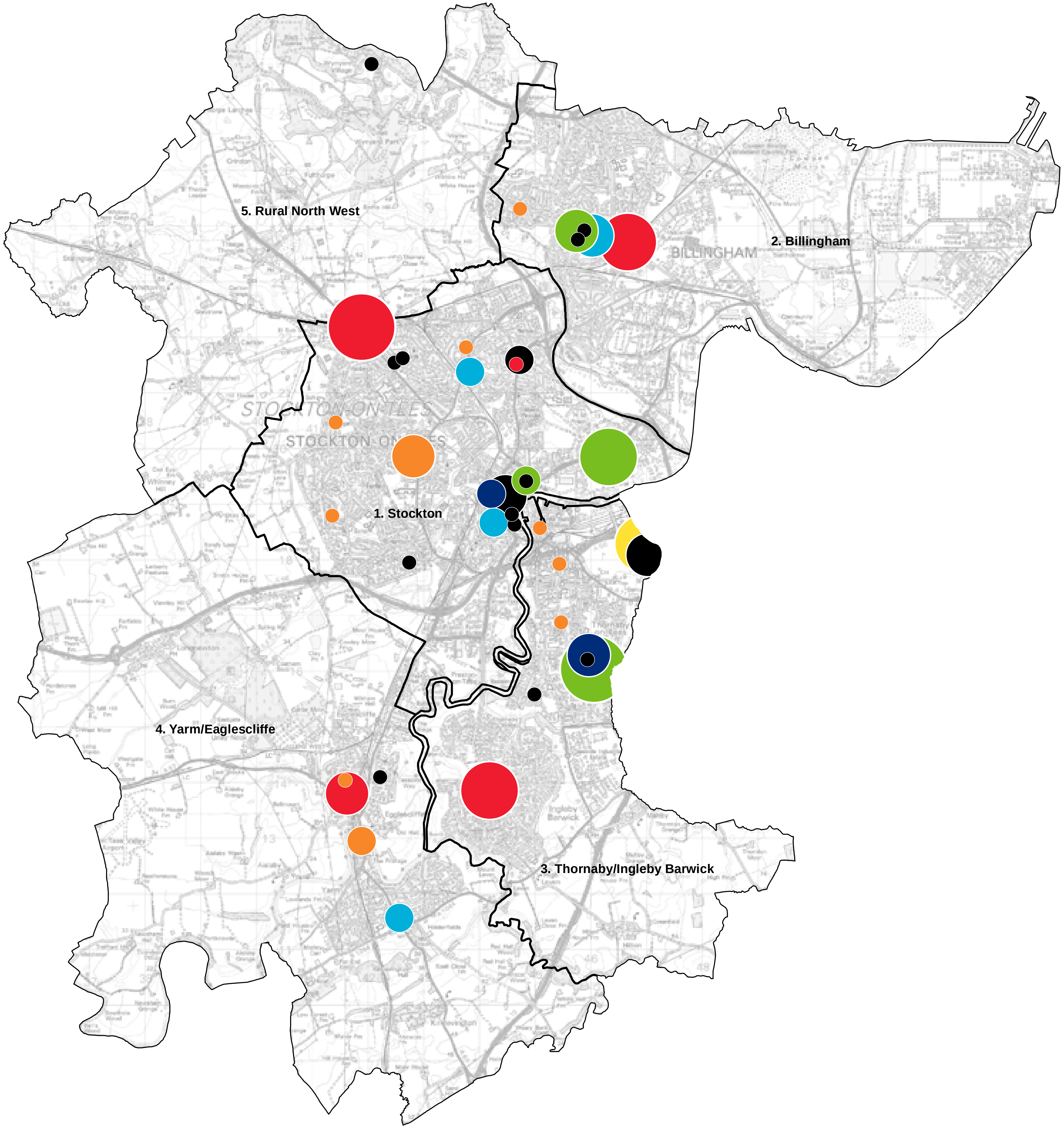
GIS Reference: S:\NE22964 - Stockton Town Centre Needs Study\NE22964 - Stockton Town Centre Needs Study - Survey Zones & Existing Centres - 12.05.2016.mxd

Appendix 2 Existing Foodstores



Key

Household Survey Zones (based on LSOAs)

Existing Foodstores

Operator:

- Asda
- Morrisons
- Sainsbury's
- Tesco
- Aldi
- Lidl
- Other

Net Sales Area (SQM):

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

Source: ORC Storepoint Database

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Project	Stockton Town Centre Needs Study
Title	Existing Foodstores
Client	Stockton on Tees Borough Council
Date	12.10.2016
Scale	-
Drawn by	MAR
Drg. No	GIS\22964\01-03

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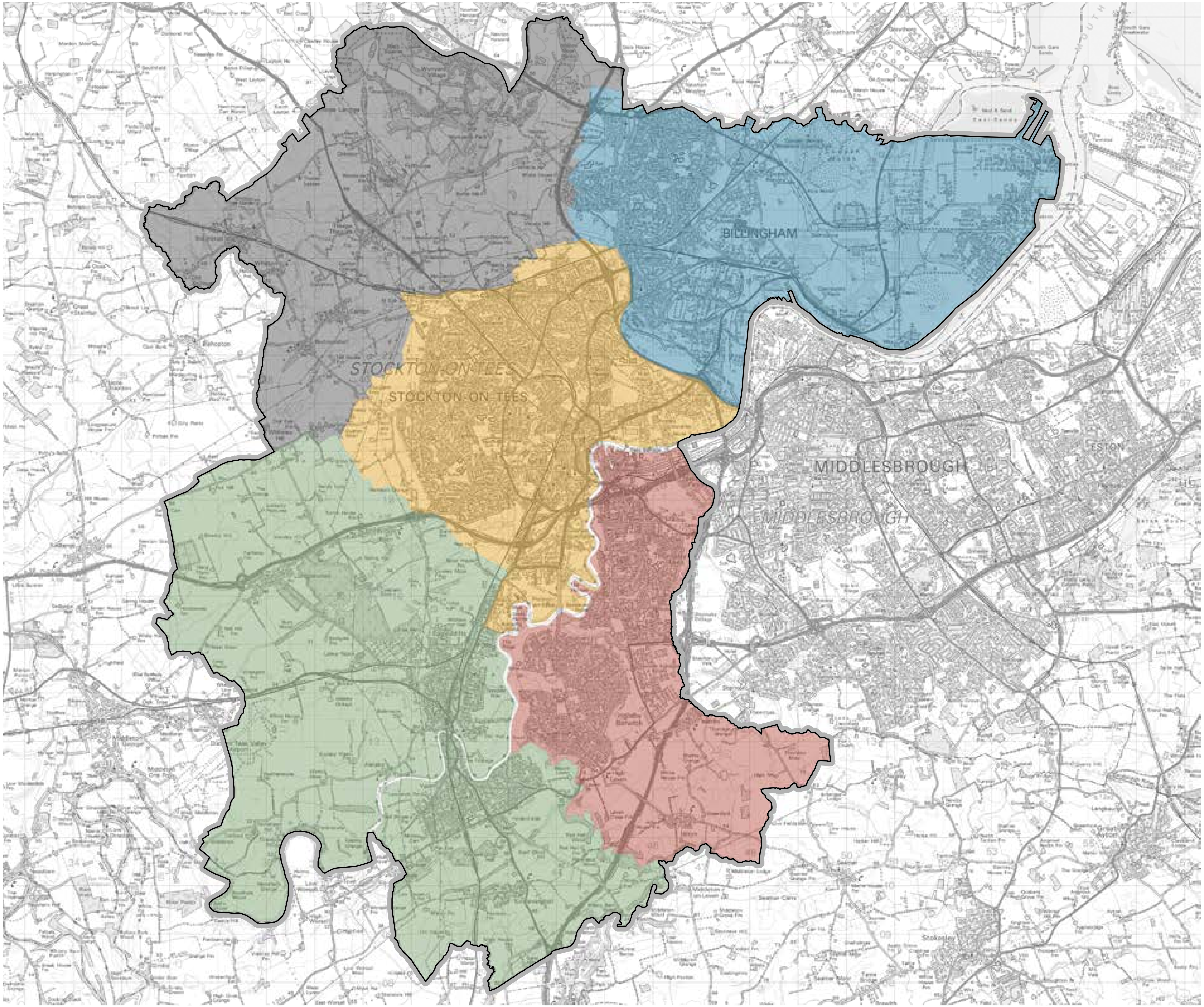
GIS Reference: S:\NE22964 - Stockton Town Centre Needs Study\NE22964 - Stockton Town Centre Needs Study - Survey Zones & Existing Foodstores - 12.05.2016.mxd

Appendix 3 Household Survey Zones Plan



Key

Stockton-on-Tees Local Authority Boundary

Household Survey Zones (based on LSOAs):

Zone 1. Stockton

Zone 2. Billingham

Zone 3. Thornaby/Ingleby Barwick

Zone 4. Yarm/Eaglescliffe

Zone 5. Rural North West

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Project	Stockton Town Centre Needs Study
Title	Household Survey Zones
Client	Stockton on Tees Borough Council
Date	12.10.2016
Scale	-
Drawn by	MAR
Drg. No	GIS\22964\01-01

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GIS Reference: S:\NE22964 - Stockton Town Centre Needs Study\NE22964 - Stockton Town Centre Needs Study - Survey Zones - 25.02.2016.mxd

Appendix 4 Convenience Goods Retail Capacity Assessment

CONVENIENCE GOODS RETAIL CAPACITY ASSESSMENT

Table 1: Study Area Population

Zone	2012	2016	2021	2026	2032
Zone 1 - Stockton	83,553	85,289	87,860	90,300	92,872
Zone 2 - Billingham	35,909	35,969	36,056	36,139	36,226
Zone 3 - Thornaby/Ingleby Barwick	45,752	46,521	47,660	48,742	49,882
Zone 4 - Yarm/Eaglescliffe	21,452	22,267	23,473	24,618	25,825
Zone 5 - Rural North West	5,740	6,305	7,142	7,936	8,773
Total	**192,406**	**196,351**	**202,191**	**207,735**	**213,578**

Sources: *ORS, SBC and Experian*

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

Zone	2016	2021	2026	2032
Zone 1 - Stockton	1,812	1,798	1,794	1,788
Zone 2 - Billingham	1,794	1,780	1,776	1,770
Zone 3 - Thornaby/Ingleby Barwick	1,830	1,816	1,812	1,805
Zone 4 - Yarm/Eaglescliffe	2,072	2,056	2,051	2,044
Zone 5 - Rural North West	2,396	2,378	2,373	2,364

Sources:

Experian Local Expenditure 2014 (2014 prices)

Experian Retail Planner Briefing Note (October 2015)

Excludes Special Forms of Trading

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

Zone	2016	2021	2026	2032
Zone 1 - Stockton	154.54	157.97	162.00	166.05
Zone 2 - Billingham	64.53	64.18	64.18	64.12
Zone 3 - Thornaby/Ingleby Barwick	85.13	86.55	88.32	90.04
Zone 4 - Yarm/Eaglescliffe	46.14	48.26	50.49	52.79
Zone 5 - Rural North West	15.11	16.98	18.83	20.74
Total	**365.45**	**373.95**	**383.83**	**393.74**

Source: Tables 1 and 2

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

Centre/Facility	Zone 1 Stockton	Zone 2 Billingham	Zone 3 Thornaby/Ingleby Barwick	Zone 4 Yarm/Eaglesliffe	Zone 5 Rural North West	% Inflow
Zone 1 - Stockton						
Lid, Wellington Square	1.5%	0.2%	0.3%	0.5%	1.9%	10.0%
Marks & Spencer, High Street	2.0%	0.2%	0.3%	1.2%	2.1%	10.0%
Asda, Bath Lane	0.7%	0.0%	0.6%	0.0%	0.0%	10.0%
Other Stores, Stockton Town Centre	7.2%	0.2%	1.3%	0.3%	1.4%	10.0%
Stockton Town Centre Sub-Total	***11.4%***	***0.6%***	***2.5%***	***2.0%***	***5.4%***	
Asda, Portrack Lane	14.8%	7.2%	3.5%	2.2%	8.9%	30.0%
Sainsbury's, Whitehouse Farm	11.0%	0.2%	0.2%	1.4%	5.5%	10.0%
Tesco, Durham Road	16.9%	3.3%	0.9%	2.3%	23.8%	20.0%
Aldi, Norton	9.2%	6.9%	0.3%	1.1%	6.1%	15.0%
Aldi, Yarm Lane	5.5%	0.3%	1.7%	2.4%	0.8%	15.0%
Co-op, Norton	3.3%	0.2%	0.0%	0.0%	0.3%	10.0%
Other Stores/Centres	10.8%	0.3%	0.2%	2.7%	3.7%	10.0%
Stockton Zone Total	**82.9%**	**19.0%**	**9.3%**	**14.1%**	**54.5%**	
Zone 2 - Billingham						
Asda, The Causeway	0.4%	17.6%	0.0%	0.0%	2.1%	5.0%
Other Stores, Billingham District Centre	0.3%	8.3%	0.0%	0.0%	0.8%	5.0%
Billingham District Centre Sub-Total	***0.7%***	***25.9%***	***0.0%***	***0.0%***	***2.9%***	
Tesco, Leeholme Road	0.8%	34.2%	0.0%	0.5%	7.0%	5.0%
Other Stores	0.4%	6.1%	0.0%	0.5%	2.9%	5.0%
Billingham Zone Total	**1.9%**	**66.2%**	**0.0%**	**1.0%**	**12.8%**	
Zone 3 - Thornaby						
Asda, Allensway	1.2%	0.0%	24.0%	2.4%	0.0%	35.0%
Lidl	0.3%	0.0%	10.5%	0.2%	0.0%	25.0%
Other Stores, Thornaby District Centre	0.0%	0.0%	7.4%	0.5%	0.0%	5.0%
Thornaby District Centre Sub-Total	***1.5%***	***0.0%***	***41.9%***	***3.1%***	***0.0%***	
Morrisons, Teesside Park	4.6%	2.7%	5.8%	5.8%	4.0%	50.0%
Marks & Spencer, Teesside Park	2.2%	2.7%	1.9%	3.6%	4.3%	35.0%
Tesco, Ingleby Barwick	0.8%	0.2%	25.2%	9.9%	0.3%	25.0%
Other Stores/Centres	0.4%	0.4%	3.4%	0.0%	0.0%	5.0%
Thornaby Zone Total	**9.5%**	**6.0%**	**78.2%**	**22.4%**	**8.6%**	
Zone 4 - Yarm						
Sainsbury's, High Street	0.0%	0.2%	0.5%	13.8%	0.0%	40.0%
Other Stores, Yarm District Centre	0.0%	0.0%	0.2%	1.1%	0.3%	40.0%
Yarm District Centre Sub-Total	**0.0%**	**0.2%**	**0.7%**	**14.9%**	**0.3%**	
Tesco, Eaglescliffe	1.1%	0.4%	0.0%	16.6%	0.5%	25.0%
Aldi, Healaugh Park	0.9%	0.0%	6.1%	18.6%	0.3%	20.0%
Other Stores/Centres	0.1%	0.0%	0.6%	3.2%	0.0%	5.0%
Yarm Zone Total	**2.1%**	**0.6%**	**7.4%**	**53.3%**	**1.1%**	
Other Stores in Zone 5	**0.0%**	**0.0%**	**0.4%**	**0.0%**	**7.2%**	5.0%
Stockton Borough Total	**96.4%**	**91.8%**	**95.3%**	**90.8%**	**84.2%**	
Outside Stockton Borough	**3.6%**	**8.2%**	**4.7%**	**9.2%**	**15.8%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey March 2016

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

Centre/Facility	Zone 1 Stockton	Zone 2 Billingham	Zone 3 Thornaby/Ingleby Barwick	Zone 4 Yarm/Eaglesliffe	Zone 5 Rural North West	Inflow	Total
Expenditure 2016	**154.54**	**64.53**	**85.13**	**46.14**	**15.11**		
Zone 1 - Stockton							
Lid, Wellington Square	2.32	0.13	0.26	0.23	0.29	0.36	**3.58**
Marks & Spencer, High Street	3.09	0.13	0.26	0.55	0.32	0.48	**4.83**
Asda, Bath Lane	1.08	0.00	0.51	0.00	0.00	0.18	**1.77**
Other Stores, Stockton Town Centre	11.13	0.13	1.11	0.14	0.21	1.41	**14.13**
Stockton Town Centre Sub-Total	***17.62***	***0.39***	***2.13***	***0.92***	***0.82***	***2.43***	***24.30***
Asda, Portrack Lane	22.87	4.65	2.98	1.02	1.34	14.08	**46.94**
Sainsbury's, Whitehouse Farm	17.00	0.13	0.17	0.65	0.83	2.09	**20.86**
Tesco, Durham Road	26.12	2.13	0.77	1.06	3.60	8.42	**42.09**
Aldi, Norton	14.22	4.45	0.26	0.51	0.92	3.59	**23.95**
Aldi, Yarm Lane	8.50	0.19	1.45	1.11	0.12	2.01	**13.38**
Co-op, Norton	5.10	0.13	0.00	0.00	0.05	0.59	**5.86**
Other Stores/Centres	16.69	0.19	0.17	1.25	0.56	2.10	**20.95**
Stockton Zone Total	**128.12**	**12.26**	**7.92**	**6.51**	**8.23**	**35.30**	**198.33**
Zone 2 - Billingham							
Asda, The Causeway	0.62	11.36	0.00	0.00	0.32	0.65	**12.94**
Other Stores, Billingham District Centre	0.46	5.36	0.00	0.00	0.12	0.31	**6.25**
Billingham District Centre Sub-Total	***1.08***	***16.71***	***0.00***	***0.00***	***0.44***	***0.96***	***19.19***
Tesco, Leeholme Road	1.24	22.07	0.00	0.23	1.06	1.29	**25.89**
Other Stores	0.62	3.94	0.00	0.23	0.44	0.27	**5.50**
Billingham Zone Total	**2.94**	**42.72**	**0.00**	**0.46**	**1.93**	**2.53**	**50.58**
Zone 3 - Thornaby							
Asda, Allensway	1.85	0.00	20.43	1.11	0.00	12.60	**35.99**
Lidl	0.46	0.00	8.94	0.09	0.00	3.16	**12.66**
Other Stores, Thornaby District Centre	0.00	0.00	6.30	0.23	0.00	0.34	**6.87**
Thornaby District Centre Sub-Total	***2.32***	***0.00***	***35.67***	***1.43***	***0.00***	***16.11***	***55.52***
Morrisons, Teesside Park	7.11	1.74	4.94	2.68	0.60	17.07	**34.14**
Marks & Spencer, Teesside Park	3.40	1.74	1.62	1.66	0.65	4.88	**13.95**
Tesco, Ingleby Barwick	1.24	0.13	21.45	4.57	0.05	9.14	**36.58**
Other Stores/Centres	0.62	0.26	2.89	0.00	0.00	0.20	**3.97**
Thornaby Zone Total	**14.68**	**3.87**	**66.57**	**10.33**	**1.30**	**47.40**	**144.16**
Zone 4 - Yarm							
Sainsbury's, High Street	0.00	0.13	0.43	6.37	0.00	4.61	**11.54**
Other Stores, Yarm District Centre	0.00	0.00	0.17	0.51	0.05	0.48	**1.21**
Yarm District Centre Sub-Total	***0.00***	***0.13***	***0.60***	***6.87***	***0.05***	***5.10***	***12.74***
Tesco, Eaglescliffe	1.70	0.26	0.00	7.66	0.08	3.23	**12.92**
Aldi, Healaugh Park	1.39	0.00	5.19	8.58	0.05	3.80	**19.01**
Other Stores/Centres	0.15	0.00	0.51	1.48	0.00	0.11	**2.25**
Yarm Zone Total	**3.25**	**0.39**	**6.30**	**24.59**	**0.17**	**12.24**	**46.93**
Other Stores in Zone 5	**0.00**	**0.00**	**0.34**	**0.00**	**1.09**	**0.08**	**1.50**
Stockton Borough Total	**148.98**	**59.24**	**81.13**	**41.89**	**12.72**	**97.54**	**441.51**
Outside Stockton Borough	**5.56**	**5.29**	**4.00**	**4.24**	**2.39**		
TOTAL	**154.54**	**64.53**	**85.13**	**46.14**	**15.11**		

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

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

Centre/Facility	Zone 1 Stockton	Zone 2 Billingham	Zone 3 Thornaby/Ingleby Barwick	Zone 4 Yarm/Eaglesliffe	Zone 5 Rural North West	Inflow	Total
Expenditure 2021	**157.97**	**64.18**	**86.55**	**48.26**	**16.98**		
Zone 1 - Stockton							
Lid, Wellington Square	2.37	0.13	0.26	0.24	0.32	0.37	3.69
Marks & Spencer, High Street	3.16	0.13	0.26	0.58	0.36	0.50	4.98
Asda, Bath Lane	1.11	0.00	0.52	0.00	0.00	0.18	1.81
Other Stores, Stockton Town Centre	11.37	0.13	1.13	0.14	0.24	1.45	14.46
Stockton Town Centre Sub-Total	***18.01***	***0.39***	***2.16***	***0.97***	***0.92***	***2.49***	***24.93***
Asda, Portrack Lane	23.38	4.62	3.03	1.06	1.51	14.40	48.00
Sainsbury's, Whitehouse Farm	17.38	0.13	0.17	0.68	0.93	2.14	21.43
Tesco, Durham Road	26.70	2.12	0.78	1.11	4.04	8.69	43.43
Aldi, Norton	14.53	4.43	0.26	0.53	1.04	3.67	24.46
Aldi, Yarm Lane	8.69	0.19	1.47	1.16	0.14	2.06	13.70
Co-op, Norton	5.21	0.13	0.00	0.00	0.05	0.60	5.99
Other Stores/Centres	17.06	0.19	0.17	1.30	0.63	2.15	21.51
Stockton Zone Total	**130.96**	**12.19**	**8.05**	**6.80**	**9.26**	**36.20**	**203.46**
Zone 2 - Billingham							
Asda, The Causeway	0.63	11.30	0.00	0.00	0.36	0.65	12.93
Other Stores, Billingham District Centre	0.47	5.33	0.00	0.00	0.14	0.31	6.25
Billingham District Centre Sub-Total	***1.11***	***16.62***	***0.00***	***0.00***	***0.49***	***0.96***	***19.18***
Tesco, Leeholme Road	1.26	21.95	0.00	0.24	1.19	1.30	25.94
Other Stores	0.63	3.91	0.00	0.24	0.49	0.28	5.56
Billingham Zone Total	**3.00**	**42.49**	**0.00**	**0.48**	**2.17**	**2.53**	**50.68**
Zone 3 - Thornaby							
Asda, Allensway	1.90	0.00	20.77	1.16	0.00	12.83	36.66
Lidl	0.47	0.00	9.09	0.10	0.00	3.22	12.88
Other Stores, Thornaby District Centre	0.00	0.00	6.40	0.24	0.00	0.35	7.00
Thornaby District Centre Sub-Total	***2.37***	***0.00***	***36.26***	***1.50***	***0.00***	***16.40***	***56.53***
Morrisons, Teesside Park	7.27	1.73	5.02	2.80	0.68	17.50	35.00
Marks & Spencer, Teesside Park	3.48	1.73	1.64	1.74	0.73	5.02	14.34
Tesco, Ingleby Barwick	1.26	0.13	21.81	4.78	0.05	9.34	37.38
Other Stores/Centres	0.63	0.26	2.94	0.00	0.00	0.20	4.03
Thornaby Zone Total	**15.01**	**3.85**	**67.68**	**10.81**	**1.46**	**48.46**	**147.27**
Zone 4 - Yarm							
Sainsbury's, High Street	0.00	0.13	0.43	6.66	0.00	4.81	12.04
Other Stores, Yarm District Centre	0.00	0.00	0.17	0.53	0.05	0.50	1.26
Yarm District Centre Sub-Total	***0.00***	***0.13***	***0.61***	***7.19***	***0.05***	***0.00***	***7.98***
Tesco, Eaglescliffe	1.74	0.26	0.00	8.01	0.08	3.36	13.45
Aldi, Healaugh Park	1.42	0.00	5.28	8.98	0.05	3.93	19.66
Other Stores/Centres	0.16	0.00	0.52	1.54	0.00	0.12	2.34
Yarm Zone Total	**3.32**	**0.39**	**6.40**	**25.72**	**0.19**	**7.41**	**43.43**
Other Stores in Zone 5	**0.00**	**0.00**	**0.35**	**0.00**	**1.22**	**0.08**	**1.65**
Stockton Borough Total	**152.28**	**58.92**	**82.48**	**43.82**	**14.30**	**94.69**	**446.49**
Outside Stockton Borough	5.69	5.26	4.07	4.44	2.68		
TOTAL	**157.97**	**64.18**	**86.55**	**48.26**	**16.98**		

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

Table 7: Convenience Goods Expenditure 2026 (£m) (2014 Prices)

Centre/Facility	Zone 1 Stockton	Zone 2 Billingham	Zone 3 Thornaby/Ingleby Barwick	Zone 4 Yarm/Eaglescliffe	Zone 5 Rural North West	Inflow	Total
Expenditure 2026	**162.00**	**64.18**	**88.32**	**50.49**	**18.83**		
Zone 1 - Stockton							
Lid, Wellington Square	2.43	0.13	0.26	0.25	0.36	0.38	3.82
Marks & Spencer, High Street	3.24	0.13	0.26	0.61	0.40	0.51	5.15
Asda, Bath Lane	1.13	0.00	0.53	0.00	0.00	0.18	1.85
Other Stores, Stockton Town Centre	11.66	0.13	1.15	0.15	0.26	1.48	14.84
Stockton Town Centre Sub-Total	***18.47***	***0.39***	***2.21***	***1.01***	***1.02***	***2.57***	***25.65***
Asda, Portrack Lane	23.98	4.62	3.09	1.11	1.68	14.78	49.25
Sainsbury's, Whitehouse Farm	17.82	0.13	0.18	0.71	1.04	2.21	22.08
Tesco, Durham Road	27.38	2.12	0.79	1.16	4.48	8.98	44.92
Aldi, Norton	14.90	4.43	0.26	0.56	1.15	3.76	25.06
Aldi, Yarm Lane	8.91	0.19	1.50	1.21	0.15	2.11	14.08
Co-op, Norton	5.35	0.13	0.00	0.00	0.06	0.61	6.15
Other Stores/Centres	17.50	0.19	0.18	1.36	0.70	2.21	22.14
Stockton Zone Total	**134.30**	**12.19**	**8.21**	**7.12**	**10.26**	**37.23**	**209.32**
Zone 2 - Billingham							
Asda, The Causeway	0.65	11.30	0.00	0.00	0.40	0.65	12.99
Other Stores, Billingham District Centre	0.49	5.33	0.00	0.00	0.15	0.31	6.28
Billingham District Centre Sub-Total	***1.13***	***16.62***	***0.00***	***0.00***	***0.55***	***0.96***	***19.27***
Tesco, Leeholme Road	1.30	21.95	0.00	0.25	1.32	1.31	26.12
Other Stores	0.65	3.92	0.00	0.25	0.55	0.28	5.64
Billingham Zone Total	**3.08**	**42.49**	**0.00**	**0.50**	**2.41**	**2.55**	**51.03**
Zone 3 - Thornaby							
Asda, Allensway	1.94	0.00	21.20	1.21	0.00	13.11	37.47
Lidl	0.49	0.00	9.27	0.10	0.00	3.29	13.15
Other Stores, Thornaby District Centre	0.00	0.00	6.54	0.25	0.00	0.36	7.15
Thornaby District Centre Sub-Total	***2.43***	***0.00***	***37.01***	***1.57***	***0.00***	***16.76***	***57.76***
Morrisons, Teesside Park	7.45	1.73	5.12	2.93	0.75	17.99	35.98
Marks & Spencer, Teesside Park	3.56	1.73	1.68	1.82	0.81	5.17	14.77
Tesco, Ingleby Barwick	1.30	0.13	22.26	5.00	0.06	9.58	38.32
Other Stores/Centres	0.65	0.26	3.00	0.00	0.00	0.21	4.11
Thornaby Zone Total	**15.39**	**3.85**	**69.07**	**11.31**	**1.62**	**49.70**	**150.94**
Zone 4 - Yarm							
Sainsbury's, High Street	0.00	0.13	0.44	6.97	0.00	5.03	12.56
Other Stores, Yarm District Centre	0.00	0.00	0.18	0.56	0.06	0.53	1.31
Yarm District Centre Sub-Total	***0.00***	***0.13***	***0.62***	***7.52***	***0.06***	***0.00***	***8.33***
Tesco, Eaglescliffe	1.78	0.26	0.00	8.38	0.09	3.50	14.02
Aldi, Healaugh Park	1.46	0.00	5.39	9.39	0.06	4.07	20.37
Other Stores/Centres	0.16	0.00	0.53	1.62	0.00	0.12	2.43
Yarm Zone Total	**3.40**	**0.39**	**6.54**	**26.91**	**0.21**	**7.70**	**45.14**
Other Stores in Zone 5	**0.00**	**0.00**	**0.35**	**0.00**	**1.36**	**0.09**	**1.80**
Stockton Borough Total	**156.17**	**58.92**	**84.17**	**45.85**	**15.86**	**97.27**	**458.23**
Outside Stockton Borough	5.83	5.26	4.15	4.65	2.98		
TOTAL	**162.00**	**64.18**	**88.32**	**50.49**	**18.83**		

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

Table 8: Convenience Goods Expenditure 2032 (£m) (2014 Prices)

Centre/Facility	Zone 1 Stockton	Zone 2 Billingham	Zone 3 Thornaby/Ingleby Barwick	Zone 4 Yarm/Eaglesliffe	Zone 5 Rural North West	Inflow	Total
Expenditure 2028	**166.05**	**64.12**	**90.04**	**52.79**	**20.74**		
Zone 1 - Stockton							
Lid, Wellington Square	2.49	0.13	0.27	0.26	0.39	0.39	3.94
Marks & Spencer, High Street	3.32	0.13	0.27	0.63	0.44	0.53	5.32
Asda, Bath Lane	1.16	0.00	0.54	0.00	0.00	0.19	1.89
Other Stores, Stockton Town Centre	11.96	0.13	1.17	0.16	0.29	1.52	15.23
Stockton Town Centre Sub-Total	***18.93***	***0.38***	***2.25***	***1.06***	***1.12***	***2.64***	***26.38***
Asda, Portrack Lane	24.58	4.62	3.15	1.16	1.85	15.15	50.50
Sainsbury's, Whitehouse Farm	18.27	0.13	0.18	0.74	1.14	2.27	22.73
Tesco, Durham Road	28.06	2.12	0.81	1.21	4.94	9.28	46.42
Aldi, Norton	15.28	4.42	0.27	0.58	1.27	3.85	25.67
Aldi, Yarm Lane	9.13	0.19	1.53	1.27	0.17	2.17	14.46
Co-op, Norton	5.48	0.13	0.00	0.00	0.06	0.63	6.30
Other Stores/Centres	17.93	0.19	0.18	1.43	0.77	2.28	22.78
Stockton Zone Total	**137.66**	**12.18**	**8.37**	**7.44**	**11.30**	**38.27**	**215.23**
Zone 2 - Billingham							
Asda, The Causeway	0.66	11.29	0.00	0.00	0.44	0.65	13.04
Other Stores, Billingham District Centre	0.50	5.32	0.00	0.00	0.17	0.32	6.30
Billingham District Centre Sub-Total	***1.16***	***16.61***	***0.00***	***0.00***	***0.60***	***0.97***	***19.34***
Tesco, Leeholme Road	1.33	21.93	0.00	0.26	1.45	1.31	26.29
Other Stores	0.66	3.91	0.00	0.26	0.60	0.29	5.73
Billingham Zone Total	**3.16**	**42.45**	**0.00**	**0.53**	**2.65**	**2.57**	**51.35**
Zone 3 - Thornaby							
Asda, Allensway	1.99	0.00	21.61	1.27	0.00	13.39	38.26
Lidl	0.50	0.00	9.45	0.11	0.00	3.35	13.41
Other Stores, Thornaby District Centre	0.00	0.00	6.66	0.26	0.00	0.36	7.29
Thornaby District Centre Sub-Total	***2.49***	***0.00***	***37.73***	***1.64***	***0.00***	***17.11***	***58.96***
Morrisons, Teesside Park	7.64	1.73	5.22	3.06	0.83	18.48	36.97
Marks & Spencer, Teesside Park	3.65	1.73	1.71	1.90	0.89	5.32	15.21
Tesco, Ingleby Barwick	1.33	0.13	22.69	5.23	0.06	9.81	39.25
Other Stores/Centres	0.66	0.26	3.06	0.00	0.00	0.21	4.19
Thornaby Zone Total	**15.78**	**3.85**	**70.41**	**11.82**	**1.78**	**50.94**	**154.57**
Zone 4 - Yarm							
Sainsbury's, High Street	0.00	0.13	0.45	7.28	0.00	5.24	13.10
Other Stores, Yarm District Centre	0.00	0.00	0.18	0.58	0.06	0.55	1.37
Yarm District Centre Sub-Total	***0.00***	***0.13***	***0.63***	***7.87***	***0.06***	***0.00***	***8.69***
Tesco, Eaglescliffe	1.83	0.26	0.00	8.76	0.10	3.65	14.60
Aldi, Healaugh Park	1.49	0.00	5.49	9.82	0.06	4.22	21.08
Other Stores/Centres	0.17	0.00	0.54	1.69	0.00	0.13	2.52
Yarm Zone Total	**3.49**	**0.38**	**6.66**	**28.14**	**0.23**	**7.99**	**46.89**
Other Stores in Zone 5	**0.00**	**0.00**	**0.36**	**0.00**	**1.49**	**0.10**	**1.95**
Stockton Borough Total	**160.08**	**58.86**	**85.80**	**47.93**	**17.46**	**99.87**	**470.00**
Outside Stockton Borough	5.98	5.26	4.23	4.86	3.28		
TOTAL	**166.05**	**64.12**	**90.04**	**52.79**	**20.74**		

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

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

Store	Sales Floorspace (sq.m net)	Convenience Goods Floorspace (%)	Convenience Goods Floorspace (sq.m net)	Benchmark Turnover (£ per sq.m)	Total Turnover (Benchmark) (£m)	Total Turnover (Survey-Based) (£m)	Under/Over Trading (£m)
Zone 1 - Stockton							
Lidl, Wellington Square	863	85%	734	£7,723	£5.67	£3.58	-£2.09
Marks & Spencer, High Street	1,300	50%	650	£10,329	£6.71	£4.83	-£1.88
Asda, Bath Lane	711	80%	569	£15,213	£8.65	£1.77	-£6.88
Other Stores, Stockton Town Centre	4,537	100%	4,537	£4,500	£20.42	£14.13	-£6.29
Stockton Town Centre Sub-Total	***7,411***		***6,489***		***£41.45***	***£24.30***	***-£17.15***
Asda, Portrack Lane	5,040	55%	2,772	£15,213	£42.17	£46.94	£4.77
Sainsbury's, Whitehouse Farm	2,276	80%	1,821	£11,690	£21.29	£20.86	-£0.42
Tesco, Durham Road	7,829	55%	4,306	£11,058	£47.61	£42.09	-£5.53
Aldi, Norton	960	75%	720	£11,557	£8.32	£23.95	£15.63
Aldi, Yarm Lane	898	75%	674	£11,557	£7.78	£13.38	£5.59
Co-op, Norton	840	85%	714	£8,903	£6.36	£5.86	-£0.50
Other Stores/Centres					£20.95	£20.95	£0.00
Stockton Zone Total	**25,254**		**17,495**		**£195.93**	**£198.33**	**£2.40**
Zone 2 - Billingham							
Asda, The Causeway	796	85%	677	£15,213	£10.29	£12.94	£2.65
Other Stores, Billingham District Centre	1,743	100%	1,743	£4,000	£6.97	£6.25	-£0.72
Billingham District Centre Sub-Total	***2,539***		***2,420***		***17.27***	***19.19***	***1.93***
Tesco, Leeholme Road	3,260	70%	2,282	£11,058	£25.23	£25.89	£0.65
Other Stores					£5.50	£5.50	£0.00
Billingham Zone Total	**5,799**		**4,702**		**£48.00**	**£50.58**	**£2.58**
Zone 3 - Thornaby							
Asda, Allensway	4,600	60%	2,760	£15,213	£41.99	£35.99	-£6.00
Lidl	1,268	81%	1,029	£7,723	£7.95	£12.66	£4.71
Other Stores, Thornaby District Centre	1,899	100%	1,899	£4,000	£7.60	£6.87	-£0.72
Thornaby District Centre Sub-Total	***7,767***		***5,688***		***£57.53***	***£55.52***	***-£2.01***
Morrisons, Teesside Park	3,846	70%	2,692	£10,849	£29.21	£34.14	£4.93
Marks & Spencer, Teesside Park	3,866	21%	806	£10,329	£8.33	£13.95	£5.63
Tesco, Ingleby Barwick	2,620	70%	1,834	£11,058	£20.28	£36.58	£16.30
Other Stores/Centres					£3.97	£3.97	£0.00
Thornaby Zone Total	**18,099**		**11,020**		**£119.31**	**£144.16**	**£24.85**
Zone 4 - Yarm							
Sainsbury's, High Street	771	85%	655	£11,690	£7.66	£11.54	£3.88
Other Stores, Yarm District Centre	532	100%	532	£4,000	£2.13	£1.21	-£0.92
Yarm District Centre Sub-Total	***1,303***		***1,187***		***£9.79***	***£12.74***	***£2.95***
Tesco, Eaglescliffe	1,300	80%	1,040	£11,058	£11.50	£12.92	£1.42
Aldi, Healaugh Park	930	75%	698	£11,557	£8.06	£19.01	£10.95
Other Stores/Centres					£2.25	£2.25	£0.00
Yarm Zone Total	**3,533**		**2,925**		**£31.60**	**£46.93**	**£15.33**
Other Stores in Zone 5					**£1.50**	**£1.50**	**£0.00**
Stockton Borough Total	**52,685**		**36,142**		**£396.35**	**£441.51**	**£45.15**

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

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

Store	Sales Floorspace (sq.m net)	Convenience Goods Floorspace (%)	Convenience Goods Floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)	Zone
Lidl, Wellington Square	417	100%	417	7723	3.22	1
North Shore	715	80%	572	4000	2.29	1
Nifco, Yarm Road	1,424	80%	1139	£7,723	8.80	1
Norton Road	195	100%	195	£4,000	0.78	1
Discount Food Warehouse, Holmehouse Road	975	90%	878	£7,111	6.24	1
The Causeway, Billingham	990	70%	690	£11,557	7.97	2
Tesco, Ingleby Barwick	1,683	24%	403	£11,058	4.46	3
Ingleby Barwick Village 6	750	50%	375	£4,000	1.50	3
Unit 9, Teesside Industrial Estate	192	50%	163	£12,879	2.10	3
Tedder Avenue, Thornaby	1,254	80%	1003	£11,557	11.59	3
Little Maltby Farm	1,000	50%	500	£4,000	2.00	3
Allens West	175	100%	175	£4,000	0.70	4
Wynyard Village	233	100%	233	£4,000	0.93	5
Wynyard Park	175	50%	88	£4,000	0.35	5
Total	**10,178**		**6,830**		**£52.93**	

Source: Stockton on Tees Borough Council and Mintel

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

Area	2021	2026	2032
Available Expenditure in Stockton Borough (£m)			
Zone 1 - Stockton	203.46	209.32	215.23
Zone 2 - Billingham	50.68	51.03	51.35
Zone 3 - Thornaby/Ingleby Barwick	147.27	150.94	154.57
Zone 4 - Yarm/Eaglescliffe	43.43	45.14	46.89
Zone 5 - Rural North West	1.65	1.80	1.95
Total	**446.49**	**458.23**	**470.00**
Turnover of Existing Facilities (£m)			
Zone 1 - Stockton	217.26	217.26	217.26
Zone 2 - Billingham	55.97	55.97	55.97
Zone 3 - Thornaby/Ingleby Barwick	140.96	140.96	140.96
Zone 4 - Yarm/Eaglescliffe	32.30	32.30	32.30
Zone 5 - Rural North West	2.79	2.79	2.79
Total	**449.29**	**449.29**	**449.29**
Surplus/Deficit Expenditure (£m)			
Zone 1 - Stockton	-13.8	-7.9	-2.0
Zone 2 - Billingham	-5.3	-4.9	-4.6
Zone 3 - Thornaby/Ingleby Barwick	6.3	10.0	13.6
Zone 4 - Yarm/Eaglescliffe	11.1	12.8	14.6
Zone 5 - Rural North West	-1.1	-1.0	-0.8
Total	**-2.8**	**8.9**	**20.7**

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

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

Area	2021	2026	2032
Turnover Density New Floorspace (£ per sq.m)	£11,000	£11,000	£11,000
Floorspace Requirement (sq.m net)			
Zone 1 - Stockton	-1,255	-722	-184
Zone 2 - Billingham	-481	-449	-420
Zone 3 - Thornaby/Ingleby Barwick	574	907	1,237
Zone 4 - Yarm/Eaglescliffe	1,011	1,167	1,326
Zone 5 - Rural North West	-103	-90	-76
Total	**-254**	**813**	**1,883**
Floorspace Requirement (sq.m gross)			
Zone 1 - Stockton	-1,792	-1,031	-263
Zone 2 - Billingham	-687	-641	-600
Zone 3 - Thornaby/Ingleby Barwick	819	1,296	1,768
Zone 4 - Yarm/Eaglescliffe	1,445	1,667	1,894
Zone 5 - Rural North West	-147	-128	-108
Total	**-363**	**1,162**	**2,691**

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

Appendix 5 Comparison Goods Retail Capacity Assessment

COMPARISON GOODS RETAIL CAPACITY ASSESSMENT

Table 1: Study Area Population

Zone	2012	2016	2021	2026	2032
Zone 1 - Stockton	83,553	85,289	87,860	90,300	92,872
Zone 2 - Billingham	35,909	35,969	36,056	36,139	36,226
Zone 3 - Thornaby/Ingleby Barwick	45,752	46,521	47,660	48,742	49,882
Zone 4 - Yarm/Eaglescliffe	21,452	22,267	23,473	24,618	25,825
Zone 5 - Rural North West	5,740	6,305	7,142	7,936	8,773
Total	**192,406**	**196,351**	**202,191**	**207,735**	**213,578**

Sources: *ORS, SBC and Experian*

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

Zone	2016	2021	2026	2032
Zone 1 - Stockton	2,720	3,056	3,571	4,339
Zone 2 - Billingham	2,755	3,096	3,617	4,395
Zone 3 - Thornaby/Ingleby Barwick	3,298	3,707	4,331	5,262
Zone 4 - Yarm/Eaglescliffe	4,065	4,568	5,337	6,485
Zone 5 - Rural North West	5,012	5,632	6,580	7,996

Sources:

Experian Local Expenditure 2014 (2014 prices)

Experian Retail Planner Briefing Note (October 2015)

Excludes Special Forms of Trading

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

Zone	2016	2021	2026	2032
Zone 1 - Stockton	231.99	268.50	322.46	402.97
Zone 2 - Billingham	99.09	111.63	130.71	159.22
Zone 3 - Thornaby/Ingleby Barwick	153.43	176.68	211.10	262.48
Zone 4 - Yarm/Eaglescliffe	90.52	107.23	131.39	167.48
Zone 5 - Rural North West	31.60	40.22	52.22	70.15
Total	**606.62**	**704.25**	**847.88**	**1062.29**

Source: Tables 1 and 2

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

Centre/Facility	Zone 1 Stockton	Zone 2 Billingham	Zone 3 Thornaby/Ingleby Barwick	Zone 4 Yarm/Eaglesliffe	Zone 5 Rural North West	% Inflow
Stockton Town Centre	27.4%	6.3%	11.1%	7.8%	10.7%	15.0%
Billingham District Centre	0.6%	25.3%	0.0%	0.2%	4.6%	5.0%
Thornaby District Centre	0.8%	0.0%	17.8%	1.6%	0.0%	20.0%
Yarm District Centre	0.4%	0.1%	1.1%	12.5%	1.0%	20.0%
Portrack Lane	11.7%	8.9%	9.5%	7.5%	10.3%	40.0%
Teesside Retail Park	28.3%	24.6%	33.9%	31.1%	30.9%	55.0%
Bridge Road Retail Park	0.6%	0.4%	0.1%	0.8%	0.0%	20.0%
Out of Centre Foodstores	9.2%	6.3%	1.6%	2.2%	8.4%	20.0%
Other Stores/Centres	2.5%	0.1%	3.7%	3.7%	2.5%	5.0%
Stockton Borough Total	**81.5%**	**72.0%**	**78.8%**	**67.4%**	**68.4%**	
Outside Stockton Borough	**18.5%**	**28.0%**	**21.2%**	**32.6%**	**31.6%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey March 2016

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

Centre/Facility	Zone 1 Stockton	Zone 2 Billingham	Zone 3 Thornaby/Ingleby Barwick	Zone 4 Yarm/Eaglesliffe	Zone 5 Rural North West	Inflow	Total
Expenditure 2016	**231.99**	**99.09**	**153.43**	**90.52**	**31.60**		
Stockton Town Centre	63.56	6.24	17.03	7.06	3.38	17.17	114.45
Billingham District Centre	1.39	25.07	0.00	0.18	1.45	1.48	29.58
Thornaby District Centre	1.86	0.00	27.31	1.45	0.00	7.65	38.27
Yarm District Centre	0.93	0.10	1.69	11.31	0.32	3.59	17.93
Portrack Lane	27.14	8.82	14.58	6.79	3.25	40.39	100.97
Teesside Retail Park	65.65	24.38	52.01	28.15	9.76	219.95	399.90
Bridge Road Retail Park	1.39	0.40	0.15	0.72	0.00	0.67	3.33
Out of Centre Foodstores	21.34	6.24	2.45	1.99	2.65	8.67	43.36
Other Stores/Centres	5.80	0.10	5.68	3.35	0.79	0.83	16.54
Stockton Borough Total	**189.07**	**71.35**	**120.90**	**61.01**	**21.62**	**300.38**	**764.32**
Outside Stockton Borough	**42.92**	**27.75**	**32.53**	**29.51**	**9.99**		
TOTAL	**231.99**	**99.09**	**153.43**	**90.52**	**31.60**		

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

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

Centre/Facility	Zone 1 Stockton	Zone 2 Billingham	Zone 3 Thornaby/Ingleby Barwick	Zone 4 Yarm/Eaglesliffe	Zone 5 Rural North West	Inflow	Total
Expenditure 2021	**268.50**	**111.63**	**176.68**	**107.23**	**40.22**		
Stockton Town Centre	73.57	7.03	19.61	8.36	4.30	19.92	132.80
Billingham District Centre	1.61	28.24	0.00	0.21	1.85	1.68	33.60
Thornaby District Centre	2.15	0.00	31.45	1.72	0.00	8.83	44.14
Yarm District Centre	1.07	0.11	1.94	13.40	0.40	4.23	21.17
Portrack Lane	31.41	9.93	16.78	8.04	4.14	46.88	117.20
Teesside Retail Park	75.99	27.46	59.89	33.35	12.43	255.58	464.70
Bridge Road Retail Park	1.61	0.45	0.18	0.86	0.00	0.77	3.86
Out of Centre Foodstores	24.70	7.03	2.83	2.36	3.38	10.07	50.37
Other Stores/Centres	6.71	0.11	6.54	3.97	1.01	0.96	19.30
Stockton Borough Total	**218.83**	**80.37**	**139.22**	**72.27**	**27.51**	**348.94**	**887.14**
Outside Stockton Borough	**49.67**	**31.26**	**37.46**	**34.96**	**12.71**		
TOTAL	**268.50**	**111.63**	**176.68**	**107.23**	**40.22**		

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

Table 7: Comparison Goods Expenditure 2026 (£m) (2014 Prices)

Centre/Facility	Zone 1 Stockton	Zone 2 Billingham	Zone 3 Thornaby/Ingleby Barwick	Zone 4 Yarm/Eaglesliffe	Zone 5 Rural North West	Inflow	Total
Expenditure 2026	**322.46**	**130.71**	**211.10**	**131.39**	**52.22**		
Stockton Town Centre	88.35	8.24	23.43	10.25	5.59	23.97	159.83
Billingham District Centre	1.93	33.07	0.00	0.26	2.40	1.98	39.65
Thornaby District Centre	2.58	0.00	37.58	2.10	0.00	10.56	52.82
Yarm District Centre	1.29	0.13	2.32	16.42	0.52	5.17	25.86
Portrack Lane	37.73	11.63	20.05	9.85	5.38	56.43	141.08
Teesside Retail Park	91.26	32.16	71.56	40.86	16.14	307.97	559.94
Bridge Road Retail Park	1.93	0.52	0.21	1.05	0.00	0.93	4.65
Out of Centre Foodstores	29.67	8.24	3.38	2.89	4.39	12.14	60.70
Other Stores/Centres	8.06	0.13	7.81	4.86	1.31	1.17	23.34
Stockton Borough Total	**262.81**	**94.11**	**166.35**	**88.56**	**35.72**	**420.33**	**1067.87**
Outside Stockton Borough	**59.66**	**36.60**	**44.75**	**42.83**	**16.50**		
TOTAL	**322.46**	**130.71**	**211.10**	**131.39**	**52.22**		

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

Table 8: Comparison Goods Expenditure 2032 (£m) (2014 Prices)

Centre/Facility	Zone 1 Stockton	Zone 2 Billingham	Zone 3 Thornaby/Ingleby Barwick	Zone 4 Yarm/Eaglesliffe	Zone 5 Rural North West	Inflow	Total
Expenditure 2028	**402.97**	**159.22**	**262.48**	**167.48**	**70.15**		
Stockton Town Centre	110.41	10.03	29.13	13.06	7.51	30.03	200.17
Billingham District Centre	2.42	40.28	0.00	0.33	3.23	2.43	48.70
Thornaby District Centre	3.22	0.00	46.72	2.68	0.00	13.16	65.78
Yarm District Centre	1.61	0.16	2.89	20.93	0.70	6.57	32.87
Portrack Lane	47.15	14.17	24.94	12.56	7.23	70.69	176.73
Teesside Retail Park	114.04	39.17	88.98	52.09	21.68	386.16	702.11
Bridge Road Retail Park	2.42	0.64	0.26	1.34	0.00	1.16	5.82
Out of Centre Foodstores	37.07	10.03	4.20	3.68	5.89	15.22	76.10
Other Stores/Centres	10.07	0.16	9.71	6.20	1.75	1.47	29.36
Stockton Borough Total	**328.42**	**114.63**	**206.83**	**112.88**	**47.98**	**526.90**	**1337.64**
Outside Stockton Borough	**74.55**	**44.58**	**55.65**	**54.60**	**22.17**		
TOTAL	**402.97**	**159.22**	**262.48**	**167.48**	**70.15**		

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

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

Store	Sales Floorspace (sq.m net)	Comparison Goods Floorspace (%)	Comparison Goods Floorspace (sq.m net)	Benchmark Turnover (£ per sq.m)	Total Turnover (Benchmark) (£m)	Total Turnover (Survey-Based) (£m)	Under/Over Trading (£m)
Stockton Town Centre	30,228	100%	30,228	£4,500	£136.03	£114.45	-£21.58
Billingham District Centre	7,634	100%	7,634	£3,500	£26.72	£29.58	£2.86
Thornaby District Centre	7,105	100%	7,105	£5,000	£35.53	£38.27	£2.74
Yarm District Centre	3,801	100%	3,801	£3,500	£13.30	£17.93	£4.63
Portrack Lane	66,265	100%	66,265	£2,000	£132.53	£100.97	-£31.56
Teesside Retail Park	51,935	100%	51,935	£4,000	£207.74	£399.90	£192.16
Bridge Road Retail Park	6,720	100%	6,720	£4,000	£26.88	£3.33	-£23.55
Out of Centre Foodstores	10,333	100%	10,333	£5,999	£61.99	£43.36	-£18.63
Other Stores/Centres					£16.54	£16.54	£0.00
Stockton Borough Total	**184,021**		**184,021**		**£657.25**	**£764.32**	**£107.07**

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

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

Store	Sales Floorspace (sq.m net)	Comparison Goods Floorspace (%)	Comparison Goods Floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)	Location
North Shore	945	100%	945	£3,000	2.84	Other Stores/Centres
Nifco, Yarm Road	1,424	20%	285	£4,864	1.39	Out of Centre Foodstores
Lustrum Avenue	1624	100%	1624	£2,848	4.62	Portrack Lane
Adj. to Portrack Retail Park	1562	100%	1562	£3,000	4.69	Portrack Lane
The Causeway, Billingham	990	30%	300	£6,980	2.09	Billingham District Centre
Tesco, Ingleby Barwick	1,683	76%	1280	£5,999	7.68	Other Stores/Centres
Ingleby Barwick Village 6	750	50%	375	£3,000	1.13	Other Stores/Centres
Unit 9, Teesside Industrial Estate	304	100%	304	£4,980	1.51	Other Stores/Centres
Wynyard Park	175	50%	88	£3,000	0.26	Other Stores/Centres
Tedder Avenue, Thornaby	1,254	20%	251	£6,980	1.75	Other Stores/Centres
Little Maltby Farm	1,000	50%	500	£3,000	1.50	Other Stores/Centres
Total	**11,711**		**7,513**		**£29.46**	

Source: Stockton on Tees Borough Council and Mintel

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

Area	2016	2021	2026	2032
Available Expenditure in Stockton Borough (£m)				
Stockton Town Centre	114.45	132.80	159.83	200.17
Billingham District Centre	29.58	33.60	39.65	48.70
Thornaby District Centre	38.27	44.14	52.82	65.78
Yarm District Centre	17.93	21.17	25.86	32.87
Portrack Lane	100.97	117.20	141.08	176.73
Teesside Retail Park	399.90	464.70	559.94	702.11
Bridge Road Retail Park	3.33	3.86	4.65	5.82
Out of Centre Foodstores	43.36	50.37	60.70	76.10
Other Stores/Centres	16.54	19.30	23.34	29.36
Total	**764.32**	**887.14**	**1,067.87**	**1,337.64**
Turnover of Existing Facilities (£m)				
Stockton Town Centre	114.45	126.36	139.51	157.11
Billingham District Centre	29.58	34.75	38.36	43.21
Thornaby District Centre	38.27	42.25	46.65	52.53
Yarm District Centre	17.93	19.80	21.86	24.62
Portrack Lane	100.97	120.79	133.36	150.18
Teesside Retail Park	399.90	441.52	487.48	548.98
Stockton Retail Park	3.33	3.68	4.06	4.57
Out of Centre Foodstores	43.36	49.26	54.38	61.24
Other Stores/Centres	16.54	34.93	38.56	43.43
Total	**764.32**	**873.33**	**964.23**	**1,085.88**
Surplus/Deficit Expenditure (£m)				
Stockton Town Centre	0.00	6.44	20.32	43.06
Billingham District Centre	0.00	-1.15	1.29	5.49
Thornaby District Centre	0.00	1.89	6.17	13.25
Yarm District Centre	0.00	1.37	4.00	8.25
Portrack Lane	0.00	-3.59	7.72	26.55
Teesside Retail Park	0.00	23.17	72.46	153.13
Stockton Retail Park	0.00	0.19	0.59	1.25
Out of Centre Foodstores	0.00	1.12	6.31	14.86
Other Stores/Centres	0.00	-15.63	-15.23	-14.07
Total	**0.00**	**13.81**	**103.64**	**251.77**

Source: Tables 5 to 11
Notes:
Commitments from Table 11 added to the turnover of Existing Facilities for each location in 2021
Comparison goods sales efficiency applied to turnover of existing facilities on basis of growth rate of 2% per annum

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

Area	2016	2021	2026	2032
Turnover Density New Floorspace (£ per sq.m)	£4,500	£4,500	£4,500	£4,500
Floorspace Requirement (sq.m net)				
Stockton Town Centre	0	1,432	4,516	9,570
Billingham District Centre	0	-256	286	1,220
Thornaby District Centre	0	420	1,372	2,944
Yarm District Centre	0	304	889	1,834
Portrack Lane	0	-798	1,716	5,899
Teesside Retail Park	0	5,150	16,103	34,028
Stockton Retail Park	0	41	131	277
Out of Centre Foodstores	0	248	1,403	3,302
Other Stores/Centres	0	-3,473	-3,384	-3,126
Total	**0**	**3,069**	**23,032**	**55,948**
Floorspace Requirement (sq.m gross)				
Stockton Town Centre	0	2,045	6,452	13,671
Billingham District Centre	0	-365	409	1,743
Thornaby District Centre	0	600	1,960	4,205
Yarm District Centre	0	435	1,271	2,620
Portrack Lane	0	-1,140	2,451	8,428
Teesside Retail Park	0	7,357	23,004	48,612
Stockton Retail Park	0	59	187	396
Out of Centre Foodstores	0	355	2,004	4,717
Other Stores/Centres	0	-4,962	-4,834	-4,466
Total	**0**	**4,384**	**32,903**	**79,926**

(Please note some figures may not total precisely due to rounding)
(Floorspace requirements from 2021 onwards take into account commitments)

Appendix 6 Cinema Capacity Assessment

CINEMA CAPACITY ASSESSMENT

Table 1: Study Area Population

Zone	2012	2016	2021	2026	2032
Zone 1 - Stockton	83,553	85,289	87,860	90,300	92,872
Zone 2 - Billingham	35,909	35,969	36,056	36,139	36,226
Zone 3 - Thornaby/Ingleby Barwick	45,752	46,521	47,660	48,742	49,882
Zone 4 - Yarm/Eaglescliffe	21,452	22,267	23,473	24,618	25,825
Zone 5 - Rural North West	5,740	6,305	7,142	7,936	8,773
Total	**192,406**	**196,351**	**202,191**	**207,735**	**213,578**

Sources: *ORS, SBC and Experian*

Table 2: Total Number of Cinema Trips (per annum)

Zone	2016	2021	2026	2032
Zone 1 - Stockton	238,810	246,007	252,841	260,041
Zone 2 - Billingham	100,712	100,957	101,189	101,434
Zone 3 - Thornaby/Ingleby Barwick	130,259	133,449	136,477	139,668
Zone 4 - Yarm/Eaglescliffe	62,348	65,725	68,931	72,310
Zone 5 - Rural North West	17,654	19,997	22,221	24,564
Total	**549,784**	**566,134**	**581,659**	**598,018**

Sources:

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

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

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	% Inflow
Stockton Borough (ARC, Dovecot Street)	11.9%	0.0%	1.4%	10.4%	2.4%	10.0%
Other Destinations						
Showcase, Teessside Leisure Park	50.7%	43.6%	47.2%	47.9%	54.8%	n/a
Cineworld, Marton Road, Middlesbrough	34.3%	32.7%	47.2%	37.5%	26.2%	n/a
Vue, Marina Way, Hartlepool	0.0%	21.8%	1.4%	2.1%	7.1%	n/a
Other Cinemas	3.0%	1.8%	2.8%	2.1%	9.5%	n/a
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey March 2016

Table 4: Base Year 2016 Total Cinema Trips Per Annum

Area	Zone 1 Stockton	Zone 2 Billingham	Zone 3 Thornaby/Ingleby Barwick	Zone 4 Yarm/Eaglesliffe	Zone 5 Rural North West	Inflow	Total
Trips 2016	**238,810**	**100,712**	**130,259**	**62,348**	**17,654**		**549,784**
Stockton Borough (ARC, Dovecot Street)	28,515	0	1,809	6,495	420	4,138	41,376
Other Destinations							
Showcase, Teessside Leisure Park	121,187	43,947	61,511	29,875	9,668	n/a	266,188
Cineworld, Marton Road, Middlesbrough	81,980	32,960	61,511	23,380	4,624	n/a	204,455
Vue, Marina Way, Hartlepool	0	21,973	1,809	1,299	1,261	n/a	26,343
Other Cinemas	7,129	1,831	3,618	1,299	1,681	n/a	15,558
Total	**238,810**	**100,712**	**130,259**	**62,348**	**17,654**		**553,921**

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

Table 5: Total Cinema Trips Per Annum 2021

Area	Zone 1 Stockton	Zone 2 Billingham	Zone 3 Thornaby/Ingleby Barwick	Zone 4 Yarm/Eaglesliffe	Zone 5 Rural North West	Inflow	Total
Trips 2021	**246,007**	**100,957**	**133,449**	**65,725**	**19,997**		**566,134**
Stockton Borough (ARC, Dovecot Street)	29,374	0	1,853	6,846	476	4,283	42,833
Other Destinations							
Showcase, Teessside Leisure Park	124,839	44,054	63,017	31,493	10,951	n/a	274,354
Cineworld, Marton Road, Middlesbrough	84,450	33,040	63,017	24,647	5,237	n/a	210,392
Vue, Marina Way, Hartlepool	0	22,027	1,853	1,369	1,428	n/a	26,678
Other Cinemas	7,343	1,836	3,707	1,369	1,904	n/a	16,160
Total	**246,007**	**100,957**	**133,449**	**65,725**	**19,997**		**570,417**

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

Table 6: Total Cinema Trips Per Annum 2026

Area	Zone 1 Stockton	Zone 2 Billingham	Zone 3 Thornaby/Ingleby Barwick	Zone 4 Yarm/Eaglesliffe	Zone 5 Rural North West	Inflow	Total
Trips 2026	**252,841**	**101,189**	**136,477**	**68,931**	**22,221**		**581,659**
Stockton Borough (ARC, Dovecot Street)	30,190	0	1,896	7,180	529	4,422	44,217
Other Destinations							
Showcase, Teessside Leisure Park	128,307	44,155	64,448	33,030	12,169	n/a	282,108
Cineworld, Marton Road, Middlesbrough	86,796	33,116	64,448	25,849	5,820	n/a	216,029
Vue, Marina Way, Hartlepool	0	22,078	1,896	1,436	1,587	n/a	26,996
Other Cinemas	7,547	1,840	3,791	1,436	2,116	n/a	16,731
Total	**252,841**	**101,189**	**136,477**	**68,931**	**22,221**		**586,081**

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

Table 7: Total Cinema Trips Per Annum 2032

Area	Zone 1 Stockton	Zone 2 Billingham	Zone 3 Thornaby/Ingleby Barwick	Zone 4 Yarm/Eaglesliffe	Zone 5 Rural North West	Inflow	Total
Trips 2032	**260,041**	**101,434**	**139,668**	**72,310**	**24,564**		**598,018**
Stockton Borough (ARC, Dovecot Street)	31,050	0	1,940	7,532	585	4,567	45,674
Other Destinations							
Showcase, Teessside Leisure Park	131,961	44,262	65,955	34,649	13,452	n/a	290,278
Cineworld, Marton Road, Middlesbrough	89,268	33,197	65,955	27,116	6,434	n/a	221,969
Vue, Marina Way, Hartlepool	0	22,131	1,940	1,506	1,755	n/a	27,332
Other Cinemas	7,762	1,844	3,880	1,506	2,339	n/a	17,332
Total	**260,041**	**101,434**	**139,668**	**72,310**	**24,564**		**602,586**

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

Table 8: Cinema Screen Capacity 2016 to 2032

	2016	2021	2026	2032
Total Cinema Trips attracted to Stockton Borough (per annum)	41,376	42,833	44,217	45,674
Number of Trips per Screen (per annum)	47,000	47,000	47,000	47,000
Cinema Screen Potential	0.9	0.9	0.9	1.0
Existing Screens in Stockton Borough	1	1	1	1
Stockton Borough Screen Capacity	0	0	0	0

Table 9: Cinema Seat Capacity 2016 to 2032

	2016	2021	2026	2032
Total Cinema Trips attracted to Stockton Borough (per annum)	41,376	42,833	44,217	45,674
Number of Trips per Seat (per annum)	232	232	232	232
Cinema Seat Potential	178	185	191	197
Existing Seats in Stockton Borough	130	130	130	130
Stockton Borough Seat Capacity	48	55	61	67

Appendix 7 Food and Beverage Capacity Assessment

FOOD AND BEVERAGE CAPACITY ASSESSMENT

Table 1: Study Area Population

Zone	2012	2016	2021	2026	2032
Zone 1 - Stockton	83,553	85,289	87,860	90,300	92,872
Zone 2 - Billingham	35,909	35,969	36,056	36,139	36,226
Zone 3 - Thornaby/Ingleby Barwick	45,752	46,521	47,660	48,742	49,882
Zone 4 - Yarm/Eaglescliffe	21,452	22,267	23,473	24,618	25,825
Zone 5 - Rural North West	5,740	6,305	7,142	7,936	8,773
Total	**192,406**	**196,351**	**202,191**	**207,735**	**213,578**

Sources: *ORS, SBC and Experian*

Table 2: Food and Beverage Expenditure per person (£) (2014 Prices)

Zone	2016	2021	2026	2032
Zone 1 - Stockton	954	1,020	1,093	1,188
Zone 2 - Billingham	953	1,019	1,092	1,186
Zone 3 - Thornaby/Ingleby Barwick	1,102	1,179	1,262	1,372
Zone 4 - Yarm/Eaglescliffe	1,469	1,572	1,683	1,830
Zone 5 - Rural North West	1,779	1,903	2,038	2,216

Sources:

Experian Local Expenditure 2014 (2014 prices)

Experian Retail Planner Briefing Note (October 2015)

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

Zone	2016	2021	2026	2032
Zone 1 - Stockton	81.37	89.62	98.70	110.33
Zone 2 - Billingham	34.28	36.74	39.46	42.96
Zone 3 - Thornaby/Ingleby Barwick	51.27	56.19	61.51	68.44
Zone 4 - Yarm/Eaglescliffe	32.71	36.90	41.43	47.26
Zone 5 - Rural North West	11.22	13.59	16.17	19.44
Total	**210.84**	**233.04**	**257.28**	**288.43**

Source: Tables 1 and 2

Table 4: Base Year 2016 Food and Beverage Market Shares (%) (2014 Prices)

Centre/Facility	Zone 1 Stockton	Zone 2 Billingham	Zone 3 Thornaby/Ingleby Barwick	Zone 4 Yarm/Eaglesliffe	Zone 5 Rural North West	% Inflow
Stockton	37.4%	8.4%	15.1%	5.0%	10.2%	20.0%
Billingham	2.7%	45.9%	0.7%	1.5%	10.4%	5.0%
Thornaby	0.5%	0.0%	12.5%	0.0%	0.0%	15.0%
Yarm	10.3%	2.3%	23.6%	52.7%	9.2%	15.0%
Norton	22.8%	10.9%	0.0%	1.8%	5.1%	15.0%
Ingleby Barwick	0.0%	0.0%	12.2%	1.3%	0.0%	5.0%
Other Destinations	2.8%	8.8%	5.1%	10.7%	20.6%	5.0%
Stockton Borough Total	**76.6%**	**76.3%**	**69.2%**	**73.1%**	**55.5%**	
Outside Stockton Borough	**23.4%**	**23.7%**	**30.8%**	**26.9%**	**44.5%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey March 2016

Table 5: Base Year 2016 Food and Beverage Expenditure (£m) (2014 Prices)

Centre/Facility	Zone 1 Stockton	Zone 2 Billingham	Zone 3 Thornaby/Ingleby Barwick	Zone 4 Yarm/Eaglescliffe	Zone 5 Rural North West	Inflow	Total
Expenditure 2016	**81.37**	**34.28**	**51.27**	**32.71**	**11.22**		
Stockton	30.46	2.89	7.75	1.65	1.15	10.97	54.87
Billingham	2.18	15.74	0.36	0.50	1.17	1.05	21.00
Thornaby	0.44	0.00	6.43	0.00	0.00	1.21	8.09
Yarm	8.36	0.78	12.10	17.25	1.03	6.98	46.51
Norton	18.54	3.73	0.00	0.57	0.57	4.13	27.55
Ingleby Barwick	0.00	0.00	6.24	0.43	0.00	0.35	7.02
Other Destinations	2.30	3.01	2.60	3.50	2.31	0.72	14.44
Stockton Borough Total	**62.29**	**26.15**	**35.48**	**23.90**	**6.23**	**25.42**	**179.48**
Outside Stockton Borough	**19.07**	**8.12**	**15.78**	**8.81**	**4.99**		
TOTAL	**81.37**	**34.28**	**51.27**	**32.71**	**11.22**		

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

Table 6: Food and Beverage Expenditure 2021 (£m) (2014 Prices)

Centre/Facility	Zone 1 Stockton	Zone 2 Billingham	Zone 3 Thornaby/Ingleby Barwick	Zone 4 Yarm/Eaglesliffe	Zone 5 Rural North West	Inflow	Total
Expenditure 2021	**89.62**	**36.74**	**56.19**	**36.90**	**13.59**		
Stockton	33.55	3.10	8.50	1.86	1.39	12.10	60.49
Billingham	2.40	16.87	0.39	0.56	1.41	1.14	22.78
Thornaby	0.49	0.00	7.05	0.00	0.00	1.33	8.87
Yarm	9.21	0.84	13.26	19.46	1.25	7.77	51.79
Norton	20.42	4.00	0.00	0.65	0.70	4.55	30.31
Ingleby Barwick	0.00	0.00	6.84	0.48	0.00	0.39	7.70
Other Destinations	2.54	3.23	2.85	3.95	2.79	0.81	16.17
Stockton Borough Total	**68.61**	**28.03**	**38.89**	**26.96**	**7.54**	**28.08**	**198.12**
Outside Stockton Borough	21.01	8.71	17.30	9.94	6.05		
TOTAL	**89.62**	**36.74**	**56.19**	**36.90**	**13.59**		

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

Table 7: Food and Beverage Expenditure 2026 (£m) (2014 Prices)

Centre/Facility	Zone 1 Stockton	Zone 2 Billingham	Zone 3 Thornaby/Ingleby Barwick	Zone 4 Yarm/Eaglesliffe	Zone 5 Rural North West	Inflow	Total
Expenditure 2026	**98.70**	**39.46**	**61.51**	**41.43**	**16.17**		
Stockton	36.95	3.32	9.30	2.09	1.66	13.33	66.65
Billingham	2.65	18.12	0.43	0.63	1.68	1.24	24.75
Thornaby	0.54	0.00	7.71	0.00	0.00	1.46	9.71
Yarm	10.15	0.90	14.52	21.85	1.49	8.63	57.53
Norton	22.49	4.30	0.00	0.73	0.83	5.00	33.34
Ingleby Barwick	0.00	0.00	7.48	0.54	0.00	0.42	8.45
Other Destinations	2.79	3.47	3.12	4.43	3.33	0.90	18.04
Stockton Borough Total	**75.56**	**30.11**	**42.58**	**30.27**	**8.98**	**30.98**	**218.48**
Outside Stockton Borough	23.14	9.35	18.94	11.16	7.20		
TOTAL	**98.70**	**39.46**	**61.51**	**41.43**	**16.17**		

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

Table 8: Food and Beverage Expenditure 2032 (£m) (2014 Prices)

Centre/Facility	Zone 1 Stockton	Zone 2 Billingham	Zone 3 Thornaby/Ingleby Barwick	Zone 4 Yarm/Eaglesliffe	Zone 5 Rural North West	Inflow	Total
Expenditure 2028	**110.33**	**42.96**	**68.44**	**47.26**	**19.44**		
Stockton	41.31	3.62	10.35	2.38	1.99	14.91	74.56
Billingham	2.96	19.73	0.48	0.72	2.02	1.36	27.27
Thornaby	0.60	0.00	8.58	0.00	0.00	1.62	10.81
Yarm	11.34	0.98	16.15	24.92	1.79	9.74	64.93
Norton	25.14	4.68	0.00	0.83	0.99	5.58	37.23
Ingleby Barwick	0.00	0.00	8.33	0.62	0.00	0.47	9.42
Other Destinations	3.12	3.77	3.47	5.06	4.00	1.02	20.45
Stockton Borough Total	**84.47**	**32.78**	**47.37**	**34.53**	**10.79**	**34.71**	**244.65**
Outside Stockton Borough	25.86	10.18	21.07	12.73	8.65		
TOTAL	**110.33**	**42.96**	**68.44**	**47.26**	**19.44**		

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

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

Area	2016	2021	2026	2032
Available Expenditure in Stockton Borough (£m)				
Stockton	54.87	60.49	66.65	74.56
Billingham	21.00	22.78	24.75	27.27
Thornaby	8.09	8.87	9.71	10.81
Yarm	46.51	51.79	57.53	64.93
Norton	27.55	30.31	33.34	37.23
Ingleby Barwick	7.02	7.70	8.45	9.42
Other Destinations	14.44	16.17	18.04	20.45
Total	**179.48**	**198.12**	**218.48**	**244.65**
Turnover of Existing Facilities (£m)				
Stockton	54.87	57.67	60.61	64.34
Billingham	21.00	22.07	23.19	24.62
Thornaby	8.09	8.50	8.93	9.48
Yarm	46.51	48.88	51.37	54.53
Norton	27.55	28.96	30.44	32.31
Ingleby Barwick	7.02	7.37	7.75	8.23
Other Destinations	14.44	15.18	15.96	16.94
Total	**179.48**	**188.63**	**198.25**	**210.45**
Surplus/Deficit Expenditure (£m)				
Stockton	0.00	2.82	6.04	10.21
Billingham	0.00	0.72	1.56	2.65
Thornaby	0.00	0.37	0.78	1.32
Yarm	0.00	2.92	6.16	10.40
Norton	0.00	1.35	2.91	4.92
Ingleby Barwick	0.00	0.33	0.70	1.19
Other Destinations	0.00	0.99	2.09	3.51
Total	**0.00**	**9.49**	**20.23**	**34.20**

Source: Tables 5 to 9
Growth in food & beverage sales efficiency of 1% per annum applied to turnover of existing facilities
(Please note some figures may not total precisely due to rounding)

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

Area	2016	2021	2026	2032
Turnover Density New Floorspace (£ per sq.m)	£5,000	£5,255	£5,523	£5,863
Floorspace Requirement (sqm gross)				
Stockton	0	537	1,093	1,742
Billingham	0	136	282	453
Thornaby	0	70	141	226
Yarm	0	555	1,116	1,773
Norton	0	257	526	839
Ingleby Barwick	0	63	126	203
Other Destinations	0	188	378	599
Total	**0**	**1,805**	**3,662**	**5,834**