



A Study of Retail, Leisure and Other Town Centres Uses in Northumberland

Final Report

Date: February 2011



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Project No: A055809

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EXECUTIVE SUMMARY

Introduction

- 01 WYG Planning & Design (WYG) was commissioned by Northumberland County Council in July 2009 to undertake a Town Centre and Retail Study. A summary of the findings is set out below.
- 02 From the analysis undertaken (set out in the main report) there is anticipated to be notable 'capacity' across Northumberland for additional retail and leisure floorspace through to the year 2026. In addition, the analysis identifies that there are also certain qualitative needs within parts of Northumberland to enhance and improve existing retail/leisure provision in order to provide more sustainable shopping/travel patterns.

Towards a future strategy for town centre uses

- 04 The future strategy for retail and commercial leisure development in Northumberland County should be determined by taking account of a number of relevant factors, as follows:
- (i) The extent of quantitative and qualitative need for a new retail and commercial leisure floorspace identified in this study.
 - (ii) Whether it is feasible to plan to meet the full extent of the needs identified, taking into account the effects of the current severe economic downturn and considerable uncertainties over the short to medium term economic outlook; the impact on an investment in regeneration arising through planned significant cut backs in public expenditure, in a part of the country where public sector pump priming investment has traditionally been a substantial and important driver of regeneration.
 - (iii) Linked to the above, the extent of future commitment to existing regeneration strategies already being pursued for different settlements within the County, many of which are legacies inherited from the former Boroughs and Districts of Northumberland.
 - (iv) Whether it is desirable to plan to meet the full extent of needs identified in the study, taking into account physical and viability constraints to achieving substantial redevelopment within or on the edge of certain centres in the County. In that respect, in certain centres where the level of assessed vitality and viability is not strong, the allocation of sites for substantial retail development in out of centre locations in order to meet identified quantitative need (due to the absence of suitable, available and viable in centre or edge of centre sites) could result in a harmful impact on those centres.



- 05 The household shopping survey, undertaken as part of this study, confirmed that there is considerable leakage of available expenditure from the Study area to higher order shopping locations outside the study area, particularly in terms of comparison goods. The influence of Newcastle City Centre, the Metrocentre, Gateshead and the Silverlink Shopping Park (North Tyneside) on comparison shopping patterns of residents living in the survey zones in the south and centre of the study area, is very strong. Similarly the centres of Edinburgh and Galashiels are important attractors of comparison expenditure generated in the northern study zones. This would suggest that there would be substantial benefits, when developing a retail strategy for Northumberland, to seek to claw back as much of that expenditure as possible in order to achieve more sustainable shopping related travel patterns and potentially to generate spin-off economic benefits to existing centres within the County.
- 06 The assessment of floorspace 'needs' carried out in this retail and leisure study is based on a relatively conservative, retention of existing market shares approach. The recommendations regarding strategy in this report are based on that "steady state" scenario. However, commentary is provided in relation to qualitative 'needs' which may be informed by the potential to enhance existing market shares.
- 07 PPS4 requires LPA's to set out a strategy for the management and growth centres over the plan period (Policy EC 3.1) and to define a network and hierarchy of centres, having made choices about which centres will accommodate any identified need for growth in town centre floorspace, considering their expansion where necessary (Policy EC3.1 d (i)). Policy EC5.5 requires LPA's to allocate sufficient sites in development plan documents to meet at least the first 5 years identified need.
- 08 In the light of that advice, the main study seeks to:
- (i) Provide recommendations on the proposed centre hierarchy for the County;
 - (ii) In the context of that hierarchy, to consider which centres should be the main focus for accommodating new town centre floorspace development; and
 - (iii) Provide advice on the most appropriate general areas within and on the edge of centres (or potentially out of centre locations) to search for allocation sites to meet at least the first 5 years of identified need for new retail and commercial leisure developments.



Retail Hierarchy

- 09 In formulating a proposed centre hierarchy for the County we have taken into account into account a number of factors:
- a) The hierarchy of centres in the adopted North East Regional Spatial Strategy (now revoked).
 - b) The definition of centres used in the various adopted development plans prepared by the constituent authorities of the new Northumberland County.
 - c) The proposed Regional retail centre hierarchy in the North East Retail and Leisure Study prepared on behalf of One North East by DTZ.
 - d) The Venuescore ranking of centres prepared by the Javelin Group.
 - e) Data on centre turnover, floorspace and market share derived from this retail study.
- 10 We have examined these various sources in the context of the over-arching definitions of different types of centres in Annex B of PPS4 i.e. city, town, district and local. The resulting proposed hierarchy set out below uses the PPS4 Annex B definitions in order to ensure consistency with national planning policy.
- 11 In reaching the conclusions on the appropriate designation of centres within the County we have taken into account the household shopping survey derived turnover of centres and also market share information and also information on the growth retail floorspace of the centres derived from the health check assessments. That information is shown at Table ES1 below



Sub-Regional Hierarchy by centre size, turnover and market share

Table ES1: Hierarchy and Market Share of the Main Centres within Northumberland County

Centre	Gross Retail Floorspace (sq m)	Convenience Turnover (£m)	Comparison Turnover (£m)	Total Turnover (£m)	Market Share in Study Area (%)	Market Share Amongst Centres (%)
1. Cramlington	29,200	50.08	61.28	111.36	6.9	17.6
2. Ashington	24,250	51.40	56.22	107.62	6.6	17.0
3. Blyth	22,230	19.79	58.47	78.26	4.8	12.3
4. Hexham	18,240	4.77	58.23	63.00	3.9	10.0
5. Morpeth*	16,630	35.22	26.28	61.50	3.8	9.7
6. Berwick-upon-Tweed	22,290	4.70	55.70	60.40	3.7	9.5
7. Alnwick	13,860	22.38	30.10	52.48	3.2	8.3
8. Prudhoe	5,480	11.77	6.30	18.07	1.1	2.9
9. Bedlington	4,120	11.64	2.38	14.02	0.9	2.2
10. Ponteland	5,480	5.73	2.81	8.54	0.5	1.3
11. Amble	4,030	4.07	4.15	8.22	0.5	1.3
12. Haltwhistle	3,580	3.97	3.86	7.83	0.5	1.2
13. Newbiggin	2,720	1.57	4.32	5.89	0.4	0.9
14. Wooler	2,200	3.23	2.15	5.38	0.3	0.8
15. Seahouses	2,530	1.87	2.34	4.21	0.3	0.7
16. Rothbury	3,120	1.16	3.02	4.18	0.3	0.7
17. Corbridge	2,475	1.83	1.84	3.67	0.2	0.6
18. Allendale	1,065	2.52	0.68	3.20	0.2	0.5
19. Seaton Delaval	1,810	1.29	1.77	3.06	0.2	0.5
20. Guide Post	1,425	1.07	1.43	2.50	0.2	0.4
21. Hadston	575	1.98	0.46	2.44	0.2	0.4
22. Bellingham	830	1.38	0.76	2.14	0.1	0.3
23. Bedlington Station	2,370	0.79	0.64	1.43	0.1	0.2
24. Lynemouth	640	0.13	0.71	0.84	<0.1	0.1
25. Wriddington Station	340	0.81	0.00	0.81	<0.1	0.1
26. Haydon Bridge	835	0.77	0.00	0.77	<0.1	0.1
27. Belford	830	0.32	0.35	0.67	<0.1	0.1
28. Ellington	245	0.26	0.00	0.26	<0.1	<0.1
TOTAL	193,400	246.50	386.25	632.75	39.0	100.0

Notes:

WYG (2009)

Floorspace derived from Experian Goad (August 2009) but excludes out-of-centre provision based on guidance set out in PPS4

* Does not take into account Sanderson Arcade, which was not open at the time of the survey

At 2007 prices



- 12 From the above analysis we suggest the following hierarchy of centres in the County:
- (i) **Town centres** - Alnwick, Ashington, Berwick on Tweed, Blyth, Cramlington, Hexham and Morpeth.
 - (ii) **District centres** – Amble, Ponteland, Prudhoe, Haltwhistle and Bedlington.
 - (iii) **Local centres** – Seahouses, Wooler, Rothbury, Belford, Seaton Delaval, Hadston, Ellington, Lynemouth, Wriddington Station, Allendale, Bellingham, Corbridge, Haydon Bridge, Bedlington station, Guide Post and Newbiggin.

Key Recommendations and the Future Role of Proposed Town Centres

- 13 Set out below are WYG’s key recommendations relating to the future role of existing centres within the county, starting with the centres which we consider merit the status of town centre.

Alnwick Town Centre

- 14 The research undertaken by Infonet informing this study confirms that the centre of Alnwick is particularly vital and viable. The vacancy rate within the centre is currently well below the national average and there is a strong mix of convenience and comparison goods retailers albeit focussed more on the independent sector rather than major national multiples found in higher order centres.
- 15 Similar to Berwick-upon-Tweed, Alnwick also has a strong leisure offer (restaurants, cafés, bars and pubs) which seek to service both the needs of the local community and tourists who frequently visit the centre and surrounding area.
- 16 Similar to other historic market towns within Northumberland, Alnwick’s primary shopping area is dominated by its historic core and important conservation area. As a result, the opportunities for comprehensive retail and leisure development are particularly limited. Therefore, it will continually prove difficult to accommodate large scale retail developments within the centre which leads to the provision of facilities beyond the PSA and town centre boundary once the sequential approach has been applied. A recent example of this is the new Sainsbury's store in Alnwick which could clearly not be accommodated within the town centre.
- 17 However, this does not rule out the potential for any future retail and leisure development within the town centre over the plan period.



- 18 Clearly, the findings of this study appear to suggest that there will be some modest need for additional convenience and comparison goods retail facilities in the medium to long-term (i.e. by 2019). As the current primary shopping area is effectively focussed on three streets including Bondgate Within, Market Street, and Fenkle Street, the opportunities for further development within the PSA are clearly constrained. Furthermore, the low vacancy rate within the town centre means that nay opportunity for the redevelopment of groups of vacant properties is also limited in the short to medium-term. However, there are a number of sites to the west of the town centre primarily focussed on Lagny Street which might have some potential for future redevelopment. This may also include the current bus station off Clayport Street and land including and to the rear of the Telephone Exchange off Fenkle Street. Beyond this, it is difficult to see how further redevelopment opportunities could be accommodated within the historic core without removing or significantly altering current buildings fronting onto the primary shopping streets.
- 19 As a result, whilst there may be opportunities for further incremental development over time within Alnwick, we do not believe that it would be sensible to plan for major retail expansion in and around Alnwick, as any significant development would have to occur in an out-of-centre location which could prove damaging to the future vitality and viability of the town centre as a whole.
- 20 The Practice Guidance accompanying PPS4 makes it quite clear that in historic centres, it is often more appropriate to adopt a cautious strategy to new retail and leisure development so as to ensure that the vitality and viability of the established historic core is not undermined by large scale retail and leisure developments in an out-of-centre location.

Ashington Town Centre

- 21 Ashington town centre is a second most important centre within the county as measured by growth retail floor space, total turnover and market share. As assessed by Infonet, the health check of the centre indicates reasonable levels of vitality and viability in terms of low vacancy rates, good level of accessibility by car and public transport. However, in respect of a number of other indicators the centre is perceived to be performing less well, such as relatively high retail yields, mediocre shopping environment, poor choice and range of shops and poor level of cleanliness.



- 22 The household shopping survey results showed a high level of expenditure leakage in terms of comparison goods from Zone 14 and Zone 4, the main area from which Ashington town centre attracts customers. For convenience goods within the same zones the market share of existing facilities rises to just over 60%. However that level of market share for convenience goods within Ashington core catchment area is relatively low and reflects the significant attraction of the existing large Asda store at Cowpen Road, Blyth for local shoppers.
- 23 However it should be noted that the household shopping survey predates the opening of the new replacement Asda store on Lintonville Road, which is well linked to the primary shopping area of the town centre and which provides a substantially enhanced convenience and comparison offer compared to the store it replaced. Hence the market share retention for convenience goods within Zones 4 and 11 and potentially also for comparison goods, is likely to have risen since the household shopping survey was carried out.
- 24 That large store redevelopment is an initial and vital stage in the planned regeneration of Ashington town centre, as set out in the adopted Ashington Town Centre Supplementary Planning Document (February 2010). That document proposes substantial land use changes within the defined town centre SPD area, which is somewhat smaller in its extent than the Experian Goad defined town centre area. Important proposals in that document are the creation of several substantial redevelopment sites for accommodating comparison retail development, on the site of the old Asda store and current bus station and depot, coupled with the relocation of the bus station. A range of physical improvement works are proposed to ensure strong linkage between the proposed new retail areas, the new Asda store and the traditional shopping core of the town centre located along Woodhorn Road and Station Road.
- 25 The needs assessment carried out in this study, which is based on a steady state market share approach, identifies substantial capacity for additional convenience goods facilities in the short term. However, most of that capacity, particularly in the short term, will be absorbed by the replacement Asda store. In terms of comparison goods, the estimated capacity for new floor space is relatively limited in the short term but becomes more substantial in the period to beyond 2019.
- 26 While the quantitative and qualitative need for new convenience retail floor space is likely to be met in the short term by the replacement Asda store (the effect of which increase the market share of convenience goods expenditure retained within Zones 4 and 14) we consider that there is more



substantial scope to achieve improved market share retention of comparison goods expenditure in Ashington town centre, should the planned investment proposed in the Ashington town centre SPD, be realised. One helpful factor which provides some optimism that the regeneration strategy can be realised is the relatively high level of retail operator demand for a new retail floor space within Ashington as described in paragraph 10.63 of the Study. Nevertheless, there are some fairly significant hurdles to overcome in order to achieve the preferred re-development strategy described in Figure 4 of the SPD, including the successful relocation of the bus station and depot, potentially requiring the use of CPO powers to overcome difficulties in acquisition.

- 27 While the aspiration to achieve substantial improvements to the retail offer within Ashington town centre are acceptable in principle, the potential effects of consequent changes in market share on the potential to achieve regeneration proposals within nearby Cramlington and Blyth will need to be addressed. As such, any new major retail proposals coming forward in conjunction with the town centre SPD would need to provide evidence on the potential impact on other centres, in accordance with Policy EC14.6 of PPS4.
- 28 Overall, it is concluded that its scope to accommodate substantial increased in comparison retail floor space within Ashington town centre in accordance with the adopted town centre SPD, so that there is no requirement to identify any alternative sites outside that area for additional retail floorspace over the period to 2026.

Berwick-upon-Tweed Town Centre

- 29 Similar to many of the historic market towns within North Northumberland, Berwick's potential for expansion is significantly constrained by its historic environment and important conservation area status. As a result, many of the modern retail developments that have taken place within Berwick have occurred beyond the town centre, as opportunities for comprehensive redevelopment within the primary shopping area are clearly constrained/limited. Also, the role and function of Berwick-upon-Tweed Town Centre is clearly constrained by the proximity of regional shopping destinations such as Edinburgh to the north, which will always have a strong influence on non-food shopping patterns within Berwick's wider catchment.
- 30 Despite this, the evidence gathered by Infonet confirms that Berwick-upon-Tweed is a relatively healthy centre which performs an important role in meeting both the needs of its local



community/rural hinterland, as well as servicing the requirements of the many visitors to the centre throughout the year.

- 31 In 2006, several applications were received by the Council for further retail development within and around Berwick. The planning applications were for both convenience and comparison goods floorspace which sought to address any quantitative and qualitative deficiency which existed at that stage. The numerous applications were dealt with at a Public Inquiry which resulted in the granting of planning permission for a new Tesco foodstore, an extension to the existing Morrison's foodstore, and a new non-food retail park on North Road. In granting planning permission for the three retail developments, the Inspector concluded that Berwick-upon-Tweed was a vital and vibrant centre and that there were no sequentially superior sites available within the town centre that could accommodate the development proposed.
- 32 Whilst at this stage none of the schemes permitted have yet been implemented and opened for trading, it is evident that these permissions are significant material considerations when assessing the need for future redevelopment opportunities within Berwick-upon-Tweed.
- 33 The analysis undertaken as part of this study confirmed that convenience goods shopping patterns are still currently dominated by the existing Morrison's foodstore to the north of the town. Since the survey was completed, Asda have now occupied the existing Co-op store which will clearly provide greater competition for the existing Morrison's store, but is unlikely to fully address the qualitative deficiency identified by the Inspector when granting planning permission for the Tesco foodstore.
- 34 On the basis that the Morrison's extension will be implemented, and that the Tesco foodstore is now open, combined with the rebranding of the Co-op store and the previous opening of an M&S Simply foodstore, we anticipate that there will be no requirement to identify any further sites or opportunities for convenience goods floorspace development over the next plan period.
- 35 With regard to comparison goods floorspace, it is evident that the extension of the Morrison's store and the new Tesco foodstore will include a proportion of non-food goods. As a result, the limited medium-term need identified by the study will be more than addressed through these developments. Furthermore, although the implementation of the non-food retail park at North Road may be more uncertain, even if that development is not implemented and planning permission lapses, the Council will only have to consider the implications of this post-2019. Therefore, it is



recommended at this stage that it is unnecessary for the Council to identify significant comparison goods retail sites/opportunities within Berwick-upon-Tweed given that any need through to 2019 and beyond will be met by the existing foodstore proposals regardless of what happens to the retail warehouse scheme at North Road.

- 36 However, this does not rule out the potential for bringing forward small scale redevelopment opportunities within the town centre over the plan period whereby a mix of uses might be more appropriate and at a scale which can respond positively to the limited size of opportunities available within the town centre and the constraints of the conservation area.

Blyth Town Centre

- 37 Blyth town centre is the third most important centre within the County as measured by floorspace, total turnover and market share within the study area. In respect of the health check assessment carried out by Infonet, the centre scores relatively well in terms of a number of vitality and viability indicators including relatively low commercial yields, reasonably high shopping rents, reasonably low vacancy rates as compared to the UK average (although there are areas within the centre where vacancy levels are concentrated and relatively high). In contrast to Cramlington and Ashington, there are fewer centre visitors who are dissatisfied with the choice of shops available within the centre. The centre is viewed as being accessible by car and by public transport. Indeed it is only really in terms of the centres' cleanliness that the perception of the centres' vitality and viability is rated as relatively poor.
- 38 The results of the household shopping survey indicate that within Zones 5 and 12, which is the primary convenience shopping catchment area for Blyth there is a reasonably high level of expenditure retention for convenience goods expenditure (74%), although that market share is heavily influenced by the strong attraction of the out of centre Asda store Cowpen Road, on the edge of the town, which has a wide influence on convenience shopping patterns. The existing town centre convenience provision is relatively modest and the anchor store, Morrison's, is in qualitative terms, very poor. In respect of comparison retailing, as is common with most of the other settlements within Northumberland, the household shopping survey reveals substantial leakage of comparison expenditure from Blyth's shopping catchment area (Zone 12), particularly to Newcastle City Centre. This suggests that there would be benefits in pursuing a strategy which seeks to enhance the comparison expenditure market share within Blyth. Nevertheless, even based on the



steady market share approach adopted in this study, there is assessed to be substantial expenditure capacity to support new comparison retail floorspace within Blyth town centre particularly in the period from 2019 onwards.

- 39 We have reviewed the various public regeneration initiatives for Blyth town centre contained in the adopted development briefs for Commissioners Quay, Dun Cow Quay, the Bus Depot site and the supermarket site. The latter brief relates to the existing centre Morrison's store and adjoining land and that initiative is currently being pursued by virtue of a planning application proposing a replacement Morrison's store in accordance with the main aim of the brief. As such, the proposal should be supported in principle.
- 40 In respect of the Commissioners Quay and Dun Cow Quay redevelopment proposals, both of these sites are somewhat remote from the town centre and have little or no commercial presence which would render them of interest to potential retail or commercial leisure investors. Sensibly, neither of the development briefs envisage retail or commercial leisure uses as forming a major part of the proposed mixed use developments on those sites and we do not recommend their allocation for retail or major commercial leisure use.
- 41 The Bus Depot site, however, is within the Experian Goad defined town centre area and is well related to the existing bus station and the enclosed Keel Row shopping centre, which is the main attractor in the centre. Therefore, the redevelopment of this site provides a realistic opportunity for accommodating town centre uses, particularly comparison retail or major commercial leisure development. We understand that the key to unlocking this site in terms of availability is to identify an alternative location for the existing bus depot, which to date has proved difficult. Subject to that constraint being overcome, we would recommend that this site be safeguarded to accommodate the short to medium term requirements for comparison goods retailing within Blyth.
- 42 In addition, we are aware that there have been discussions over recent years with the owners of the Keel Row shopping centre regarding proposals to extend the shopping centre into the car parking area to the north. While we understand that the ownership of the Keel Row shopping centre has recently changed, the principle of extending that shopping mall in order to encourage a greater diversity of retail operators into the centre should be encouraged, subject to consideration of alternative car parking provision. In addition to those opportunity sites, we believe there are further



opportunities for redevelopment of parts of the existing centre involving existing poor quality and vacant premises on either side of Union Street.

43 While the level of comparison retail expenditure leakage from Zones 5 and 12 to Newcastle City Centre would suggest that it would be beneficial to adopt a strategy seeking to increase the level of market share by claw back of expenditure, we would suggest the following factors would counter that approach:

- (i) There is no evidence of any current retail operator demand for location within Blyth.
- (ii) Notwithstanding the evidence of popularity of the centre for the local people who currently shop there, it is not perceived as a priority location by the type of mainstream and higher order national multiple retailers represented in Newcastle city centre and the Metrocentre, Gateshead. Therefore, the chances of Blyth town centre attracting the critical mass of such high street retailers into the town centre to represent a realistic alternative of shopping destinations to those high order centres, is virtually nil.
- (iii) Other than the opportunity sites identified above suitable to accommodate the retail floorspace needs arising from this study, there are no obvious commercially viable, suitable and available sites within or on the edge of the town centre that could accommodate large scale comparison goods retail developments likely to be occupied by high street retailers. Therefore, any such operator requirements, arising from higher levels of quantitative need (as a result of planned increases in market share) are most likely to be met in out of centre locations, probably in the form of a retail park located close to the strategic road network (the A189). Such a development would be potentially harmful not only to Blyth town centre, but also Cramlington and Ashington.

Cramlington Town Centre

44 Cramlington is the largest centre in the County by floor space and turnover and has the largest market share (combined convenience and comparison expenditure) of all of the town centres in Northumberland. The health check assessment carried out by Infonet indicates that the centre is performing relatively strongly in terms of a number of the PPS4 vitality and viability indicators including the offer of a wide diversity of town centre uses; low vacancy rates; good accessibility by car and public transport and an attractive and safe shopping environment. However, there are negative consumer perceptions of the choice of shops available in the centre and views that the



centre parking could be improved as well as a perceived need for enhanced leisure facilities, including a cinema and bowling alley.

- 45 The household shopping results showed that the response of many residents in the defined Cramlington shopping zone (11) to the perceived lack of choice of retailing in the centre was to shop elsewhere, particularly for comparison goods, with considerable levels of comparison expenditure leakage being identified, mainly to Newcastle City Centre. In contrast, Cramlington is highly self-contained in terms of convenience shopping. The household survey reveals that very high proportion (81%) of the expenditure generated in Zone 11 (centred on Cramlington) is retained by existing stores in that zone.
- 46 Our assessment of need has identified a quantitative requirement for a new medium sized foodstore, or substantial extension to one of the existing foodstores over the period to 2026 and substantial quantitative capacity for new comparison floorspace has been identified over the same period, although towards the latter end (post-2019). Additional qualitative requirements for a cinema and bowling alley have been identified.
- 47 The assessed quantitative capacity for new floor space is based on an assumption of a steady state market share. While that is a reasonable assumption in this case for forecasting future convenience floor space capacity, the high level of leakage in comparison in goods expenditure from Zone 11 suggest that there would be major benefits in seeking to achieve a step change in the quantum and quality of comparison retail provision in Cramlington town centre. This would encourage greater numbers of local people to spend more on comparison goods retailing within that centre, resulting in a higher market share.
- 48 In the case of Cramlington, there is a relatively favourable set of circumstances prevailing which are likely to assist in the achievement of that objective, such as:
 - (i) The willingness of the owners of the major part of the centre (Hammerson) to achieve that step change through investment in the centre. Aspirations and emerging strategies to develop the town centre have been discussed with the Council for a number of years and we understand that a detailed, costed and phased re-development strategy, which could



potentially result in a substantial net increase in retail floor space, plus substantive improvements to leisure facilities, has been prepared.

- (ii) While the existing (Experian Goad defined) town centre area is fully occupied by existing town centre uses and associated car parking, there appears to be no overriding physical or policy constraints (e.g. listed buildings/ conservation areas) to achieving redevelopment through reconfiguration, intensification and relocation of uses. Due to the planned development of the settlement as a new town, the capacity of the road system leading to and around the centre is likely to be adequate to accommodate the additional traffic movements associated with major new retail development within the centre.
- (iii) Due to the fact that the settlement has been planned as a new town, and that the town centre area is physically well defined, there is scope to achieve substantial new town centre floor space development within the (Experian Goad defined) town centre area without needing to expand those boundaries or search for out of centre locations to meet the requirements of any new developments for major retail floor space.

49 While supporting the principal of achieving a step change in the quantity and quality of comparison retail development in Cramlington town centre, a few notes of caution should be raised, as follows:

- (a) Detailed consideration should be given, in the context of any submitted proposals, regarding the extent to which the resulting increase in market share of comparison expenditure associated with the new development could impact on the health of other important centres within Northumberland and future planned public and private sector investment in those centres, in accordance with policy EC14.6 of PPS4.
- (b) We have some reservations about whether any redevelopment scheme for Cramlington town centre would be able to attract the critical mass of quality high street retailers to affect a significant and lasting change in the current pattern of shopping by local people in the context of the strength of the attraction of major destinations such as Newcastle City Centre and the Gateshead Metrocentre.



Hexham Town Centre

- 50 Hexham Town Centre again shows clear signs of being a vital and viable centre with a low vacancy rate and a good mix of independent and national multiple retailers. The town centre is clearly underpinned by a strong convenience offer, much of which is located on the edge of the town centre, including the Tesco Extra, Aldi and Waitrose supermarkets. The centre also benefits from the key anchors underpinning the retail offer including M&S and the well established Robb's department store.
- 51 Like many of the historic centres within Northumberland, Hexham benefits significantly from the quality of its environment and the strong presence of independent retailers which, whilst adding to the overall mix of retailers found within the town, add a quality of service which commands a loyal local catchment.
- 52 Although concerns were raised in the Infonet research as to a lack of car parking within the town centre, it is evident that there are a number of large car parks serving the existing foodstore and town centre which are located just a short walk from the primary shopping area. Therefore, Hexham is a highly accessible centre benefiting from its proximity to the A69 and major bus routes which serve the central core.
- 53 It is unsurprising, given the strong offer within the convenience goods sector to find that Hexham achieves a significant market share within its immediate catchment (Zone 9 of the Study Area). However, the strong provision of retail floorspace within Hexham when compared to the capacity/need generated by its catchment and hinterland, it would appear that there is an over-supply of convenience goods floorspace within the centre as a whole. The growth in population and expenditure through to 2026 is not significant enough to address this over-supply and therefore, it is apparent that there will be no need to identify any further sites for convenience goods floorspace within Hexham over the next plan period.
- 54 This position will be further reinforced by the proposed new developments within Prudhoe whereby a new foodstore will be implemented and will clearly claw back trade currently lost to Hexham reinforcing the current over-supply of floorspace identified within this study.



- 55 In terms of the future need for comparison goods floorspace, it is evident that Hexham again achieves a strong market share within its immediate catchment and has a significant role to play within this part of the sub-region. However, with the limited forecast growth in comparison goods expenditure over the short to medium-term (i.e. the next five to 10 years), it is anticipated that any significant need for additional comparison goods floorspace will only arise at post-2019.
- 56 As with the other important historic centres within Northumberland, the opportunities for comprehensive redevelopment at the very heart of the centre are extremely limited. However, there are significant areas of land located between the primary shopping area and the key edge-of-centre retail destinations which could accommodate additional retail development in the longer-term. Whilst much of this land is currently used for car parking, this does not rule out the potential opportunity for comprehensive redevelopment which would provide replacement car parking either as part of the scheme, or elsewhere within the town centre. Clearly, any expansion of the centre towards the existing Tesco Extra and Waitrose supermarket would help reinforce future linkages between these edge-of-centre retail attractors and the primary shopping core, thereby hopefully facilitating additional linked trips.
- 57 However, given the current limited demand in the non-food retail sector and the current over-supply of convenience goods floorspace within Hexham, we would not envisage that Hexham Town Centre would be under significant pressure to identify potential redevelopment opportunities in the short to medium-term. Clearly, the majority of town centre and edge-of-centre redevelopment is currently being driven by the convenience goods sector. Therefore, as we anticipate there will be limited demand for comparison goods retail development within Hexham in the short-term, it would appear that the Council has sufficient time to carefully consider the future expansion and development of the town centre, whereby suitable redevelopment opportunities are identified that will help reinforce the future vitality and viability of the centre, by encouraging linked trips between any new development and the established retail core focussed on Fore Street and Battlehill/Cattle Market.

Morpeth Town Centre

- 58 The Health Check Assessment prepared by Infonet on behalf of Northumberland County Council was prepared at a transitional period in Morpeth Town Centre's ongoing development. At that time, the key town centre redevelopment opportunity known as Sanderson Arcade had not yet been completed and was therefore not open for trading or fully let. Since the health check was



undertaken, the scheme is now up and trading and includes major high street anchor retailers such as M&S, Waterstone's, New Look, Laura Ashley, Paperchase, etc. Clearly, such a development will have had a significant impact on the health and fortunes of Morpeth Town Centre and these positive benefits are unlikely to have been fully reflected within Infonet's analysis.

- 59 It is evident from visiting the scheme implemented by Dransfield Properties that this is a high quality town centre redevelopment which connects directly into the existing primary shopping area with a direct route through to Bridge Street. The Arcade also provides an important link from Bridge Street through to the main car park in the town centre which also serves the existing Morrison's supermarket. By attracting major anchors including M&S, the scheme will have certainly impacted upon Morpeth's attraction within its immediate catchment and will have met a significant part of the town's needs in relation to comparison goods development within the medium to long-term.
- 60 The analysis undertaken as part of this report has identified that the need for future comparison goods floorspace within Morpeth through to 2026 is clearly tempered by its current market share within the wider sub-region, and the fact that the town performs an important local role serving the needs, primarily, of its local catchment/community. However, it is important to note that with the opening of Sanderson Arcade, it is likely that Morpeth will also appeal to a wider audience given the inclusion of key high street national multiples which are not present in any of the centres in the northern part of the County. As a result, it is highly likely that people living within the catchments of other centres such as Alnwick could be drawn to Morpeth Town Centre to visit key retailers including, M&S, Laura Ashley, New Look, etc.
- 61 Despite this, we would not expect the market share of Morpeth Town Centre to change dramatically over the emerging plan period and therefore, the town centre would still be primarily seeking to serve the needs of its local community and rural inter-land.
- 62 As a result, we would not anticipate the need for any major comparison goods redevelopment opportunities to be identified within the short to medium-term, i.e. within the next 10 years. The scale and quality of the Sanderson Arcade scheme provides a development which in a centre the size of Morpeth is often something that is secured once in a generation, rather than every five years. As a result, whilst there may be other opportunities to pursue further comparison goods development in the future, we do not anticipate that there will be a need to identify opportunities at this stage.



- 63 The analysis undertaken in relation to convenience goods floorspace identifies that current provision within Morpeth is broadly in line with current demand. However, we note that within its immediate catchment (i.e. Zones 13 and 3); there is the potential for Morpeth to increase its market share to retain a greater proportion of convenience goods shopping trips locally. Clearly, the choice at present within Morpeth Town Centre is limited to Morrison's, M&S, Lidl, and Iceland, as well as other independent convenience stores. Given that only one of the "big four" supermarkets is present within the town, it is not surprising that trade is currently leaking elsewhere, particularly if local residents do not like the Morrison's brand.
- 64 In order to address this qualitative shortfall, three new supermarket proposals were put before the Council this year. The Council resolved to grant planning permission for a new supermarket, again promoted by Dransfield Properties, on Staithes Lane in Morpeth Town Centre.
- 65 Whilst this development is currently in its early stages, it is evident that the proposed store will address the current qualitative need within Morpeth and provide greater choice and competition for local residents. The location of the proposed development will also mean that there will still be opportunities for linked trips to occur between the new foodstore and the primary shopping area within Morpeth Town Centre. This is fundamental to securing the ongoing vitality and viability of Morpeth Town Centre, given that the other two proposals would have taken valuable trade away from the existing Morrison's store which currently forms an important part of the overall town centre retail offer.
- 66 As the proposed new foodstore will also include an element of comparison goods floorspace, it would appear that the current proposals being pursued by Dransfield Properties will meet both the comparison goods and convenience goods needs of the town centre in the short to medium-term.
- 67 Therefore, at this stage we do not believe that it is necessary to identify additional sites within or on the edge of Morpeth Town Centre until greater clarity is provided as to the implementation of the proposed foodstore, and the consequences for any additional need for retail floorspace beyond this.



Key Recommendations and the Future Role of Proposed District Centres

- 68 In certain district centres there are existing commitments or proposals which would appear to meet the identified need in this study (such as Prudhoe and Amble). In the other centres (Bedlington, Haltwhistle and Ponteland) there would appear to be no pressing need for the Council to be allocating sites for significant retail development in the future. However, as highlighted below, there are a number of qualitative arguments that could be pursued to support additional provision in the future. As these would tend to be 'operator driven' it is possible that there will be further future commercial demand for new retail floorspace, most likely in the form of new foodstores, within those settlements. We therefore recommend that the retail strategy also incorporates a criterion based policy (reflecting on the key tests for retail development in PPS4) in order to consider the appropriateness of any such proposals over the plan period. Under Policy EC3.1d of PPS4, the opportunity is provided to set local level thresholds for the scale of edge of centre or out of centre development which should be the subject of an impact assessment under EC16.1. The default scale of development over which an impact assessment is required is 2,500 sq m gfa. Given the relatively modest scale of the various proposed district centres in Northumberland a development smaller than that size could have a potentially substantial effect on the role and function of the centre. We therefore suggest that it may be more sensible to adopt a local threshold of 1,000 sqm (gross floor area) for which the proposed criterion based policy for determining unplanned future retail proposals in those towns would apply.
- 69 A summary of the centres recommended to perform the role of district centres within the overall hierarchy is set out below.

Amble District Centre

- 70 Whilst our analysis demonstrates no clear quantitative for additional convenience goods floorspace in Amble, it is important to note that this is based on maintaining current market shares. As outlined in Section 10, some 87% of convenience goods expenditure generated in Zone 15 (Amble) is directed to facilities elsewhere, including 91% of main food shopping trips. Unsurprisingly, the most popular destinations are existing main food shopping destinations in Ashington and Blyth.
- 71 In summary therefore, there would appear to be a qualitative need to improve the convenience goods offer in Amble in order to address the current deficiency in main food shopping provision.



However, we are aware that outline planning permission currently exists for a 2,787 sq m (gross) foodstore in Amble. If implemented, this store will help to reduce the need for local residents to travel to facilities elsewhere (such as Ashington, Blyth and Alnwick), thereby providing more sustainable shopping patterns. The store will also include an element of comparison goods which will help meet the identified need for Amble.

Bedlington District Centre

- 72 There are no requirements for additional retail floorspace (convenience or comparison goods) in Bedlington, based on a continuation of an existing market shares. The estimated turnover of existing facilities are projected to outstrip the expenditure available over the whole of the period assessed. Moreover, the market share achieved by the existing shopping facilities is low, even within Zone 5 wherein Bedlington sits.
- 73 There is a current proposal to replace the existing Tesco store within the centre of Bedlington with a larger store and this qualitative improvement will enable a higher market share to be achieved within Zone 5 for convenience retailing, by clawing back expenditure currently being directed principally to the out of centre Asda store at Cowpen Road, Blyth. Apart from that development, we consider there is no realistic scope to achieve further quantitative or qualitative enhancement of retail provision in the short to medium term and we therefore do not recommend allocation of any sites for future retail development within Bedlington. A larger Tesco store plus the existing Netto (now owned by Asda) would provide a reasonable range in quality of food retailing for a settlement of this size. The modest scale of the centre, its proximity to Morpeth and Ashington, both higher order centres, and the evident lack of retail demand, combine to restrict the opportunity to achieve further comparison retail growth in the centre.

Haltwhistle District Centre

- 74 Existing facilities within Haltwhistle are identified to be trading below expected levels – particularly the Sainsbury's Local. Therefore, based on maintaining existing market share there is no clear need for additional convenience goods floorspace in Haltwhistle through to 2026. However, as previously highlighted, the vast majority of local residents within the Haltwhistle area have to travel to facilities nearby to undertake their main food shopping because of the lack of provision locally. The existing Co-op and Sainsbury's Local stores only really perform a top-up shopping role which cannot



compete with other larger foodstores elsewhere (such as Hexham). On this basis, there would appear to be a strong qualitative argument for improving the convenience goods offer in Haltwhistle (particularly focused on meeting main food shopping needs) which in turn would help to reduce the need for local residents to travel elsewhere.

- 75 Such a facility could also provide additional comparison goods floorspace that would also help meet the need identified in this sector.

Prudhoe District Centre

- 76 A combination of reasonable market share retention within Zone 8 and overtrading in the existing Co-op store, gives rise to a quantitative requirement for a modest sized new supermarket, with a turnover equivalent to a typical discount foodstore (by 2019) based on a continuation of current market shares. Such a store would bring competition and choice to the established centre which is currently dominated by a single retailer. This in turn would result in some claw back of convenience expenditure lost to the Asda store in the Metrocentre and foodstore in Hexham.

- 77 However, it is noted that there is the prospect of the re-submission of a proposal for large scale convenience and comparison retail floorspace on land to the rear of Front Street, within the town centre, following a High Court ruling which overturned the previous planning permission on that site.

- 78 Should such a large scale mixed use development (including a large foodstore) come forward, the effect would be a significant increase in retail market share within Zone 8. This could increase the overall turnover of Prudhoe town centre and the floorspace within it, to the point where it begins to operate at a higher level than the district centre status we are currently recommending for it. As such, any new proposals coming forward at Front Street will require careful scrutiny to ensure that the resulting scale of the centre and its function does not undermine the future role of Hexham as an established town centre.

Ponteland District Centre

- 79 Ponteland is an attractive location, offering a reasonable range and quality of convenience retail provision and retail services within a somewhat unstructured and dispersed shopping area. The main attraction within the centre is the recently opened Waitrose store, although there is also a



Sainsbury's Local store. The comparison goods market share is low within Zone 7, with considerable leakage of expenditure to higher order centres.

- 80 Based on the assessment of need carried out on the basis of retaining existing market shares, there is no requirement to allocate any sites for new convenient or comparison retail development within Ponteland.

Key Recommendations and the Future Role of Proposed Local Centres

- 81 Future demand for new retail floorspace within local centres in the county is also most likely to arise from food retailers. The appropriateness of such proposal can be assessed using a criterion based policy as suggested above. An important consideration will be whether the scale of the development proposed would be proportionate and in keeping with the role and function of the local centre, or whether it would elevate the status of the centre to the next level, potentially affecting the vitality and viability of existing district centres within the catchment area. For that reason we would suggest a local threshold of 750 sq m gfa, within the criterion based policy to apply to all of the local centres.



1.0 INTRODUCTION

Scope and Purpose

- 1.01 WYG Planning & Design (WYG) was commissioned by Northumberland County Council in July 2009 to undertake a Town Centre and Retail Study. In response to the Tender Specification this report seeks to provide:
- An assessment of quantitative and qualitative need for new floorspace for retail, commercial and leisure uses within the new authority area of over the period to 2026.
 - Advice on how any identified floorspace requirements should be distributed amongst the main and secondary centres, including the review of centre capacity to accommodate growth.
 - The vitality and viability within existing main and secondary centres in Northumberland and to review the centre hierarchy.
 - Recommendations regarding the definition of primary shopping areas within the main centres in the County.
- 1.02 This study includes an in-depth analysis of the retail and other town centre uses within the main centres of Northumberland. This includes an assessment of the extent to which the centres are meeting the needs of the local community with regard to retail and other town centre uses as well as examining the role of the local network of centres and the Sub-Regional shopping hierarchy.
- 1.03 In undertaking the study, regard was had to the relevant advice contained in Planning Policy Statement 4 (PPS4) 'Planning for Sustainable Economic Growth', which was published in December 2009, along with other relevant legislation, advice and good practice.



2.0 CURRENT AND EMERGING TRENDS IN RETAILING AND OTHER MAIN TOWN CENTRE USES

Introduction

- 2.01 The retail and leisure property landscape across the UK has changed significantly over the past 50 years, from post-war redevelopment in town centres, through to the emergence of the retail warehouse parks and out-of-town regional shopping malls and out-of-town leisure destinations.
- 2.02 During this time, the retail and leisure sectors have both experienced considerable growth. Spending on retail goods has increased significantly over the past decade, particularly spending on comparison (or non-food) goods. This expenditure growth is attributable to a number of factors, including greater disposable income, cheaper prices and new technology.
- 2.03 However, amongst other things, poor investment and lending policies by banks led to the UK entering recession in mid 2008. Whilst this is a global economic downturn, the UK has been hit particularly hard by the recession, including many UK retailers.

Current Retail Picture

- 2.04 Research undertaken by CBRE (Spring Retail Report, 2010) provided information on recent trends together with forecasts for the future of retailing in the UK. The research identifies that although the UK retail sector has entered 2010 in a stronger position than was predicted, the coming years are still likely to be difficult for the retail industry. Demand and output in the economy was greatly reduced in 2009 and it could be that retailers may be even harder hit in the future.
- 2.05 A number of retailers have fallen into administration and, with large scale closures and new development flooding the market, Zone A rental levels are generally falling. CBRE states that, due to the challenging trading conditions, there are currently no retailers looking to expand rapidly and that incentives offered in order to make retail units more attractive will continue to rise in shopping centre and mid-market locations.
- 2.06 Whilst it is anticipated that the current slow down in the economy will not last significantly beyond 2010, it is notable that Oxford Economics, which identifies the latest retail consumer expenditure in



the UK, has recently significantly revised its forecast growth rates for comparison goods expenditure. Its forecast annual per capita comparison growth rate to 2014 has been reduced from +5.0%¹ to +1.6%², after assessing the implications of the recession. This represents a significant reduction in the forecast growth of comparison goods expenditure from that experienced in recent years.

- 2.07 In line with the above expectations, it has been widely reported that a number of high street retailers suffered poor trading figures during the latter part of 2008, resulting in many operators selling heavily reduced goods. Despite heavy discounting over the 2008 festive period and the reduction in VAT from 17.5% to 15.0% until January 2010, a number of retailers fell into administration around the end of 2008 and the early part of 2009, including Woolworths, Adams and Zavvi. Further losses to the high street are expected during the coming years, particularly with the likely increase in VAT to a level about 17.5%.
- 2.08 Despite the difficulties set out above and the general decline in the comparison goods sector, specific types of goods continue to perform well. The market for recreational goods (including DVDs, CDs, toys, computers and books) has performed well in recent years, with healthy growth attributed to supermarket sales together with the growing popularity of online shopping, which continues to see an increase in sales year-on-year.
- 2.09 Convenience goods expenditure, although suffering a downturn and a slight negative per capita forecast growth rate, is not predicted to be the subject of as great a decrease in percentage points terms as comparison goods expenditure. Oxford Economics' most recent forecast suggests an annual per capita convenience growth rate to 2014 of 0.5%³, compared to a previous forecast of +1.5%⁴.
- 2.10 Perhaps as a consequence of these conditions, discount convenience retailers such as Aldi and Lidl have performed well during the recession. Similarly, Iceland has also seen an increased performance and has recently purchased a number of former Woolworth stores as it seeks to

¹ Average annual per capita comparison goods growth rate between 2005 and 2012 provided by Oxford Economics in MapInfo Information Brief 07/02, published September 2007

² Average annual per capita comparison goods growth rate between 2008 and 2014 provided by Oxford Economics in MapInfo Information Brief 09/02, published September 2009

³ Average annual per capita convenience goods growth rate between 2009 and 2012 provided by Oxford Economics in its Revised Retail Spending Outlook, published March 2009

⁴ Average annual per capita convenience goods growth rate between 2008 and 2014 provided by Oxford Economics in MapInfo Information Brief 09/02, published September 2009



expand. Conversely, Marks & Spencer has not performed as well resulting in the closure of some of its Simply Food stores throughout the UK, although it is still committed to opening a number of new stores elsewhere and may decide to increase its numbers of Simply Food stores at motorway service stations.

Trends in Comparison Goods Shopping

- 2.11 Whilst it is anticipated that growth in retail spending over the next ten years will not mirror that of the last decade, there will continue to be some growth in comparison goods expenditure. Consequently, there is increasing impetus from retailers to achieve more efficient use of floorspace, particularly given the recent poor performance of many national multiples, many of which have been affected by the significant increase in e-tailing. As a consequence of their recent performance, retailers are more reluctant to commit to new development than they have been in previous decades. Instead, they are more selective and are holding out for accommodation that is appropriate both in terms of location and the type of premises provided. Indeed, retailers are seeking to occupy larger units in order to achieve more efficient use of floorspace and attract shoppers from a wider area. These larger floorplates enable retailers to provide a greater range of goods.
- 2.12 International market conditions and price deflation in some key sectors means that many high street names are becoming increasingly vulnerable to takeovers. Similarly, due to increased competition there have been a number of high profile losses from the high street, including Littlewoods, Music Zone, Woolworths, MFI and The Pier.
- 2.13 There will continue to be demand for larger, modern retail units in the future, although increased sensitivity over future viability will mean a cautious approach to new investment for many key national retailers. Marginal locations within centres will increasingly be rejected. Whilst many national retailers would previously consider smaller/lower order centres in order to increase their market share, the ongoing downturn in the economy has resulted in a number of retailers assessing the performance of existing stores and the potential closure of underperforming stores. Consequently, many investment decisions will be influenced by the scale of commitment from other retailers; developers will increasingly need to promote large town centre redevelopment schemes if they are to attract high quality retailers.



Trends in Food Retailing

2.14 In the aftermath of the growth in the number of edge and out-of-centre large format supermarkets during the 1990s, development of such facilities is now more limited due to stricter planning laws, following the publication of PPS6 (and now PPS4), and a lack of suitable sites. As a result, the national multiples in the food retailing sector are finding a range of other measures to improve their market share. These include:

- Offering a wider product range, such as financial and insurance products, petrol and non-food goods;
- Developing a wider range of outlets, for example small-format convenience stores in town centres (e.g. Sainsbury's Local, Tesco Express), smaller supermarkets mostly in town centres (e.g. Tesco Metro), superstores (e.g. Tesco) and hypermarkets (e.g. Tesco Extra, Asda Supercentres);
- Extended opening hours;
- Offering cheap products and no-frills service;
- Providing an attractive and powerful brand image; and
- Offering a home delivery service.

2.15 Verdict (2009)⁵ estimates that the food and grocery market was worth £124.1bn in 2008. Verdict identified that in 2008 food and grocery specialists defied wider retail market gloom, increasing their combined sales by 5.0%.

2.16 Verdict identifies that the 'credit crunch' and subsequent recession, allied with a bout of inflation have had a profound impact on consumer behaviour and the wider dynamics of grocery retailing. Price, or specifically value, is now identified as the key issue for consumers and more and more shoppers are looking at value for money. Consequently, supermarket operators have responded with new products at lower prices. The focus has shifted towards lower price point products. For example Tesco has launched its Discount range.

2.17 Given the recent success of the food and grocery market, during 2008 retailers' total space increased by 1.3%, delivering an additional net 1.5m sq ft of new floorspace (Verdict 2009). The 'Big Four' (Asda, Morrison's, Tesco and Sainsbury's) have been highly active in both new store

⁵ Verdict – UK Grocery Retailers, April 2009



openings and extensions, particularly from Morrison's and Sainsbury's. In addition, Verdict also identifies that Waitrose, Iceland and hard discounters, such as Aldi and Lidl, have been particularly busy in developing more retail floorspace. Hard discounters such as Aldi and Lidl appear to have benefitted from the recession, opening new stores and increasing their market share, including a proportion of more affluent ABC1 shoppers (Verdict 2009).

- 2.18 Chase & Partners (2010) describes Tesco as being the third largest grocery retailer in the world and has well over 2,000 stores in the UK. In fact, some 2,000,000 sq ft of new retail floorspace was opened in the UK last year. More green technology and a reduction in their carbon footprint are clear objectives for their store development programme in the coming years.
- 2.19 ASDA contains the second highest market share in convenience retailing and has a portfolio of 371 stores in the UK. ASDA's performance is solid and their customer base continues to grow (Chase & Partners 2010). Furthermore, in May 2010, Asda bought Netto, in an aggressive bid to close the gap on Tesco, increasing their portfolio by 193 stores.
- 2.20 Chase & Partners (2010) states that Sainsbury's have demonstrated that their recent resurgence has not been short-lived. Last year they opened 38 supermarkets, meaning they now have 525 mainline supermarkets and their growth and expansion plan is likely to continue. Furthermore, sales increased by 5.7% between 2008 and 2009, highlighting their strength as a food retailer.
- 2.21 Following Morrison's merger with Safeway, it now has 425 stores across the UK. They opened 11 new stores between 2008 and 2009, whilst underlying profit shot up by 21%. Morrison's has expanded their portfolio in the southern half of the country, with most of their recent acquisitions being in this region (Chase & Partners 2010).

Out of Centre Retailing

- 2.22 Chase & Partners (2010) describes competition for out-of-centre representation as being much reduced. Landlords have had to offer incentives to potential tenants, including rent free periods, although as the market improves, this should change. The size and location of out-of-centre units remain important to retailers and in particular, smaller units have become more popular.
- 2.23 Some out-of-centre retailers for example MFI, Land of Leather and Allied Carpets have either gone into administration or ceased trading. However, new out-of-centre retailers, for example John Lewis



at Home, DW Sports and Best Buy may look to fill these voids in the coming years. Value retailers, for example B&M and Home Bargains have performed well in this market. Furthermore, other established retailers such as Pets at Home will look to expand as the market improves.

Shopping Centre Development

- 2.24 Some confidence returned to the shopping centre investment market in the latter part of 2009. The size of retail units was a key issue for investors. Prime yields started to increase, attracting more aggressive investors. Although, shopping centres of a poor quality and/or those in a poor location struggled to recover.
- 2.25 In future years, secondary shopping centres will continue to suffer, with rents declining and vacancies increasing. Although, dominant shopping centres are likely to consolidate their market position.
- 2.26 The research also identifies that retailers are reluctant to commit to schemes before they are constructed due to difficult trading positions and a large amount of supply. Retailers are able to 'cherry-pick' the best schemes to which they commit, and the largest anchor stores in particular, including Debenhams, House of Fraser and Marks and Spencer, are able to negotiate very favourable letting terms.
- 2.27 Town centre shopping centre schemes that will be successful in the future are considered to be those which benefit from good design and good location. Good transport links together with car parking facilities are also a distinct advantage. It is this type of development that will be able to compete with out-of-centre shopping facilities, which whilst more convenient for many consumers are considered not to offer an attractive shopping experience.
- 2.28 Although a number of major town centre schemes are still in the pipeline, the lack of funding available to developers due to the global 'credit crunch' has resulted in a number of schemes falling away.

Growth in E-tailing ('E-commerce')

- 2.29 Many consumers who previously shopped in town centres and at retail parks are now using the internet for some of their purchases. This trend is set to continue, although the exact impact that e-



commerce will have on the high street has yet to be fully established. However, the rise in the UK in recent years of e-commerce has impacted upon retailers, developers and investors alike. As access to the internet/online shopping continues to grow through digital televisions and mobile phones, proportionally less money is anticipated to be spent in the high street or at retail parks.

- 2.30 The growth in use of the internet as a sales medium has been enabled by increasing access to the internet by households. The proportion of households with access to the internet is expected to increase further over the coming years. This has supported the strong growth recorded, together with improved consumer confidence in the security of online payment, and heavy demand for expensive electrical products available online. However, it is notable that there are parts of Northumberland that still do not have broadband access.
- 2.31 A recent report by the BBC identified that more than a third (36.3%) of UK consumers now purchases goods over the internet. Moreover, the average spend per customer is increasing. The online electrical goods sector represents the largest amount of expenditure, followed by online food shopping.
- 2.32 More recent research conducted by the Interactive Media in Retail Group and analysts Capgemini indicates that internet shopping accounted for 15p of every £1 of retail spending during 2007. This equates to some £46.6 billion of expenditure. However, this compares to the British Retail Consortium's data identifying that online sales accounted for 6% of retail spending during 2007. Despite these differing results, internet spend has increased in recent years.
- 2.33 The forecast for online sales suggests that this sector could more than double over the next five years. Furthermore, online sales are expected to account for an increasing share of all retail goods sales, with a market share predicted to increase to a little fewer than 10% in 2011. Against this, forecasts by Experian (Retail Planner Briefing Note 6.1 – January 2009) indicate that whilst growth in this sector will be rapid, it will tail-off and stabilise not far beyond 12%.
- 2.34 With regard to supermarket operators, Verdict (2009) identify that with the exception of Morrison's (which does not trade online) the other major retailers have seen their online business grow over 2008 as online shopping penetration has continued to increase and as the likes of Asda and Sainsbury's have improved their geographical coverage and capacity. This growth in online purchases in convenience goods identified by Verdict compares to MapInfo (Expenditure Explanatory



Volume – 2008 Release) identifying no increase in the level of annual spend via Special Forms of Trading (e.g. online purchase) since 2005.

- 2.35 The success of internet shopping is having an impact upon traditional high streets, in light of increased competition and lower prices. Consequently, there is a possibility that online retailing will put some pressure on retail rental growth over the next five to ten years, but is unlikely to impact on capital values. Research by BCSC identifies that 'large' and 'very large' shopping centres (of over 40,000 sq m) are deemed almost immune from the impact of online shopping as they offer the complete 'day out'. Although as the size of the shopping centres decreases, it is more likely that there will be greater adverse effects. Within small shopping centres (sized between 5,000 – 20,000 sq m), including market towns, it is likely that the growth of online shopping could reduce turnover notwithstanding any growth in disposable income.
- 2.36 Furthermore, there is some evidence to suggest that the increase in e-commerce is impacting not just on high street sales, but also on the inclination of retailers to expand their 'bricks and mortar' outlets (BCSC, 2006). Despite this, retailers are optimistic, as they envisage a continued demand for physical stores and, for most, store sizes are likely to remain the same. Significantly, more retailers ranked physical stores first, ahead of all other current channels of retail distribution, and this is a pattern that they envisaged continuing. Retailers see e-tailing as another channel of distribution (BCSC, 2006).
- 2.37 As a consequence of the likely increase in e-tailing, retailers will increasingly have to adapt their stores to create more experience led environments. However, the increase in 'virtual' floorspace could result in a decrease in the level of innovation and number of new concepts and formats in the high street and in shopping centres.
- 2.38 Despite all these different assumptions with regard to the future effect of online shopping, it is considered that e-tailing will not replace the shopping experience as shopping is a social activity. Online shopping is very much seen as a complementary tool to support retail sales from physical destinations (BCSC, 2006). For successful retailers, online selling provides an additional route to the market. Online retailers benefit from demand generated through physical channels whilst high-street outlets can benefit from reaching a wider customer base through the internet.



- 2.39 In response to increased competition from the internet, high street retailers have improved their online services. The future for online retailing will mean that retailers without a website will lose out to competitors who have one. Crucially, retailers which combine a strong high-street offer with a well-represented and closely related e-tailing offer will have a positive outlook.

Trends in the Leisure Sector

- 2.40 Due to the recession and higher prices due to increased overheads, spending on leisure activities reduced in 2009. During the past five years, cultural leisure has performed the best, which includes music and concert festivals, the theatre and museums and galleries. In fact, the music concerts and festivals sector grew by over 8% in 2009, whilst the theatre (4%) and museums and galleries (4%) have also grown recently. Eating out and drinking in pubs and bars accounts for over two-thirds of total leisure spend. Eating out has seen growth of 17% in the past five years, although since the recession began, the eating out industry has had to focus more on providing value to customers. Drinking in pubs and bars has reduced by 3% in the past five years. This is due to the smoking ban and supermarkets charging low prices for alcoholic drinks.
- 2.41 Due to the economic downturn, people are most likely to have made cutbacks on drinking in pubs and bars, eating out, clubbing, going to the cinema and betting and bingo. In the coming years, people are likely to spend less on visiting theme parks and gym memberships. The family market has been particularly exposed to the economic downturn, with tenpin bowling (-3%), theme parks (-4%) and zoos/wildlife parks (-5%) having been hit the hardest in 2009.



3.0 PLANNING POLICY CONTEXT

Introduction

- 3.01 Given that this study seeks to provide important evidence that will assist in the future development of the Local Development Framework (LDF) process, it is important to review key policy advice and explore how current national planning policy may impact upon the development of policies locally.

Planning Policy Statement 4: Planning for Sustainable Economic Growth

- 3.02 On the 29th December 2009, the Government published the much anticipated PPS 4 - Planning for Sustainable Economic Growth, which provides essential guidance to assist in achieving the Governments over-arching objective of sustainable economic growth. The document seeks to support growth that can be sustained within environmental limits, but also enhances environmental and social welfare and avoids greater extremes in future economic cycles.
- 3.03 In order to achieve sustainable economic growth, the document sets out a number of key objectives for Planning which can be summarised as follows:
- To build prosperous communities by improving economic performance;
 - To promote regeneration and tackle deprivation;
 - To deliver more sustainable patterns of development and reduce the need to travel;
 - To promote the vitality and viability of established towns and other centres; and
 - To raise the quality of life and environment in rural areas.
- 3.04 As well as providing guidance on the need to gather evidence and to monitor and manage this evidence over time, the document is essentially sub-divided into two sections, with the first section focussing on plan and making policies, and the second section on development management policies (or development control as we know it). In addition to PPS4 which is a much more simplified document compared to the various statements and guidance that it replaces, there is a lengthy good practice guide which focuses on key retail policy tests including need, impact and the sequential approach. The good practice guide must be read in conjunction with the relevant sections of PPS4 that deal with Retail Planning matters and Town Centres.



3.05 In terms of planning for economic development, the new guidance seeks to ensure that the regional planning bodies and the Local Planning Authorities include the following within their development plan:

- A clear economic vision and strategy for their area;
- Support for existing business sectors, but with sufficient flexibility to respond to changes in economic circumstances;
- Planning for the location, promotion, and expansion of clusters or networks of high technology industries;
- Ensure the most efficient and effective use of land;
- Prioritising previously developed land;
- Identify, protect and promote key distribution networks;
- Co-locate developments which generate substantial transport movements where possible using rail and water transport;
- Plan for the delivery of sustainable transport and other infrastructure required to support planned economic growth;
- Disaggregate minimum job targets to each Local Authority;
- Safeguard land from other uses to meet the needs of future economic development;
- Encourage new uses for vacant and derelict buildings;
- Bring forward sufficient sites to meet the need required through the use of CPO powers, Area Action Plans, simplified planning zones, and local development orders; and
- Facilitate new working practices such as live/work.

3.06 Regarding planning for established centres, the statement reiterates much of the guidance set out in the previous PPS6, but introduces the requirement for flexible policies for established centres which are able to respond to changing economic circumstances. Furthermore, the statement requires Local Planning Authorities to consider setting floorspace thresholds for the scale of edge-of-centre and out-of-centre development which would be subject to an Impact Assessment as set out in Policy EC16.1 of the statement.

3.07 Furthermore, the guidance seeks to encourage Local Planning Authorities to pro-actively plan to promote competitive Town Centre environments and enhance consumer choice. The statement suggests that this could be achieved through:



- Supporting a diverse range of uses which appeal to a wide range of social groups;
- Plan for a strong retail mix which meets the requirements of the local catchment area;
- Support shops, services, and other important small scale economic uses in local centres and villages;
- Identify sites in the centre or failing that, edge-of-centre, capable of accommodating large format developments;
- Retain and enhance existing markets and, where appropriate, re-introduce or create new ones; and
- Take measures to conserve and, where appropriate, enhance the established character and diversity of centres.

3.08 As part of the plan making process, PPS4 confirms that Local Planning Authorities should assess the need for future economic development, including retail and Town Centre uses, and then identify an appropriate range of sites to accommodate the identified need. In identifying sites to accommodate future need, the guidance reiterates that the sequential approach to site selection should be applied. In applying this sequential approach, the first priority is for sites within existing centres, which are likely to become available within the plan period, followed by edge-of-centre locations with preference given to sites which are or will be well connected to the centre. Only then should out-of-centre sites be considered, again with preference given to those sites which are or will be well served by a choice of means of transport and are closest to the centre and have a higher likelihood of forming links. In addition, the guidance also confirms that sites which best serve the needs of deprived areas should be given preference when considered against alternatives with similar location characteristics.

3.09 Having identified the necessary sites to accommodate the need required, the impact of the development of these sites should then be assessed, particularly for developments over 2,500 sq m, or any locally set threshold.

3.10 PPS4 also provides guidance on plan making policies for rural areas ensuring that:

- Economic development in the open countryside is strictly controlled;
- Local service centres are identified as the priority for new development;
- Support the conversion and re-use of buildings in the countryside;



- Set out permissible scale of replacement buildings in circumstances where replacement buildings would not be acceptable;
- Seek to remedy any identified deficiency in local shopping;
- Set out criteria to be applied to planning applications for farm diversification;
- Where appropriate support equine enterprises;
- Support the provision and expansion of tourist and visitor facilities in appropriate locations;
- Wherever possible, locate tourist and visitor facilities in existing or replacement buildings;
- Support extensions to existing tourist accommodation where the scale is appropriate;
- Ensure that new or expanded holiday and touring caravan sites are not prominent in the landscape and visual intrusion is minimised; and
- Recognise that in areas designated for their natural or cultural heritage qualities, there will be some scope for tourist and leisure related developments.

3.11 In seeking to determine planning applications for economic developments, PPS4 states that Local Planning Authorities should adopt a positive and constructive approach towards planning applications and those applications that secure sustainable economic growth should be treated favourably. In seeking to assess planning applications for economic development, PPS4 states that such applications should be assessed against the following impact considerations:

- Whether the proposal has been planned over the lifetime of the development to limit carbon dioxide emissions;
- The accessibility of the proposal by a choice of means of transport;
- Whether the proposal secures a high quality and inclusive design;
- The impact on economic and physical regeneration in the area; and
- The impact on local employment.

3.12 Where planning applications for economic development are not in accordance with an up to date development plan, PPS4 recommends that Local Planning Authorities should weigh market and other economic information alongside environmental and social information, take full account of any long-term benefits as well as the costs, and consider whether those proposals help meet the wider objectives of the development plan.

3.13 In dealing with applications for main Town Centre uses, the most significant change in respect of the previous guidance set out in PPS6, is the removal of the needs test. Whilst this could be seen as



a significant shift in policy, it must be noted that the guidance still requires the production of an Impact Assessment which would include an assessment of the impact on the trade/turnover on the centre and the wider area, and how this relates to future consumer expenditure capacity in the catchment area defined. Therefore, although on the one hand the guidance suggests that the well established test of need should be removed, there will still be a requirement to examine the turnover of the proposed development and how this would impact upon the trading performance of existing facilities within the defined catchment, which in some cases is a very similar exercise.

- 3.14 Although the need test has been removed, there is still a requirement for the applicant to satisfy the sequential approach as well as demonstrate that there will be no adverse impact created by the proposed development. Where no significant adverse impact has been identified, Local Planning Authorities when determining such applications should also take account of the positive and negative impacts of the proposal, as well as the likely cumulative effect of recent permissions, developments under construction, and completed developments. Here the guidance stresses that judgements about the extent and significance of any impact should be informed by the development plan.

Planning Policy Statement 1: Delivering Sustainable Development

- 3.15 On 31st January 2005, the Government published PPS1, which provides guidance on delivering sustainable development. Paragraph 13 of this statement sets out six key principles, these being:
- (i) Development plans should ensure that sustainable development is pursued in an integrated manner. Development plans should promote outcomes in which environmental, economic and social objectives are achieved together over time;
 - (ii) Development plans should contribute to global sustainability by addressing the causes and potential impacts of climate change;
 - (iii) A spatial planning approach should be at the heart of planning for sustainable development;
 - (iv) Planning policies should promote high quality inclusive design in the layout of new developments for the lifetime of the development;



- (v) Development plans should also contain clear, comprehensive and inclusive access policies – in terms of both location and external physical access; and
- (vi) Community involvement is an essential element in delivering sustainable development and creating sustainable and safe communities.

Planning Policy Guidance 17: Planning for Open Space, Sport & Recreation

- 3.16 On 24th July 2002, the Government published PPG17, which provides guidance on planning for open space, sport and recreation. PPG17 states that open spaces, sport and recreation all underpin people's quality of life. Well designed and implemented planning policies for open space, sport and recreation are therefore fundamental to delivering broader Government objectives. These include: supporting an urban renaissance, supporting a rural renewal, promotion of social inclusion and community cohesion, health and wellbeing and promoting more sustainable development.
- 3.17 PPG17 is of some relevance to this study. In particular, paragraph 21 states that planning permission for mixed-use sport, recreation and leisure facilities should only be granted where they are to be located in highly accessible locations in or adjacent to town centres, or in district or neighbourhood centres. Planning permission should not be granted for a location outside such a town centre if the resulting development would undermine the centre. Sites in central locations should be allocated where there is a high level of demand for such mixed-use facilities.

The North East of England Plan Regional Spatial Strategy to 2021

- 3.18 On 6 July 2010, the Secretary of State for Communities and Local Government announced the revocation of Regional Strategies with immediate effect. In due course the legal basis for Regional Strategies will be abolished through the "Localism Bill" that the Coalition Government intends to introduce in the current Parliamentary session. The DCLG has produced guidance on how the planning system will continue to operate in the transitional period. In that advice, it is confirmed that the Regional Strategies no longer form part of the development plan for the purposes of s38(6) of the Planning and Compulsory Purchase Act 2004. However, all current PPS's will continue to apply until they are replaced by a National Planning Framework. LPAs are advised to continue to develop LDF Core Strategies, although the opportunity is available to review and revise their emerging policies in the light of the revocation of the Regional Strategies. Where LPAs decide to review/revise



their emerging policies they will need to ensure that the revised policies meet the requirements for soundness under current legislation, including the presentation of supporting evidence.



4.0 ORIGINAL MARKET RESEARCH

Introduction

4.01 Although WYG acknowledges that there are limitations to survey research, particularly in relation to the samples that can be achieved, the results provide important broad indicators as to consumer preference in relation to where people live and shop. Original market research enables analysis of a particular area, which helps to evaluate the actual draw of major centres and how they impact upon the market share of smaller centres. This is particularly important for some of the smaller centres within the Northumberland Sub-Region given the strength and proximity of competing centres such as Newcastle-upon-Tyne, Edinburgh and The Metrocentre. The use of specifically commissioned survey research is fundamental in informing a study that will effectively identify the likely capacity for future retail floorspace within the Sub-Region.

4.02 A key element of this Study was to obtain a detailed understanding of shopping patterns within and just beyond Northumberland and identify the potential catchment of existing centres within it. WYG commissioned specialist market researchers (NEMS Market Research Limited) to undertake empirical research, which comprised the following:

- Household Telephone Survey;
- On-street Survey; and
- Business Survey⁶

Household Telephone Survey

4.03 In August 2009 a survey of 1,509 households was undertaken within a defined Study Area, which comprised the new Northumberland County Council authority area, but also extended to include the neighbouring authorities, including the Scottish Borders and Newcastle-upon-Tyne. Figure 4.1 indicates the extent of the defined Study Area. A more detailed plan indicating the Study Area in relation to the local authority boundaries is contained at [Appendix 1](#).

4.04 The Study Area was broken down into 15 zones based on post code sectors at a four digit level (e.g. CA14 1):

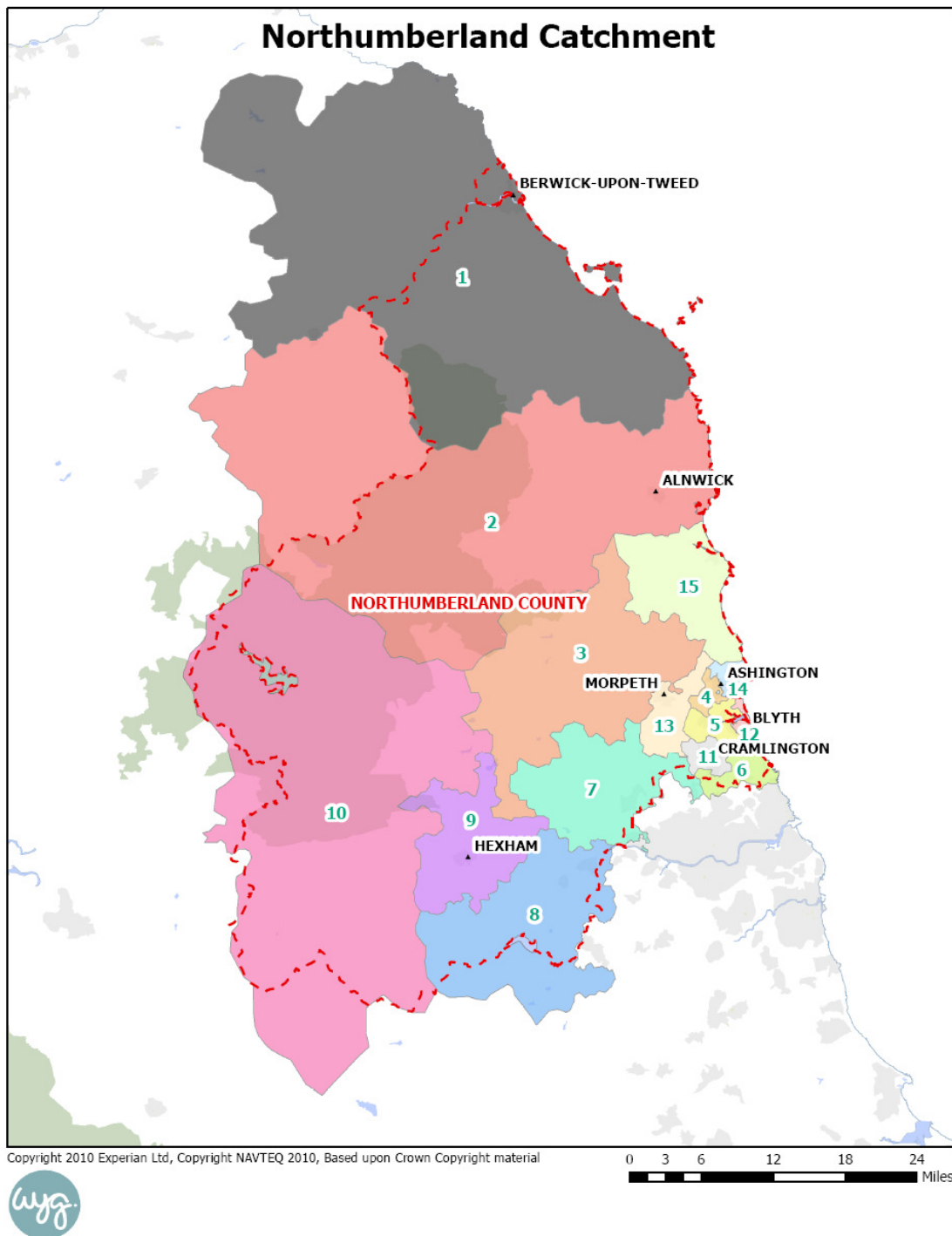
⁶ Business surveys undertaken by WYG, although distributed by MPG.



1.	Berwick-upon-Tweed	(NE66 5, NE67 5, NE68 7, NE69 7, NE70 7, NE71 6, TD10 6, TD11 3, TD12 4, TD14 5, TD15 1, TD15 2 and TD5 7)
2.	Alnwick	(NE19 1, NE65 7, NE66 1/2/3/4, TD5 8 and TD8 6)
3.	Scots Gap	(NE19 2, NE61 3, NE61 4 and NE65 8)
4.	Ashington West	(NE62 5 and NE63 8)
5.	Bedlington	(NE22 5/6/7 and NE24 4)
6.	Seaton Delaval	(NE23 7, NE25 0 and NE26 4)
7.	Ponteland	(NE13 6, NE15 0/9, NE18 0, NE20 0 and NE20 9)
8.	Prudhoe	(DH8 9, NE17 7, NE41 8, NE42 5/6, NE43 7, NE44 6, NE47 0)
9.	Hexham	(NE45 5, NE46 1/2/3 and 4)
10.	Haltwhistle	(CA8 7, CA9 3, NE47 5/6/7/8/9, NE48 1/2/3/4 and NE49 0/9)
11.	Cramlington	(NE23 1/2/3/6/8)
12.	Blyth	(NE24 1/2/3/5)
13.	Morpeth	(NE61 1/2/6)
14.	Ashington East	(NE63 0/9 and NE64 6)
15.	Amble	(NE61 5, NE65 0/9)

- 4.05 It is important to note that the above zones are defined according to post code geography to assist in the collection of data for the purposes of a telephone based Household Survey rather than necessarily representing the shopping catchment areas of the respective areas. Nevertheless, in selecting the groupings of post code sectors to form zones, we have attempted to represent the shopping catchments of particular settlements and in that respect, it is noteworthy that each of the 15 survey zones are based around one or more existing main or secondary centres (as defined in the current development plan policies). The only area that is entirely rural in nature is Zone 3 ('Scots Gap').

Figure 4.1: Plan indicating the Extent of the Northumberland Study Area





- 4.06 A copy of the questionnaire and full tabulations of the Northumberland Household Survey are contained at [Appendix 2](#).

On-Street Survey

- 4.07 In addition, an on-street survey has been undertaken within the following centres:

- Allendale (19 surveys);
- Bellingham (50 surveys);
- Hadston (73 surveys);
- Haydon Bridge (49 surveys);
- Widdrington Station (25 surveys);
- Corbridge (25 surveys);
- Bedlington Station (25 surveys);
- Guide Post (125 surveys);
- Ellington (25 surveys); and
- Lynemouth (75 surveys).

- 4.08 On-street surveys were undertaken within these centres in order to identify customers' views, including their perceptions of each centre and how the centres could be improved. A total of 491 surveys were undertaken in September 2009. The tabulated results of the on-street survey are contained at [Appendix 3](#). On-street surveys were not completed within the remaining main and secondary centres due to the fact that 'health checks' had already been completed, which included the use of survey evidence and that evidence was updated as part of this study.

Business Survey

- 4.09 To complement the survey work undertaken by NEMS Market Research, in October 2009 WYG undertook a postal survey of all businesses within the following centres in Northumberland:

- | | |
|--------------|----------------|
| • Alnwick; | • Prudhoe; |
| • Ashington; | • Berwick; |
| • Hexham; | • Rothbury; |
| • Morpeth; | • Haltwhistle; |
| • Amble; | • Bedlington; |



- Newbiggin;
- Ponteland;
- Blyth;
- Cramlington;
- Seaton Delaval;
- Belford;
- Seahouses;
- Wooler;
- Allendale;
- Bellingham;
- Hadston;
- Haydon Bridge;
- Widdrington Station;
- Corbridge;
- Bedlington Station;
- Guide Post;
- Ellington; and
- Lynemouth.

4.10 This survey explored the current strengths and weaknesses from a business operator’s perspective as recommended by PPS4. Business surveys were distributed to all of the commercial premises within the defined centres. A copy of the questionnaires and summary of the results are contained at [Appendix 4](#).



5.0 ASSESSMENT OF VITALITY AND VIABILITY OF EXISTING CENTRES

Assessing the 'Vitality and Viability' of Existing Centres

- 5.01 Planning Policy Statement 4 'Planning for Sustainable Economic Growth' (2009) emphasises the importance of maintaining a 'healthy' town centre as it helps foster civic pride and local identity and can contribute towards the aim of sustainable development. It also states that by monitoring town centres on a regular basis, signs of decline can be identified early.
- 5.02 [Appendix 5](#) provides detailed analysis of the vitality and viability of the following centres (completed by WYG as part of this study) in accordance with guidance contained in PPS4:
- Allendale;
 - Bellingham;
 - Hadston;
 - Haydon Bridge;
 - Widdrington Station;
 - Corbridge;
 - Bedlington Station;
 - Guide Post;
 - Ellington; and
 - Lynemouth.
- 5.03 'Health Checks' for the other centres within the County have been carried out by Northumberland Infonet and therefore, have not been updated as part of this study although a summary of each centre is provided. The full health checks carried out by Infonet are available at http://www.northumberlandinfonet.org.uk/economic_prosperity/town_centres/. For consistency, our assessment of the centres outlined above follows the template set out for the work previously undertaken by Northumberland Infonet (where information is available), which is consistent with guidance contained in PPS4. However, in terms of retail expenditure referred to in the health checks completed by Northumberland Infonet, this has been superseded by the expenditure figures



within this report, although the qualitative issues identified remain applicable. The health checks completed by Northumberland Infonet are contained at [Appendix 6](#) and a summary of the health checks produced by Northumberland Infonet are contained towards the end of section 5.

5.04 Indicators of vitality and viability, set out in Annex D of PPS4, are used as a basis for the assessment of the 'health' of existing centres. These indicators are as follows:

- Diversity of main town centre uses (by number, type and amount of floorspace);
- The amount of retail, leisure and office floorspace in edge-of-centre and out-of-centre locations;
- The potential capacity for growth or change of centres in the network;
- Commercial operator representation and intentions to change representation;
- Shopping rents;
- Proportion of vacant street level property;
- Commercial yields on non-domestic property (i.e. the capital value in relation to the expected market rental);
- Land Values and the length of time key sites have remained undeveloped;
- Pedestrian flows;
- Accessibility;
- Customers' and residents' views and behaviour;
- Perception of safety and occurrence of crime; and
- State of the city/town centre environmental quality.

5.05 Given the size of the centres surveyed it is important to note that there is limited data available (such as rental levels, commercial yields, etc.). However, based on our analysis, set out below is a summary of the ten centres surveyed as part of this study together with a summary of the larger centres previously assessed by Northumberland Infonet.

Allendale

5.06 Allendale is a small centre located approximately ten miles south west of Hexham. It comprises 16 commercial units totalling 2,940 sq m of floorspace. Retailing within the centre is focused around Market Place and parts of Shield Street.



- 5.07 Despite its limited size, Allendale serves an important role for local residents and appears to performing well with no vacancies. Furthermore, local businesses indicated that trade has improved in recent years although high rents/overheads and limited passing trade were identified as barriers affecting performance.
- 5.08 The centre includes a number of local facilities that meet some of the day-to-day needs of the local population and for visitors to the area. These include a small convenience store (Co-op), bank, hairdressers and chemist. The survey of visitors to Allendale identified that the main reasons for visiting was for food shopping. The main strengths of the centre were identified to be the cleanliness of the centre and the availability of public car parking.
- 5.09 Allendale serves an important role in the network of centres within this part of Northumberland.

Bellingham

- 5.10 Bellingham is located at the eastern edge of the Northumberland National Park 20 miles north of Hexham. The centre is only limited in size and comprises 16 commercial units totalling just over 2,000 sq m of floorspace. Retailing is focused on Front Street, Parkside Place, Lock Up Lane and Manchester Square. Existing facilities include a small Co-op foodstore together with a number of independent retailers and services, including two high street banks. The main reason for visiting Bellingham was identified to be food shopping.
- 5.11 Bellingham appears to be performing well with most businesses surveyed suggesting that business had grown in recent years and that they are trading well. However, lack of car parking was seen as a weakness of the centre although access by public transport was considered good by visitors to Bellingham.
- 5.12 Given its rural location and its distance from nearby centres, Bellingham serves an important role within the network of centres within Northumberland, reducing the need for local residents to travel to facilities elsewhere for some of their day-to-day needs.

Hadston

- 5.13 Hadston is located approximately 12 miles south-east of Alnwick. Commercial activity within the centre is focused around The Precinct, a purpose-built shopping parade with ample off-street car



parking available. Hadston is identified to comprise 12 commercial units within almost 1,400 sq m of floorspace.

5.14 As would be expected, the vast majority of visitors to Hadston are identified to be from the surrounding area, with a strong local walk-in catchment. Existing facilities within Hadston include a Co-op Foodstore together with a range of independent retail and services. The current retail offer of Hadston is reflected by the visitors stating that the main reason for visiting the centre was for food shopping.

5.15 Overall, Hadston serves an important, albeit limited role, in the network of centres within this part of Northumberland particularly for the surrounding resident population. The centre appears to be performing well with existing businesses suggesting that they were trading well.

Haydon Bridge

5.16 Haydon Bridge is located approximately seven miles to the west of Hexham along the A69. The focus for retailing in Haydon Bridge comprises Church Street, Ratcliffe Road and John Martin Street/Shaftoe Street. In total Haydon Bridge is identified to comprise 16 commercial units and almost 2,900 sq m of floorspace.

5.17 Haydon Bridge is identified to comprise a number of key local attractors, including a Co-op foodstore, Post Office, chemist and a bank. The main reason for visiting Haydon Bridge was identified to be for food shopping.

5.18 Overall, Haydon Bridge serves an important role locally with a strong walk-in catchment.

Widdrington Station

5.19 Widdrington Station is situated to the north of Ashington with the main focus for retailing being on Ena Street and Grangemoor Road. The centre is identified to comprise ten units within just over 900 sq m of floorspace. Of these ten units, six (or 334 sq m) were identified to be vacant.

5.20 Within the retail sector, Widdrington Station does contain a Co-op foodstore and accordingly, the main reason for visiting the centre was identified to be for food shopping. Given the limited commercial offer, it is evident that Widdrington Station currently serves a limited role.



Corbridge

- 5.21 Corbridge is located approximately three miles to the east of Hexham. The centre itself is part of a wider Conservation Area designation and the main focus for retailing in Corbridge is on Middle Street, the Market Place, Hill Street and Princes Street. The centre comprises 57 commercial units totalling more than 5,500 sq m of floorspace. Existing retailers include a Co-op supermarket together with a range of independent retailers. The main reason for visiting Corbridge was identified to be for food shopping.
- 5.22 In addition to its retail offer, Corbridge also contains local services such as a hairdresser, high street banks, medical practice, public houses and take aways.
- 5.23 Existing businesses within Corbridge suggest that the centre is performing well, although the main barriers affecting performance were identified to be inadequate customer parking. Parking was also identified as an issue by visitors to Corbridge.
- 5.24 The retail offer of Corbridge is affected by its proximity from the much larger centre of Hexham. Despite this, Corbridge is identified to be performing well and helps to meet some of the day-to-day needs of the local population.

Bedlington Station

- 5.25 Bedlington Station is located in close proximity to the larger centre of Bedlington (c. one mile) and five miles south of Ashington. A train line (which is for freight only) runs through Bedlington Station, which divides the centre. The main focus for retailing in Bedlington Station is along Station Road, Station Street, Ravensworth Terrace and Clayton Street. The centre is identified to comprise 39 commercial units totalling some 4,800 sq m of floorspace.
- 5.26 The convenience goods sector is well represented in Bedlington Station and includes a Co-op, Premier and Londis. The relative strength of the convenience goods offer in Bedlington Station was reflected by the on-street survey which identified that the main reason for visiting was to undertake food shopping. Other local facilities within Bedlington Station include a chemist (Boots) and local services such as hairdressers and takeaways. Visitors to Bedlington Station identified that



accessibility by public transport to be good although the quality of existing properties, litter and illegal parking detracted from the overall quality of the centre.

- 5.27 Bedlington Station serves a limited role, providing 'top-up' food shopping facilities and local services. The proximity of nearby larger centres such as Ashington impacts upon its role as a retail and leisure destination within the County.

Guide Post

- 5.28 Guide Post is situated to the east of Morpeth (five miles) and in close proximity to Ashington (three miles). The focus for retailing in Guide Post is The Square and comprises 20 units and more than 2,400 sq m of floorspace. The Square provides a pedestrian friendly shopping facility with off-street car parking being available, although parking (including disabled parking) was identified as poor aspects of the centre.
- 5.29 Existing facilities within Guide Post include a small Co-op foodstore, a Londis convenience store and a Post Office. Other facilities include a dentist surgery and library. Given the relatively strong convenience goods offer, the main reason cited by visitors to Guide Post was to undertake food shopping.
- 5.30 Existing businesses surveyed suggested that trade was good with half the business stating that that business had grown since they began trading in Guide Post with the remainder stating that trade has remained static. Particular strengths of the centre were identified by visitors to Guide Post were daytime safety and public transport.
- 5.31 Overall, Guide Post serves an important local shopping function for local residents. The centre contains a number of key local facilities, and helps to meet some of the day-to-day needs of the local population and reducing the need to regularly travel to larger centres nearby, such as Ashington.

Ellington

- 5.32 Ellington is a small centre (six units, or 824 sq m of floorspace) situated four miles north of Ashington via the A1068. The focus for retailing in Ellington is on Front Street and Warkworth Drive. Within Ellington existing facilities include a small convenience store and Post Office together



with a library and community centre. Accordingly, the main reasons identified by visitors for using Ellington were for food shopping or to use the Post Office.

- 5.33 Despite its size, local businesses indicated that they were trading 'well' although the inadequacy of existing premises was identified as the main barrier affecting trade.
- 5.34 Given its size and its proximity to larger centres such as Ashington, Ellington serves a limited retail role.

Lynemouth

- 5.35 Lynemouth is a small centre located approximately three miles to the north east of Ashington and comprises only six occupied commercial units totalling 1,000 sq m of floorspace. Retailing in Lynemouth is focused on the West Market Street and includes a Co-op foodstore. It is evident that the Co-op foodstore is the main attractor of Lynemouth with food shopping being identified as the main reason for visiting the centre.
- 5.36 Overall, Lynemouth provides a limited retail role for the local residential population. Anti-social behaviour, the poor quality of the shopping environment and lack of passing trade were all identified by local businesses as factors affecting trade. Similarly, visitors to the centre indicated that litter, street furniture and the shopping environment were also identified as particularly poor aspects of Lynemouth. Moreover, three-quarters of visitors to Lynemouth suggested that the overall attractiveness of Lynemouth had declined over the past 12 months.

Summary of Northumberland Infonet Health Checks

Alnwick

- 5.37 Shoppers generally felt that the range and choice of shops could be improved in the centre. As would be expected for a centre of this size, the comparison offer in Alnwick was greater than the convenience sector and the retail service sector. Vacant floorspace in the centre was relatively low at 5% and has reduced in recent years, due to some vacant properties becoming occupied. Almost half (49%) of shoppers surveyed felt that there was a lack of parking and that current parking provision could be improved. Public transport to Alnwick is good, particularly travel by bus.



Amble

- 5.38 Shoppers generally felt that the range and quality of shops needs to be improved in Amble. The comparison offer in the centre was the dominant sector and was greater than the convenience sector and retail service sector. Vacant floorspace (10%) was similar to other centres of this size, although vacant floorspace increased in recent years. 39% of shoppers felt that parking was the main problem with their shopping experience and in particular a lack of parking. Public transport provision was generally seen as good, especially the quality, regularity and destinations served. It was found that it was particularly easy to travel to Amble by bus. Only 7% of local residents shopped in Amble.

Ashington

- 5.39 Over half (52%) of shoppers felt that Ashington did not contain a wide choice of shops. Again, the comparison offer in Ashington was greater than the level of convenience provision and retail service provision [NB this survey was carried out before the opening of the replacement edge of centre Asda store on Lintonville Road, which is now operational]. The amount of vacant floorspace in the centre (7%) was fairly low. However, in recent years, the amount of vacant floorspace has remained constant. Ashington is accessible by public transport, with buses connecting to a large number of local destinations. However, only 25% of shoppers found it easy to travel into the town centre by bus.

Bedlington

- 5.40 Just less than half (48%) of shoppers did not think that Bedlington offered a wide choice of shops. Comparison provision was greater than the other types of retail provision. 10% of floorspace in Bedlington was vacant, which is similar to the national average. The vast majority of shoppers felt that it was easy to travel into the town centre by car (94%) or bus (92%). The largest proportion of respondents (49%) stated that the availability of parking spaces was good or very good in the town centre. Almost two-thirds of respondents felt that the quality, regularity and destinations served by public transport in Bedlington were good or very good.

Belford

- 5.41 Shoppers had mixed views on their perception of the range of retail provision in Belford, with 45% stating that Belford contained a wide choice of shops, although 46% thought otherwise. Shoppers



highlighted a need for food shops in particular. Vacant floorspace was particularly high in Belford (16%). Belford was seen by the majority of shoppers as easy to access by car (97%) and the amount of car parking spaces were plentiful (70%). Less than half of respondents rated the quality and regularity of the bus/rail services serving Belford as good.

Berwick-upon-Tweed

- 5.42 A third (33%) of shoppers did not feel that Berwick-upon-Tweed offered a wide choice of shops. 9% of floorspace in the town centre was vacant, which is similar to the national average. However, the number of vacant units has decreased slightly in recent years. Whilst 40% of respondents found it fairly easy to travel into the town centre by car, almost half of shoppers (45%) felt that the availability of public parking spaces was poor or very poor. Over two-thirds of respondents (68%) found it easy or very easy to travel to Berwick-upon-Tweed by bus. There were a number of ideas put forward by respondents as ways of improving the town centre. These included improving accessibility, better quality footpaths, improved road safety and more pedestrian crossings.

Blyth

- 5.43 Less than a third of shoppers interviewed (28%) felt that Blyth did not offer a wide choice of shops. The level of vacant floorspace in Blyth was at 9%, which is similar to the national average. Furthermore, the proportion of vacant units has decreased in recent years. The majority of shoppers interviewed found it easy or very easy to travel into Blyth by car. Over half of respondents (52%) felt that the availability of car parking spaces in Blyth was good or very good. Buses are frequent and serve a number of local areas to Blyth, according to just less than two-thirds of shoppers interviewed. In fact, over three-quarters of respondents (76%) felt that travelling by bus into Blyth is easy or fairly easy.

Cramlington

- 5.44 Over half of shoppers interviewed (58%) did not think that Cramlington contained a wide choice of shops. Vacant floorspace in the town centre was particularly low (4%). However, the proportion of vacant units has increased in recent years. The vast majority of respondents (86%) found it easy to travel into Cramlington by car. However, 22% of shoppers interviewed felt that parking in the town centre was either poor or very poor. Almost all respondents (96%) felt that travelling into Cramlington by bus was easy or fairly easy. Only 5% of local residents shop in Cramlington. Expenditure was lost to Newcastle (37%) and the Metrocentre (21%).



Haltwhistle

- 5.45 Just less than half of shoppers interviewed (46%) felt that Haltwhistle offered a wide choice of shops. Vacant floorspace in the town centre (11%) was similar to the national average. Of the respondents who travelled into Haltwhistle by car, 62% found it easy or very easy to access the town centre. The largest proportion of respondents (38%) felt that the availability of parking spaces was good or very good. However, a further 29% felt that the availability of parking spaces was poor or very poor. The majority of shoppers interviewed (80%) found it easy to travel into the town centre by bus. Over two-thirds of respondents felt that Haltwhistle had a good quality and regular bus and railway service.

Hexham

- 5.46 Shoppers interviewed generally felt that the range and quality of shops needed to be improved in Hexham. The proportion of vacant floorspace in Hexham (6%) was relatively low. In recent years, the amount of vacant floorspace has reduced in the town centre. The majority of respondents (87%) found it easy to travel into the town centre by car. However, almost a third (30%) of respondents felt that the main problem with their shopping experience in Hexham was a lack of parking. The vast majority of shoppers interviewed (92%) found it easy to travel into the town centre by bus. Indeed, almost two-thirds of shoppers gave a positive response when rating the quality, regularity and destinations served by public transport.

Morpeth

- 5.47 Shoppers interviewed felt that the range and quality of shops in Morpeth needed to be improved. Vacant floorspace in Morpeth was at 8% which is similar to the national average. A large proportion of the vacant units and floorspace were situated in the Sanderson Arcade. Furthermore, in recent years, the amount of vacant floorspace has increased in the town centre. The availability of public parking spaces (39%) and the cost of parking (52%) were seen as poor or very poor by the largest proportion of respondents. The majority of shoppers interviewed (81%) found it easy to travel into Morpeth by bus. At the time of the survey, the 'new' Sanderson Arcade was due to re-open with a number of well-known retailers having signed up to the scheme. Also, as part of the revised Sanderson Arcade, a new transport interchange and long-stay parking were to be introduced which should benefit Morpeth.



Newbiggin-by-the-Sea

- 5.48 Almost two-thirds of respondents (61%) did not think that Newbiggin-by-the-Sea offered a wide choice of shops to customers. Vacant floorspace in the centre was high (13%) compared to the national average. Just less than a third (30%) of shoppers interviewed felt that parking in the town centre was either poor or very poor. Respondents felt that the quality and regularity of bus services to and from Newbiggin-by-the-Sea was good.

Ponteland

- 5.49 Just less than half (48%) of shoppers interviewed did not think that Ponteland offered a wide choice of shops to customers. There were more leisure services and financial and business services units in the town centre than either comparison or convenience units. Only 4% of retail floorspace in the centre was vacant, which is significantly below the national average. The majority of respondents (76%) found it easy to travel into the town centre by car, whilst two thirds (67%) of respondents felt that the availability of parking in the town centre was either good or very good.

Prudhoe

- 5.50 Shoppers interviewed generally felt that the range and quantity of shops needed to be improved. 10% of floorspace in Prudhoe was vacant which is similar to the national average. However, in recent years, the amount of vacant floorspace in the town centre has increased. Almost all (99%) of shoppers interviewed found it easy to travel into the town centre by car. Two thirds (67%) of respondents, rated the quality, regularity and destinations served by public transport as good or very good.

Rothbury

- 5.51 60% of respondents felt that Rothbury did not offer a wide choice of shops to customers. Vacant floorspace in the town centre was very low at 3%. The vast majority of shoppers interviewed (94%) found it easy to travel into the town centre by car. The largest proportion of respondents (42%) felt that the availability of parking spaces was good or very good, although 35% stated that the availability of parking spaces was poor or very poor. The majority of shoppers interviewed had a fairly low opinion of public transport in Rothbury.



Seahouses

- 5.52 Just less than half (45%) of shoppers interviewed, thought that Seahouses offered a wide choice of shops to customers. In terms of improving the shopping offer in the town centre, respondents wanted to see more clothing stores and food shops. 6% of floorspace in Seahouses was vacant, which is a fairly low level. Whilst respondents found it easy or very easy to travel into Seahouses by car, over half (52%) of respondents felt that the availability of car parking spaces in the town centre was poor or very poor. Just over half of respondents rated the quality and the regularity of the bus/rail services and the destinations served by public transport.

Seaton Delaval

- 5.53 To improve their shopping experience of Seaton Delaval, shoppers interviewed felt that more shops and a wider choice of shops were needed, as well as longer opening hours and a supermarket in the town centre. Vacant floorspace in Seaton Delaval (13%) was greater than the national average. Whilst almost all (92%) of shoppers interviewed found it easy to travel into the town centre by car, approximately three-quarters (74%) felt that parking provision in the town centre was either poor or very poor. The majority of respondents (79%) found it easy to travel into the town centre by bus.

Wooler

- 5.54 Just less than half (43%) of shoppers interviewed thought that Wooler offered a wide choice of shops. Respondents felt that more clothes and food shops would improve the shopping experience in Wooler. 8% of the total retail floorspace in Wooler was vacant. In contrast to other nearby centres, over half of respondents (52%) felt that the availability of car parking spaces in Wooler was good or very good. Furthermore, over 70% of respondents rated the quality and regularity of the bus/rail services and the destinations served by public transport as good or very good.

6.0 POPULATION AND RETAIL EXPENDITURE

6.01 This section of the report assesses the current population and expenditure generated within the defined Study Area based on the identified 15 survey zones outlined in Section 4 of this report.

Study Area Population

6.02 The population within each postal code sector has been calculated using MapInfo AnySite data (2007 data). This baseline population has then been projected forward based on mid-year ONS based population estimates as identified by MapInfo for the defined Study Area.

6.03 Table 6.1 provides a detailed breakdown of the forecast population change within each survey zone through to 2026.

Table 6.1: Population by Survey Zone (2009 – 2026)

Survey Zone	2009	2014	2019	2024	2026
1 Berwick-upon-Tweed	52,543	54,970	56,675	58,433	59,151
2 Alnwick	32,653	34,466	35,767	37,117	37,573
3 Scots Gap	8,516	8,733	8,808	8,884	8,993
4 Ashington East	17,660	17,834	17,745	17,856	18,076
5 Bedlington	25,250	26,886	28,004	29,168	29,527
6 Seaton Delaval	23,645	24,169	24,540	24,917	25,223
7 Ponteland	27,255	27,706	27,739	27,772	28,113
8 Prudhoe	29,576	30,898	31,888	32,910	33,314
9 Hexham	18,286	19,556	20,053	20,563	20,815
10 Haltwhistle	20,162	21,228	21,970	22,738	23,017
11 Cramlington	30,132	30,650	30,960	31,273	31,658
12 Blyth	30,749	31,919	32,620	33,336	33,746
13 Morpeth	18,859	19,605	19,954	20,309	20,559
14 Ashington East	25,457	26,511	27,205	27,917	28,260
15 Amble	23,053	24,231	24,901	25,690	25,904
TOTAL	374,066	399,362	408,929	418,783	423,931

Source: MapInfo AnySite Data (2006)

Retail Expenditure

6.04 In order to calculate convenience and comparison expenditure per person, WYG has utilised MapInfo AnySite data, which provides detailed information on local consumer expenditure and that takes into account the socio-economic characteristics of the local resident population. MapInfo is a widely accepted source of expenditure and population information and is used nationally.



- 6.05 Forecasts have been derived from MapInfo Brief 09/02, which was published in September 2009. Importantly, the latest expenditure forecasts take into account the current downturn in the UK economy, which has had an impact on the retail sector. For the purposes of this study the following forecasts have been applied:

	Convenience	Comparison
2008	-0.7%	+4.6%
2009	-0.8%	-2.7%
2010	-0.8%	-2.7%
2011 to 2014	+1.1% per annum	+3.8%
2015 onwards	+0.7% per annum	+4.5%

- 6.06 The latest forecasts suggest that the downturn in the economy will continue to impact on future expenditure (at least in the short-term). However, in the longer term it is expected that the forecast levels of growth will increase as the economy recovers to levels reflective of that identified by MapInfo (both actual and forecast) pre-2008. However, WYG considers that the growth in expenditure forecast in the longer term should be treated with caution given the uncertainty in forecasting future growth through to 2026.
- 6.07 Using these forecast growth rates identified by MapInfo, it is possible to produce expenditure estimates for each survey zone in 2009, 2014, 2019, 2024 and 2026. The assessment takes into account both retail expenditure growth and population change.

Convenience Goods Expenditure

- 6.08 It is estimated that in 2009 the resident population within the Study Area generates some £604.85m of convenience goods expenditure. This is forecast to increase to £752.77m by 2026, which represents an increase of £147.92m (or 24%) between 2009 and 2026.

Main Food and 'Top-up' Shopping

- 6.09 As part of the Household Survey respondents were specifically asked questions in relation to the proportion of money they spend on their main food shopping and 'top-up' food shopping. For the purposes of this assessment we have assumed that 75% of convenience goods expenditure is



directed to the main food shopping destination (i.e. bulk food shop) and 25% directed to 'top-up' shopping destinations (i.e. regular purchase of products such as milk, bread, etc.).

- 6.10 By applying these expenditure estimates per person to the identified population of the defined Study Area, convenience goods expenditure on main food shopping is estimated to be approximately £453.64m in 2009. With regard to 'top-up' shopping, in 2009 the resident population within the Study Area is estimated to generate £151.21m of convenience goods expenditure.

Comparison Goods Expenditure

- 6.11 In 2009 the resident population within the Study Area is identified to generate £1,016.12m of comparison goods expenditure. Given the forecast growth in population and expenditure this is anticipated to increase to £2,149.05m by 2026. This represents an increase of £1,132.93m (or 111%) between 2009 and 2026 – assuming current expenditure forecasts remain through to 2027.
- 6.12 For the purposes of this study comparison goods expenditure has also been divided into nine sub-categories: 'Furniture', 'DIY', 'Garden' and 'Electrical' goods, which are known as bulky goods and what is referred to as non-bulky goods: 'Clothing & Footwear', 'Books, CDs, DVDs, etc.', 'Household Goods', 'Toys, Bicycles and Other Recreational Goods' and 'Chemist Goods'. In this respect the proportion of expenditure directed to each sub-category by residents within the Study Area is as follows:

Bulky Goods

- 'Furniture' – 10.3%
 - 'DIY' – 5.5%
 - 'Electrical' – 14.2%
 - Garden – 1.7%
- Sub-Total – 31.7%*

Non-bulky Goods

- 'Clothing & footwear' – 26.0%
 - 'Books, CDs, DVDs, etc.' – 6.6%
 - 'Household Goods' – 9.6%
 - 'Toys, Bicycles and Other Recreational Goods' – 14.2%
 - 'Chemist Goods' – 12.2%
- Sub-Total – 68.3%*

- 6.13 Analysis of shopping patterns for the nine comparison goods sub-categories enables an assessment to be made with regard to different shopping patterns within the Study Area for a wide variety of goods. This provides useful information when considering future retail need (particularly qualitative need).



7.0 SHOPPING PATTERNS WITHIN THE NORTHUMBERLAND STUDY AREA

Introduction

- 7.01 Having calculated the likely levels of retail expenditure that is generated by the resident population living within the defined Study Area (Section 6 of this report), it is important to understand what proportion of this expenditure is directed to existing facilities/centres within Northumberland and the effect of competing facilities elsewhere.
- 7.02 The amount of trade that is captured by a particular centre within a defined study area is referred to as its 'market share'. The most accurate way to estimate the potential market share of a particular centre within the defined Study Area is to undertake original market research to understand where people within Northumberland and the wider area currently shop. As previously highlighted, a critical element of the overall study has involved the completion of approximately 1,500 household interviews. By analysing the results from the survey it has been possible to understand the current role of existing centres/facilities throughout the County.

Convenience Goods Shopping

Market Shares

- 7.03 It is evident that Northumberland contains a wide range of convenience goods retailers, including large-format stores, such as: the Morrison's stores in Berwick-upon-Tweed, Blyth, Alnwick and Morpeth; the Asda stores in Ashington, Cramlington and Blyth; the Tesco Extra store in Hexham; and the Sainsbury's store in Cramlington. Further provision is provided by a range of smaller retailers such as Co-op, Lidl, Aldi, Iceland and Waitrose together with a number of independents traders (including markets) and smaller formats of the larger retailers (e.g. Sainsbury's Local in Haltwhistle) located throughout Northumberland and the wider Study Area.
- 7.04 The Household Survey identifies that all facilities within Northumberland attract **73.0%** of convenience goods expenditure generated in the Study Area (£604.85m). This equates to a convenience goods turnover of £441.51m in 2009. Based on current market share this convenience goods turnover is anticipated to increase to £475.95m by 2014 and to £549.52m by 2026. This



represents an increase in convenience goods expenditure attracted to existing facilities in the Study Area of more than £108m between 2009 and 2026.

- 7.05 In terms of individual foodstores within Northumberland, the survey results suggest that the Asda store at Cowpen Road in Blyth is the most popular store, attracting more than £67m of convenience goods expenditure generated within the Study Area. This turnover equates to a market share of 11.1% of convenience goods expenditure generated in the Study Area. Other popular stores are identified to include: the Asda store in Ashington (£43.73m, or 7.2%); the Morrison's store in Berwick-upon-Tweed (£37.40m, or 6.2%); the Asda store in Cramlington (£31.92m, or 5.3%); the Tesco Extra store in Hexham (£30.73m, or 5.1%); and the Morrison's store in Morpeth (£28.33m, or 4.7%).
- 7.06 Table 7.1 provides a breakdown of the market share and turnover of the main convenience goods shopping facilities, both within and outside Northumberland based on respondents within the defined Study Area.

Table 7.1: Market Share/Turnover of Convenience Goods Facilities within and outside Northumberland from the defined Study Area

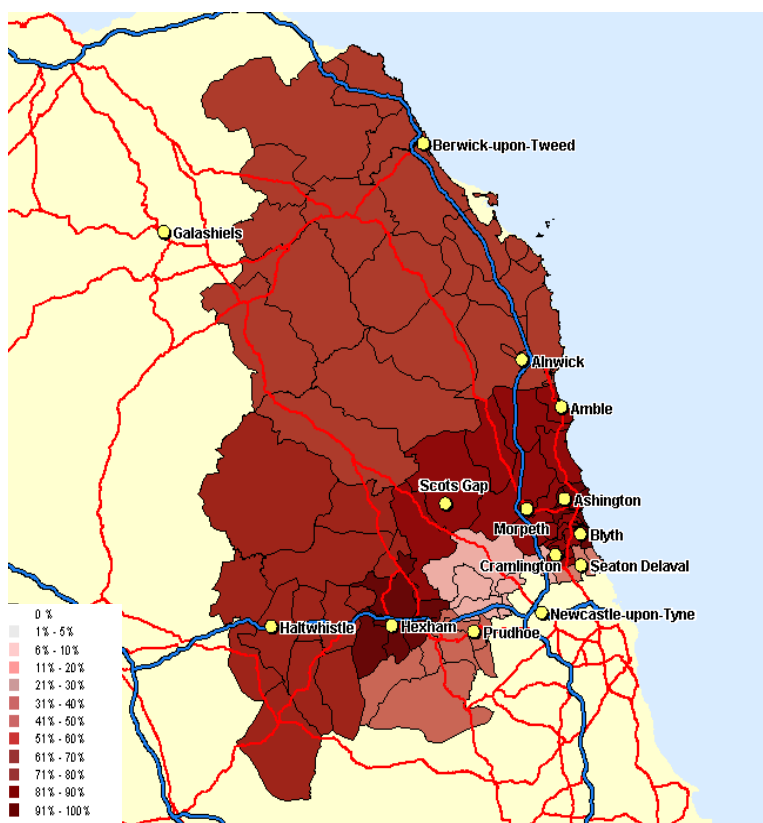
Store	Market Share (%)	Turnover (£m)
Within Northumberland County		
<i>Main Foodstores</i> [^]		
Asda, Cowpen Road, Blyth	11.1	67.04
Asda, Lyntonville Terrace, Ashington	7.2	43.73
Morrison's, North Road, Berwick-upon-Tweed	6.2	37.40
Asda, Manor Walks Shopping Centre, Cramlington	5.3	31.92
Tesco Extra, Tynedale Retail Park, Hexham	5.1	30.73
Morrison's, Stanley Terrace, Morpeth	4.7	28.33
Morrison's, Fenkle Street, Alnwick	3.3	19.87
Morrison's, Regent Street, Blyth	2.7	16.53
Sainsbury's, Manor Walks Shopping Centre, Cramlington	2.6	15.48
Sainsbury's, Willowbarn Avenue, Alnwick	2.4	14.33
Co-op Superstore, Oakfield Terrace, Prudhoe	1.8	11.09
Sub-Total	52.3	316.45
Other within Northumberland County	20.7	125.06
Sub-Total Northumberland County	73.0	441.51
Outside Northumberland County		
<i>Main Foodstores</i> [^]		
Tesco Extra, Kingston Park	3.1	18.47
Morrison's, The Killingworth Centre, Killingworth	2.6	16.00
Asda, Metrocentre	2.4	14.28
Asda, Currie Road, Galashiels	2.0	11.83
Sub-Total	10.0	60.58
Other outside Northumberland County	14.3	86.55
Sub-Total Outside Northumberland County	24.3	147.13
Online	2.7	16.21
TOTAL	100.0	604.85

Notes: Derived from Northumberland Household Survey (August 2009) and WYG analysis
[^] Only includes destinations that achieve a convenience goods turnover of at least £10m from within the Study Area
 At 2007 prices

7.07 Table 7.1 illustrates that of the £442m convenience goods expenditure generated within the Study Area that is directed to facilities in Northumberland more than two thirds (72%) is directed to the eleven most popular stores within the County.

7.08 The Household Survey results identify that existing convenience goods facilities in Northumberland have a main food shopping catchment of approximately 274,850 people from within the defined Study Area. Figure 7.1 illustrates the catchment of existing convenience goods facilities within Northumberland.

Figure 7.1: Northumberland's Convenience Goods Shopping Catchment within Study Area



Market Share of all Convenience Goods Floorspace within Northumberland

Survey Zones														
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
69.6	65.1	81.6	92.0	90.4	40.4	20.5	45.6	91.4	73.3	90.5	94.8	89.1	93.5	90.8

Comparison Goods Shopping

- 7.09 The Household Survey identifies that the current level of trade passing through all comparison goods facilities within Northumberland is estimated to be £434.51m in 2009. This represents less than half (**42.7%**) of the total comparison goods expenditure generated in the Study Area (£1,016.12m). Based on current market share, this comparison goods turnover is anticipated to increase to £507.84m by 2014 and to £917.64m by 2026. This represents an increase in comparison goods expenditure attracted to existing facilities in the Study Area of more than £483m between 2009 and 2026 – assuming no change in shopping online.

- 7.10 In terms of the attraction of existing centres within Northumberland, Table 7.2 provides a breakdown of the market share achieved by facilities within and outside Northumberland.

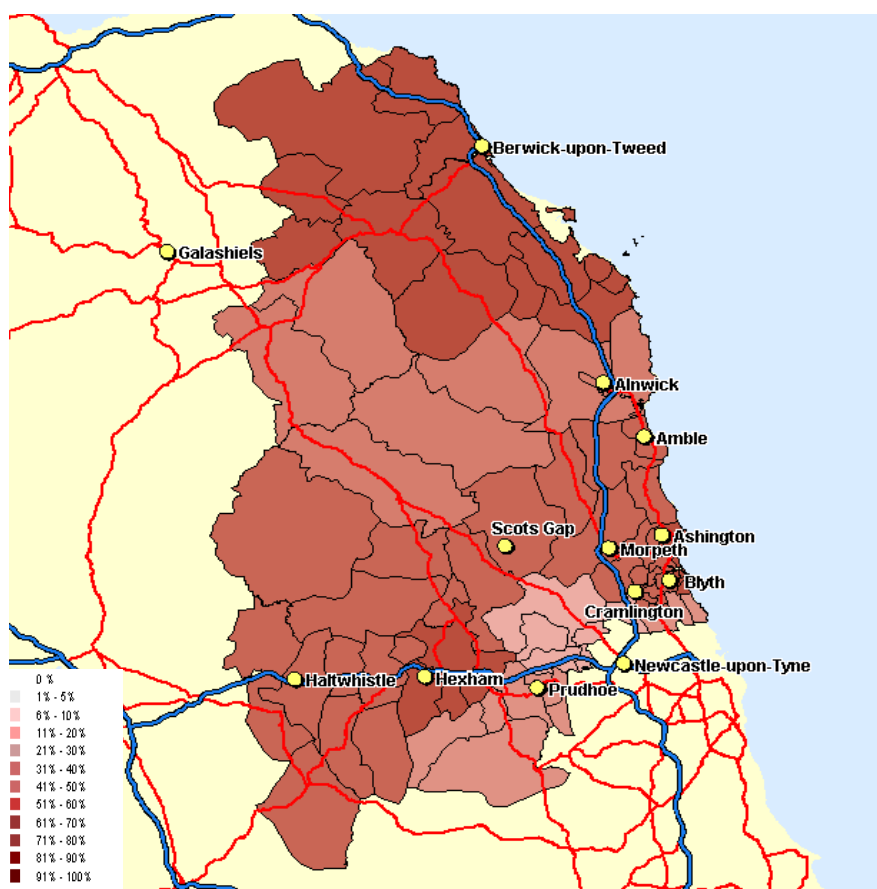
Table 7.2: Market Share / Turnover of Existing Comparison Goods Facilities within and outside Northumberland

Store	Market Share (%)	Turnover (£m)
Within Northumberland County		
<i>Main Centres</i> [^]		
Blyth Town Centre	6.6	66.79
Hexham Town Centre	5.9	60.44
Cramlington Town Centre	5.7	57.98
Ashington Town Centre	5.5	56.22
Berwick-upon-Tweed Town Centre	5.5	55.70
Alnwick Town Centre	3.0	30.10
Morpeth Town Centre	2.6	26.28
Sub-Total	34.8	353.51
Other within Northumberland County	8.0	81.00
Sub-Total Northumberland County	42.7	434.51
Outside Northumberland County		
<i>Main Centres</i> [^]		
Newcastle-upon-Tyne City Centre	15.3	155.55
The Metrocentre	10.4	106.68
Silverlink Shopping Park	4.9	50.04
Kingston Park	2.7	27.39
Galashiels Town Centre	2.1	21.62
Edinburgh City Centre	1.7	17.75
Sub-Total	37.3	379.03
Other outside Northumberland County	11.5	116.35
Sub-Total Outside Northumberland County	48.8	495.38
Online	8.5	86.23
TOTAL	100.0	1,016.12

Notes: Derived from Northumberland Household Survey (August 2009) and WYG analysis
[^] Only includes destinations that achieve a comparison goods turnover of at least £15m from within the Study Area
 At 2007 prices

- 7.11 Although the majority (57%) of expenditure generated in the Study Area is identified to be directed to competing facilities outside Northumberland or online, Table 7.2 identifies that within Northumberland, Blyth Town Centre is identified to be the most popular retail destination, followed by Hexham Town Centre and Cramlington Town Centre. Figure 7.2 illustrates the catchment of existing comparison goods facilities within Northumberland.

Figure 7.2: Northumberland's Comparison Goods Catchment within Study Area

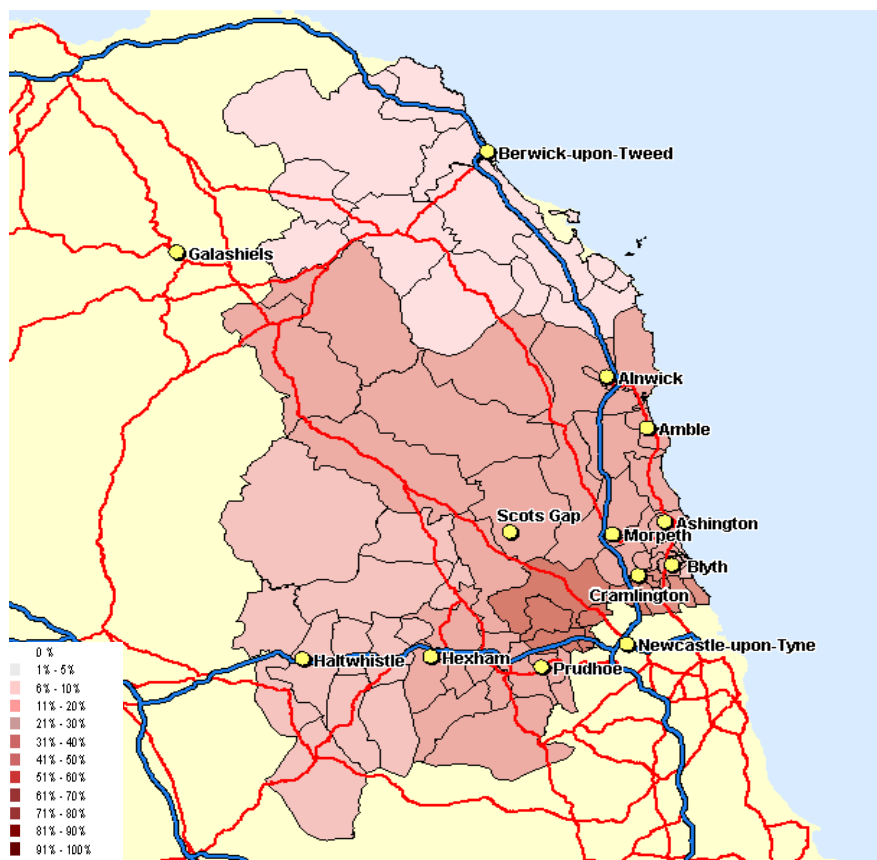


Market Share of all Comparison Goods Floorspace within Northumberland

Survey Zones														
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
53.0	40.5	41.1	48.9	43.2	25.7	12.5	23.8	56.6	49.3	43.6	54.4	45.6	58.7	47.5

7.12 It is evident that the attraction of competing facilities (most notably Newcastle City Centre and The Metrocentre) has a significant influence on comparison goods shopping. In this respect, Figure 7.3, Figure 7.4 and Figure 7.5 illustrate the influence of three of the most popular comparison goods destinations outside Northumberland – Newcastle City Centre, The Metrocentre and Galashiels.

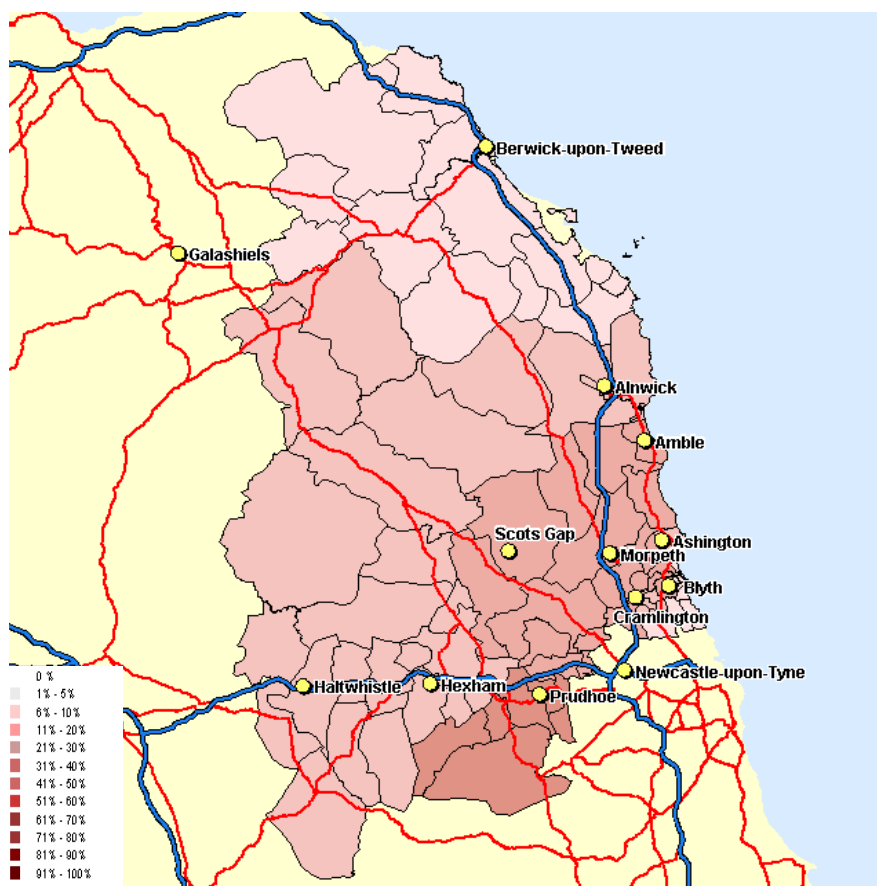
Figure 7.3: Newcastle City Centre's Comparison Goods Catchment within Study Area



Market Share of Newcastle City Centre – Comparison Goods

Survey Zones														
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
4.2	15.0	20.0	15.6	18.2	21.0	31.3	14.6	16.1	6.6	23.0	10.1	17.8	12.7	15.6

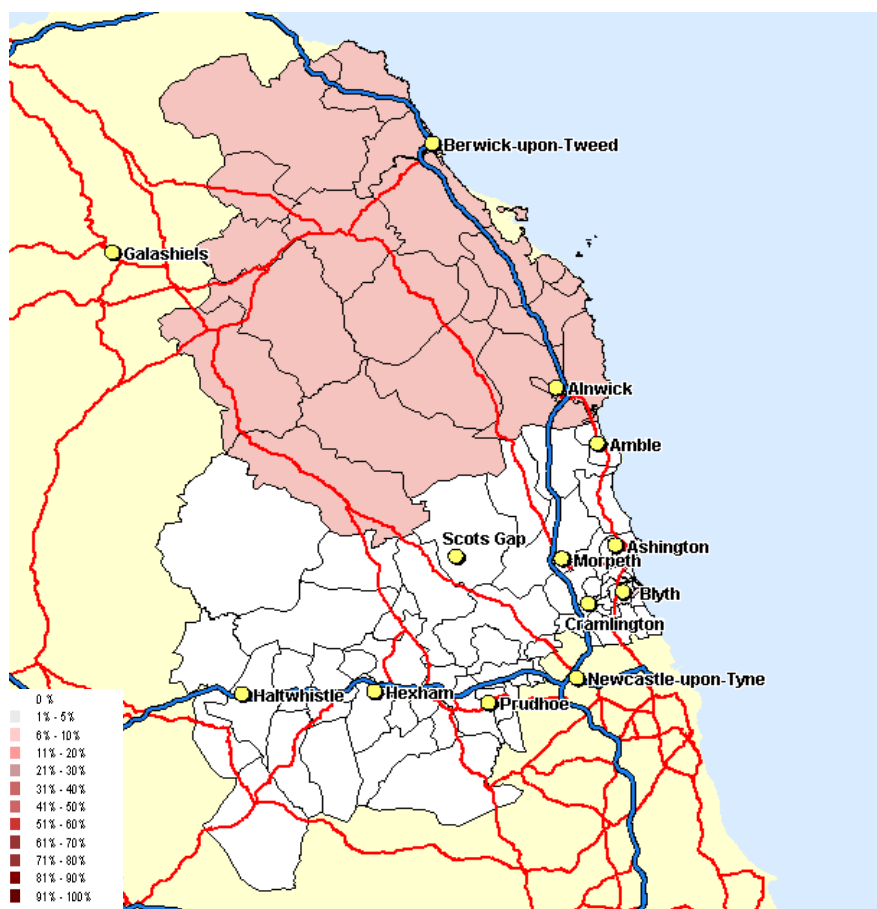
Figure 7.4: The Metrocentre's Comparison Goods Catchment within Study Area



Market Share of Metrocentre – Comparison Goods Shopping

Survey Zones														
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
2.7	8.1	10.8	13.0	12.0	5.6	19.7	30.2	10.7	10.8	8.2	5.6	9.5	8.9	13.7

Figure 7.5: Galashiels' Comparison Goods Catchment



Market Share of Galashiels – Comparison Goods Shopping

Survey Zones														
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
8.4	10.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

7.13 In terms of specific goods, the Household Survey identifies shopping patterns for a variety of comparison goods, comprising:

- Clothing & Footwear;
- Books, CDs, DVDs, etc.;
- Small Household Goods;
- Recreational Goods (Toys, games, bicycles, etc.);
- Chemist Goods;
- Electrical Goods;
- DIY Goods;
- Furniture & Floor Coverings; and
- Garden Centre Goods.



- 7.14 Set out below is an assessment of the shopping patterns and expenditure flows for the different types of comparison goods identified by the Household Survey.

Clothing & Footwear

Market Shares

- 7.15 Existing facilities within Northumberland are identified to attract **31.7%** of expenditure generated for Clothing & Footwear Goods. This equates to a turnover of some £83.78m in 2008.
- 7.16 This low market share is reflective of the strength of competing provision located just beyond the defined Study Area, most notably, Newcastle City Centre, The Metrocentre and Edinburgh City Centre. Indeed, collectively these three centres/facilities attract 43% of expenditure generated in the Study Area. Given the regional status of these retail destinations, it is not surprising to find such high levels of expenditure being directed to them.
- 7.17 Table 7.3 provides a breakdown of the market share and turnover achieved by the main shopping destinations within and outside Northumberland for Clothing and Footwear shopping.

Table 7.3: Market Share of Destinations within and outside Northumberland for Clothing & Footwear from the defined Study Area

Store	Market Share (%)	Turnover (£m)
Within Northumberland County		
<i>Main Centres[^]</i>		
Hexham Town Centre	6.4	16.94
Ashington Town Centre	5.3	13.93
Blyth Town Centre	5.1	13.54
Cramlington Town Centre	5.0	13.32
Berwick-upon-Tweed Town Centre	3.6	9.64
Morpeth Town Centre	1.9	5.14
Alnwick Town Centre	1.4	3.59
Sub-Total	28.8	76.10
Other within Northumberland County	2.9	7.68
Sub-Total Northumberland County	31.7	83.78
Outside Northumberland County		
<i>Main Centres[*]</i>		
Newcastle-upon-Tyne City Centre	24.5	64.88
The Metrocentre	14.7	39.02
Edinburgh City Centre	3.9	10.36
Galashiels Town Centre	3.4	9.10
Silverlink Shopping Park	3.3	8.76
Sub-Total	49.9	132.12
Other outside Northumberland County	12.9	34.26
Sub-Total Outside Northumberland County	62.8	166.38
Online	5.5	14.56
TOTAL	100.0	264.72

Notes: Derived from Northumberland Household Survey (August 2009) and WYG analysis
[^] Only includes destinations that achieve a turnover of at least £3m from within the Study Area
^{*} Only includes destinations that achieve a turnover of at least £8m from within the Study Area
 At 2007 prices

Books, CDs, DVDs, etc.

Market Shares

- 7.18 Existing facilities within Northumberland are identified to attract **38.1%** of expenditure generated for Clothing & Footwear Goods. This equates to a turnover of some £26.70m in 2009. Hexham and Blyth retain the largest proportion of market share in this sector within the Study Area (6.8% and 6.6% respectively).
- 7.19 Again, this low market share is reflective of the strength of competing provision located just beyond the defined Study Area, most notably, Newcastle City Centre and The Metrocentre. These centres/facilities contain larger stores selling a wider range of goods. These two centres attract 23% of expenditure generated in the Study Area. It should also be noted that 23% of expenditure

for these goods was spent online. This again is not surprising, as a significant proportion of these types of goods are bought online throughout the UK.

- 7.20 Table 7.4 provides a breakdown of the market share and turnover achieved by the main shopping destinations within and outside Northumberland for Books, CDs, and DVDs etc.

Table 7.4: Market Share of Destinations within and outside Northumberland for Books, CDs, DVDs, etc., within the Study Area

Store	Market Share (%)	Turnover (£m)
Within Northumberland County		
<i>Main Centres</i> [^]		
Hexham Town Centre	6.8	4.77
Blyth Town Centre	6.6	4.62
Alnwick Town Centre	4.4	3.11
Cramlington Town Centre	4.3	2.98
Berwick-upon-Tweed Town Centre	3.6	2.54
Morpeth Town Centre	3.4	2.41
Ashington Town Centre	3.4	2.35
Sub-Total	32.5	22.78
Other within Northumberland County	5.6	3.92
Sub-Total Northumberland County	38.1	26.70
Outside Northumberland County		
<i>Main Centres</i> [*]		
Newcastle-upon-Tyne City Centre	13.1	9.18
The Metrocentre	10.1	7.05
Silverlink Shopping Park	3.8	2.68
Sub-Total	27.0	18.91
Other outside Northumberland County	12.5	8.80
Sub-Total Outside Northumberland County	39.5	27.71
Online	22.5	15.75
TOTAL	100.0	70.16

Notes: Derived from Northumberland Household Survey (August 2009) and WYG analysis
[^] Only includes destinations that achieve a turnover of at least £2m from within the Study Area
^{*} Only includes destinations that achieve a turnover of at least £2m from within the Study Area
 At 2007 prices

Small Household Goods

Market Shares

- 7.21 Existing facilities within Northumberland are identified to attract **36.3%** of expenditure generated for Small Household Goods. This equates to a turnover of some £33.25m in 2009. Blyth and Cramlington retain the largest proportion of market share in this sector within the Study Area (8.0% and 6.0% respectively).

- 7.22 When compared to competing facilities outside the County, Newcastle City Centre and The Metrocentre retain the largest proportion of market share (20.1% and 13.7% respectively). Aside from this, the remainder of Gateshead Borough attracts a small proportion of market share for small household goods (3.3%).
- 7.23 Table 7.5 provides a breakdown of the market share and turnover achieved by the main shopping destinations within and outside Northumberland for Small Household Goods shopping.

Table 7.5: Market Share of Destinations within and outside Northumberland for Small Household Goods within the Study Area

Store	Market Share (%)	Turnover (£m)
Within Northumberland County		
<i>Main Centres</i> [^]		
Blyth Town Centre	8.0	7.34
Cramlington Town Centre	6.0	5.53
Berwick-upon-Tweed Town Centre	5.9	5.41
Hexham Town Centre	4.6	4.24
Ashington Town Centre	4.1	3.79
Alnwick Town Centre	2.9	2.63
Sub-Total	31.6	28.94
Other within Northumberland County	4.7	4.31
Sub-Total Northumberland County	36.3	33.25
Outside Northumberland County		
<i>Main Centres</i> [*]		
Newcastle-upon-Tyne City Centre	20.1	18.43
The Metrocentre	17.0	15.60
Kingston Park	2.3	2.15
Silverlink Shopping Park	2.2	2.05
Sub-Total	41.6	38.23
Other outside Northumberland County	16.4	15.00
Sub-Total Outside Northumberland County	58.0	53.23
Online	5.7	5.24
TOTAL	100.0	91.72

Notes: Derived from Northumberland Household Survey (August 2009) and WYG analysis
[^] Only includes destinations that achieve a turnover of at least £2m from within the Study Area
^{*} Only includes destinations that achieve a turnover of at least £2m from within the Study Area
 At 2007 prices

Recreational Goods – Toys, Games, Bicycles, etc.

Market Shares

- 7.24 Existing facilities within Northumberland are identified to attract **40.0%** of expenditure generated for Recreational Goods. This equates to a turnover of some £60.36m in 2009. Cramlington and

Berwick-upon-Tweed retain the largest proportion of market share in this sector within the Study Area (7.3% and 6.4% respectively).

7.25 Outside the County, The Metrocentre and Newcastle City Centre continue to attract the largest proportion of market share, collectively retaining 29.9%. In addition, the wider Borough of Gateshead and Silverlink Shopping Park attract a small proportion of expenditure in this sector (3.1% and 2.9% respectively).

7.26 Table 7.6 provides a breakdown of the market share and turnover achieved by the main shopping destinations within and outside Northumberland for Recreational Goods shopping.

Table 7.6: Market Share of Destinations within and outside Northumberland for Recreational Goods within the Study Area

Store	Market Share (%)	Turnover (£m)
Within Northumberland County		
<i>Main Centres[^]</i>		
Cramlington Town Centre	7.3	10.99
Berwick-upon-Tweed Town Centre	6.4	9.59
Blyth Town Centre	6.2	9.35
Hexham Town Centre	5.3	8.02
Ashington Town Centre	4.6	6.91
Alnwick Town Centre	4.4	6.67
Morpeth Town Centre	2.2	3.36
Sub-Total	36.4	54.89
Other within Northumberland County	3.6	5.47
Sub-Total Northumberland County	40.0	60.36
Outside Northumberland County		
<i>Main Centres[*]</i>		
The Metrocentre	19.1	28.79
Newcastle-upon-Tyne City Centre	13.9	20.97
Silverlink Shopping Park	2.9	4.42
Sub-Total	35.9	54.18
Other outside Northumberland County	11.9	17.90
Sub-Total Outside Northumberland County	47.8	72.08
Online	12.2	18.38
TOTAL	100.0	150.82

Notes: Derived from Northumberland Household Survey (August 2009) and WYG analysis
[^] Only includes destinations that achieve a turnover of at least £3m from within the Study Area
^{*} Only includes destinations that achieve a turnover of at least £4m from within the Study Area
 At 2007 prices

Chemist Goods

Market Shares

- 7.27 Existing facilities within Northumberland are identified to attract **76.9%** of expenditure generated for Chemist Goods. This equates to a turnover of some £89.53m in 2009. This is to be expected as people tend to shop locally for chemist goods, and rarely travel farther afield for this type of good, unless it is a linked trip. Cramlington and Blyth retain the largest proportion of market share in this sector within the Study Area (9.1% and 8.4% respectively).
- 7.28 Newcastle City Centre and The Metrocentre attract the largest proportion of market share outside the County, (4.2% and 3.0% respectively). In addition, Kingston Retail Park and Galashiels attract a small proportion of market share in this sector (1.9% and 0.9% respectively).
- 7.29 Table 7.7 provides a breakdown of the market share and turnover achieved by the main shopping destinations within and outside Northumberland for Chemist Goods shopping.

Table 7.7: Market Share of Destinations within and outside Northumberland for Chemist Goods within the Study Area

Store	Market Share (%)	Turnover (£m)
Within Northumberland County		
<i>Main Centres[^]</i>		
Cramlington Town Centre	9.1	10.62
Blyth Town Centre	8.4	9.82
Hexham Town Centre	7.9	9.25
Berwick-upon-Tweed Town Centre	7.5	8.75
Morpeth Town Centre	7.5	8.73
Ashington Town Centre	7.4	8.58
Alnwick Town Centre	5.9	6.91
Sub-Total	53.8	62.66
Other within Northumberland County	23.1	26.87
Sub-Total Northumberland County	76.9	89.53
Outside Northumberland County		
<i>Main Centres[*]</i>		
Newcastle-upon-Tyne City Centre	4.2	4.92
The Metrocentre	3.0	3.51
Kingston Retail Park	1.9	2.18
Galashiels	0.9	1.07
Sub-Total	10.0	11.68
Other outside Northumberland County	11.0	12.83
Sub-Total Outside Northumberland County	21.0	24.51
Online	2.1	2.44
TOTAL	100.0	116.48

Notes: Derived from Northumberland Household Survey (August 2009) and WYG analysis
[^] Only includes destinations that achieve a turnover of at least £6m from within the Study Area
^{*} Only includes destinations that achieve a turnover of at least £1m from within the Study Area
 At 2007 prices



Electrical Goods

Market Shares

- 7.30 Existing facilities within Northumberland are identified to attract **29.9%** of expenditure generated for Electrical Goods. This equates to a turnover of some £47.24m in 2009. Berwick-upon-Tweed (£9.15m), Hexham (£7.03m), Ashington (£6.24m) and Blyth (£5.43) town centres are identified at the most popular Electrical Goods shopping destinations within Northumberland, achieving market shares of 5.8%, 4.4%, 3.9% and 3.4% respectively.
- 7.31 Of the Electrical Goods expenditure directed to shopping destinations outside of Northumberland (£86.04m), the most popular destinations identified are Silverlink Shopping Park (£26.39m), Newcastle City Centre (£23.52m) and Kingston Retail Park (£10.78m), which account for 16.7%, 14.9% and 6.8% of the overall market share. The use of the internet/mail order/catalogue retailers for purchasing Electrical Goods is fairly high, achieving a market share of 15.7% (£24.82m).
- 7.32 Table 7.8 provides a breakdown of the market share and turnover achieved by the main shopping destinations within and outside Northumberland for Electrical Goods shopping.

Table 7.8: Market Share of Destinations within and outside Northumberland for Electrical Goods within the Study Area

Store	Market Share (%)	Turnover (£m)
Within Northumberland County		
<i>Main Centres</i> [^]		
Berwick-upon-Tweed	5.8	9.15
Hexham	4.4	7.03
Ashington	3.9	6.24
Blyth	3.4	5.43
Cramlington	2.7	4.26
Alnwick	1.9	2.99
Sub-Total	22.1	35.1
Other within Northumberland County	7.8	12.14
Sub-Total Northumberland County	29.9	47.24
Outside Northumberland County		
<i>Main Centres</i> [*]		
Silverlink Shopping Park, Newcastle-upon-Tyne	16.7	26.39
Newcastle City Centre	14.9	23.52
Kingston Retail Park, Newcastle-upon-Tyne	6.8	10.78
Sub-Total	38.4	60.69
Other outside Northumberland County	16.0	25.35
Sub-Total Outside Northumberland County	54.4	86.04
Online	15.7	24.82
TOTAL	100.0	158.10

Notes: Derived from Northumberland Household Survey (August 2009) and WYG analysis
[^] Only includes destinations that achieve a turnover of at least £2m from within the Study Area
^{*} Only includes destinations that achieve a turnover of at least £10m from within the Study Area
 At 2007 prices

DIY Goods

Market Shares

- 7.33 Existing facilities within Northumberland are identified to attract **58.5%** of expenditure generated for DIY Goods. This equates to a turnover of some £31.23m in 2009. Ashington town centre is identified to be the most popular DIY goods destination, achieving a market share of 17.2% within Northumberland, with a turnover of £5.36m. In terms of dedicated DIY retail stores, the three Homebase stores in Berwick-upon-Tweed (£3.56m), Alnwick (£2.91m) and Blyth (£2.15m) account for 6.7%, 5.5% and 4.0% of expenditure within Northumberland. The Focus store at Cramlington Retail Park achieves a market share of 5.8% (£3.07m).
- 7.34 Of the DIY Goods expenditure directed to shopping destinations outside of Northumberland (£20.86m), the most popular destinations identified comprise three B&Q stores and the Silverlink Shopping Park. The B&Q Warehouse in Scotswood, the B&Q Warehouse in Wallsend and the B&Q

Supercentre in Newcastle-upon-Tyne achieve the highest market share outside the County area (8.8%, 5.8% and 4.3% respectively). The Silverlink Shopping Park achieves an overall market share of 2.8% (£1.48m).

- 7.35 Table 7.9 provides a breakdown of the market share and turnover achieved by the main shopping destinations within and outside Northumberland for DIY Goods shopping. In this respect, it is important to note that for DIY Goods shopping not all the retail destinations are located within or at the edge-of existing centres. For example, the Focus store at North Seaton (in the suburbs of the town) is identified to attract notable DIY expenditure. Similar Blyth Retail Park (which includes a Homebase store) is located a notable distance from Blyth Town Centre.

Table 7.9: Market Share of Destinations within and outside Northumberland for DIY Goods

Store	Market Share (%)	Turnover (£m)
Within Northumberland County		
<i>Main Centres[^]</i>		
Ashington	10.0	5.36
Homebase, Northumberland Road, Berwick-upon-Tweed	6.7	3.56
Focus, Cramlington Retail Park, Cramlington	5.8	3.07
Homebase, Willowburn Avenue, Alnwick	5.5	2.91
Hexham	4.2	2.26
Homebase, Blyth Valley Retail Park, Blyth	4.0	2.15
Berwick-upon-Tweed	4.0	2.15
Sub-Total	40.2	21.46
Other within Northumberland County	18.3	9.77
Sub-Total Northumberland County	58.5	31.23
Outside Northumberland County		
<i>Main Centres[*]</i>		
B&Q Warehouse, Scotswood Road, Scotswood	8.8	4.68
B&Q Warehouse, Middle Engine Lane, Wallsend	5.8	3.10
B&Q Supercentre, Fossway, Newcastle-upon-Tyne	4.3	2.28
Silverlink Shopping Park, Newcastle-upon-Tyne	2.8	1.48
Sub-Total	21.7	11.54
Other outside Northumberland County	17.5	9.32
Sub-Total Outside Northumberland County	39.1	20.86
Online	2.3	1.25
TOTAL	100.00	53.34

Notes: Derived from Northumberland Household Survey (August 2009) and WYG analysis
[^] Only includes destinations that achieve a turnover of at least £2m from within the Study Area
^{*} Only includes destinations that achieve a turnover of at least £1m from within the Study Area
 At 2007 prices

Furniture Goods

Market Shares

- 7.36 Existing facilities within Northumberland are identified to attract **53.4%** of expenditure generated for Furniture Goods. This equates to a turnover of some £51.52m in 2009. Berwick-upon-Tweed town centre is identified to be the most popular destination, achieving a market share of 8.8% (£8.46m) within the Study Area, followed by Cramlington 7.3% (£7.07m) and Ashington 7.2% (£6.96m).
- 7.37 Of the Furniture Goods expenditure directed to shopping destinations outside of Northumberland (£41.13m), the most popular destinations identified are Newcastle City Centre (£3.5%) and the Metrocentre (7.5%).
- 7.38 Table 7.10 provides a breakdown of the market share and turnover achieved by the main shopping destinations within and outside Northumberland for Furniture Goods shopping.

Table 7.10: Market Share of Destinations within and outside Northumberland for Furniture Goods

Store	Market Share (%)	Turnover (£m)
Within Northumberland County		
<i>Main Centres[^]</i>		
Berwick-upon-Tweed	8.8	8.46
Cramlington	7.3	7.07
Ashington	7.2	6.96
Blyth	7.1	6.84
Hexham	5.9	5.73
Sub-Total	36.3	35.06
Other within Northumberland County	17.1	16.48
Sub-Total Northumberland County	53.4	51.52
Outside Northumberland County		
<i>Main Centres[*]</i>		
Newcastle City Centre	13.5	13.02
Metrocentre	7.5	7.22
Silverlink Shopping Park, Newcastle-upon-Tyne	3.4	3.28
Sub-Total	24.4	23.52
Other outside Northumberland County	18.3	17.61
Sub-Total Outside Northumberland County	42.7	41.13
Online	3.9	3.78
TOTAL	100.0	96.43

Notes: Derived from Northumberland Household Survey (August 2009) and WYG analysis
[^] Only includes destinations that achieve a turnover of at least £5m from within the Study Area
^{*} Only includes destinations that achieve a turnover of at least £3m from within the Study Area
 At 2007 prices



Garden Centre Goods

Market Shares

- 7.39 Existing facilities within Northumberland are identified to attract **71.7%** of expenditure generated for Garden Centre Goods. This equates to a turnover of some £11.22m in 2009. The existing Heighley Gate Garden Centre a few miles from Morpeth Town Centre is identified to be the most popular destination, achieving a market share of 28.8% within Northumberland which equates to a turnover of £4.51m. The Shades of Green Garden Centre in Ashington and Dobbies Garden World in Ponteland achieve a market share within Northumberland of 9.8% (£1.54m) and 8.2% (£1.29m) respectively. As reflected in DIY Goods shopping, a number of popular destinations for residents are located outside existing centres.
- 7.40 Of the Garden Centre Goods expenditure directed to shopping destinations outside of Northumberland (£4.43m), the most popular destinations identified are Peter Barratts in Newcastle-upon-Tyne and the Mayfield Garden Centre in Kelso, which achieve an overall market share of 9.2% (£1.44m) and 4.9% (£0.76m).
- 7.41 Table 7.11 provides a breakdown of the market share and turnover achieved by the main shopping destinations within and outside Northumberland for Garden Centre Goods shopping.

Table 7.11: Market Share of Destinations within and outside Northumberland for Garden Centre Goods

Store	Market Share (%)	Turnover (£m)
Within Northumberland County		
<i>Main Centres</i> [^]		
Heighley Gate Garden Centre, Morpeth	28.8	4.51
Shades of Green Garden Centre, Ashington	9.8	1.54
Dobbies Garden World, Ponteland	8.2	1.29
Down To Earth, Tyne Mills Industrial Estate, Hexham	7.2	1.12
Azure Garden Centre, Station Road, Cramlington	3.6	0.57
Sub-Total	57.6	9.03
Other within Northumberland County	14.1	2.2
Sub-Total Northumberland County	71.7	11.22
Outside Northumberland County		
<i>Main Centres</i> [*]		
Peter Barratts, Gosforth Park, Newcastle-upon-Tyne	9.2	1.44
Mayfield Garden Centre, Kelso	4.9	0.76
Cowells Garden Centre, Woosington	2.4	0.38
Sub-Total	16.5	2.58
Other outside Northumberland County	11.8	1.85
Sub-Total Outside Northumberland County	28.3	4.43
Online	0.0	0.00
TOTAL	100.0	15.65

Notes:
 Derived from Northumberland Household Survey (August 2009) and WYG analysis
[^] Only includes destinations that achieve a turnover of at least £0.5m from within the Study Area
^{*} Only includes destinations that achieve a turnover of at least £0.3m from within the Study Area
 At 2007 prices

Tourism Expenditure

- 7.42 Given that much of Northumberland (particularly north Northumberland) is a popular tourist destination it is important to note that additional expenditure will be generated by tourists and visitors who live outside the defined Study Area.
- 7.43 General information on expenditure by tourists/visitors has been provided by Northumberland Tourism which demonstrates that certain parts of the County benefit from additional expenditure generated outside of the study area. This is primarily focused in key tourist destinations such as Alnwick, Berwick, Morpeth, Hexham, Amble, Seahouses, Wooler and Haltwhistle. However, the information gathered on expenditure is broken down into broad categories such as accommodation, food and drink, shopping, etc and is only provided for the County as a whole (i.e. not location specific). It is evident that there will be significant overlap between food and drink and shopping categories whereby it is not clear whether the food and drink category relates to expenditure in foodstores as well as restaurants and pubs. Therefore, it is extremely difficult to come to a robust view as to how much of this additional expenditure will pass through existing retail facilities in the



County. In addition, from the evidence we have been provided with, the data covers the period 2008 to 2009 and there is therefore no reliable and consistent long term data available comparable to that provided by MapInfo for households.

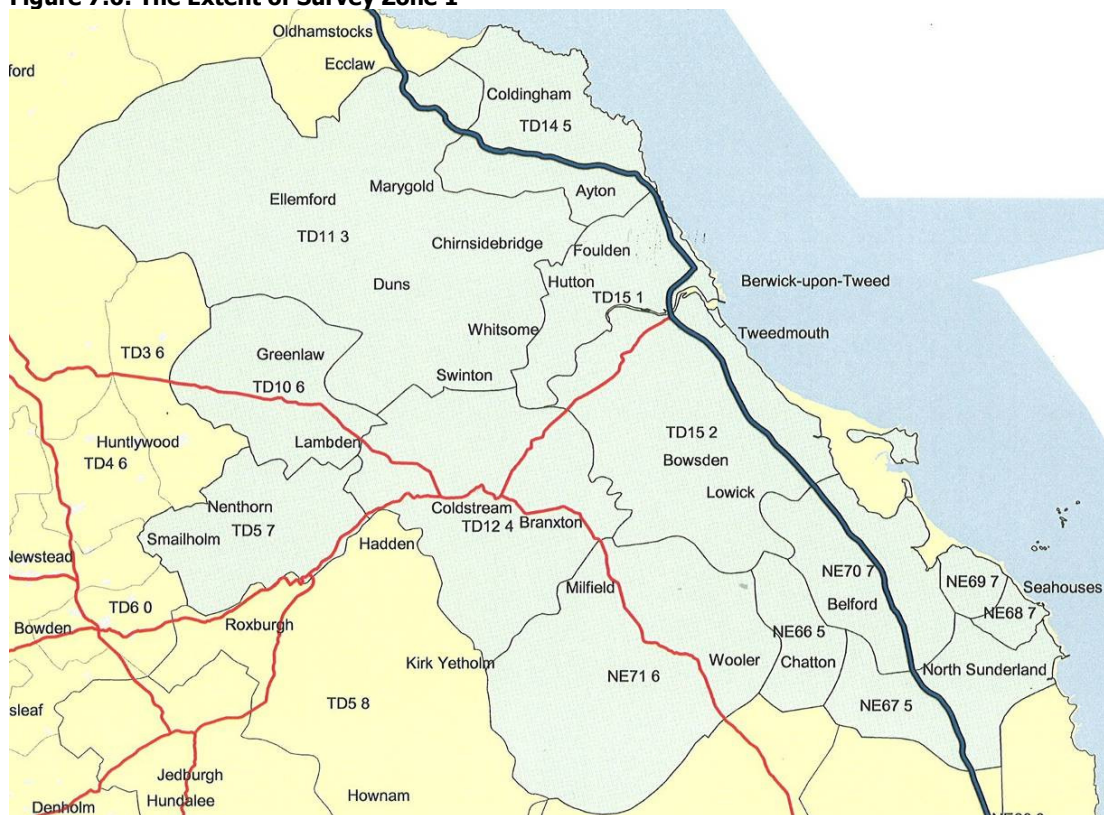
- 7.44 Therefore, for the purposes of this report no allowance for tourism expenditure has been made albeit it is accepted that this is a cautious approach and we would expect future developments to make some allowance for inflowing expenditure in certain locations where there is clear evidence of significant tourist activity.

Shopping Patterns by Zone

- 7.44 Whilst the above analysis considering shopping patterns within the whole Study Area, we set out below an assessment of shopping patterns on a zone-by-zone basis. This analysis provides useful information with regard to expenditure flows between particular parts of Northumberland and the wider Study Area together with an indication of retention/leakage within the County. This will help in identifying spatially where there may be a requirement to improve retail provision within the County.

Survey Zone 1 – Berwick-upon-Tweed

Figure 7.6: The Extent of Survey Zone 1



Overview

- 7.45 This zone is identified to comprise a resident population of approximately 52,543 people in 2009 and generates some £90m of convenience goods expenditure and over £142m of comparison goods expenditure.
- 7.46 This zone includes Berwick-upon Tweed Town Centre, together with Kelso, Duns and Wooler. Whilst much of this zone comprises the area surrounding Berwick-upon-Tweed (to the east of the A1) it also covers part of the Scottish Borders authority area.



Convenience Goods Shopping

- 7.47 The Household Survey identifies that facilities within the Study Area retain some 76% of convenience goods expenditure generated in this zone, which equates to some £63.29m of expenditure in 2009.
- 7.48 Within Zone 1, the most popular destinations for convenience goods shopping are identified to be:
- Morrison's at Berwick-upon-Tweed (41.3% market share);
 - Internet (5.3%);
 - Co-op Superstore at Tweedmouth (now operated by Asda) (4.8%)⁷; and
 - Somerfield at Kelso (4.0%).
- 7.49 Overall, existing facilities within Zone 1 retain **70.8%** of convenience goods expenditure generated by local residents. This is reflective of the strength of the Morrison's store at Berwick-upon-Tweed, within this zone.

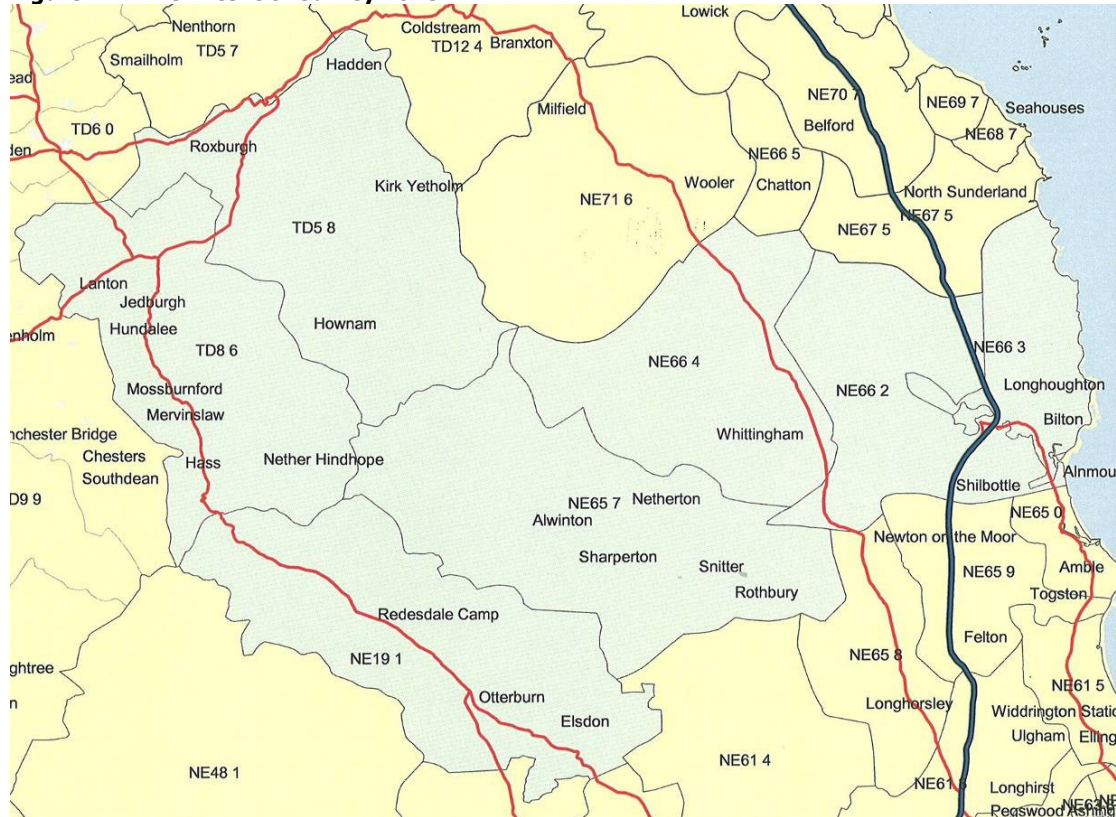
Comparison Goods Shopping

- 7.50 Existing facilities within the Study Area are identified to attract £81.64m of comparison goods expenditure generated in this zone, which equates to a market share of approximately 57%. The most popular destinations within and outside the Study Area for comparison goods shopping by respondents within this zone identified by the Household Survey were as follows:
- Berwick-upon-Tweed (37.9% market share);
 - Edinburgh City Centre (11.8%);
 - Internet (10.8%); and
 - Scottish Borders Local Authority Area (9.2%).
- 7.51 Overall, existing facilities within Zone 1 retain **53.9%** (or (£76.69m) of comparison goods expenditure generated within this zone. This suggests that just over half of the local population undertake their comparison goods shopping in Zone 1; however others continue to travel elsewhere, including Edinburgh City Centre and centres in the Scottish Borders authority area (part of which falls within Zone 1) together with facilities in Newcastle-upon-Tyne.

⁷ At the time of the household survey this store was operated by Co-op and has only recently been occupied by Asda

Survey Zone 2 – Alnwick

Figure 7.7: The Extent of Survey Zone 2



Overview

- 7.52 This zone is identified to have a population of 32,653 people in 2009 and generates some £57m of convenience goods expenditure and £95m of comparison goods expenditure.
- 7.53 This zone comprises Alnwick, Jedburgh and Rothbury. It stretches from the A1 along the east coast to the west of the County area and into part of the Scottish Borders authority area.



Convenience Goods Shopping

- 7.54 The Household Survey identifies that facilities within the Study Area retain some 77% of convenience goods expenditure generated in this zone, which equates to some £43.58m of expenditure in 2009.
- 7.55 Within Zone 2, the most popular destinations for convenience goods shopping are identified to be:
- Morrison's at Alnwick (28.5% market share);
 - Sainsbury's at Alnwick (17.1%);
 - Co-op Alldays at Jedburgh (7.2%); and
 - Asda at Galashiels (6.4%).
- 7.56 Overall, existing facilities within Zone 2 retain **60.5%** of convenience goods expenditure generated by local residents. This is reflective of the strength of the Morrison's store at Alnwick, within this zone.

Comparison Goods Shopping

- 7.57 Existing facilities within the Study Area are identified to attract £41.60m of comparison goods expenditure generated in this zone, which equates to a market share of approximately 44%. The most popular destinations within and outside the Study Area for comparison goods shopping by respondents within this zone identified by the Household Survey were as follows:
- Alnwick (22.7% market share);
 - Newcastle City Centre (21.2%);
 - Scottish Borders Local Authority Area (10.1%); and
 - The Metrocentre and remainder of Gateshead Borough (8.6%).
- 7.58 Overall, existing facilities within Zone 2 retain **28.5%** (or £27.01m) of comparison goods expenditure generated within this zone. Whilst this suggests that local residents are travelling elsewhere to undertake their comparison goods shopping, this is to be expected given the strength of centres nearby, such as Newcastle City Centre and facilities in the Scottish Borders authority area.

Survey Zone 3 – Scots Gap

Figure 7.8: The Extent of Survey Zone 3



Overview

- 7.59 This survey zone is identified to have a population of 8,516 people in 2009 and generates some £14m of convenience goods expenditure and £26.25m of comparison goods expenditure.
- 7.60 This zone comprises Scots Gap only. It is located in the centre of the Study Area and has the A1 running directly through it.

Convenience Goods Shopping

- 7.61 The Household Survey identifies that facilities within the Study Area retain some 83% of convenience goods expenditure generated in this zone, which equates to some £11.92m of expenditure in 2009.



7.62 Within Zone 3, the most popular destinations for convenience goods shopping are identified to be:

- Morrison's at Morpeth (43.7% market share);
- Asda at Ashington (6.2%); and
- Tesco Extra at Newcastle-upon-Tyne (6.2%).

7.63 Existing facilities within Zone 3 retain **0.0%** of convenience goods expenditure generated by local residents. This is due to their being a lack of convenience facilities in this zone.

Comparison Goods Shopping

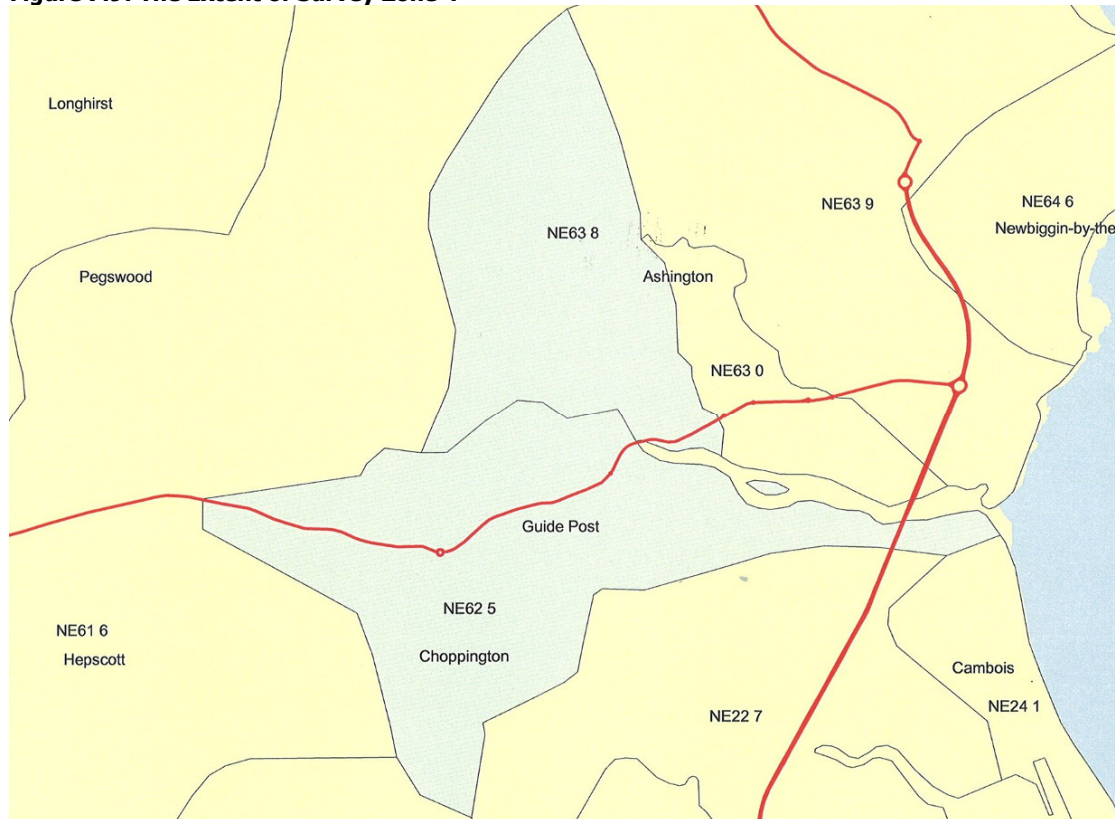
7.64 Existing facilities within the Study Area are identified to attract £10.80m of comparison goods expenditure generated in this zone, which equates to a market share of approximately 41%. The most popular destinations within and outside the Study Area for comparison goods shopping by respondents within this zone identified by the Household Survey were as follows:

- Newcastle City Centre (28.2% market share);
- Morpeth (19.6%);
- The Metrocentre and the remainder of Gateshead Borough (12.4%); and
- South Tyneside (9.9%).

7.65 Existing facilities within Zone 3 retain **0.2%** (or £0.05m) of comparison goods expenditure generated within this zone. This suggests that almost all local residents are travelling elsewhere to undertake their comparison goods shopping, due to a lack of comparison goods facilities within Zone 3. This is to facilities including Newcastle City Centre, Morpeth and The Metrocentre and the remainder of Gateshead Borough.

Survey Zone 4 – Ashington West

Figure 7.9: The Extent of Survey Zone 4



Overview

- 7.66 This zone comprises predominantly the area to the north and south of Wansbeck River, to the north of Blyth and to the west of Newbiggin-by-the-Sea. The population within this zone is identified to be 17,660 people in 2009, which generates some £14m of convenience goods expenditure and £13m of comparison goods expenditure.

Convenience Goods Shopping

- 7.67 Existing facilities within the Study Area attract more than £24m of convenience goods expenditure generated from this zone, which represents a market share of 92%. The Household Survey identifies the following destinations to be the most popular for respondents within this zone for convenience goods shopping:



- Asda at Ashington (35.9% market share);
- Asda at Blyth (26.1%); and
- Aldi at Ashington (3.6%).

7.68 In terms of facilities within Zone 4, these are identified to retain **19.8%** (or £5.20m) of convenience goods expenditure generated in this zone. The largest proportion (36%) of this expenditure is identified to be directed to the Asda store at Lyntonville Terrace.

Comparison Goods Shopping

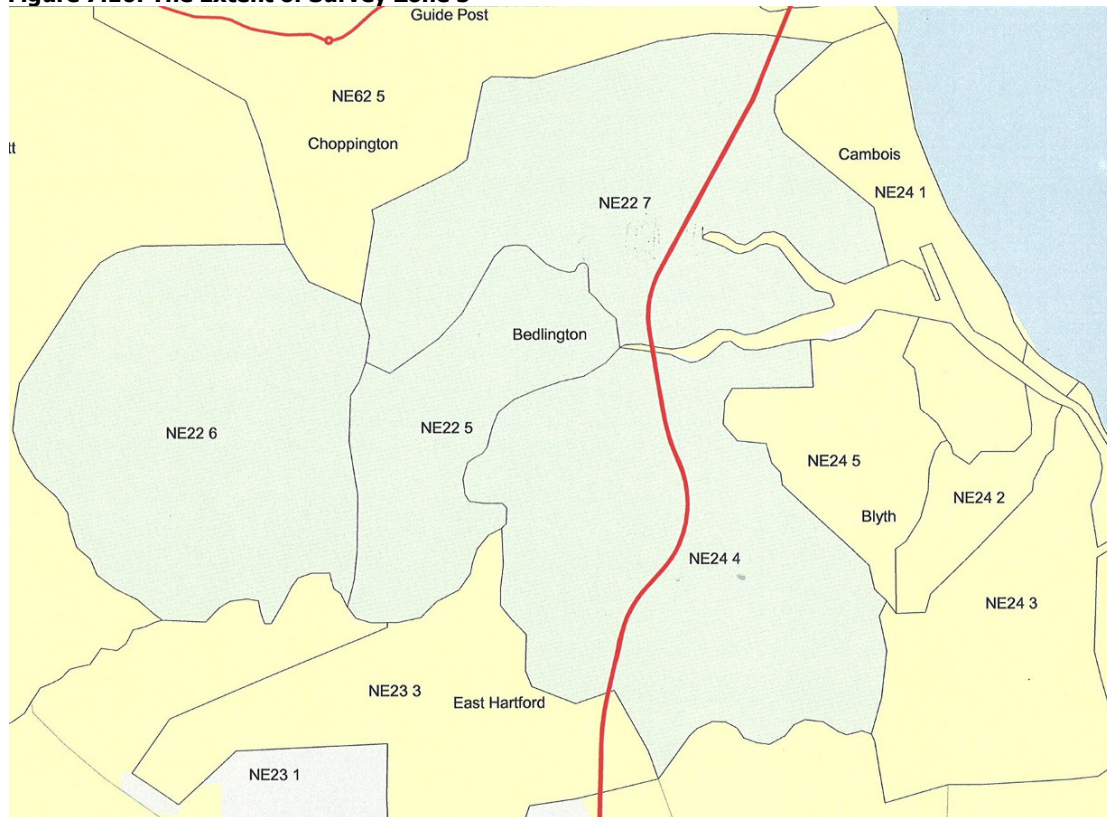
7.69 Existing facilities within the Study Area are identified to attract £21.26m of comparison goods expenditure generated in this zone, which equates to a market share of approximately 49%. The most popular destinations within and outside the Study Area for comparison goods shopping by respondents within this zone identified by the Household Survey were as follows:

- Newcastle City Centre (26.9% market share);
- Ashington (24.8%);
- The Metrocentre and the remainder of Gateshead Borough(13.1%); and
- Blyth (8.3%).

7.70 **30.3%** (or £13.20m) of comparison goods expenditure generated in this zone is spent at existing facilities in this zone.

Survey Zone 5 – Bedlington

Figure 7.10: The Extent of Survey Zone 5



Overview

- 7.71 This survey zone covers the area to the north of Cramlington and to the west of Blyth. Accordingly, it includes the centres of Bedlington and Bedlington Station. This survey zone is identified to have a population of 25,520 people in 2009, which generates £38m of convenience goods expenditure and £63m of comparison goods expenditure.

Convenience Goods Shopping

- 7.72 Of all convenience goods expenditure generated within this zone, some 90% (or £33.96m) of expenditure is retained by existing facilities within the Study Area. The Household Survey identified the following destinations, both within and outside the Study Area, to be the most popular:

- Asda at Blyth (44.6% market share);
- Tesco at Bedlington (17.5%);
- Netto at Bedlington (5.2%); and
- Morrison's at Blyth (5.0%).

7.73 With regard to existing facilities within Zone 5 only, some £10.01m of convenience goods expenditure generated is retained. This equates to a market share of **26.6%** within the Study Area. This analysis suggests that almost three quarters (73%) of convenience goods expenditure is directed to facilities outside this zone, most notably to the Asda store on Cowpen Road and the Morrison's store on Regent Street (both Zone 12), both of which are located only a short distance from residents within this zone.

Comparison Goods Shopping

7.74 Existing facilities within the Study Area are identified to attract £26.99m of comparison goods expenditure generated in this zone, which equates to a market share of approximately 43%. The most popular destinations within and outside the Study Area for comparison goods shopping by respondents within this zone identified by the Household Survey were as follows:

- Newcastle City Centre (26.9% market share);
- Blyth (16.2%);
- The Metrocentre and the remainder of Gateshead Borough (13.1%); and
- Cramlington (8.0%).

7.75 With regard to facilities within Zone 5, these are identified to retain only **3.6%** (or £2.23m) of comparison goods expenditure generated in this zone. This is directed primarily to Bedlington. Although it achieves a market share of less than 3% within this zone, this represents almost three quarters (71%) of the comparison goods expenditure that is retained in this zone, which reflects the centre's local importance.

Survey Zone 6 – Seaton Delaval

Figure 7.11: The Extent of Survey Zone 6



Overview

- 7.76 This survey zone covers the south eastern part of the County. It covers the area to the south of Blyth and to the east of Cramlington. Accordingly, it includes the centres of Seaton Delaval and Seaton Sluice. This survey zone is identified to have a population of 23,645 people in 2009, which generates £37m of convenience goods expenditure and £61m of comparison goods expenditure.

Convenience Goods Shopping

- 7.77 Of all convenience goods expenditure generated within this zone, some 40% (or £14.73m) of expenditure is retained by existing facilities within the Study Area. The Household Survey identified the following destinations, both within and outside the Study Area, to be most popular:

- Morrison's at Tynemouth (25.0% market share);



- Asda at Cramlington (17.5%);
- Sainsbury's at Whitley Bay (11.5%); and
- Asda at Blyth (6.7%).

7.78 With regard to existing facilities within Zone 6 only, £1.29m of convenience goods expenditure generated is retained. This equates to a market share of only **3.5%** within the Study Area. This analysis suggests that almost all (97%) of convenience goods expenditure is directed to facilities outside this zone, most notably to the Morrison's store on Preston Road North (North Tyneside authority area) and the Asda store at Manor Walks Shopping Centre (Zone 11), both of which are located near to residents within this zone.

Comparison Goods Shopping

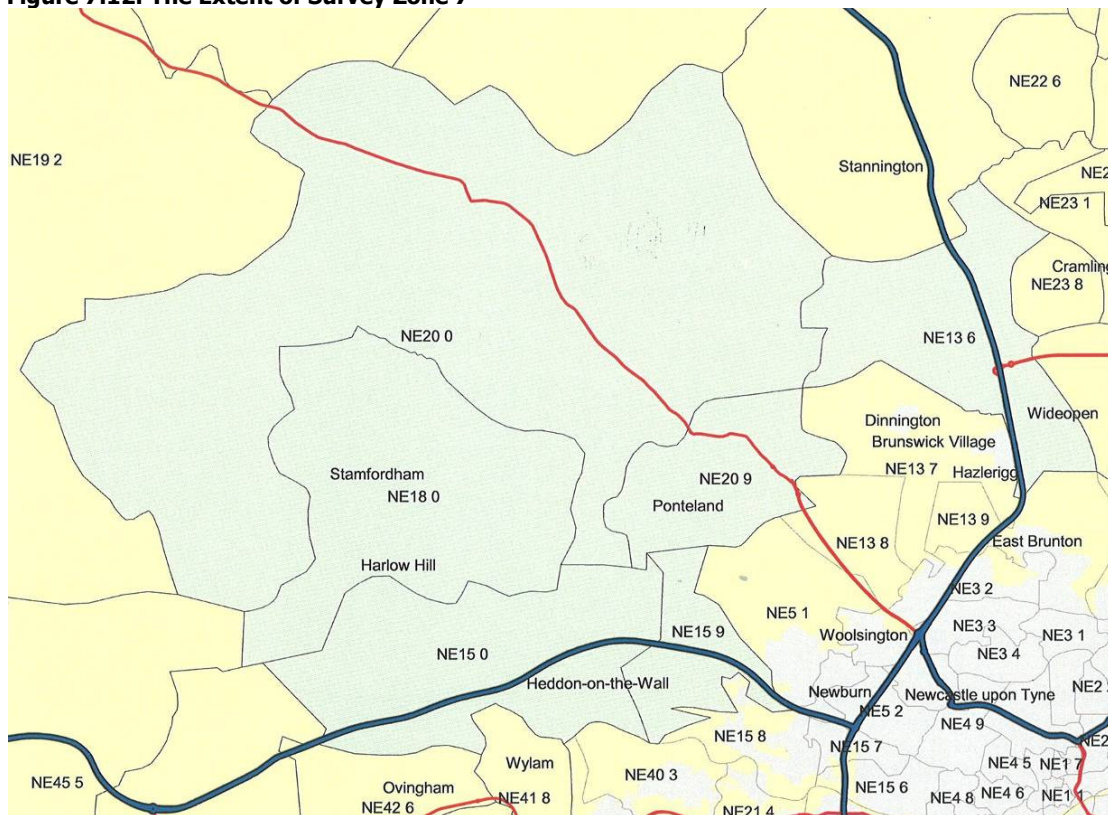
7.79 Existing facilities within the Study Area are identified to attract £15.64m of comparison goods expenditure generated in this zone, which equates to a market share of approximately 26%. The most popular destinations within and outside the Study Area for comparison goods shopping by respondents within this zone identified by the Household Survey were as follows:

- Newcastle City Centre (42.7% market share);
- Cramlington (12.8%);
- North Tyneside (12.2%); and
- Blyth (6.6%).

7.80 With regard to facilities within Zone 6, these are identified to retain only **2.6%** (or £1.61m) of comparison goods expenditure generated in this zone. This is directed primarily to Seaton Delaval. Although it achieves a market share of 2% within this zone, this represents over three quarters (77%) of the comparison goods expenditure that is retained in this zone, which reflects the centre's local importance.

Survey Zone 7 – Ponteland

Figure 7.12: The Extent of Survey Zone 7



Overview

- 7.81 This survey zone comprises some 27,255 people in 2009 and generates £44m of convenience goods expenditure and £76m of comparison goods expenditure. The geographical extent of this survey zone relates to the south eastern part of the County. It covers the area to the west of Cramlington and to the north of Ponteland. This zone includes Ponteland, Throckley and Wide Open.

Convenience Goods Shopping

- 7.82 Existing convenience goods facilities within the Study Area are identified to attract some £8.97m of convenience goods expenditure generated in this zone. This equates to a market share of almost 21%. The most popular convenience goods destinations for respondents within this zone, both within and outside the Study Area are as follows:



- Tesco Extra at Kingston Park, Newcastle-upon Tyne (19.8% market share);
- Sainsbury's Local at Ryton (11.1%);
- Asda at Gosforth (6.5%); and
- Asda at The Metrocentre (6.5%).

7.83 Only £5.52m of convenience goods expenditure generated in this zone is identified as being retained in the zone. This equates to a market share of just **12.6%** within Zone 7. The most popular destinations within this zone include 'local shops' in Ponteland (6%) and the Sainsbury's store at Bell Villas (4%).

Comparison Goods Shopping

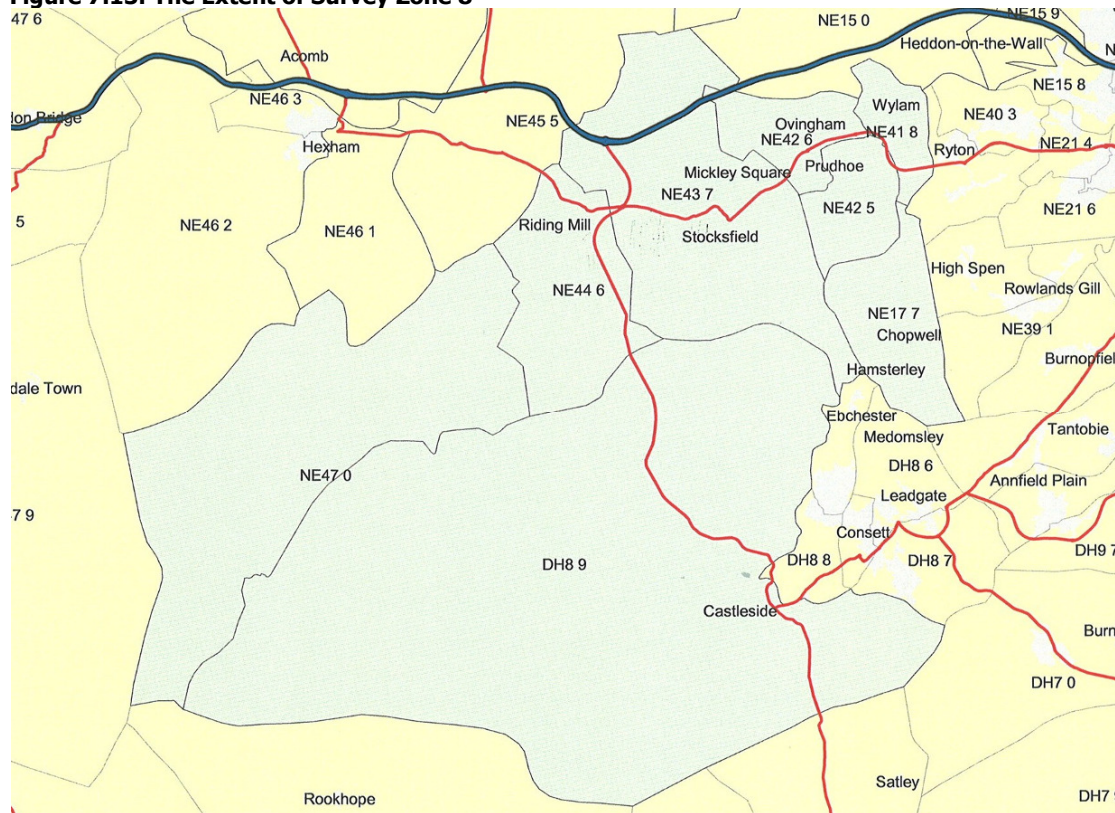
7.84 All facilities within the Study Area are identified to retain 13% (or £9.55m) of comparison goods expenditure generated in Zone 7. The most popular destinations within and outside the Study Area for comparison goods shopping were identified as follows:

- Newcastle City Centre (51.8% market share);
- The Metrocentre and the remainder of Gateshead Borough (21.2%);
- Hexham (3.6%); and
- Ponteland (3.4%).

7.85 Existing facilities within Zone 7 (such as Ponteland) were identified to attract only **5.8%** of comparison goods expenditure generated. This reflects the limited comparison goods offer in this zone and the strength and close proximity of provision elsewhere, such as Newcastle City Centre and The Metrocentre.

Survey Zone 8 – Prudhoe

Figure 7.13: The Extent of Survey Zone 8



Overview

- 7.86 This survey zone comprises some 29,576 people in 2009 and generates £45m of convenience goods expenditure and £79m of comparison goods expenditure. The geographical extent of this survey zone relates to the southern part of the County. It covers the area to the west of Newcastle City Centre. This zone includes Prudhoe, Wylam, Chopwell and Stocksfield.

Convenience Goods Shopping

- 7.87 Existing convenience goods facilities within the Study Area are identified to attract some £20.63m of convenience goods expenditure generated in this zone. This equates to a market share of almost 46%. The most popular convenience goods destinations for respondents within this zone, both within and outside the Study Area are as follows:



- Co-op at Prudhoe (22.6% market share);
- Asda at the Metrocentre (21.2%);
- Tesco Extra at Hexham (11.7%); and
- Morrison's at Consett (9.4%).

7.88 £10.90m of convenience goods expenditure generated in the zone is identified as being retained in the zone. This equates to a market share of **24.1%** within Zone 8. The most popular destinations within this zone include the Co-op Superstore on Oakfield Terrace (23%) and 'local shops' in Prudhoe (2%).

Comparison Goods Shopping

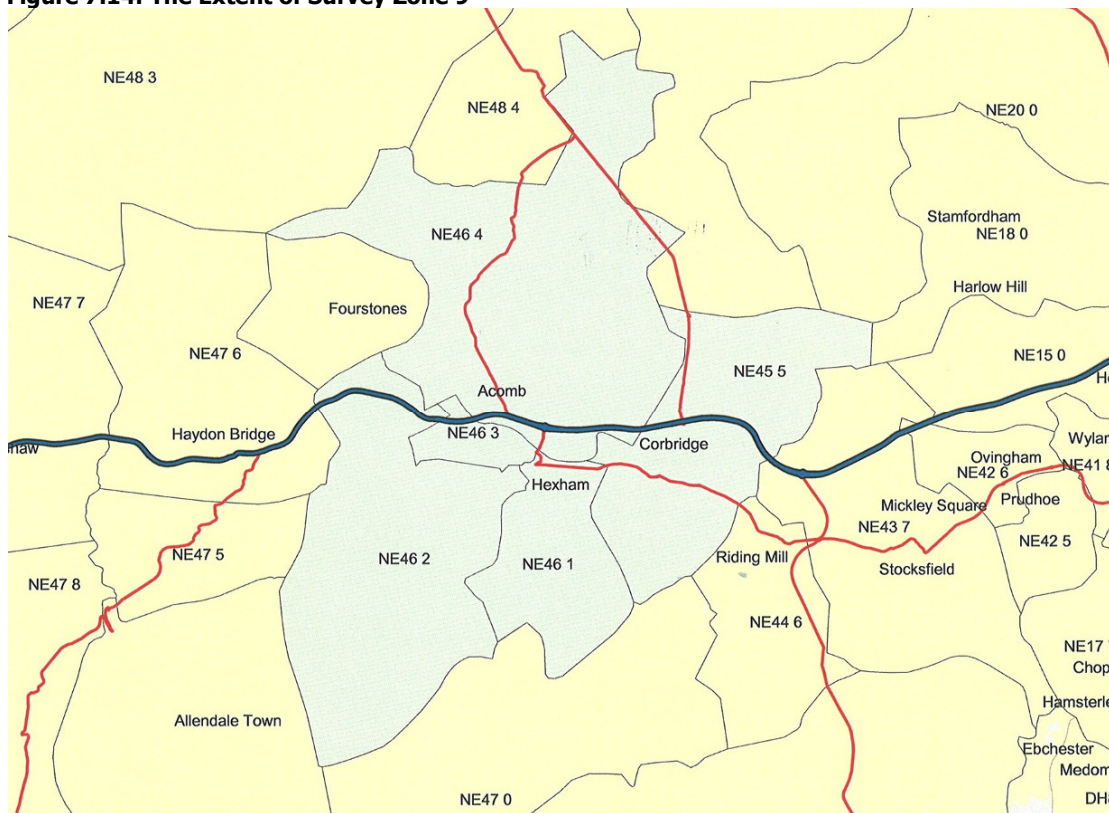
7.89 All facilities within the Study Area are identified to retain 24% (or £18.89m) of comparison goods expenditure generated in Zone 8. The most popular destinations within and outside the Study Area for comparison goods shopping were identified as follows:

- The Metrocentre and the remainder of Gateshead Borough (35.9% market share);
- Newcastle City Centre (20.9%);
- Hexham (10.9%); and
- Durham (7.8%).

7.90 Existing facilities within Zone 8 (such as Prudhoe) were identified to attract only **10.1%** of comparison goods expenditure generated. This reflects the limited comparison goods offer in this zone and the strength and close proximity of provision elsewhere, such as The Metrocentre and Newcastle City Centre.

Survey Zone 9 – Hexham

Figure 7.14: The Extent of Survey Zone 9



Overview

- 7.91 This zone comprises the region towards the southern part of the Study Area and includes the settlements of Hexham and Corbridge. This zone is identified to comprise some 18,286 people in 2009 and generates £29m of convenience goods expenditure and £51m of comparison goods expenditure.

Convenience Goods Shopping

- 7.92 Existing facilities within the Study Area are identified to attract £26.41m of convenience goods expenditure generated in this zone. This equates to a market share of 91% within this zone. The most popular destinations were identified as follows:

- Tesco Extra at Hexham (39.3% market share);



- Waitrose at Hexham (19.3%);
- Local Shops at Hexham (12.2%); and
- Aldi at Hexham (10.9%).

7.93 With regard to facilities within Zone 9, some £26.20m of convenience goods expenditure is retained, which equates to a market share of **90.7%**. This means that within the Study Area, 9 in 10 shoppers undertake food shopping within this zone. 43% of this expenditure is directed to the Tesco Extra store at Hexham.

Comparison Goods Shopping

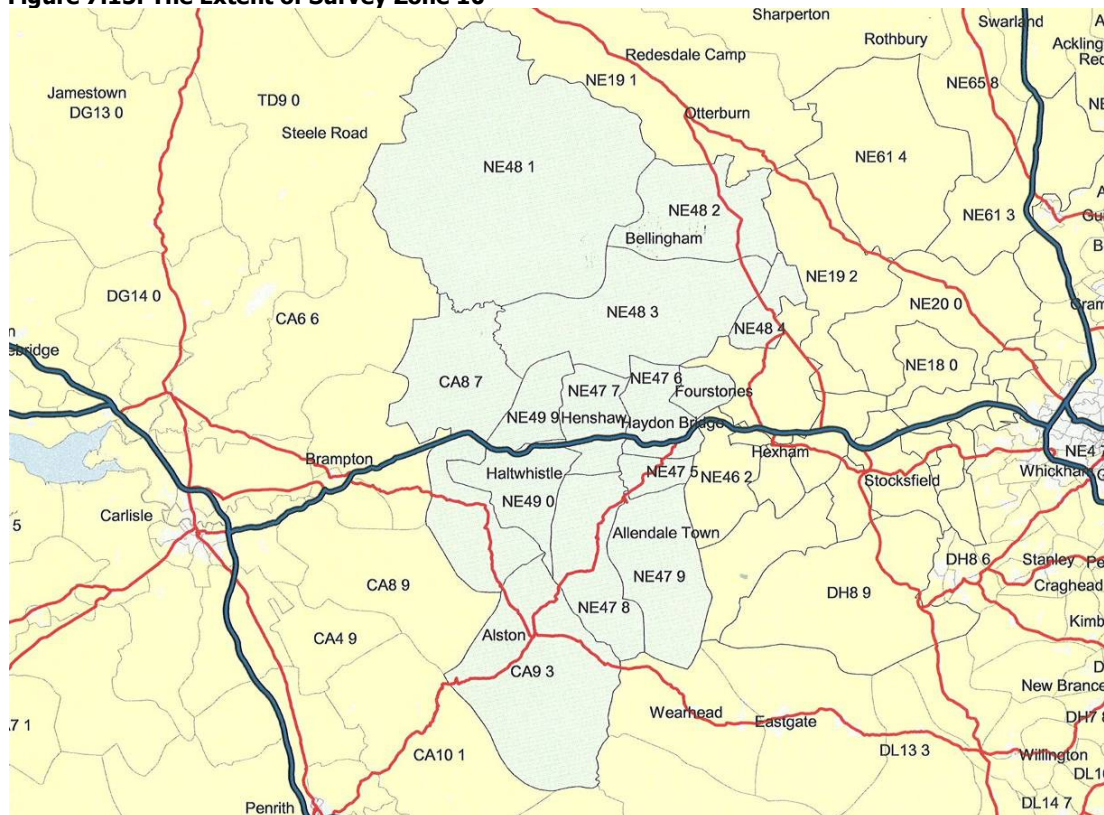
7.94 Existing facilities within the Study Area are identified to attract £28.92m of comparison goods expenditure generated in Zone 9. This equates to a market share of 57%. The most popular destinations for comparison goods shopping (both within and outside the Study Area) of respondents within the Zone 9 area are as follows:

- Hexham (50.1% market share);
- Newcastle City Centre (20.0%); and
- The Metrocentre and the remainder of Gateshead Borough (12.0%).

7.95 Hexham Town Centre is the most popular comparison retail destination for respondents within Zone 9. Aside from this, facilities in Newcastle City Centre and The Metrocentre (together with the remainder of Gateshead Borough) are the next most popular destinations respectively. Facilities within Zone 9 (most notably Hexham) are identified to attract some £28.37m of comparison goods expenditure generated in this zone. This equates to a market share of **55.5%** within this zone.

Survey Zone 10 – Haltwhistle

Figure 7.15: The Extent of Survey Zone 10



Overview

- 7.96 This zone comprises the region to the south west of the Study Area and includes the settlements of Allendale, Alston, Bellingham, Haltwhistle and Haydon Bridge. This zone is identified to comprise some 20,162 people in 2009 and generates £32m of convenience goods expenditure and £55m of comparison goods expenditure.

Convenience Goods Shopping

- 7.97 Existing facilities within the Study Area are identified to attract £23.3m of convenience goods expenditure generated in this zone. This equates to a market share of 73% within this zone. The most popular destinations within and outside the Study Area were identified as follows:

- Tesco Extra at Hexham (35.2%);



- Sainsbury's at Haltwhistle (7.2%);
- Co-op Shop at Allendale (6.9%); and
- Asda at Carlisle (5.9%).

7.98 With regard to facilities within Zone 10, some £4.96m of convenience goods expenditure is retained, which equates to a market share of **15.6%**. This means that within the Study Area, little of the convenience goods market share is retained in this zone. Just less than half (46%) of this expenditure is directed to the Sainsbury's store in Haltwhistle.

Comparison Goods Shopping

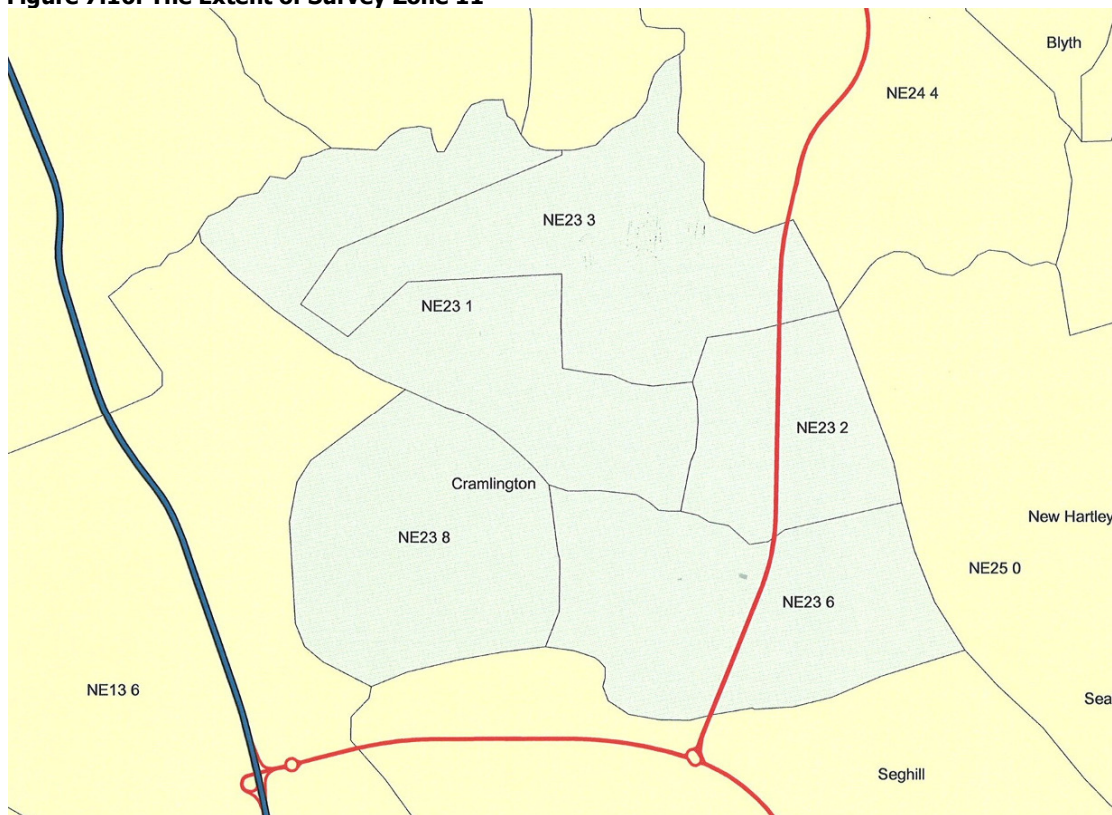
7.99 Existing facilities within the Study Area are identified to attract £26.97m of comparison goods expenditure generated in Zone 10. This equates to a market share of 49%. The most popular destinations for comparison goods shopping (both within and outside the Study Area) of respondents within the Zone 10 area are as follows:

- Hexham (34.5% market share);
- Carlisle City Centre (15.1%);
- The Metrocentre and the remainder of Gateshead Borough (11.5%); and
- Newcastle City Centre (10.8%).

7.100 Hexham Town Centre is the most popular comparison retail destination for respondents within Zone 10. Aside from this, facilities in Carlisle City Centre and the Metrocentre (together with the remainder of Gateshead Borough) are the next most popular destinations respectively. Facilities within Zone 10 (most notably Haltwhistle) are identified to attract some £5.71m of comparison goods expenditure generates in this zone. This equates to a market share of **10.4%** within this zone.

Survey Zone 11 – Cramlington

Figure 7.16: The Extent of Survey Zone 11



Overview

- 7.101 This survey zone is located to the south east of the County, to the north of Newcastle City Centre and to the south west of Blyth. It includes the centre of Cramlington. The population within this zone is identified to be 30,132 people in 2009, generating £45m of convenience goods expenditure and £78m of comparison goods expenditure.

Convenience Goods Shopping

- 7.102 Existing facilities within the Study Area are identified to attract £41.10m of convenience goods expenditure generated in this zone. This represents a market share of 91%. The most popular destinations within and outside the Study Area were identified by the Household Survey as follows:

- Asda at Cramlington (49.2% market share);



- Sainsbury's at Cramlington (24.2%);
- Asda at Blyth (7.3%); and
- Morrison's at Killingworth (5.5%).

7.103 Existing facilities within Zone 11 are identified to retain **80.7%** (or £36.64m) of convenience goods expenditure generated in this zone. Some 61% of this expenditure is directed to the existing Asda store in Cramlington.

Comparison Goods Shopping

7.104 Existing facilities within the Study Area are identified to attract almost 44% (or £33.78m) of comparison goods expenditure generated in Zone 11. The most popular comparison goods destinations of respondents in Zone 11 are identified as follows:

- Newcastle City Centre (35.5% market share);
- Cramlington (34.7%);
- The Metrocentre and the remainder of Gateshead Borough (8.9%); and
- Internet (6.4%).

7.105 In terms of the market share of existing comparison goods facilities within Zone 11, analysis of the Household Survey identifies that existing facilities retain **39.0%** of comparison goods expenditure generated from that zone.

Survey Zone 12 – Blyth

Figure 7.17: The Extent of Survey Zone 12



Overview

- 7.106 This survey zone is located to the south east of the County, on the coast, north of Newcastle City Centre and south of Newbiggin-by-the-Sea. It includes Blyth Town Centre as the main centre within the zone. The population within this zone is identified to be 30,749 people in 2009, generating £45m of convenience goods expenditure and £73m of comparison goods expenditure.

Convenience Goods Shopping

- 7.107 Existing facilities within the Study Area are identified to attract £42.15m of convenience goods expenditure generated in this zone. This represents a market share of 95%. The most popular destinations within and outside the Study Area were identified by the Household Survey as follows:

- Asda at Blyth (49.2% market share);

- Morrison's at Blyth (29.8%);
- Local Shops at Blyth (5.6%); and
- Netto at Blyth (2.5%).

7.108 Existing facilities within Zone 12 are identified to retain **90.4%** (or £40.20m) of convenience goods expenditure generated in this zone. Some 55% of this expenditure is directed to the existing Asda store in Blyth.

Comparison Goods Shopping

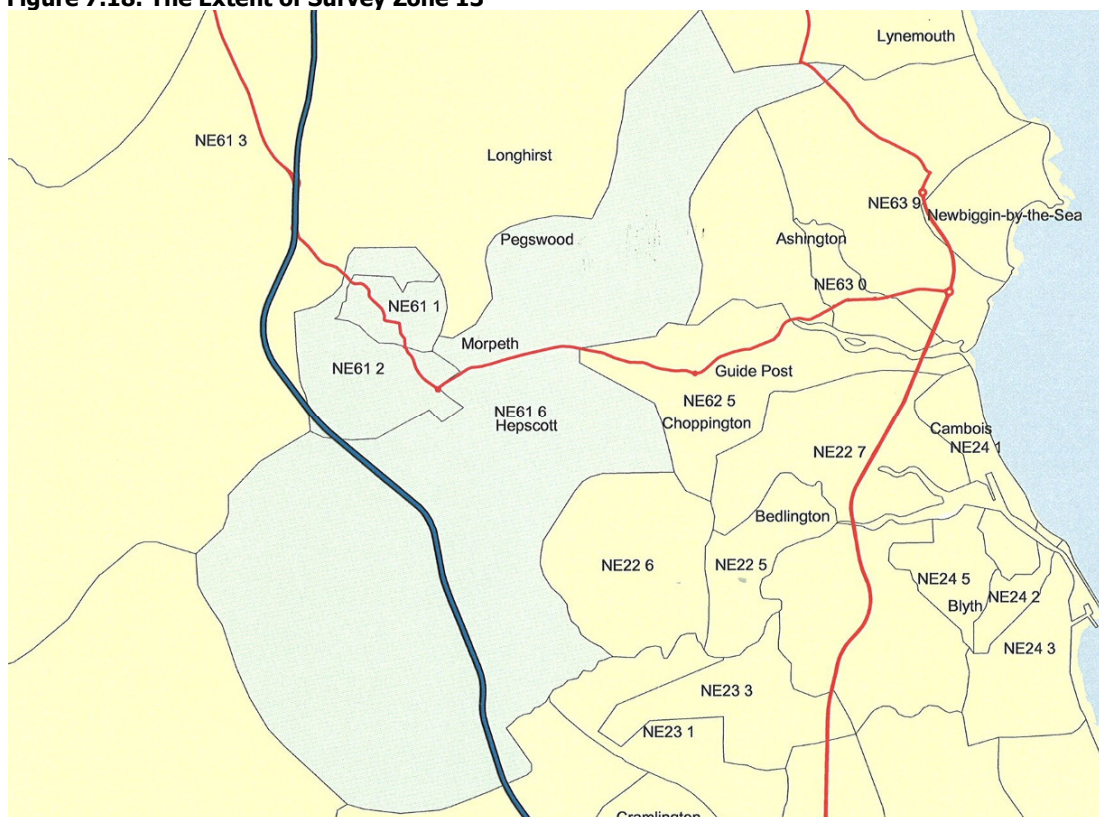
7.109 Existing facilities within the Study Area are identified to attract over 54% (or £39.48m) of comparison goods expenditure generated in Zone 12. The most popular comparison goods destinations of respondents in Zone 12 are identified as follows:

- Blyth (39.1% market share);
- Newcastle City Centre (25.3%);
- Internet (6.4%); and
- The Metrocentre and the remainder of Gateshead Borough (5.7%).

7.110 In terms of the market share of existing comparison goods facilities within Zone 12, analysis of the Household Survey identifies that existing facilities retain **45.4%** of comparison goods expenditure generated from that zone.

Survey Zone 13 – Morpeth

Figure 7.18: The Extent of Survey Zone 13



Overview

- 7.111 This survey zone covers the area to the south east of the County, to the west of Blyth and to the south west of Newbiggin-by-the-Sea. This survey zone is identified to have a population of 18,859 people in 2009, which generates £31m of convenience goods expenditure and £54m of comparison goods expenditure.

Convenience Goods Shopping

- 7.112 Of all convenience goods expenditure generated within this zone, some 89% (or £27.23m) of expenditure is retained by existing facilities within the Study Area. The Household Survey identified the following destinations, both within and outside the Study Area, to be the most popular:

- Morrison's at Morpeth (55.3% market share);

- Asda at Ashington (6.7%);
- Asda at Blyth (5.7%); and
- Tesco Extra at Newcastle-upon-Tyne (5.3%).

7.113 With regard to existing facilities within Zone 13 only, some £20.99m of convenience goods expenditure generated is retained. This equates to a market share of **68.7%** within the Study Area. 80% of this market share is retained by the Morrison's store in Morpeth in this zone.

Comparison Goods Shopping

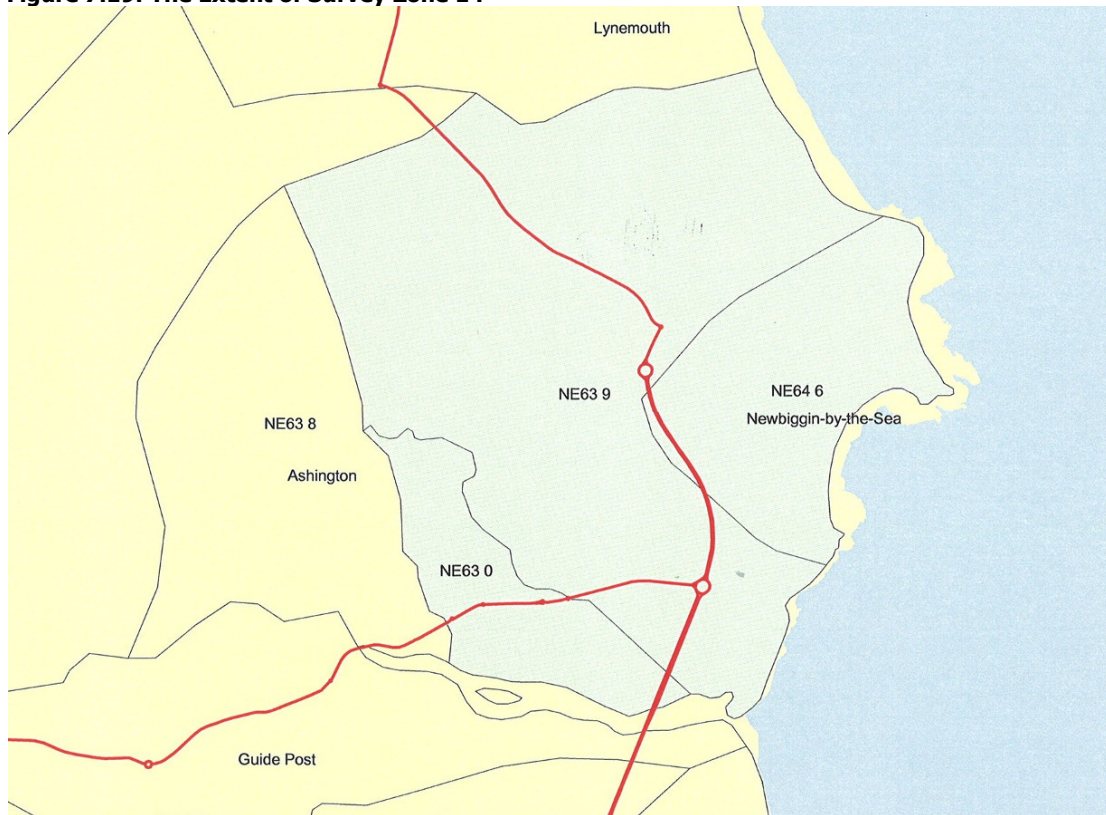
7.114 Existing facilities within the Study Area are identified to attract £24.45m of comparison goods expenditure generated in this zone, which equates to a market share of approximately 46%. The most popular destination within and outside the Study Area for comparison goods shopping by respondents within this zone were as follows:

- Newcastle City Centre (27.6% market share);
- Morpeth (25.8%);
- The Metrocentre and the remainder of Gateshead Borough (11.0%); and
- Internet (10.9%).

7.115 With regard to facilities within Zone 13, these are identified to retain **27.0%** (or £14.48m) of comparison goods expenditure generated in this zone. This is directed primarily to Morpeth. Morpeth achieves a market share of 26% within this zone; however it represents the vast majority (95%) of the comparison goods expenditure that is retained in this zone, which reflects the centre's local importance. Furthermore, it is likely that the opening of the Sanderson Arcade after the completion of the Household Survey will have resulted in an increase in the market share of Morpeth.

Survey Zone 14 – Ashington East/Newbiggin-by-the-Sea

Figure 7.19: The Extent of Survey Zone 14



Overview

- 7.116 This survey zone comprises some 25,457 people in 2009 and generates £37m of convenience goods expenditure and £59m of comparison goods expenditure. The geographical extent of this survey zone relates to the south east of the County and covers the area north of Blyth and south of Lynemouth. This zone includes Newbiggin-by-the-Sea Town Centre.

Convenience Goods Shopping

- 7.117 Existing convenience goods facilities within the Study Area are identified to attract some £34.34m of convenience goods expenditure generated in this zone. This equates to a market share of almost 94%. The most popular convenience goods destinations for respondents within this zone, both within and outside the Study Area are as follows:



- Asda at Ashington (52.9% market share);
- Asda at Blyth (16.6%);
- Iceland at Ashington (4.7%); and
- Netto at Ashington (2.9%).

7.118 Only £1.17m of convenience goods expenditure generated in the zone is identified as being retained in the zone. This equates to a market share of just **3.2%** within Zone 14. This is due to a lack of major foodstores within this zone and the close proximity of the Asda store in Ashington, which is in Zone 4 but very close to Zone 14. There are also other major foodstores nearby such as the Asda store in Blyth (Zone 12). The most popular destinations within Zone 14 include the Co-op Late Shop in Newbiggin-by-the-Sea (2.1%) and 'local shops' in Newbiggin-by-the-Sea (1.1%).

Comparison Goods Shopping

7.119 All facilities within the Study Area are identified to retain 59% (or £34.60m) of comparison goods expenditure generated in Zone 14. The most popular destinations within and outside the Study Area for comparison goods shopping were identified as follows:

- Ashington (38.6% market share);
- Newcastle City Centre (20.7%);
- The Metrocentre and the remainder of Gateshead Borough (9.8%); and
- Internet (5.7%).

7.120 Existing facilities within Zone 14 (such as Newbiggin-by-the-Sea) were identified to attract only **4.8%** of comparison goods expenditure generated. This reflects the limited comparison goods offer in this zone and the strength and close proximity of provision elsewhere, such as Ashington and Newcastle City Centre.

Survey Zone 15 – Amble

Figure 7.20: The Extent of Survey Zone 15



Overview

- 7.121 This survey zone comprises some 23,053 people in 2009 and generates £36m of convenience goods expenditure and £62m of comparison goods expenditure. The geographical extent of this survey zone relates to the central eastern part of the County and covers the area north of Newbiggin-by-the-Sea and to the south of Alnwick. This zone includes Amble, Lynemouth, Hadston and Widdrington Station.

Convenience Goods Shopping

- 7.122 Existing convenience goods facilities within the Study Area are identified to attract some £32.86m of convenience goods expenditure generated in this zone. This equates to a market share of almost 91%. The most popular convenience goods destinations for respondents within this zone, both within and outside the Study Area are as follows:

- Asda at Ashington (29.9% market share);
- Asda at Blyth (16.7%);
- Sainsbury's at Alnwick (8.3%); and
- Co-op Supermarket at Amble (6.6%).

7.123 £7.09m of convenience goods expenditure generated in the zone is retained locally. This equates to a market share of **19.7%** within Zone 15. The most popular destinations within this zone include the Co-op Supermarket at Amble (33.6%) and the Co-op Supermarket at Hadston (20.6%).

Comparison Goods Shopping

7.124 All facilities within the Study Area are identified to retain 48% (or £29.31m) of comparison goods expenditure generated in Zone 15. The most popular destinations within and outside the Study Area for comparison goods shopping are:

- Newcastle City Centre (25.3% market share);
- Ashington (14.7%);
- The Metrocentre and the remainder of Gateshead Borough (14.3%); and
- Internet (9.4%).

7.125 Existing facilities within Zone 15 (such as Amble) were identified to attract only **7.3%** of comparison goods expenditure generated. This reflects the limited comparison goods offer in this zone and the strength and close proximity of provision elsewhere, such as Newcastle City Centre and Ashington.

Summary

7.126 Based on analysis of the Household Survey results it is possible to identify the following key findings:

Convenience Goods Shopping

7.127 Within the Study Area, over 75% of convenience goods expenditure generated in the Study Area is retained by existing facilities, with the most popular being: the Asda store at Blyth; the Asda store at Ashington; and the Morrison's store at Berwick-upon-Tweed. Whilst the overall retention level achieved by all facilities within the Study Area (both within and outside Northumberland) is fairly high, the market share achieved differs significantly on a zone-by-zone basis (Table 7.12).

Table 7.12: Market Share Achieved by Existing Facilities – Convenience Goods

Survey Zone	Market Share		
	All Facilities within Study Area	Facilities within Zone	Most Popular Zone within Study Area
Zone 1 – Berwick-upon-Tweed	76%	71%	Zone 1 (Berwick)
Zone 2 – Alnwick	77%	61%	Zone 2 (Alnwick)
Zone 3 – Scots Gap	83%	0%	Zone 13 (Morpeth)
Zone 4 – Ashington West	92%	20%	Zone 4 (Ashington West)
Zone 5 – Bedlington	90%	27%	Zone 12 (Blyth)
Zone 6 – Seaton Delaval	40%	4%	Zone 11 (Cramlington)
Zone 7 – Ponteland	21%	13%	Zone 7 (Ponteland)
Zone 8 – Prudhoe	46%	24%	Zone 9 (Hexham)
Zone 9 – Hexham	91%	91%	Zone 9 (Hexham)
Zone 10 – Haltwhistle	73%	16%	Zone 9 (Hexham)
Zone 11 – Cramlington	91%	81%	Zone 11 (Cramlington)
Zone 12 – Blyth	95%	90%	Zone 12 (Blyth)
Zone 13 – Morpeth	89%	69%	Zone 13 (Morpeth)
Zone 14 – Ashington East/Newbiggin-by-the-Sea	94%	3%	Zone 4 (Ashington West)
Zone 15 – Amble	91%	20%	Zone 4 (Ashington West)
TOTAL	75%	-	-

Notes: Based on market share of expenditure

- 7.128 Table 7.12 illustrates that a high proportion of convenience goods expenditure generated in each zone is directed to existing facilities within the Study Area (at least 73% of expenditure generated in each zone, excluding zones 6, 7 and 8). Indeed, within Zone 9 (Hexham) some 91% of convenience goods expenditure generated in this zone is retained by facilities within this zone (namely Tesco Extra and Waitrose stores). This compares to 0% of convenience goods expenditure generated in Zone 3 (Scots Gap) being retained by facilities within that zone. This reflects the lack of facilities in this part of Northumberland. Accordingly, local residents have to travel to facilities elsewhere (both within and outside the Study Area) to meet their convenience goods shopping needs. Whilst many residents within this zone are located in relatively close proximity to provision elsewhere in the Study Area (such as the Morrison's store at Morpeth or the Asda store at Ashington), the survey evidence does suggest that there is a deficiency in provision in this part of the Study Area. A similar pattern is also identified within Zone 14 (Ashington East/Newbiggin-by-the-Sea) where only 3% of convenience goods expenditure generated in this zone is retained. However, it is important to note that facilities in Ashington are located in close proximity to the majority of residents within this zone.

Comparison Goods Shopping

- 7.129 With regard to comparison goods shopping, existing facilities within the Study Area retain less than 44% of comparison goods expenditure generated within the Study Area. This market share is significantly lower than that identified for convenience goods shopping (75%). This is reflective of the limited comparison goods offer within the Study Area but also the strength of nearby provision such as Newcastle City Centre, The Metrocentre and Edinburgh City Centre, whose natural



catchments cover a wide area, including substantial parts of the defined Study Area. Furthermore, the shopping patterns highlight that residents are more willing to travel longer distances for comparison goods shopping than they are for convenience goods shopping; for convenience goods shopping people generally use the facility that is most convenient for them. Table 7.13 provides a breakdown of the market shares achieved by facilities within the Study Area for comparison goods shopping.

Table 7.13: Market Share Achieved by Existing Facilities – Comparison Goods

Survey Zone	Market Share		
	All Facilities within Study Area	Facilities within Zone	Most Popular Zone within Study Area
Zone 1 – Berwick-upon-Tweed	57%	54%	Zone 1 (Berwick)
Zone 2 – Alnwick	44%	29%	Zone 2 (Alnwick)
Zone 3 – Scots Gap	41%	0%	Zone 13 (Morpeth)
Zone 4 – Ashington West	49%	30%	Zone 4 (Ashington West)
Zone 5 – Bedlington	43%	4%	Zone 12 (Blyth)
Zone 6 – Seaton Delaval	26%	3%	Zone 11 (Cramlington)
Zone 7 – Ponteland	13%	6%	Zone 7 (Ponteland)
Zone 8 – Prudhoe	24%	10%	Zone 9 (Hexham)
Zone 9 – Hexham	57%	56%	Zone 9 (Hexham)
Zone 10 – Haltwhistle	49%	10%	Zone 9 (Hexham)
Zone 11 – Cramlington	44%	39%	Zone 11 (Cramlington)
Zone 12 – Blyth	54%	45%	Zone 12 (Blyth)
Zone 13 – Morpeth	46%	27%	Zone 13 (Morpeth)
Zone 14 – Ashington East/Newbiggin-by-the-Sea	59%	5%	Zone 4 (Ashington West)
Zone 15 – Amble	48%	7%	Zone 4 (Ashington West)
TOTAL	44%	-	-

Notes: Based on market share of expenditure

- 7.130 As with convenience goods shopping there are notable fluctuations in the market share achieved by facilities within the respective survey zones. The market shares of facilities within each zone range from no market share in Zone 3 (Scots Gap) to 56% in Zone 9 (Hexham).



8.0 RETAIL CAPACITY ASSESSMENT – NORTHUMBERLAND

Introduction

- 8.01 The modelling for the capacity assessment has been undertaken for two different categories of expenditure. Typically these categories reflect the differences in patterns for convenience shopping and comparison shopping. This approach is advocated in PPS4, which states at paragraph EC1.4 that:

'When assessing quantitative need, have regard to relevant market information and economic data, including a realistic assessment of:

- i. existing and forecast population levels**
- ii. forecast expenditure for specific classes of goods to be sold, within the broad categories of comparison and convenience goods and for main leisure sectors and**
- iii. forecast improvements in retail sales density.'**

- 8.02 For the purposes of this capacity exercise, WYG has primarily examined the need for new convenience and comparison goods floorspace. Details of the capacity exercise are set out in [Appendix 7](#). Indicative capacity assessments are provided for 2014 together with 2019, 2024 and 2026. Any assessment in the long-term should be viewed with caution. Any identified need or capacity beyond 2014 is not necessarily justification for new retail floorspace outside of existing centres, as this could prejudice more central sites coming forward that, although not available for retail development at present, may become available between now and 2014 or after 2014.

Capacity Formula

- 8.03 For all types of capacity assessment, the conceptual approach is broadly identical, although the data sources and assumptions may differ. The key relationship is Expenditure (£m) – allowing for population change and retail growth – less turnover (£m) – allowing for improved 'productivity' – equals Surplus/Deficit (£m).

Expenditure (£m) – the expenditure element of the above equation is calculated by taking the population within the defined Study Area and then multiplying this figure by the average annual expenditure levels for various forms of retail spending per annum. The formula is subject to a number of factors, which need to be considered to help provide the most accurate figure for that particular catchment. These include:



- Change in population;
- Growth in expenditure per person per annum; and
- Special Forms of Trading (e.g. catalogue shopping/internet).

Turnover (£m) – the turnover figure relates to the annual turnover generated by existing retail facilities within the Study Area. The turnover of existing facilities is calculated using Mintel Retail Rankings and/or Verdict Grocery Retailers – independent analysis which lists the sales densities (trading performance) for major retail multiples.

Residual (£m) – this represents the difference between the expenditure and turnover figures outlined above. A surplus figure will suggest an 'under provision' of retail facilities within the Study Area (which all things being equal would suggest that additional floorspace is required), whereas a deficit would represent an over provision of retail facilities (and in these circumstances it would prove more difficult to justify additional floorspace).

- 8.04 Although a surplus figure is generated in monetary terms, it is possible to convert this figure into an indication of aggregate floorspace. The level of floorspace will vary dependent on the type of retail floorspace and goods sold. Indeed, retailers such as electrical retailers (which are considered a bulky goods retailer) have a much higher sales density than other bulky goods retailers such as carpet retailers and leading clothing and footwear operators (non-bulky) generally have a higher sales density than bulky goods retailers.

Northumberland Sub-Region

Quantitative Need

Convenience Goods Shopping

- 8.05 Based on current market shares existing facilities within Northumberland only, which includes town centres, freestanding stores, local centres, etc., our analysis indicates that existing facilities achieve a convenience goods turnover of £441.51m in 2009. This equates to a market share of **73.0%** of expenditure generated by residents within the Study Area.

8.06 Table 8.1 below indicates the current trading position compared against the 'benchmark' (or anticipated) turnover of existing convenience goods facilities in Northumberland County and projects this forward to 2026 using constant market share. In 'rolling forward' current market share against available expenditure no allowance has been made for an increase in non-store retail sales (e.g. online shopping). Although recent research undertaken by Experian suggests that the market share of non-store retail sales for convenience goods shopping could increase (at least in the short-term), it is important to note that an internet sale does not necessarily imply that items have not passed through a retail outlet. Experian acknowledges that some supermarkets source internet goods from existing stores and therefore the current market share identified for non-store retail sales may be an overestimate. Therefore, for the purposes of this assessment we have assumed constant market share for non-store retail sales within the Study Area of 2.7% as suggested by the findings of the Household Survey.

Table 8.1: Estimated 'Capacity' for Convenience Goods Facilities – Northumberland County

Year	Turnover - £m ¹	Expenditure Available - £m ²	Surplus Expenditure - £m
2009	440.25	441.51	1.26
2014	444.67	475.95	31.28
2019	449.13	504.74	55.61
2024	453.64	535.33	81.69
2026	455.46	549.52	94.06

Notes: ¹ – Allows for increased productivity at +0.2% per annum
² – Assumes constant market share 73.0% in the Study Area
 * - Assumes local shops outside defined centres (Section 10) are trading in equilibrium
 At 2007 prices

8.07 Based on the findings of the Household Survey, Table 8.1 indicates that collectively existing convenience goods facilities in Northumberland County appear to be trading at expected levels – if not slightly above. However, given the forecast growth in population and expenditure, even after allowing for improved productivity of existing floorspace, by 2014 existing facilities are expected to trade above expected levels (c. £31m). This overtrading is set to increase to more £55m by 2019, to almost £82m by 2024 and more than £94m by 2026 – not taking into account outstanding commitments. Notwithstanding this, although dependent upon the type of floorspace created the identified capacity in 2014 could support between 2,480 sq m (net) and 6,195 sq m (net). This is forecast to increase to between 4,360 sq m (net) and 10,900 sq m (net) in 2019, to between 6,340 sq m (net) and 15,855 sq m (net) in 2024 and between 7,275 sq m (net) and 18,185 sq m (net) by 2026⁸. It is also important to note that this 'capacity' differs throughout the sub-region and be

⁸ Based on applying an average sales density of £12,500 per sq m to reflect the trading performance of the four leading supermarkets (Asda, Tesco, Morrison's and Sainsbury's) and £5,000 per sq m for smaller retailers such as Iceland, Netto, Aldi, etc., as identified by Verdict Grocery Retailers (2009). Allows for improved productivity of +0.2% per annum.



accommodating all the identified capacity in one location will not meet the need identified in specific parts of Northumberland.

Comparison Goods Shopping

- 8.08 With regard to comparison goods, our analysis identifies that in 2009 existing facilities within Northumberland County achieve a comparison goods turnover of more than £434m. This equates to a market share of **42.8%** of total comparison goods expenditure generated by residents in the Study Area.
- 8.09 Although no allowance has been made for the growth in non-store retail sales for convenience goods, given the recent increase in online shopping for comparison goods (particularly for goods such as books, CDs, electrical goods, etc.) an allowance has been made for growth in this sector. As highlighted in Section 2 of this study, it is likely that given the timeframe of the study online shopping will continue to grow for comparison goods and will have an impact on future floorspace requirements for 'traditional' retail premises within Northumberland County and beyond.
- 8.10 The Household Survey identifies that online shopping/mail order attracts some £86.23m of comparison goods expenditure generated in the Study Area. This equates to a market share of 8.5% in 2009. In this respect, the Household Survey identifies different market shares for the variety of comparison goods identified. These are as follows:

• Clothing & Footwear:	5.5% of expenditure;
• Books, CDs, DVDs, etc.:	22.4%;
• Small Household Goods:	5.7%;
• Toys, Games, Bicycles, etc:	12.2%
• Chemist Goods:	2.1%
• Electrical Goods:	15.7%
• Furniture Goods:	3.9%
• DIY Goods:	2.3%
• Garden Goods:	0.0%
All Comparison Goods:	8.5%

- 8.11 The Household Survey identifies high market shares for non-store retail sales for 'Books, CDs, DVDs, etc.' (22.4%), 'Electrical Goods' (15.7%) and 'Toys, Games, Bicycles, etc.' (12.2%). This compares to market shares of less than 3% for 'DIY Goods', 'Chemist Goods' and 'Garden Goods'.
- 8.12 Research undertaken by Experian (Retail Planner Briefing Note 7.1, August 2009) forecasts that the market share of non-store retail sales could increase to 9.3% by 2014. Whilst this market share is only slightly above the survey derived market share for Northumberland it is likely that given the rural nature of much of the County and the distances involved in travelling to retail destinations such as Newcastle City Centre, the popularity of online shopping for the local population will be higher than that identified elsewhere in the UK where access to retail facilities may be much better (e.g. within urban areas).
- 8.13 Given this, together with recent indication that online shopping has further increased despite the downturn in the UK economy, for the purposes of this assessment it is assumed that non-store retail sales will increase to 10% by 2014 and to 15% by 2019 where it is assumed to remain static through to 2026.

Table 8.2: Estimated Available Comparison Goods Expenditure – Northumberland County

Year	Turnover + Increased Productivity – £m	Expenditure Available - £m	Surplus Expenditure - £m
2009	456.21	434.51	-21.70
2014	479.48	501.40	21.92
2019	516.54	610.54	94.00
2024	556.46	777.98	221.52
2026	573.28	860.02	286.74

Notes: Allows for increased productivity of +1.0% per annum until 2014 and then increases to +1.5% per annum post 2014 to reflect the forecast growth in expenditure in the longer term
Assumes constant market share of 42.8% in the defined Study Area
Allows for SFT to increase from 8.5% in 2009, to 10.0% by 2014 and to 15% by 2019, which is deducted from the overall expenditure generated
At 2007 prices

- 8.14 Based on current market shares, as with our assessment of the performance of existing convenience goods floorspace in the County, collectively existing comparison goods floorspace within Northumberland is identified to be trading just below expected levels (by almost £22m, or 5%). However, given the forecast growth in population and comparison goods expenditure within Northumberland, by 2014 existing facilities are identified to be trading above expected levels, by almost £22m. By 2019, this capacity is forecast to increase to £94m, to almost £222m by 2024 and to £287m by 2026. However, this level of capacity does not take into account outstanding commitments – these are considered later in this Study.

- 8.15 Notwithstanding this, based on the forecast growth in comparison goods expenditure through to 2026 and by applying an average sales density of £4,500 per sq m (and taking into account anticipated increases in floorspace efficiency), the identified surplus capacity could accommodate almost 4,635 sq m (net) of additional comparison retail floorspace by 2014. This is forecast to increase to 18,450 sq m (net) by 2019, to more than 40,360 sq m (net) by 2024 and to almost 50,710 sq m (net) by 2026, although this is dependent upon the type of retail development that may come forward.
- 8.16 PPS4 advises that quantitative need should be based on specific classes of goods to be sold (i.e. convenience and comparison) rather than specific goods such as 'bulky goods'. However, it is possible from analysis of the Household Survey to identify existing shopping patterns for bulky and non-bulky goods and capacity available within these two sectors.
- 8.17 With regard to bulky goods, existing facilities within Northumberland are identified to achieve a market share within the Study Area of **43.8%**, which equates to a turnover of some £141.21m in 2009. A breakdown of the market share achieved by existing facilities in Northumberland on a zone-by-zone basis is contained at Table 8.3.

Table 8.3: Breakdown of Market Shares of Northumberland County – Bulky Goods

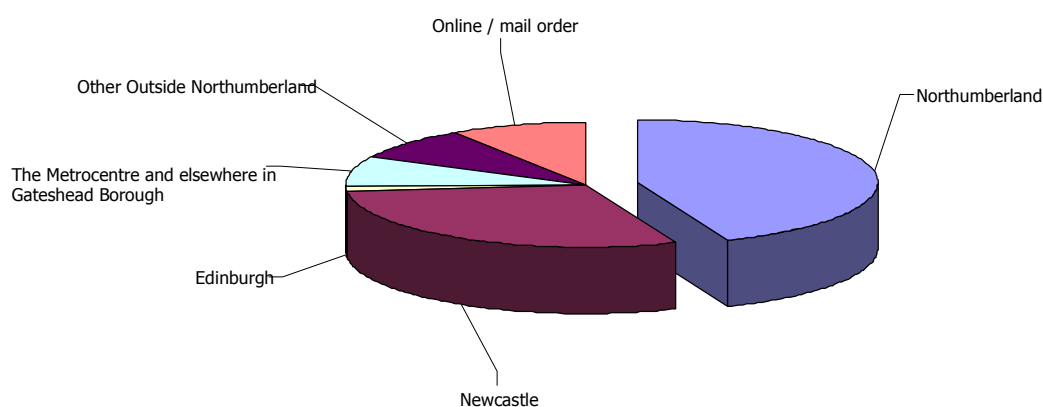
Survey Zone	Market Share (%)				
	Electrical	DIY	Furniture	Garden	Total
1. Berwick-upon-Tweed	54.5	78.1	68.2	64.2	63.9
2. Alnwick	26.4	95.2	59.7	75.8	50.8
3. Scots Gap	16.8	82.4	51.9	92.3	40.5
4. Ashington West	32.3	76.9	60.3	86.2	49.9
5. Bedlington	27.4	68.3	55.6	84.0	44.6
6. Seaton Delaval	10.8	41.6	33.9	18.7	22.7
7. Ponteland	3.9	6.4	16.8	53.5	10.4
8. Prudhoe	16.4	18.6	29.1	73.5	23.1
9. Hexham	50.0	51.8	58.6	94.7	54.9
10. Haltwhistle	44.1	36.8	45.3	75.6	44.8
11. Cramlington	21.0	57.1	49.9	64.6	37.0
12. Blyth	26.8	68.9	71.0	57.3	47.7
13. Morpeth	32.3	69.6	57.5	91.4	48.2
14. Ashington East	50.6	75.7	72.9	88.6	62.8
15. Amble	21.7	75.2	60.0	97.8	44.3
TOTAL	29.7	61.0	53.5	71.7	43.8

Notes: Derived from Northumberland Household Survey and based on WYG analysis

- 8.18 Within the Study Area, existing facilities within Northumberland are identified to attract between 30% for 'Furniture Goods' and 72% for 'Garden-related goods'. Of the identified expenditure being directed to facilities elsewhere, most is identified to be directed to facilities in Newcastle-upon-Tyne (c. £95m, or 30%) or directed to online purchases (c. £30m, or 9%). Figure 8.1 summarises the

market share achieved by facilities within and outside Northumberland for bulky comparison goods shopping.

Figure 8.1: Market Shares of Facilities in Northumberland County and Competing Destinations – Bulky Comparison Goods



Source: Derived from Northumberland Household Survey (2009)

- 8.19 Based on current market shares it is estimated that there is 'bulky goods' capacity (through growth in expenditure alone) within Northumberland of £12.99m in the short-term (i.e. 2014), increasing to £41.82m by 2019, to £84.38m by 2024 and to £105.93m by 2026 (Table 8.4) – not taking into account outstanding commitments.

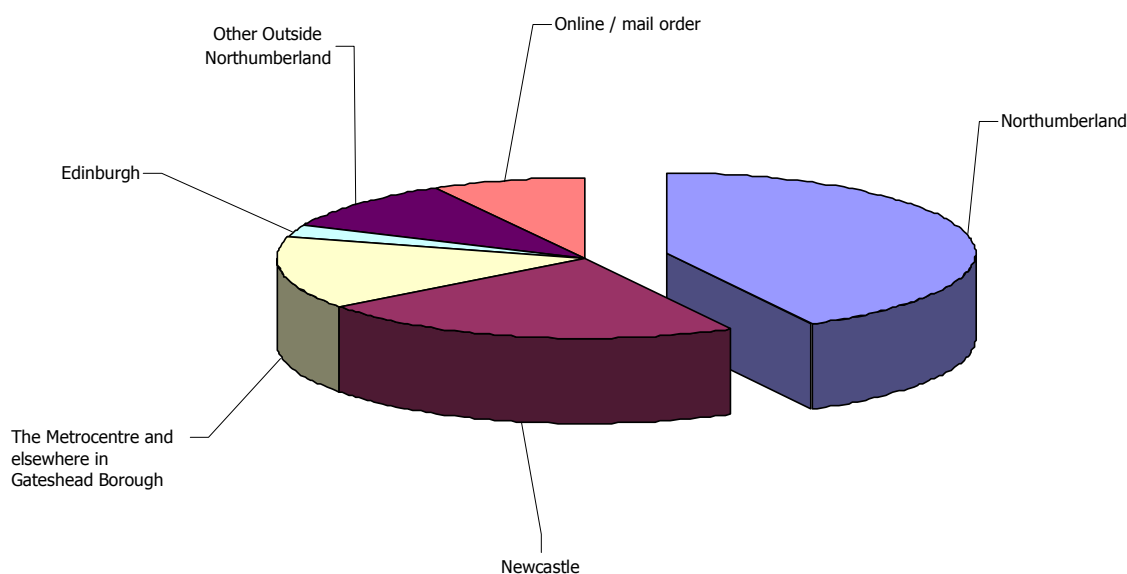
Table 8.4: Estimated Available Comparison Goods Expenditure – Northumberland County (Bulky Goods)

Year	Turnover + Increased Productivity – £m	Expenditure Available - £m	Surplus Expenditure - £m
2009	141.21	141.21	-
2014	148.41	161.40	12.99
2019	155.98	197.80	41.82
2024	168.04	252.42	84.38
2026	173.12	279.05	105.93

Notes: Allows for increased productivity of +1.0% per annum until 2014 and then increases to +1.5% per annum post 2014 to reflect the forecast growth in expenditure in the longer term
Assumes constant market share of 43.8% in the defined Study Area
Allows for SFT to increase from 8.5% in 2009, to 10.0% by 2014 and to 15% by 2019, which is deducted from the overall expenditure generated
At 2007 prices

8.20 With regard to non-bulky goods, the Household Survey identifies that existing facilities within Northumberland achieve an overall market share of **42.3%** (or £293.62m of expenditure) within the defined Study Area. This market share is comparable to that identified for 'bulky goods' (43.8%). Figure 8.2 summarises the market share achieved by facilities within and outside Northumberland for non-bulky comparison goods shopping.

Figure 8.2: Market Shares of Facilities in Northumberland County and Competing Destinations – Non Bulky Comparison Goods



Source: Derived from Northumberland Household Survey (2009)

Qualitative Need

8.21 Table 8.5 provides a breakdown of Northumberland's market share for non-bulky goods on a zone-by-zone basis.

Table 8.5: Breakdown of Market Shares of Northumberland County – Non Bulky Goods

Survey Zone	Market Share (%)					Total
	Clothing	Books, etc.	Small H'hold	Recreation	Chemist	
1. Berwick-upon-Tweed	29.8	34.0	46.2	57.7	81.3	47.4
2. Alnwick	23.1	40.1	34.6	36.1	69.1	37.2
3. Scots Gap	27.5	49.3	35.7	32.6	83.4	41.4
4. Ashington East	37.0	56.0	46.5	36.0	88.7	48.4
5. Bedlington	32.9	31.2	37.1	36.7	84.9	27.1
6. Seaton Delaval	20.7	21.5	26.6	26.4	46.5	13.6
7. Ponteland	7.5	11.1	3.2	10.6	40.0	24.1
8. Prudhoe	19.5	16.5	15.0	16.4	56.2	57.4
9. Hexham	50.0	62.8	47.7	46.0	91.6	57.4
10. Haltwhistle	46.0	46.4	29.7	46.1	90.1	51.4
11. Cramlington	35.0	44.2	34.3	44.8	89.7	46.6
12. Blyth	43.7	52.0	60.9	58.3	90.9	57.5
13. Morpeth	30.5	45.1	35.5	35.5	92.5	44.4
14. Ashington East	45.7	53.3	52.8	58.5	86.4	56.7
15. Amble	42.2	38.9	39.4	44.8	84.5	49.0
TOTAL	31.6	38.1	36.3	40.0	76.9	42.3

Notes: Derived from Northumberland Household Survey and based on WYG analysis

8.22 Table 8.5 indicates that within the Study Area existing facilities within Northumberland attract between 32% of expenditure generated on 'Clothing and Footwear' to 77% on 'Chemist Goods'. The low market share achieved by existing facilities within Northumberland is reflective of the existing offer together with the strength and proximity of competing destinations, most notably the regional retail destinations of Newcastle, Edinburgh and The Metrocentre.

8.23 By applying current market share (42.3%) to the available expenditure, our assessment identifies capacity in the short-term (based on growth alone) of £31.07m by 2014. This is forecast to increase to £89.20m by 2019, to £166.97m by 2024 and to £211.52m by 2026 – although this does not take into account outstanding commitments. This capacity is available throughout Northumberland and this need would not be met by providing the identified capacity in one location.

Table 8.6: Estimated Available Comparison Goods Expenditure – Northumberland County (Non Bulky Goods)

Year	Turnover + Increased Productivity – £m	Expenditure Available - £m	Surplus Expenditure - £m
2009	293.62	293.62	-
2014	308.60	339.67	31.07
2019	332.45	421.65	89.20
2024	358.14	525.11	166.97
2026	368.96	580.48	211.52

Notes: Allows for increased productivity of +1.0% per annum until 2014 and then increases to +1.5% per annum post 2014 to reflect the forecast growth in expenditure in the longer term
Assumes constant market share of 42.3% in the defined Study Area
Allows for SFT to increase from 8.5% in 2009, to 10.0% by 2014 and to 15% by 2019, which is deducted from the overall expenditure generated
At 2007 prices



Convenience Goods

- 8.24 The Household Survey suggests that most households undertake two kinds of food shopping – main food shopping (i.e. a bulk food shop) and ‘top-up’ food shopping (regular purchases for small scale goods such as bread, milk, etc.).
- 8.25 Northumberland County is identified to contain only five superstores (defined as comprising more than 2,500 sq m of trading floorspace in Annex B to PPS4). These comprise the Tesco Extra store in Hexham, the Asda and Sainsbury’s store in Cramlington, the Asda store in Blyth and the newly opened Asda store in Ashington.
- 8.26 Although falling below the 2,500 sq m threshold identified by PPS4, the Morrison’s store in Berwick-upon-Tweed (which has permission to extend the sales area above the 2,500 sq m threshold), the Sainsbury’s and Morrison’s stores in Alnwick, the Morrison’s store in Morpeth and the Morrison’s store in Blyth all perform important main food shopping roles for their respective catchment populations.
- 8.27 These stores are supported by a number of smaller stores, including representation within the County from Waitrose, Iceland, Lidl, Netto, Aldi, Co-op and Iceland. In addition, there are a number of smaller convenience stores and independent traders (such as butchers, bakers, grocers, etc.) which sell a variety of convenience goods, but generally serve a ‘top-up’ shopping role.
- 8.28 Existing facilities within the County are identified to attract approximately 73% of convenience goods expenditure generated within the Study Area. This suggests relatively limited convenience goods expenditure being directed to competing facilities elsewhere. As would be expected most of the convenience goods expenditure directed to competing facilities outside Northumberland is within the peripheral zones. A breakdown of the market share of existing convenience goods facilities for each survey zones is set out in Table 8.7.

Table 8.7: Market Share on a Zone-by-Zone Basis – Convenience Goods Expenditure

Survey Zone	Market Share (%)		
	Main	'Top-up'	Total
1. Berwick-upon-Tweed	64.5	85.0	69.6
2. Alnwick	65.5	63.8	65.1
3. Scots Gap	81.1	82.8	81.6
4. Ashington West	92.7	90.0	92.0
5. Bedlington	89.3	93.8	90.4
6. Seaton Delaval	36.0	53.5	40.4
7. Ponteland	15.0	37.1	20.5
8. Prudhoe	39.4	64.3	45.6
9. Hexham	89.0	98.8	91.4
10. Haltwhistle	71.3	79.2	73.3
11. Cramlington	90.2	91.5	90.5
12. Blyth	95.0	94.2	94.8
13. Morpeth	86.8	95.9	89.1
14. Ashington East	92.8	95.8	93.5
15. Amble	90.7	91.4	90.8
TOTAL	70.7	79.9	73.0

Notes: Derived from Northumberland Household Survey and based on WYG analysis

8.29 Table 8.7 illustrates that high levels of retention (more than 80%) are achieved by existing facilities in nine of the 15 zones. The lowest market shares of facilities in Northumberland are identified to be within the Ponteland (20%), Seaton Delaval (40%) and Prudhoe (46%) zones. Within the Ponteland Zone, facilities in the neighbouring authorities of Newcastle-upon-Tyne (40% market share) and Gateshead (18% market share) have a strong influence on shopping patterns within this part of the Study Area. Similarly, within the Seaton Delaval facilities in North Tyneside have a significant influence on convenience shopping patterns attracting 44% of convenience goods expenditure generated in this zone. Within the Prudhoe Zone, the Asda store at the Metrocentre together with facilities elsewhere in Gateshead Borough and in Durham have a strong influence on shopping patterns, collectively attracting more than 39% of convenience goods expenditure generated in this zone. Whilst residents within these zones are located in close proximity to competing facilities outside Northumberland, there may be scope to claw back expenditure currently being directed to facilities outside Northumberland through appropriate improvements in the convenience goods offer.

8.30 PPS4 indicates that the degree to which shops are overtrading should be taken into consideration when determining the qualitative need for new convenience floorspace. Whilst our analysis (Table 8.1) identifies that collectively existing convenience floorspace is trading below expected levels in 2009 (by 5%). It is notable that certain stores within Northumberland (primarily the larger-format stores) are trading above expected levels. This is particularly evident in centres where there is limited main food shopping provision and competition, such as in Berwick-upon-Tweed and Morpeth.

- 8.31 In addition, although the actual turnovers of existing stores derived from shopper surveys should be treated with some caution, Table 8.8 provides a summary of the current market share of the leading supermarket operators within the Northumberland Sub-Region.

Table 8.8: Market Share of Leading Foodstore Operators within Northumberland (Based on defined Study Area)

Fascia	Market Share (%)
Asda	32.3
Morrison's	23.1
Co-op / Somerfield	8.9
Tesco	8.8
Sainsbury's	7.7
Waitrose	2.5
Aldi	2.2
Netto	1.7
Iceland	1.2
Lidl	1.0

Notes: Derived from Northumberland Household Survey and WYG analysis

- 8.32 Table 8.8 illustrates that within Northumberland, Asda and Morrison's achieve a strong market share within the Study Area. Collectively, these two retailers attract more than half (55%) of convenience goods expenditure that is identified to be directed to facilities in Northumberland. No other operator attracts more than 10% of the market share, with the highest market share being achieved (9%) being achieved by existing Co-op/Somerfield stores, which generally comprise small convenience stores throughout the County. Similarly, representation from both Tesco and Sainsbury's within Northumberland is limited. This would suggest that there is qualitative need for a greater range of retailers to be represented within Northumberland in order to enhance consumer choice and provide increased competition.

Comparison Goods

- 8.33 The main focus of comparison goods floorspace within Northumberland is located within the centres of Blyth, Cramlington, Hexham, Ashington, Berwick-upon-Tweed, Alnwick and Morpeth. Collectively, these seven centres comprise almost 109,000 sq m (gross) of comparison goods floorspace. Further comparison goods provision is also provided within the larger-format foodstores and at out-of-centre retail parks, such as Tweedbank Retail Park in Berwick-upon-Tweed and Blyth Valley Retail Park in Blyth.
- 8.34 The Household Survey identifies that the market share achieved for all facilities within Northumberland for non-bulky goods shopping (42%) is less than that identified for bulky goods shopping (44%). Indeed, the influence of larger centres nearby such as Newcastle City Centre, The



Metrocentre and Edinburgh City Centre clearly has a significant effect on shopping patterns within Northumberland. This is particularly the case in the peripheral zones as demonstrated at Table 9.5.

- 8.35 It is unlikely that further comparison goods development will prevent significant expenditure being directed to competing facilities elsewhere or spent online. However, it is notable that over half of the non-bulky and bulky goods comparison expenditure generated in the Study Area is not currently directed to existing facilities within Northumberland. Accordingly, there appears a qualitative need to improve the comparison goods offer of Northumberland (both bulky and non-bulky) in order to improve consumer choice locally and reduce the need for local residents to travel to competing destinations elsewhere.



9.0 OTHER MAIN TOWN CENTRE USES

Introduction

- 9.01 In addition to considering need for additional retail floorspace within Northumberland, this report also considers need for further leisure and office floorspace.

Leisure

- 9.02 In order to establish commercial leisure patterns within Northumberland, it is possible to examine the results of the Household Survey, which asked specific questions on where and how frequently residents undertake a variety of leisure activities. The Household Survey asked questions relating to the following leisure activities:

- Indoor sports or health and fitness activity;
- Cinema-going;
- Nightlife such as bars, pubs and nightclubs;
- Restaurants;
- Ten-pin bowling;
- Bingo;
- Theatre, art galleries and museums; and
- Sporting events.

- 9.03 A copy of the questionnaire and full tabulations of the Household Survey are contained at [Appendix 2](#).

Existing Provision

- 9.04 Commercial leisure provision within Northumberland is relatively limited. Existing cinema provision includes the Forum Cinema in Hexham, Alnwick Playhouse in Alnwick and the Maltings Theatre & Arts Centre in Berwick-upon-Tweed. In addition the Queen's Hall Arts Centre in Hexham also offers a film programme and is seeking delivery of mobile cinema provision in towns and villages in west Northumberland. Likewise in south east Northumberland, Doorstep Pictures are seeking to roll out a similar programme. None of the major multiplex cinema operators are represented in the County. Similarly, Northumberland lacks a large-format ten-pin bowling facility, although North Country



Leisure is planning to create a ten-pin bowling facility in Wentworth Leisure Centre in Hexham. This is intended to be operational by the autumn.

- 9.05 Given the limited cinema offer and lack of a ten-pin bowling facility the vast majority of local residents travel to facilities outside Northumberland in order to partake in these activities.
- 9.06 In terms of other leisure facilities, Northumberland does contain a number of bingo facilities, including the Gala Bingo in Cramlington and Ashington together with more informal bingo in local social clubs and leisure centres. Northumberland also contains a number of small health clubs/leisure centres including leisure centres operated by three leisure trusts, which contribute to both the daytime and evening economy. Although the County lacks representation from any of the leading operators (such as Virgin Active, David Lloyd, Esporta, etc.). Northumberland also includes a range of local pubs and restaurants, which contribute to the evening economy of existing centres. The limited commercial facilities are reflective of the rural nature of much of the catchment, the limited population of most of the main centres and the strength and proximity of competing provision.
- 9.07 However, Northumberland does contain a number of cultural facilities, including small theatres and art galleries, such as the Phoenix Theatre in Blyth, the Maltings in Berwick-upon-Tweed, the Queens Hall Arts Centre in Hexham and the Alnwick Playhouse in Alnwick.

Existing Leisure Patterns

- 9.08 Set out below is our assessment of current leisure patterns within the defined Study Area as identified by the Household Survey. Full tabulations are contained at [Appendix 8](#).

Cinemas

- 9.09 Within the defined Study Area, the Household Survey identifies that less than half (**47%**) of respondents visit the cinema.
- 9.10 Existing cinema provision in Northumberland comprises the Forum Cinema in Hexham, The Maltings Theatre & Arts Centre in Berwick-upon-Tweed, Alnwick Playhouse in Alnwick and the Queens Hall Centre in Hexham also offers a film programme. These facilities provide a limited film choice and collectively achieve a market share of **12%** of all respondents who visit the cinema. This market share equates to a catchment population of less than 22,000 people within the Study Area.

Furthermore, given the location of existing facilities in Northumberland, these facilities achieve the highest market shares within the Hexham (73%), Haltwhistle (51%), Prudhoe (20%) and Berwick-upon-Tweed (18%) zones.

- 9.11 Table 9.1 provides a breakdown of the market share achieved by facilities in Northumberland on a zone-by-zone basis for this activity.

Table 9.1: Northumberland's 'Cinema' Market Share - 2009

Survey Zone	Market Share (%)
1. Berwick-upon-Tweed	17.8
2. Alnwick	10.9
3. Scots Gap	9.6
4. Ashington West	0.0
5. Bedlington	0.0
6. Seaton Delaval	0.0
7. Ponteland	2.4
8. Prudhoe	19.6
9. Hexham	72.7
10. Haltwhistle	51.4
11. Cramlington	0.0
12. Blyth	0.0
13. Morpeth	0.0
14. Ashington East	0.0
15. Amble	2.4
TOTAL	12.1

Source: NEMS Northumberland Household Survey (August 2009)
Excludes "Don't undertake this activity"

- 9.12 Accordingly, the vast majority of respondents who visit the cinema use facilities outside Northumberland (c. 88%), most notably the Odeon cinema in Wallsend (40%), the Odeon cinema at the Metrocentre (23%) and the Empire cinema in Newcastle City Centre. As would be expected these facilities have the greatest influence on residents within the Ashington East (93%), Bedlington (90%), Blyth (90%), Ashington West (89%), Amble (88%) and Seaton Delaval (86%) zones. Elsewhere, facilities in Edinburgh (33%) are identified to be popular in the Berwick-upon-Tweed Zone.

Cinema Capacity

- 9.13 As previously highlighted, Northumberland lacks a modern large-format multiplex cinema. Accordingly 88% of respondents who visit the cinema use facilities elsewhere. There appears a clear need for improved cinema provision within Northumberland (with the exception of Hexham, which already has its own cinema) in order to reduce the need for local residents to travel to facilities elsewhere.



- 9.14 Although existing facilities in Northumberland attract local residents who visit the cinema, it is likely that the introduction of a new cinema in Northumberland would increase the market share achieved by facilities in Northumberland and potentially the participation rate for local residents. In this respect, given the strength and proximity of competing provision, we believe that an improvement in the cinema offer would result in the market share increasing from its current level (of 12%) to a third.
- 9.15 Based on retaining 33% of the Study Area population and based on the average participation rate within the UK of 2.9 visits per person per annum (as identified by Mintel), the assessment at [Appendix 8](#) indicates that Northumberland could potentially support up to six cinema screens (over and above existing provision).
- 9.16 Given the limited cinema offer in Northumberland and current travel patterns for local residents there is a clear need for this type of facility.

Indoor, sports or health and fitness activity

- 9.17 Approximately, **35%** of respondents within the Study Area participate in health and fitness activities. Of those respondents who do undertake this type of activity, most (80%) indicated that they used facilities in Northumberland. This equates to an adult catchment population of almost 88,500 people. This suggests that relatively limited trips are being made to facilities outside Northumberland.
- 9.18 Table 9.2 provides a breakdown of the market share achieved by facilities within Northumberland on a zone-by-zone basis for this activity.

Table 9.2: Northumberland's 'Health & Fitness' Market Share - 2009

Survey Zone	Market Share (%)
1. Berwick-upon-Tweed	85.8
2. Alnwick	74.4
3. Scots Gap	85.3
4. Ashington West	83.1
5. Bedlington	90.5
6. Seaton Delaval	52.5
7. Ponteland	33.3
8. Prudhoe	81.4
9. Hexham	88.9
10. Haltwhistle	88.8
11. Cramlington	93.1
12. Blyth	86.9
13. Morpeth	85.8
14. Ashington East	89.3
15. Amble	83.0
TOTAL	80.4

Source: NEMS Northumberland Household Survey (August 2009)
Excludes 'Don't undertake this activity'

- 9.19 Existing facilities within Northumberland are identified to attract the vast majority of respondents (at least 70%) who undertake this activity within 13 of the 15 survey zones. Within Northumberland the most popular destinations are identified to be facilities in Cramlington (16%), Alnwick (10%), Hexham (9%), Berwick-upon-Tweed (8%), Ashington (8%) and Blyth (8%).
- 9.20 Given the current retention levels achieved by facilities in Northumberland together with the distribution of facilities (albeit predominantly small-format and/or independent operators together with Council provision) there appears no clear evidence to suggest that there is an outstanding requirement for further facilities in the future. However, it is notable that Northumberland lacks representation from the UK's leading health club operators such as Esporta, Virgin Active and Fitness First.

Nightlife such as Bars, Pubs and Clubs

- 9.21 Within the defined Study Area, the Household Survey identifies that half (**52%**) of respondents indicated that they visited pubs, bars or nightclubs.
- 9.22 Of those respondents within the Study Area who stated that they visited such facilities, almost two-thirds (63%) use facilities in Northumberland. This equates to an adult catchment population of approximately 101,300 people using facilities within Northumberland. Within Northumberland the most popular destinations are identified to be Morpeth (10%), Blyth (7%), Ashington (6%), Cramlington (5%) and Berwick-upon-Tweed (5%).

- 9.23 Of those respondents who use facilities outside Northumberland (37%), Newcastle City Centre is identified to be the most popular destination achieving a market share of more than 15%, which is higher than any one specific centre in Northumberland. Table 9.3 provides a breakdown of the market shares achieved by the most popular destinations within and outside Northumberland on a zone-by-zone basis.

Table 9.3: Market Share Achieved by Main Centres – Pubs/Clubs/Nightclubs

Survey Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	Total
Within Northumberland																
Morpeth	0	0	41	26	12	2	0	0	0	0	2	0	86	6	26	10
Blyth	0	0	0	0	18	2	0	0	0	0	2	64	0	0	0	7
Ashington	0	0	0	35	2	0	0	0	0	0	2	0	2	54	4	6
Alnwick	4	42	0	0	0	0	0	0	0	0	0	0	0	0	6	6
Cramlington	0	0	0	7	4	15	0	0	0	0	42	0	0	0	0	5
Berwick-upon-Tweed	41	0	0	0	0	0	0	0	0	0	0	0	0	0	0	5
Prudhoe	0	0	0	0	0	0	0	35	0	0	0	0	0	0	0	3
Hexham	0	0	5	0	0	0	0	0	49	9	0	0	0	0	0	3
Other	24	4	8	11	33	13	36	17	31	32	2	8	5	20	47	20
Sub-Total	69	46	54	78	69	33	36	52	80	49	59	72	93	80	83	63
Outside Northumberland																
Newcastle-upon-Tyne	2	6	8	11	19	33	27	23	13	16	40	9	6	12	6	15
Edinburgh	11	3	0	0	0	0	0	0	0	0	0	0	0	0	0	2
Other	18	45	39	11	12	35	36	25	7	36	11	19	2	8	11	20
Sub-Total	31	54	46	22	32	67	64	48	20	51	51	28	7	20	17	37
TOTAL	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100

Source: NEMS Northumberland Household Survey (August 2009)
Excludes 'Don't undertake this activity'

- 9.24 Table 9.3 illustrates the influence of Newcastle-upon-Tyne has on attracting residents within Northumberland and wider Study Area for pubs, clubs and nightclubs, particularly in the Cramlington Seaton Delaval zones.

Restaurants

- 9.25 Within the defined Study Area, the Household Survey identifies that more than **76%** of respondents visit restaurants. However, of those that do, less than two-thirds (61%) last used facilities within Northumberland. This equates to an adult catchment population of more than 145,000 people using facilities within Northumberland.
- 9.26 Within Northumberland the most popular destinations are identified to be Morpeth (10%), Blyth (6%), Hexham (6%), Cramlington (6%), Berwick-upon-Tweed (5%) and Alnwick (4%). In terms of facilities outside Northumberland, Newcastle City Centre is identified to be the most popular destination (13%).



- 9.27 It is evident that restaurants within both the larger and smaller centres throughout Northumberland serve an important role in meeting the needs of the local population.

Ten-pin Bowling

- 9.28 Within the defined Study Area, the Household Survey identifies that only **13%** of respondents participate in this activity.
- 9.29 As Northumberland currently contains no ten-pin bowling facility, all of those respondents who stated that they partake in this activity do so at facilities outside the Northumberland. The most popular destinations are identified to be the XS Superbowl in Longbenton (43%), Star Bowl in North Shields (13%) and AMF Bowling in Newcastle-upon-Tyne (13%).

Ten-pin Bowling Capacity

- 9.30 The Household Survey identifies ten-pin bowling participation rate of only 13%. As previously highlighted Northumberland currently contains no ten-pin bowling facility resulting in local residents having to travel to facilities elsewhere should they wish to participate in this activity. Consequently, the development of a modern ten-pin bowling facility in Northumberland will reduce the need for local residents to visit facilities elsewhere, although it is inevitable that some respondents will continue to use facilities elsewhere.
- 9.31 Again, by assuming that improved provision could achieve a 33% market share within the Study Area together with the potential for participation rate to increase from only 13% to 15%, our assessment identifies that there is the potential to support a large-format bowling facility (up to 17 lanes). As previously highlighted, North Country Leisure is planning to create a ten-pin bowling facilities in the Wentworth Leisure Centre in Hexham. This facility will help to meet the identified need for this type of facility in Northumberland.
- 9.32 Should there be commercial demand for a bowling facility in Northumberland, it would significantly reduce distances travelled by local residents who partake in ten-pin bowling, thereby providing more sustainable development.

Bingo

- 9.33 Within the defined Study Area, the Household Survey identifies that less than **9%** of respondents participate in bingo.

- 9.34 Of those respondents who stated that they participated in bingo, over half (58%) stated that they visited facilities within Northumberland, primarily the Gala Bingo in Cramlington (24%), Gala Bingo in Ashington (17%) and Mecca Bingo in Blyth (13%). Given the low participation rate, facilities within Northumberland are identified to achieve an adult catchment population for bingo of 14,850 people.
- 9.35 The most popular destinations outside Northumberland for bingo are identified to be the Gala Bingo at the Metrocentre (6%). Table 9.4 provides a breakdown of the market share achieved by facilities within Northumberland on a zone-by-zone basis for this activity.

Table 9.4: Northumberland's 'Bingo' Market Share - 2009

Survey Zone	Market Share (%)
1. Berwick-upon-Tweed	14.3
2. Alnwick	0.0
3. Scots Gap	33.3
4. Ashington West	92.3
5. Bedlington	68.7
6. Seaton Delaval	70.0
7. Ponteland	33.3
8. Prudhoe	16.7
9. Hexham	0.0
10. Haltwhistle	40.0
11. Cramlington	71.4
12. Blyth	61.5
13. Morpeth	85.7
14. Ashington East	83.4
15. Amble	62.5
TOTAL	57.5

Source: NEMS Northumberland Household Survey (August 2009)
Excludes 'Don't undertake this activity'

Bingo Capacity

- 9.36 Currently Northumberland contains three large-format bingo facilities (Mecca Bingo in Blyth and Gala Bingo in Ashington and Cramlington), which are the most popular destinations within the Study Area. Other participation is restricted to more informal bingo within pubs, social clubs, etc.
- 9.37 Currently, existing facilities within Northumberland attract almost 58% of respondents within the Study Area who participate in this activity. By 'rolling forward' current market share there appears scope to support up to two further bingo facilities in Northumberland through to 2026. Furthermore, it is evident that participation rates for bingo activity differ significantly throughout the Study Area. Indeed, where there is an existing facility (such as in Cramlington) the participation rate (14%) is much greater than where facilities are very limited, such as within the Hexham Zone, where less than 3% of respondents participate in this activity. Accordingly, the introduction of a



new bingo facility could improve participation rates throughout Northumberland. However, it is important to highlight that discussion between WYG and bingo operators indicate that bingo expansion is currently less active than it has been in recent years. The smoking ban that came into force in July 2007 has affected bingo participation rates. Consequently, it is unclear whether there is commercial demand for additional facilities within Northumberland. Should there be demand, it is considered appropriate not to locate such a facility in locations where provision is poor, such as in Hexham and Morpeth.

Cultural Activities

- 9.38 Within the defined Study Area, the Household Survey identifies that less than half (**45%**) of respondents visit cultural facilities, such as theatres, museums and art galleries. However, of those that do, only 11% last used facilities within Northumberland. This equates to an adult catchment population of less than 22,000 people using facilities within Northumberland.
- 9.39 Within Northumberland the most popular destinations are identified to be Alnwick (3%), Hexham (2%) and Berwick-upon-Tweed (2%). Popular facilities include the Alnwick Playhouse in Alnwick, the Maltings Theatre & Arts Centre in Berwick-upon-Tweed and Queens Hall Theatre in Hexham.
- 9.40 In terms of facilities outside Northumberland, Newcastle City Centre is identified to be the most popular destination attracting a market share of 60%, most notably the Theatre Royal and The Great North Museum, Hancock.

Sporting Events

- 9.41 Within the defined Study Area, the Household Survey identifies that only **19%** of respondents visit sporting events. Furthermore, of those that do, less than one percent last used facilities within Northumberland.
- 9.42 Consequently, the vast majority of respondents who visit sporting events use facilities outside Northumberland. Popular destinations include Newcastle United Football Club (54%).

Summary

- 9.43 Our analysis of the Household Survey suggests the following participation rates for leisure activities by residents in the Study Area:



- 47% participate in cinema-going (although very limited trips are directed to facilities in Northumberland, reflecting the limited facilities);
- 35% participate in health and fitness activities, with 80% directed to facilities in the Northumberland;
- 52% visit bars, pubs and nightclubs, although less than two-thirds (63%) are directed to facilities in Northumberland;
- 76% of respondents within the Study Area visit restaurants, of which 61% are directed to facilities in Northumberland;
- 13% participate in ten-pin bowling despite no facilities being available within Northumberland;
- 9% participate in bingo, with 58% of respondents using facilities in Northumberland;
- 19% go to sporting events, although less than one per cent use facilities in Northumberland; and
- 45% of respondents visit cultural facilities with only 11% using facilities in Northumberland.

9.44 Northumberland does not contain ten-pin bowling facility or a large-format multiplex cinema. Consequently, residents within Northumberland and the wider Study Area who participate in these activities primarily do so at destinations outside Northumberland. However, as set out above, North Country Leisure is planning to create a ten pin bowling facility at the Wentworth Leisure Centre in Hexham, which should be operational later in 2010.

9.45 With regard to health and fitness facilities, of those that undertake this activity (35%) more than 80% use facilities within Northumberland.

9.46 In terms of 'capacity' for additional leisure facilities, this is considered difficult given the current lack of a ten-pin bowling facility and limited cinema provision. However, based on realistic retention levels and the need to provide more sustainable leisure patterns, there appears a clear need for a cinema and ten-pin bowling facility (over and above the proposal by North Country Leisure) in Northumberland together with two additional bingo facilities. Whilst it is uncertain whether the development of such facilities in Northumberland is commercially viable, should appropriate demand develop, it will be beneficial for commercial leisure facilities to be located in sustainable locations that will be well positioned to meet the needs of much of the Northumberland Sub-Region.



Office

- 9.47 In seeking to define what constitutes a 'Town Centre' use, PPS4 (and its predecessor PPS6) identifies a broader range of uses which stretches beyond the traditional retail and leisure facilities that would normally be found within a Town Centre. Therefore, uses such as B1 office development are outlined in PPS4 as a 'Main Town Centre Use' to which policies contained within the planning statement should be applied. However, it is acknowledged that any assessment of the need for office development will vary considerably based on the size, role and function of a particular centre within the sub-region or region.
- 9.48 Traditionally, the demand for office floorspace within a particular area would be considered as part of a wider employment land study or assessment prepared as baseline evidence for the Development Plan. In assessing the need for office or B1 floorspace across a particular area, advice would be given as to the likely location where such development could be secured. This, in certain cases, may include a number of locations ranging from town centre opportunities through to out-of-centre business parks with high levels of accessibility and car parking.
- 9.49 From our discussions with various agents operating within the North East region, it is evident that much of the office development in the North East is focussed on the regional centre of Newcastle, which, at the peak period of demand was struggling to meet occupier demands and requirements. As a result, other locations in neighbouring authorities were proving popular for occupiers looking for B1 office floorspace, and developments such as the Northumberland Business Park at Cramlington and North Seaton in Ashington were competing head-to-head with occupiers also considering locations within Newcastle and the City Centre. Beyond the regional centre and the major sub-regional Business parks, the agents we have spoken to have confirmed that it will prove very difficult to forecast or estimate the likely demand for future office floorspace within the lower order centres within Northumberland.
- 9.50 Whilst there are requirements in the more remote/rural areas of Berwick-upon-Tweed, Alnwick, Hexham, etc., these requirements are not significant in number or scale/size and are often satisfied by existing stock, either within the established centres or more often, in out-of-centre locations on dedicated employment parks. As a result, it is not anticipated that there will be sufficient demand in the future to warrant bespoke office development of a significant scale within the established centres in Northumberland. In addition, given the present economic circumstances, many investors and developers are reluctant to invest considerable levels of capital required to deliver high quality



office developments without a significant pre-let. Whilst there may be opportunities in the future for public sector funding or some form of 'pump-priming', set against the current financial climate and the difficulty in securing funding from banking institutions, it is anticipated that limited development will be realised in the short to medium-term.

- 9.51 However, from our consultations to date, it is evident that there will still continue to be a market for more 'cost sensitive' end operators/occupiers whose priorities relate more to price and the flexibility of lease terms rather than the prestige of quality accommodation on an established business park or city centre. Therefore, the market anticipates that there will be continued investment by existing landlords seeking to refurbish office accommodation within established centres to appeal to this sector of the market. Much of this accommodation is now somewhat dated in format and available at first floor level above existing retail and leisure premises. In many cases, the cost of refurbishment and the limited demand at present means that certain landlords (often absentee landlords) are not willing to commit the additional capital to refurbishing properties for them to remain vacant.
- 9.52 Therefore, it would appear that there may be a steady turnover/demand for smaller office premises within the established centres towards the top of the existing hierarchy in Northumberland. However, the pace and the scale of demand is unlikely to result in a significant need for new office floorspace within the short to medium-term whereby any bespoke new build opportunities would be delivered. Furthermore, given the more attractive lease arrangements and rental deals that are currently being offered on major Business Parks (particularly in the south of the County), it is likely that any requirements would either be absorbed at existing premises or any future expansion of these key employment locations.
- 9.53 However, this limited anticipated demand within the short to medium-term does not rule out the prospect that office development within the established centres could be delivered as part of a comprehensive mixed-use scheme. The values achieved by a comprehensive redevelopment opportunity, including a significant proportion of retail development would enable the developer to 'cross-fund' the provision of B1 office floorspace as part of the wider scheme. Therefore, the feedback received to date does not suggest that there will be no future demand for office floorspace within the established centres of Northumberland. Nevertheless, the scale and pace of demand in the short to medium-term is unlikely to be sufficient to warrant the identification of additional sites for new office development within established centres. Although there is likely to be more opportunity



for such developments to be delivered on the edge of established centres or at existing out-of-centre employment locations, this does not rule out the opportunity for office floorspace to be secured as part of a comprehensive redevelopment opportunity within a centre, which would primarily be retail driven.



10.0 ROLE OF EXISTING CENTRES IN NORTHUMBERLAND

10.01 This section of the report seeks to assess the current role of existing centres/facilities within Northumberland, highlighting where necessary the need for additional facilities/development over the next plan period (i.e. up to 2026). As there are a significant number of centres and facilities located throughout the County, this section has specifically focused on the needs arising in the key town and district centres in Northumberland. The 'town' and 'district' centres identified are based on WYG's analysis which is set out in detail in Section 11 of this report. They include:

Town Centres

- Alnwick
- Ashington
- Berwick upon Tweed
- Blyth
- Cramlington
- Hexham
- Morpeth

District Centres

- Amble
- Bedlington
- Haltwhistle
- Ponteland
- Prudhoe

A summary of the assessment for each centre is set out below.

Alnwick Town Centre

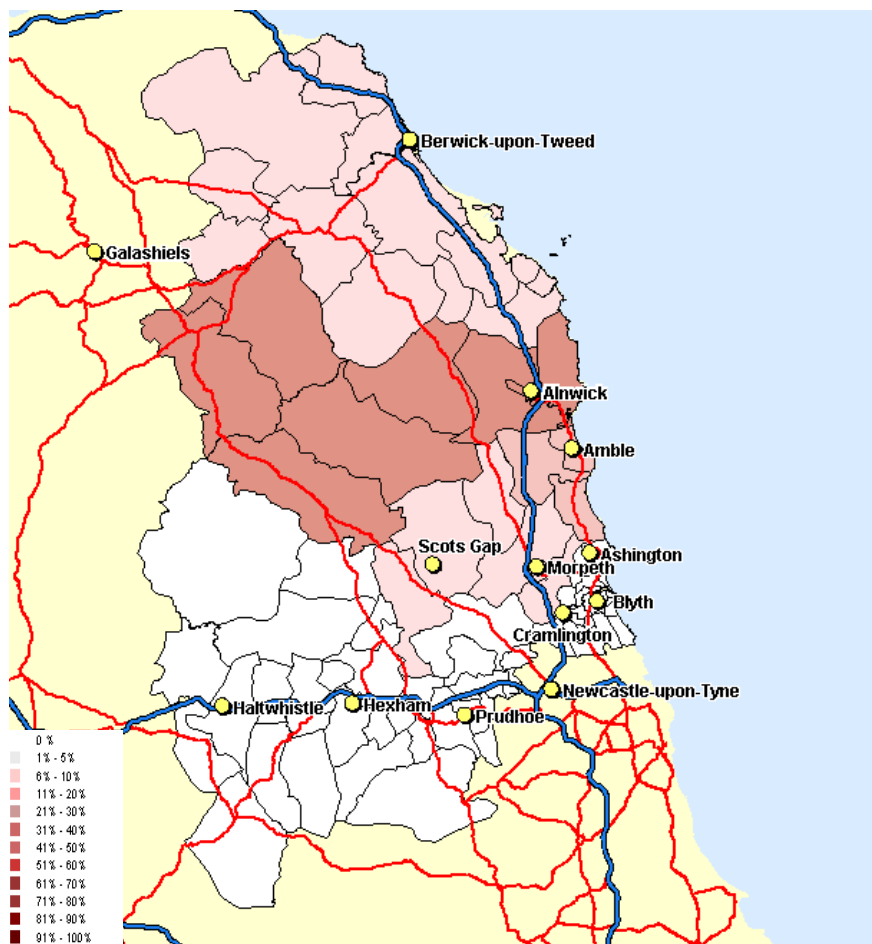
10.02 Alnwick is located adjacent to the A1 trunk road and is located approximately 35 miles north of Newcastle-upon-Tyne. Retailing within the town centre is focused on Bondgate and Market Street. The town centre is identified to comprise some 31,240 sq m of commercial floorspace, including 13,800 sq m of retail floorspace within both the convenience and comparison goods sector (as

identified by Experian Goad, August 2009). Outside the town centre, further retail floorspace is provided by the recently developed Sainsbury's store on Willowburn Avenue.

Convenience Goods Retailing

- 10.03 In terms of convenience goods shopping, existing facilities in Alnwick are identified to achieve a convenience goods turnover of some £37.57m in 2009. This equates to a market share within the Study Area of **6.2%**. This market share increases to 51% within Zone 2 (Alnwick Zone). The Household Survey identifies that existing facilities in Alnwick (both in-centre and out-of-centre) currently attract a main food shopping catchment population of approximately 22,370 people. Figure 10.1 illustrates the extent of Alnwick's convenience goods shopping.

Figure 10.1: Extent of Alnwick's Catchment within Study Area – Convenience Goods Shopping



Market Share of Alnwick– Convenience Goods Shopping

Survey Zones														
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
2.3	30.6	3.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	7.0

- 10.04 As is to be expected, existing facilities in Alnwick are identified to draw most of their trade from Zone 2 (Alnwick) of the defined Study Area. Indeed, of all the convenience goods expenditure attracted to existing facilities in Alnwick, more than three-quarters (77%) is identified to be derived from Zone 2. Of the expenditure generated in Zone 2 that is directed elsewhere, facilities in Galashiels (12%) are identified to be the most popular (which is reflective of the extent of Zone 2), followed by facilities in Morpeth (4%).
- 10.05 In terms of capacity for additional convenience goods floorspace, Table 10.1 provides a breakdown of the trading performance of existing foodstores within Alnwick.

Table 10.1: Trading Performance of Current Foodstores in Alnwick

Store	Gross Floorspace – sq m ¹	Net Floorspace – sq m ²	Net Convenience – sq m ³	Benchmark Turnover per sq m - £ ⁴	Benchmark Turnover - £m	Survey Estimate - £m ⁵
Alnwick						
Morrison's, Fenkle Street	2,160	1,421	1,136	10,597	12.04	19.87
Co-op Supermarket, Bondgate	510	406	337	5,789	1.95	0.61
Iceland, Bondgate	710	604	562	5,545	3.12	1.35
Other Alnwick Town Centre	1,390	1,043	938	3,500	3.28	0.55
Out-of-Centre						
Sainsbury's, Willowburn Avenue	-	1,778	1,334	9,218	12.30	14.33
Co-op Supermarket, Victoria Terrace	-	187	149	5,789	0.86	0.00
Sub-Total	-	5,252	4,307	-	32.69	36.71
Other					0.86	0.86
TOTAL		5,252	4,307		34.41	37.57

Notes: ¹ – Gross Floorspace derived from Experian Goad (2009), IGD Database (2006) or WYG survey
² – Net floorspace based on WYG judgement
³ – Net convenience floorspace derived from Verdict Grocery Retailers (2009) where available
⁴ – Sales densities derived from Verdict (2009) or Mintel Retail Rankings (2009) for national multiples and WYG assessment for local shops
May not add up due to rounding
At 2007 prices

- 10.06 Table 10.1 indicates that existing convenience goods floorspace in Alnwick is trading above expected levels (by £4m, or 12%). Whilst survey results should be treated with a 'note of caution' in identifying actual trading performance of specific stores, the survey results do suggest that the two largest stores (the Morrison's and out-of-centre Sainsbury's) are identified to be overtrading by 65% and 17% respectively.
- 10.07 Given this strong trading performance, together with the forecast growth in convenience goods expenditure over the period to 2026, by rolling forward current market share (6.2%), Table 10.2 identifies capacity in the short-term (i.e. 2014) of £5.66m, increasing to just over £11m by 2026.

This capacity could support between 467 sq m (net) and 1,132 sq m (net) of additional floorspace by 2014, increasing to between 913 sq m (net) and 2,214 sq m (net) by 2026 – dependent upon the end operator⁹.

Table 10.2: Estimated 'Capacity' for Convenience Goods Facilities – Alnwick

Year	Turnover - £m ¹	Expenditure Available - £m ²	Surplus Expenditure - £m
2009	34.41	37.57	3.16
2014	34.76	40.42	5.66
2019	35.10	42.87	7.77
2024	35.45	45.47	10.02
2026	35.60	46.67	11.07

Notes:
¹ - Allows for increased turnover efficiency of +0.2% per annum
² - Assumes constant market share at 6.2% within the Study Area
 At 2007 prices

- 10.08 Accordingly, based on current market shares there is a demonstrable quantitative need for further convenience goods floorspace in Alnwick. This level of capacity could support a modest expansion of an existing foodstore (such as the Morrison's or Sainsbury's) or the development of a medium-sized store dependent upon the end operator (c. 3,250 sq m gross¹⁰) based on current market shares. However, the potential improvement in the convenience goods offer in neighbouring centres, such as Berwick-upon-Tweed, Morpeth and Amble, is likely to impact on shopping patterns and trading performance of existing facilities in the Alnwick area, which would impact on future capacity. Furthermore, a new Lidl store at Station Industrial Estate was due to open in September 2009 just 1 month after the household survey was undertaken. Once this is factored into the analysis it is evident that this store would meet the capacity identified in the short to medium term (i.e. up to 2014).

Comparison Goods Retailing

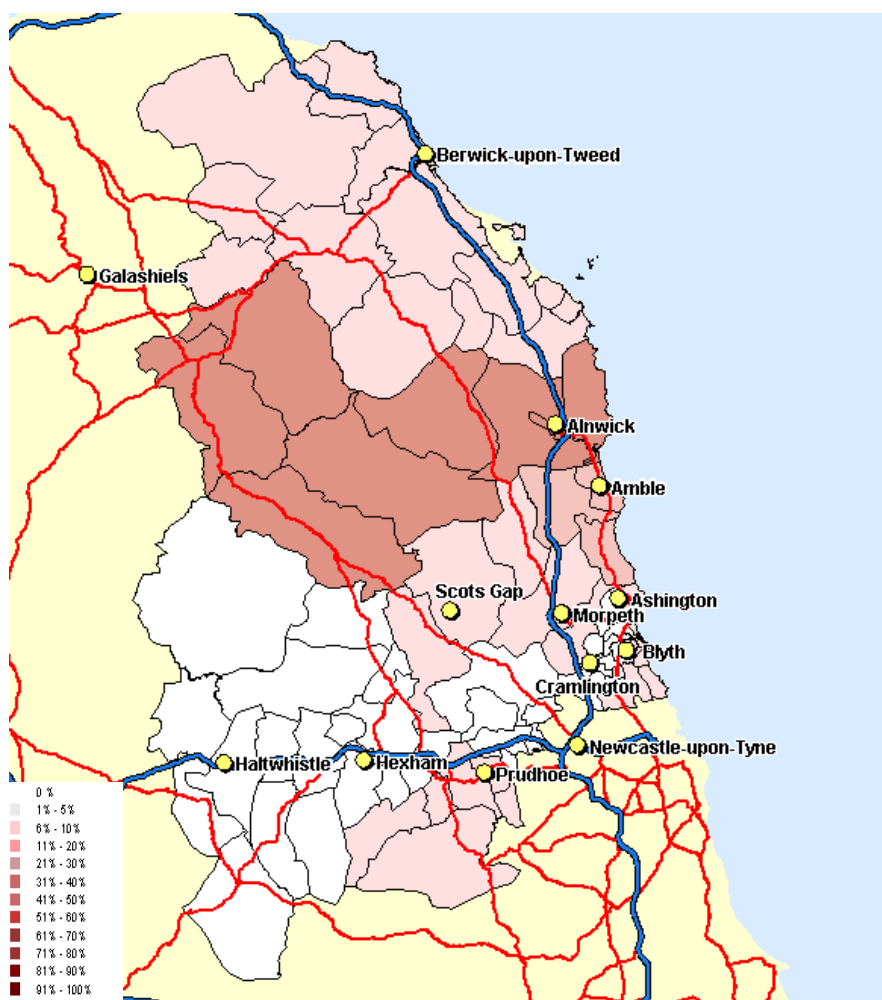
- 10.09 Alnwick Town Centre is identified to attract a comparison goods turnover of £30.10m in 2009 from the defined Study Area. This equates to a market share of 3.0% within the Study Area. By including nearby out-of-centre facilities (comprising the Homebase and Argos at Willowburn Avenue and the Willows Garden Centre) this turnover increases to £33.49m in 2009, which represents a market share of **3.3%** within the Study Area. Whilst this market share increases to 25% within Zone 2 (Alnwick), this is notably lower than that achieved for convenience goods (51%). Figure

⁹ Based Average sales density assumed to be between £5,000/sq m (based on the trading performance of smaller format stores) and £12,155/sq m (based on the average sales density of the leading four supermarkets as identified by Verdict 2009). Allows for increased turnover efficiency at 0.2% per annum

¹⁰ Based on residual capacity being not being occupied by a one of the four leading UK supermarket operators and a convenience/ comparison split of 75%/25% and a gross to net split of 75%/25%

10.2 indicates the extent of Alnwick's catchment for comparison goods (both in-centre and out-of-centre).

Figure 10.2: Extent of Alnwick's Catchment within Study Area – Comparison Goods Shopping



Market Share of Alnwick– Comparison Goods Shopping

Survey Zones														
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
2.3	25.4	4.4	0.0	0.0	0.1	0.0	0.1	0.0	0.0	0.0	0.1	0.3	0.4	7.0

10.10 Figure 10.2 illustrates the limited trade draw of Alnwick as a comparison goods retail destination within the Study Area. Indeed, with the exception of Zone 2, the next highest market share

achieved within the Study Area is only 9% from Zone 15 (Amble) and 3% from Zone 1 (Berwick-upon-Tweed). It is evident from the Household Survey that Newcastle City Centre is a popular retail destination for local residents, attracting some 22% of comparison goods expenditure generated in Zone 2, which is comparable to that identified for Alnwick (25%).

- 10.11 Based on current market shares, Table 10.3 provides an assessment of the survey derived turnover of existing facilities within Alnwick and compares it to expected turnover.

Table 10.3: Trading Performance of Current Comparison Goods Floorspace in Alnwick

Store	Gross Floorspace – sq m ¹	Net Floorspace – sq m ²	Net Comparison – sq m ³	Benchmark Turnover per sq m – £ ⁴	Benchmark Turnover – £m	Survey Estimate – £m ⁵
Alnwick						
Alnwick Town Centre	9,090	6,818	6,476	3,500	22.67	30.10
Morrison's, Fenkle Street	2,160	1,421	285	9,232	2.63	
Out-of-Centre						
Sainsbury's, Willowburn Avenue	-	1,778	444	7,686	3.41	3.25
Homebase, Willowburn Avenue	2,536	2,029	1,927	1,300	2.51	
Sub-Total	-	12,046	9,132	-	31.22	33.35
Other					0.13	0.13
TOTAL		12,046	9,132		31.35	33.48

Notes:

- ¹ – Gross Floorspace derived from Experian Goad (2009), IGD Database (2006) of WYG survey
- ² – Net floorspace based on WYG judgement
- ³ – Net comparison floorspace based on WYG judgement and takes into account comparison goods floorspace
- ⁴ – Sales densities derived from Verdict (2009) or Mintel Retail Rankings (2009) for national multiples and WYG assessment for local shops

May not add up due to rounding
At 2007 prices

- 10.12 Overall, existing comparison goods facilities within Alnwick are identified to be trading marginally above expected levels (by £2.13m, or 7%). Given this slight overtrading and the limited forecast growth in comparison goods expenditure, at least in the short-term, suggests that there is limited quantitative need for further comparison goods floorspace (less than £6m by 2014). However, whilst retail capacity in the longer-term should be treated with caution, by 2026 the identified capacity (£26.92m) could support a notable increase in the comparison goods offer in Alnwick (c. 6,120 sq m net/8,160 sq m gross). This level of capacity compares to the latest FOCUS Report for Alnwick identifying requirements from eight comparison retailers totalling up to 3,575 sq m (gross) of floorspace. Retailers seeking representation in Alnwick include Bon Marche, Fat Face and Pets at Home.

Table 10.4: Estimated 'Capacity' for Comparison Goods Facilities – Alnwick

Year	Turnover - £m ¹	Expenditure Available - £m ²	Surplus Expenditure - £m
2009	31.35	33.48	2.13
2014	32.95	38.66	5.71
2019	35.50	47.07	11.57
2024	38.24	59.98	21.74
2026	39.39	66.31	26.92

Notes: ¹ – Allows for increased turnover efficiency of +1.0% per annum between 2009 and 2014 and +1.5% per annum post 2014 to reflect the higher increase in expenditure forecast
² – Assumes constant market share at 3.3% within the Study Area
 Allows for growth in non-store retail sales
 At 2007 prices

- 10.13 Within Alnwick there is currently an outstanding commitment for an out-of-centre comparison goods unit of 586 sq m (gross) on land adjacent and north of Willowburn Avenue. Although no operator is formally attached to this application, based on applying an average sales density of £3,500 per sq m, this commitment is identified to achieve a comparison goods turnover of approximately £1.60m in 2014, increasing to almost £2m by 2026. Accordingly, this commitment (if implemented) will meet the identified capacity for additional comparison goods floorspace in Alnwick through to 2014. However, by 2026 there will remain almost £25m of comparison goods capacity for Alnwick.

Leisure

- 10.14 The commercial leisure offer of Alnwick is limited. Again, as is the case with nearby Berwick-upon-Tweed, the limited commercial leisure offer is reflective of the size of the local catchment population.
- 10.15 Existing leisure facilities in Alnwick include the Alnwick Playhouse on Bondgate (which includes a cinema screen), the Alnwick Garden and Alnwick Castle together with a range of local facilities such as restaurants, pubs and sports clubs, including the Willowburn Leisure Centre.
- 10.16 Given the existing leisure offer, the majority of local residents within Zone 2 (Alnwick) use facilities elsewhere. For example, with regard to cinema-going, the household survey that less than 11% of residents within the Alnwick area use facilities in Alnwick (the Alnwick Playhouse). Accordingly, almost 90% of residents use facilities elsewhere, most notably the Odeon Cinema in Wallsend (24%) and the Odeon Cinema at the Metrocentre (24%). Similarly, for ten-pin bowling and bingo, given the lack of facilities in Alnwick, all residents within Zone 2 who participate in these activities use facilities elsewhere, most notably in Edinburgh, The Metrocentre and Tyneside.
- 10.17 In terms leisure activities, within Zone 2 of the defined Study Area, Table 10.5 identifies the market shares and participation rates for different leisure activities within Zone 2 (Alnwick)

Table 10.5: Leisure Activity within the Alnwick Zone (Zone 2)

Activity	Participation Rate (%)	Market Share to Facilities in Alnwick (%)
Health and Fitness	46.8	70.2
Pubs, Bars, Nightclubs	68.6	42.0
Restaurants	87.1	36.0
Cultural Activities	59.7	21.1
Cinema-going	49.5	10.9
Bingo	3.9	0.0
Ten-pin Bowling	21.0	0.0
Sporting Events	25.4	0.0

Notes: Derived from Northumberland Household Survey (2009)

- 10.18 Overall, Alnwick's leisure offer is focused on the visitor /tourism sector with key attractors such as Alnwick Castle and Alnwick Garden, together with local facilities (such as restaurants, public houses, etc.), which serve both the local resident population and visitors to the area.

Summary

- 10.19 Alnwick serves an important retail destination for both convenience and comparison goods shopping particular for residents within the surrounding area and for visitors to Northumberland. The extent of its catchment is affected by the rural nature of much of the catchment and the strength and proximity of competing centres such as The Metrocentre.
- 10.20 Within the convenience goods sector, Alnwick is dominated by the Morrison's and Sainsbury's stores, which are both identified to be trading well. Overall existing convenience goods facilities in Alnwick are identified to be trading above expected levels. This overtrading together with the forecast growth in convenience goods expenditure suggests that there is scope for further convenience goods floorspace in Alnwick - £7m in 2014, increasing to £12m by 2026.
- 10.21 With regard to comparison goods, collectively existing comparison goods floorspace in Alnwick is identified to be trading above expected levels. Given this, together with the forecast growth in expenditure, there is capacity for additional comparison goods floorspace in Alnwick through to 2014 over and above outstanding commitments. In the longer term there is demonstrable capacity for further comparison goods floorspace within Alnwick just to maintain current market share.
- 10.22 As with nearby Berwick-upon-Tweed, whilst existing leisure provision in Alnwick is limited, we again do not consider that Alnwick would be the most appropriate location for major commercial leisure development.



Ashington Town Centre

- 10.23 Ashington is located in south east Northumberland some five miles east of Morpeth and approximately 21 miles north of Newcastle-upon-Tyne. The town centre is identified to comprise approximately 43,510 sq m of floorspace (including 26,000 sq m within the convenience and comparison goods sector) as identified by Experian Goad (August 2009). Within the town centre, retailing is focused along Station Road with further retailing located on Lintonville Terrace (which includes an Asda store), North Seaton Road and Woodhorn Road.

Convenience Goods Retailing

- 10.24 Existing convenience goods stores within Ashington principally draw their trade from Zone 14 (which includes part of the Ashington urban area and Newbiggin-by-the-Sea) and neighbouring Zone 4 (which includes the remainder of the Ashington urban area) and Zone 15 (Amble). Collectively, existing convenience goods facilities in Ashington are identified to attract a convenience goods turnover of £57.90m in 2009 from the defined Study Area. This equates to a market share within the Study Area of 9.5%. This market share increases to more than 60% within the Zone 4 (Ashington West) and Zone 14 (Ashington East). On this basis, the Household Survey identifies that existing facilities in Ashington attract a main food shopping catchment population of approximately 39,500 people in 2009. Figure 10.3 illustrates the extent of Ashington's convenience goods catchment.

Figure 10.3: Extent of Ashington's Catchment within Study Area – Convenience Goods Shopping



Market Share of Ashington – Convenience Goods Shopping

Survey Zones														
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
0.0	1.5	6.9	45.0	1.5	0.0	0.0	0.0	0.0	0.0	0.0	1.8	7.4	71.3	33.1

10.25 As illustrated by Figure 10.3, existing convenience goods facilities within Ashington draw the vast majority of their trade from zones 4, 14 and 15. Of the overall convenience goods expenditure directed to facilities in Ashington, almost 90% is derived from these three zones.

10.26 Further 'local' provision is provided elsewhere in surrounding nearby area, including within Guide Post and Stakeford. Although convenience provision within these smaller centres is limited and

achieve a convenience goods turnover of less than £2m in 2009. Given the scale and proximity of these smaller centres, for the purposes of this assessment the trading performance and future growth has been taken into account in assessing future capacity within Ashington. By including these facilities the overall market share within the Study Area increases marginally to **9.6%**.

- 10.27 In terms of capacity for additional convenience goods floorspace, Table 10.6 provides a breakdown of the trading performance of existing foodstores within Ashington and the immediate surrounding area.

Table 10.6: Trading Performance of Current Foodstores in Ashington

Store	Gross Floorspace – sq m ¹	Net Floorspace – sq m ²	Net Convenience – sq m ³	Benchmark Turnover per sq m – £ ⁴	Benchmark Turnover – £m	Survey Estimate – £m ⁵
Ashington						
Asda, Lyntonville Terrace*	3,561	2,148	1,246	14,741	18.37	43.73
Iceland, Woodhorn Road	570	399	371	5,545	2.06	2.52
Lidl, Northern Relief Road	1,820	1,274	1,019	3,111	3.17	1.63
Netto, Woodhorn Road	1,030	721	598	7,228	4.32	1.73
Local Shops, Ashington Town Centre	1,560	1,092	1,037	3,000	3.11	1.79
Out-of-Centre						
Aldi, Morpeth Road	-	900	657	3,987	2.62	2.47
Sub-Total	8,541	6,534	4,928	-	33.65	53.87
Other Ashington					2.06	2.06
Co-op, The Square, Guide Post	441	309	256	5,789	1.48	0.71
Local Shops, Guide Post	628	440	418	3,000	1.25	0.36
Stakeford					0.90	0.90
TOTAL	9,610	7,283	5,602	-	39.34	57.90

Notes:

- ¹ – Gross Floorspace derived from Experian Goad (2009), IGD Database (2009) or WYG/Council assessment
- ² – Net floorspace based on WYG judgement
- ³ – Net convenience floorspace derived from Verdict Grocery Retailers (2009) where available
- ⁴ – Sales densities derived from Verdict (2009) or Mintel Retail Rankings (2009) for national multiples and WYG assessment for local shops
- ⁵ – Facilities elsewhere in Ashington and Stakeford assumed to be trading in equilibrium
- * - Asda has now relocated to a new larger store. This store opened after the completion of the Household Survey

At 2007 prices

- 10.28 Based on the survey analysis, existing convenience goods facilities within Ashington are identified to be trading above expected levels, by £18.56m (or 47%). The main overtrading is identified to occur at the existing Asda store. In contrast a number of smaller stores are identified to be trading below expected levels (such as the Aldi and Netto stores). However, survey results should be treated with a note of caution as they tend to have a bias towards larger stores and understate the role of smaller stores. Indeed, given the downturn in the economy it is likely that discount retailers (such as Aldi and Netto) are trading well and their performance has been underestimated by the survey evidence. The likely strong performance of discount operators such as Aldi and Netto is reflected by their current expansion of their current store portfolio throughout the UK. Therefore, our assessment is based on the trading performance of all convenience goods floorspace in Ashington.

- 10.29 Based on a continuation of existing market shares, Table 10.7 identifies that in the short-term (i.e. 2014) there is significant additional convenience goods floorspace potential (c. £23m).

Table 10.7: Estimated 'Capacity' for Convenience Goods Facilities – Ashington

Year	Turnover - £m ¹	Expenditure Available - £m ²	Surplus Expenditure - £m
2009	39.34	57.90	18.56
2014	39.73	62.59	22.86
2019	40.13	66.38	26.25
2024	40.54	70.40	29.86
2026	40.70	72.27	31.57

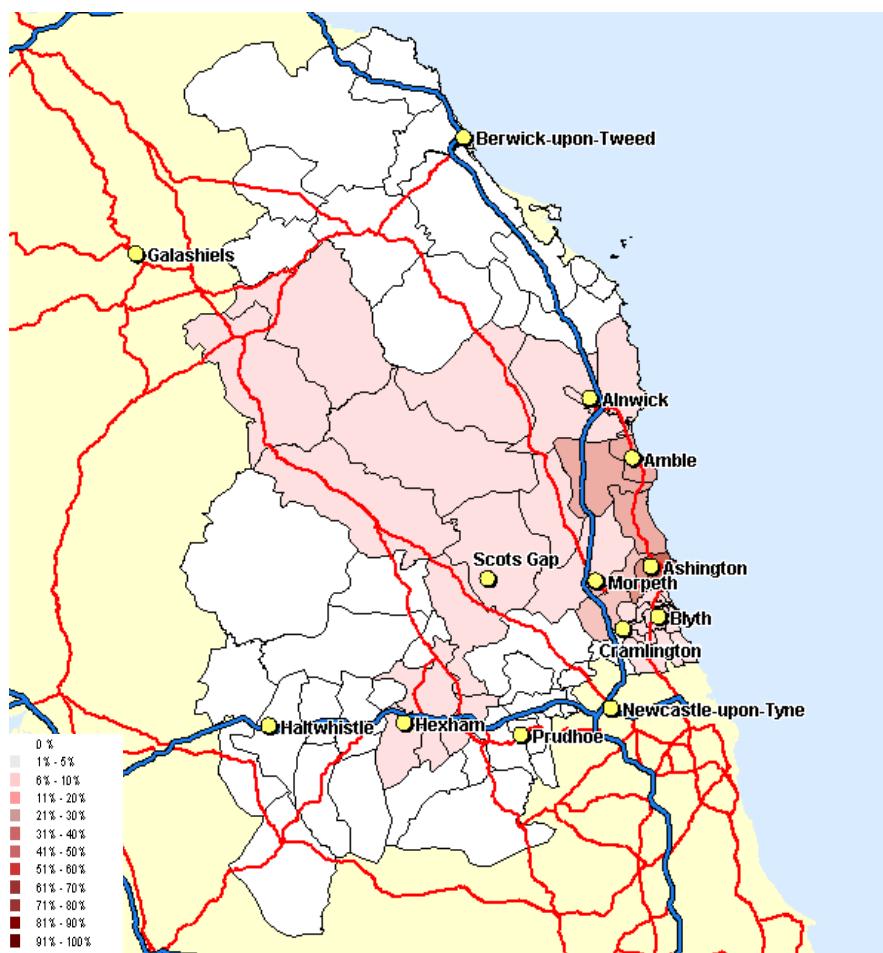
Notes: ¹ - Allows for increased turnover efficiency of +0.2% per annum
² - Assumes constant market share at 9.6% within the Study Area
 At 2007 prices

- 10.30 Whilst much of this capacity (87%) will be met by the replacement Asda store in Ashington (which is assessed to result in an uplift in convenience goods turnover of approximately £19.60m), by considering quantitative and qualitative need, in the longer-term there appears scope for a further convenience goods floorspace in Ashington.
- 10.31 Furthermore, in qualitative terms, a new supermarket will help improve consumer choice and provide competition to the existing (and replacement) Asda store, which dominates shopping patterns in the local area (particularly when the large Asda store at Cowpen Road, Blyth is also taken into account). Improved provision may also help increase the market share achieved by facilities in Ashington from the core areas (i.e. zones 4, 14 and 15).

Comparison Goods Retailing

- 10.32 Existing comparison goods facilities within Ashington and the surrounding area are identified to attract a comparison goods turnover of £56.22m in 2009. This equates to a market share of 5.5% within the Study Area. By including nearby out-of-centre facilities this turnover increases to £58.77m in 2009, which represents a market share of **5.8%** within the Study Area. This market share increases to more than 28% within zones 4, 14 and 15. Figure 10.6 illustrates the extent of Ashington's catchment for comparison goods (including in-centre and out-of-centre provision).

Figure 10.4: Plan indicating the Extent of Ashington's Catchment - Comparison Goods Shopping



Market Share of Ashington – Comparison Goods Shopping

Survey Zones														
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
0.0	1.3	3.4	27.3	5.8	0.5	0.0	0.0	0.4	0.0	0.7	2.6	7.3	42.1	15.3

10.33 As with convenience goods shopping, existing facilities in Ashington draw the majority of their trade from zones 4, 14 and 15 of the Study Area. It is evident that the strength and proximity of Newcastle City Centre and The Metrocentre as retail destinations restrict the extent of the catchment of Ashington.

10.34 Further local provision is also provided nearby in Guide Post and Stakeford, which collectively attract almost £2m of comparison goods expenditure generated in the Study Area. By including this

turnover, overall existing facilities in Ashington and the surrounding area attract 6.0% (or £60.50m) of comparison goods expenditure generated in the Study Area.

- 10.35 Table 10.8 provides a summary of the trading performance of existing comparison goods facilities within Ashington and the surrounding area derived from the survey analysis.

Table 10.8: Trading Performance of Current Comparison Goods Floorspace in Ashington

Store	Gross Floorspace – sq m ¹	Net Floorspace – sq m ²	Net Comparison – sq m ³	Benchmark Turnover per sq m – £ ⁴	Benchmark Turnover – £m	Survey Estimate – £m ⁵
Ashington						
Asda, Lyntonville Terrace	3,561	2,148	902	8,888	8.02	2.12
Local Shops, Ashington Town Centre	15,710	12,568	12,623	3,500	44.18	54.10
Sub-Total	19,366	14,716	13,525	-	52.20	56.22
Focus, Newbiggin Road	2,913	2,330	2,330	1,071	2.50	1.01
Shades of Green Garden Centre					1.54	1.54
Co-op, The Square, Guide Post	441	309	53	2,258	0.12	1.43
Local Shops, Guide Post	356	285	307	2,000	0.61	
Stakeford					0.31	0.31
TOTAL	22,981	17,640	16,215		57.28	60.50

Notes:
¹ – Gross Floorspace derived from Experian Goad (2009) or WYG assessment
² – Net floorspace based on WYG judgement
³ – Net comparison floorspace derived from Verdict Grocery Retailers (2009) where available and includes comparison goods element of foodstores
⁴ – Sales densities derived from Verdict (2009) or Mintel Retail Rankings (2009) for national multiples and WYG assessment for local shops
⁵ – Shades Garden Centre and facilities Stakeford assumed to be trading in equilibrium
 At 2007 prices

- 10.36 Overall, existing comparison goods facilities within Ashington are identified to be trading marginally above expected levels (by £3.22m or 6%). Given this overtrading together with the forecast growth in available comparison goods expenditure, there is identified to be capacity (on the basis of existing market shares) of more than £10m by 2014, increasing significantly to almost £49m by 2026.

Table 10.9: Estimated 'Capacity' for Comparison Goods Facilities – Ashington

Year	Turnover – £m ¹	Expenditure Available – £m ²	Surplus Expenditure – £m
2009	57.28	60.50	3.22
2014	60.20	70.29	10.09
2019	64.85	85.59	20.74
2024	69.87	109.06	39.19
2026	71.98	120.56	48.58

Notes:
¹ – Allows for increased turnover efficiency of +1.0% per annum between 2009 and 2014 and +1.5% per annum post 2014 to reflect the higher increase in expenditure forecast
² – Assumes constant market share at 6.0% within the Study Area
 Allows for growth in non-store retail sales
 At 2007 prices

- 10.37 Based on current market share there is potential floorspace requirement of 2,745 sq m (net) by 2014), which is forecast to increase to 5,235 sq m (net) by 2019 and to 11,045 sq m (gross) by 2026 – although growth in the long-term should be treated with caution given the uncertainties of a number of variables that may have implications on future capacity. Furthermore, some of the identified capacity will be met by the uplift in comparison goods floorspace created by the



replacement Asda store in Ashington. In this respect, the expected uplift of this additional floorspace is identified to be approximately £7m (assuming it trades at company average levels). Consequently, much (c. 70%) of the identified capacity in the short-term (i.e. 2014) based on existing shopping patterns will be met by the additional floorspace created by the replacement Asda store. However, in the longer-term there remains significant scope for further comparison retail floorspace in Ashington just to maintain existing market share (c. £40m, or 9,095 sq m net/12,125 sq m gross of additional floorspace). This level of capacity compares to the latest FOCUS Report for Ashington identifying requirements from seven comparison goods retailers seeking up to 3,765 sq m (gross) of floorspace. Retailers seeking representation in Ashington include Peacocks and B&M Bargains.

- 10.38 In addition, although dependent upon the quality of any new retail development, there appears some scope to improve the current market share through 'clawing back' expenditure from facilities elsewhere. Currently, within zones 4, 14 and 15 (which represents the primary catchment of Ashington) existing comparison goods facilities retain 28% of comparison goods expenditure (including only 42% within the Ashington Zone). Accordingly, there appears some scope to improve the market share. However, it is inevitable that retail expenditure will continue to be directed to Newcastle City Centre and The Metrocentre given their strength as retail destinations and the extent of any claw back from those locations is likely to be limited. Consequently, attempts to improve the market share of Ashington through major retail investment is likely to divert expenditure generated by residents living in Zones 4, 14 and 15 currently shopping in Blyth and Cramlington, as well as some expenditure generated by residents living in Zone 12 (Blyth) to Ashington. However, one of the interesting outcomes of the shopping survey is the current low level of interaction between the three main centres in fairly close proximity to each other (Blyth, Ashington and Cramlington) with shoppers in each of the respective zones tending to either shop in the main town within the zone, or in respect of comparison goods, direct expenditure towards higher order centres outside the study area. There are aspirations for both Cramlington and Blyth to grow in the future and enhance their role and function. The key issue therefore is to consider the extent to which each of those centres can achieve a significant improvement in retail provision without substantially reducing the market share associated with the other two centres, so that balanced growth is delivered in each of the three town centres.

Leisure

- 10.39 The leisure offer of Ashington is limited, lacking a cinema and a ten-pin bowling facility although Ashington does contain a bingo facility (Gala) on Milburn Road together with a range of other leisure facilities such as public houses, health and fitness clubs (including Ashington Leisure Centre) and restaurants.
- 10.40 Given the existing leisure offer in Ashington, residents who wish to visit commercial facilities such as the cinema or ten-pin bowling facilities use facilities elsewhere, most notably the Odeon Cinema in Wallsend and XS Superbowl in Longbenton and Star Bowl in North Shields. As would be expected residents within the local area who go to the bingo primarily use the existing Gala Bingo on Milburn Way, followed by the Gala Bingo in Cramlington.
- 10.41 As with much of Northumberland there is generally a lack of major commercial leisure facilities in Ashington. Overall, within Zone 4 (Ashington East) and Zone 14 (Ashington West) of the defined Study Area, Table 10.10 identifies the market shares and participation rates for different leisure activities within these zones.

Table 10.10: Leisure Activity within the Ashington East and Ashington West Zones (Zone 4 and 14)

Activity	Participation Rate (%)	Market Share to Facilities in Ashington (%)
Bingo	12.1	71.8
Health and Fitness	29.6	61.0
Pubs, Bars, Nightclubs	52.7	44.3
Restaurants	79.4	15.2
Cultural Activities	39.7	6.9
Sporting Events	16.0	6.7
Cinema-going	46.5	0.0
Ten-pin Bowling	17.9	0.0

Notes: Derived from Northumberland Household Survey (2009)

- 10.42 Table 10.10 illustrates that of all the leisure activities identified, facilities in Ashington achieve the highest market share for bingo (72%). This is followed by 'Health and Fitness activities' (61%) and visiting 'Pubs, Bars and Nightclubs' (44%). It is notable that for other leisure activities, such as visiting restaurants, the market share achieved by facilities in Ashington is relatively low (15%), which is reflective of the lack of this type of offer in Ashington. Instead, facilities in Morpeth or Newcastle City Centre are identified to be more popular destinations. Given this, there appears a need to improve the wider evening economy of Ashington Town Centre in order to increase the 'dwell time' of visitors to the centre.



Summary

- 10.43 Ashington serves an important role for residents within south east Northumberland. Its convenience goods offer is dominated by the existing Asda store, which is identified to be trading strongly. Given the strong performance of existing convenience facilities in Ashington our analysis identifies a need for further convenience goods floorspace. Whilst Asda are currently developing a new larger store within the town, which will meet much of the identified capacity, there is a qualitative need to provide a further main food shopping destination in Ashington in order to provide improved consumer choice and competition to the dominant Asda store.
- 10.44 Similarly, with regard to comparison goods, our assessment identifies a need (both quantitative and qualitative) further comparison goods floorspace within Ashington. In particular, although facilities such as Newcastle City Centre and The Metrocentre will continue to have an influence on shopping patterns within this part of the County, there appears a need to improve both the quantity and quality of comparison goods floorspace in Ashington to reduce the need for local residents to travel to facilities elsewhere.
- 10.45 Similarly, although Ashington contains notable commercial facilities such as a bingo facility, its wider 'evening economy' is limited. For example, whilst more than 79% of respondents within the local Ashington area visit restaurants, only 15% use facilities in Ashington, instead travelling to facilities elsewhere. On this basis, it would be beneficial for the long-term vitality and viability of the centre to enhance Ashington's evening economy.

Berwick-upon-Tweed Town Centre

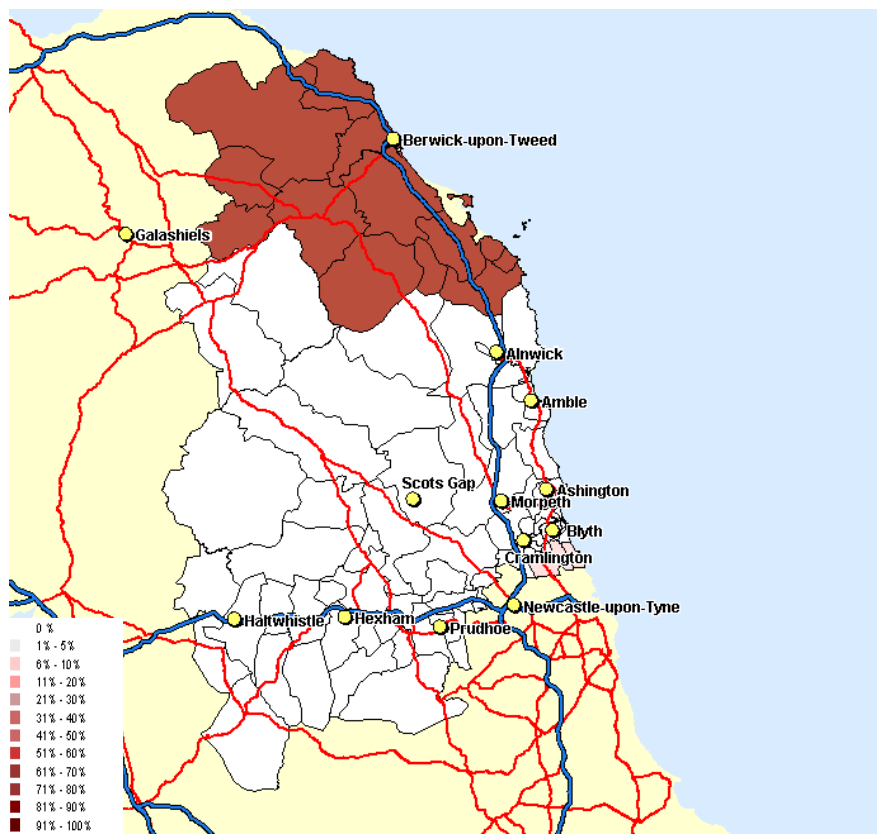
- 10.46 Berwick-upon-Tweed is the principal centre in north Northumberland and the town centre contains 44,590 sq m of floorspace (including 22,290 sq m within the convenience and comparison goods sector¹¹). It is a historic market town located off the A1, approximately 55 miles south of Edinburgh and 30 miles north of Alnwick. The town centre includes the main shopping area of Marygate, with further retailing located on Lower West Street, Castlegate, Church Street and Bridge Street. Further retail provision is provided out-of-centre and includes the Morrison's store on North Road and Tweedmouth Retail Park.

¹¹ Derived from Experian Goad (August 2009)

Convenience Goods Retailing

- 10.47 In terms of convenience goods shopping, by including out-of-centre facilities (including the Morrison's, Co-op, Aldi and M&S Simply Food stores), existing facilities in Berwick-upon-Tweed are identified to achieve a convenience goods turnover of some £48.43m in 2009. This equates to a market share within the Study Area of **8.0%**. This market share increases to 53% within Zone 1 (Berwick-upon-Tweed). The Household Survey identifies that existing facilities in Berwick-upon-Tweed currently attract a main food shopping catchment population of approximately 30,210 people in 2009, although this due primarily to the strength of nearby out-of-centre facilities (namely the Morrison's store on North Road). Figure 10.5 illustrates the extent of Berwick-upon-Tweed's convenience goods shopping, which indicates the limited influence of existing facilities outside the Berwick-upon-Tweed Zone.

Figure 10.5: Extent of Berwick-upon-Tweed's Catchment within Study Area – Convenience Goods Shopping





Market Share of Berwick-upon-Tweed – Convenience Goods Shopping

Survey Zones														
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
53.4	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

- 10.48 As illustrated by Figure 10.5, existing convenience goods stores within Berwick-upon-Tweed draw the vast majority of their trade from Zone 1 (Berwick-upon-Tweed). Indeed, of the overall convenience goods turnover generated by residents within the defined Study Area that is directed to facilities in Berwick-upon-Tweed, more than 99% is derived from Zone 1. Accordingly, it is evident that limited expenditure is identified to be directed to Berwick-upon-Tweed from the wider Study Area.
- 10.49 Further 'local' provision elsewhere in Northumberland is provided nearby within the smaller settlements of Wooler, Belford, Coldstream, Duns and Seahouses, all of which are located within Zone 1 (Berwick-upon-Tweed Zone). Collectively, these facilities achieve a convenience goods turnover of more than £10m. Overall, existing facilities within Berwick-upon-Tweed together with the immediate surrounding area achieve an increased market share of 65% within the Berwick-upon-Tweed Zone.
- 10.50 In terms of capacity for additional convenience goods floorspace, Table 10.11 provides a breakdown of the trading performance of existing foodstores within Berwick-upon-Tweed (both in-centre and out-of-centre) and the surrounding area. The trading performance of existing foodstores is based on the survey derived turnover (from the Household Survey) and is compared to the anticipated 'benchmark'/or expected turnover of existing facilities (derived from nationally published trading information from Mintel and Verdict where available or professional assumptions).



Table 10.11: Trading Performance of Current Foodstores in Berwick-upon-Tweed

Store	Gross Floorspace – sq m ¹	Net Floorspace – sq m ²	Net Convenience – sq m ³	Benchmark Turnover per sq m - £ ⁴	Benchmark Turnover - £m	Survey Estimate - £m ⁵
Berwick-upon-Tweed						
Somerfield, Castlegate	2,000	1,394	1,143	7,758	8.87	3.64
Other Berwick	2,070	1,553	1,475	3,500	5.16	1.06
Out-of-Centre						
Morrison's, North Road	4,561	2,066	1,966	10,597	20.83	37.40
Co-op, Tweedmouth	2,462	1,590	1,320	5,789	7.64	4.32
Aldi, North Road	1,240	750	548	3,987	2.18	0.54
Marks & Spencer, Northumberland Road	793	595	565	10,630	6.01	1.47
Sub-Total	13,126	7,948	7,017	-	50.69	48.43
Wooler	570	428	407	3,000	1.22	3.23
Co-op, Belford	440	308	256	5,789	1.48	0.32
Coldstream*	-	-	441	3,000	1.32	2.12
Duns*	-	-	429	3,000	1.29	2.52
Seahouses	1,240	930	884	3,000	2.65	1.87
Sub-Total	-	-	2,417	-	7.96	10.06
TOTAL			9,434		58.65	58.49

Notes: ¹ – Gross Floorspace derived from Experian Goad (2009), IGD Database (2006) or WYG survey
² – Net floorspace based on WYG judgement
³ – Net convenience floorspace derived from Verdict Grocery Retailers (2009) where available
⁴ – Sales densities derived from Verdict (2009) or Mintel Retail Rankings (2009) for national multiples and WYG assessment for local shops
* - derived from retail evidence submitted as part of the Berwick-upon-Tweed Public Inquiry
May not add up due to rounding
At 2007 prices

- 10.51 Our analysis (Table 10.11) of the trading performance of existing convenience goods floorspace in Berwick-upon-Tweed area suggests that collectively existing facilities are trading marginally below expected levels (by £0.16m). In this respect, it is evident that the only large-format foodstore in Berwick-upon-Tweed (the out-of-centre Morrison's store on North Road) is trading some 80% above expected levels. Whilst survey results should be treated with a note of caution in identifying the trading performance of particular stores, our visits to this store suggests that the store is trading very well.
- 10.52 By rolling forward current market share (9.7%), Table 10.12 identifies that given the current overtrading of existing convenience goods floorspace in Berwick-upon-Tweed there is an immediate quantitative need for further convenience goods floorspace, albeit limited.

Table 10.12: Estimated 'Capacity' for Convenience Goods Facilities – Berwick-upon-Tweed

Year	Turnover - £m ¹	Expenditure Available - £m ²	Surplus Expenditure - £m
2009	58.65	58.49	-0.16
2014	59.24	63.24	4.00
2019	59.83	67.07	7.24
2024	60.43	71.13	10.70
2026	60.68	73.02	12.34

Notes: ¹ - Allows for increased turnover efficiency of +0.2% per annum
² - Assumes constant market share at 9.7% within the Study Area
At 2007 prices

- 10.53 Whilst at current market shares there appears quantitative need for further convenience goods floorspace in Berwick-upon-Tweed, particularly in the long-term, it is also significant to note that at the time of the survey there was only one superstore (defined as contained 2,500 sq m of trading



floorspace) within Zone 1 (Berwick-upon-Tweed) of the defined Study Area – the Morrison’s store on North Road. As previously highlighted, this store is identified to be trading very strongly. Therefore, the introduction of a further main food shopping destination within Berwick-upon-Tweed will provide competition to this store and improve consumer choice to the benefit of local residents. Although there is an extant permission to extend the existing Morrison’s store (for up 1,292 sq m net of additional floorspace), which if implemented will help to address this overtrading; there will remain a strong qualitative need for a further facility within Berwick-upon-Tweed. In this respect, at the time of the survey extant permission existed for a new out-of-centre Tesco store (2,323 sq m net) on land to the north-west of the A698 at Tweedside Trading Estate. This store opened in October 2010. Collectively, these two commitments are identified to achieve a convenience goods turnover of approximately £22.66m (£17.95m by Tesco and £4.71m for Morrison’s¹²).

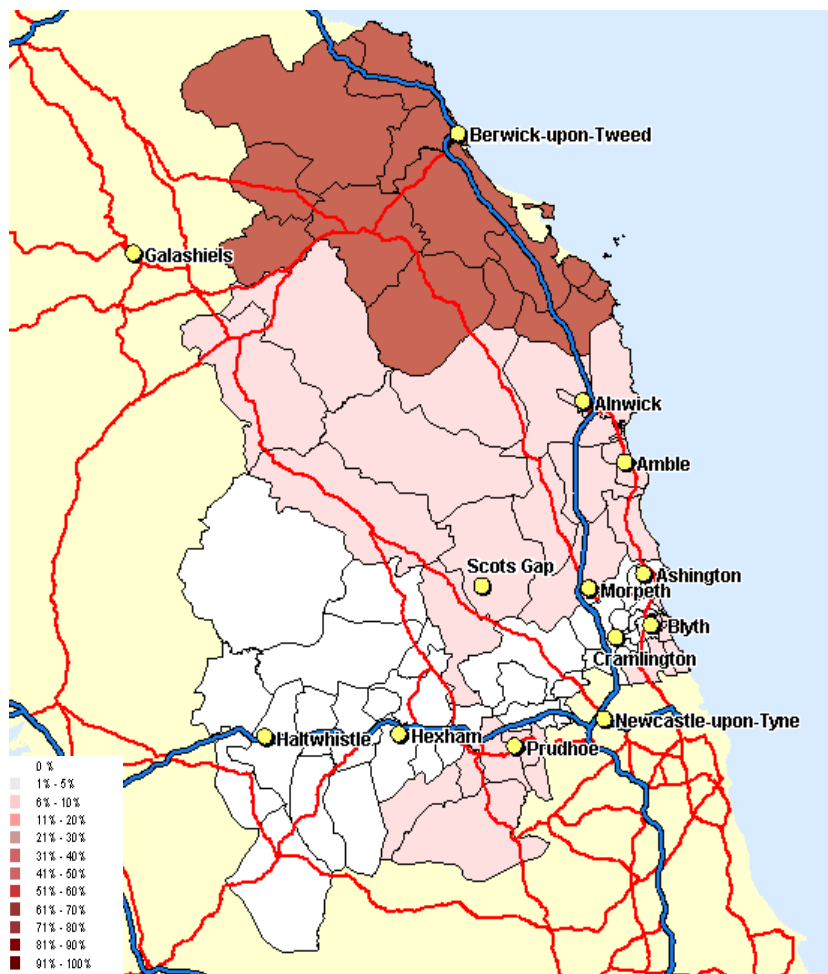
- 10.54 Whilst outstanding commitments will meet the identified capacity for additional convenience goods floorspace through to 2026, this is based on existing market share. These improvements (if implemented) will enhance the overall convenience goods offer of Berwick-upon-Tweed and is likely to increase the market share achieved. Furthermore, since the completion of the Household Survey that has informed this study, the Co-op store at Tweedmouth is now occupied by Asda. Given the strong trading performance of Asda, it is likely that this re-branding will have improved the attraction of this store and potentially on the overall market share of facilities in Berwick-upon-Tweed.
- 10.55 Currently, approximately a third of convenience goods expenditure generated within Zone 1 is directed to facilities outside Northumberland and there does appear some scope to improve the overall convenience goods market share of Berwick-upon-Tweed. Although in considering any increase in market share, it is important to note that almost a fifth of the identified expenditure (18%) directed to facilities elsewhere is to Kelso, which although located outside Northumberland County does fall within Zone 1. Furthermore, in considering convenience goods provision it is significant to note that both existing and permitted development is focused out-of-centre, which will result in limited positive impact upon the vitality and viability of the town centre.

¹² Assumes that additional floorspace resulting from the Morrison’s extension will trade at 50% expected levels

Comparison Goods Retailing

- 10.56 Berwick-upon-Tweed Town Centre is identified to attract a comparison goods turnover of £55.70m in 2009 from the defined Study Area. This equates to a market share of 5.5% within the Study Area. By including nearby out-of-centre facilities (such as Tweedbank Retail Park) this turnover increases to £61.23m in 2009, which represents a market share of **6.0%** within the Study Area. This market share increases to 42% within the Berwick-upon-Tweed Zone. Figure 10.6 indicates the extent of Berwick-upon-Tweed's catchment for comparison goods (both in-centre and out-of-centre).

Figure 10.6: Extent of Berwick-upon-Tweed's Catchment within Study Area – Comparison Goods Shopping





Market Share of Berwick-upon-Tweed – Comparison Goods Shopping

Survey Zones														
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
42.4	1.2	0.4	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.1	0.0	0.0	0.4

- 10.57 As with convenience goods shopping, the household survey identifies that existing comparison goods facilities within Berwick-upon-Tweed draw the vast majority of their turnover from Zone 1 (Berwick-upon-Tweed) with only limited expenditure being drawn from elsewhere.
- 10.58 Further 'local' provision is also provided nearby in Wooler, Belford, Coldstream, Duns and Seahouses, which collectively attract £10m of comparison goods expenditure generated in the Study Area. Accordingly, overall existing facilities within the Berwick-upon-Tweed and the surrounding area attract 49% of comparison goods expenditure generated within Zone 1 and just over 7% within the wider Study Area.
- 10.59 Table 10.13 provides an assessment of the survey derived turnover of existing facilities within Berwick-upon-Tweed and compares it to expected turnover.

Table 10.13 Trading Performance of Current Comparison Goods Floorspace in Berwick-upon-Tweed

Store	Gross Floorspace – sq m ¹	Net Floorspace – sq m ²	Net Comparison – sq m ³	Benchmark Turnover per sq m – £ ⁴	Benchmark Turnover – £m	Survey Estimate – £m ⁵
Berwick-upon-Tweed						
Berwick Town Centre	18,220	14,576	14,334	3,500	50.17	55.70
Out-of-Centre						
Morrison's, North Road	4,561	2,066	100	9,232	0.92	0.00
Tweedbank Retail Park	7,714	6,171	5,862	4,000	23.45	5.53
Sub-Total	30,181	22,797	20,296	-	74.54	61.23
Wooler	1,630	1,223	1,223	2,000	2.45	2.15
Belford	700	525	525	2,000	1.05	0.35
Coldstream*	-	-	432	2,000	0.86	1.29
Duns*	-	-	651	2,000	1.30	3.06
Seahouses	1,290	968	968	2,000	1.94	2.34
Other	-	-	-	-	1.81	1.81
Sub-Total	-	-	3,799	-	9.41	11.00
TOTAL			24,095		83.95	72.24

Notes:

¹ – Gross Floorspace derived from Experian Goad (2009), IGD Database (2006) of WYG survey

² – Net floorspace based on WYG judgement

³ – Net comparison floorspace based on WYG judgement and takes into account comparison goods floorspace

⁴ – Sales densities derived from Verdict (2009) or Mintel Retail Rankings (2009) for national multiples and WYG assessment for local shops

* - derived from retail evidence submitted as part of the Berwick-upon-Tweed Public Inquiry

May not add up due to rounding

At 2007 prices

- 10.60 Overall, existing comparison goods facilities within Berwick-upon-Tweed (and the surrounding area) are identified to be trading below expected levels (by £11.71m, or 14%). Given this undertrading, despite the forecast growth in available comparison goods expenditure, Table 10.14 identifies no clear quantitative need for further comparison goods floorspace until after 2014 based on current

market shares. Although capacity in the long-term should be treated with caution, by 2026 the identified capacity (£37.18m) could support a notable increase in the comparison goods offer in Berwick-upon-Tweed (c. 8,450 sq m net/11,265 sq m gross). This level of capacity compares to the latest FOCUS Report for Berwick-upon-Tweed (which provides a useful cross check in considering future retail need) identifying retail requirements from 11 comparison goods retailers for up to 5,435 sq m (gross) of floorspace. Retailers seeking representation in Berwick-upon-Tweed include The Body Shop, Peacocks and Pets at Home.

Table 10.14: Estimated 'Capacity' for Comparison Goods Facilities – Berwick-upon-Tweed

Year	Turnover - £m ¹	Expenditure Available - £m ²	Surplus Expenditure - £m
2009	83.95	72.24	-11.71
2014	88.23	83.18	-5.05
2019	95.05	101.28	6.23
2024	102.40	129.06	26.66
2026	105.49	142.67	37.18

Notes: ¹ – Allows for increased turnover efficiency of +1.0% per annum between 2009 and 2014 and +1.5% per annum post 2014 to reflect the higher increase in expenditure forecast
² – Assumes constant market share at 7.1% within the Study Area
 Allows for growth in non-store retail sales
 At 2007 prices

- 10.61 Whilst our analysis identifies capacity for additional comparison goods floorspace in the longer term (i.e. post 2014) outstanding commitments will meet some of the identified capacity. Outstanding commitments comprise the comparison goods element of the new Tesco store (836 sq m net), extension to the existing Morrison's store (an additional 404 sq m net) and new comparison goods floorspace in the form of a bulky goods retail park on land to the south-west of the Morrison's store off North Road totalling up to 4,969 sq m (net) floorspace. Collectively, if implemented, these commitments are identified to achieve a comparison goods turnover of up to £24.60m (Tesco - £7.83m, Morrison's - £1.86m¹³ and North Road - £14.91m), increasing to £30.91m by 2026¹⁴.
- 10.62 Whilst outstanding commitments will meet the identified capacity for additional comparison goods floorspace through to 2024, this is based on facilities within Berwick-upon-Tweed and the surrounding area maintaining existing market shares. It is likely that this improvement in the retail offer (particularly in terms of the new retail park) will reduce the need for local residents to travel elsewhere, thereby increasing the overall market share achieved. Despite this potential for an improvement in the comparison goods market share of Berwick-upon-Tweed, it is not considered that there is a pressing need for further comparison goods floorspace, at least in the short to medium term. Furthermore, recent retail development in Berwick-upon-Tweed has focused on out-

¹³ Assumes that the additional comparison goods floorspace resulting from the Morrison's extension trades at 50% expected levels

¹⁴ Allows for increased productivity of +1.0% per annum between 2009 and 2014 and +1.5% per annum post 2014



of-centre locations. Therefore, it will be important for the Council to seek to identify in-centre or good out-of-centre locations to accommodate the need identified in the longer term.

Leisure

- 10.63 In addition to its retail offer Berwick-upon-Tweed also contains some important leisure facilities, including: The Maltings Theatre & Arts Centre (which includes a cinema), Berwick-upon-Tweed Museum and Art Gallery, Berwick Barracks, the Swan Centre for Leisure and Berwick Castle together with a range of restaurants, pubs and other evening economy activities. It is evident that Berwick-upon-Tweed lacks major commercial leisure facilities (such as multiplex cinema, ten-pin bowling, etc.), which is reflective of its size. Instead, Berwick-upon-Tweed attracts a number of visitors and tourists with a wider range of accommodation within the local area.
- 10.64 Given the type of leisure offer within Berwick-upon-Tweed, the majority of residents within the local area (Zone 1) travel to commercial facilities elsewhere to undertake leisure activities. In terms of cinema-going, whilst the participation rate in the Berwick-upon-Tweed Zone (50%) is above the study area average (47%), it is evident that less than a fifth (18%) of local residents use facilities in Northumberland – most notably to the Maltings Theatre & Arts Centre. This is reflective of the limited offer within Berwick-upon-Tweed and the wider County. Accordingly, facilities in Edinburgh (33%), The Metrocentre (13%) and Newcastle-upon-Tyne (7%) are identified to be the most popular destinations for residents within Zone 1.
- 10.65 With regard to other commercial leisure facilities (such as ten-pin bowling, bingo, etc.) there are currently no major operators within Berwick-upon-Tweed, although informal bingo does take place within Berwick-upon-Tweed, including within the Firth Social & Leisure Social Club on Hide Hill. Consequently, the majority of local residents who wish to participate in these activities have to travel to facilities elsewhere – again, most notably to facilities in Edinburgh and Newcastle-upon-Tyne. Furthermore, it is notable that the predication rates for both these activities by residents within Zone 1 (both at 7%) are below the study area average (13% and 9% respectively). This may be reflective of the limited offer locally.
- 10.66 Whilst there is generally a lack of major commercial leisure facilities, Berwick-upon-Tweed does attract local residents for other leisure activities, such as restaurants, public houses and health and fitness activities. Overall, within Zone 1 of the defined Study Area, Table 10.15 identifies the market



shares and participation rates for different leisure activities within Zone 1 (Berwick-upon-Tweed Zone):

Table 10.15: Leisure Activity within the Berwick-upon-Tweed Zone (Zone 1)

Activity	Participation Rate (%)	Market Share to Facilities in Berwick-upon-Tweed (%)
Health and Fitness	43.3	50.0
Restaurants	75.1	41.7
Pubs, Bars, Nightclubs	46.2	41.3
Cultural Activities	39.4	18.0
Cinema-going	50.0	15.6
Bingo	7.1	14.3
Ten-pin Bowling	7.1	0.0
Sporting Events	19.4	0.0

Notes: Derived from Northumberland Household Survey (2009)

- 10.67 Overall, Berwick-upon-Tweed's leisure offer is focused on the tourism/visitor market and it lacks a major commercial facilities. This lack of commercial activities is reflective of the size of Berwick-upon-Tweed and the surrounding population and it is questionable whether Berwick-upon-Tweed could support such facilities.

Summary

- 10.68 Berwick-upon-Tweed serves an important retail destination for both convenience and comparison goods shopping particular for residents within North Northumberland and the Scottish Borders. Its convenience goods offer is currently dominated by the existing out-of-centre Morrison's store, which is identified to be trading very well. However, the extant permission for a new Tesco store in Berwick-upon-Tweed will enhance competition and improve consumer choice, albeit also in an out-of-centre location.
- 10.69 In terms of capacity for additional convenience goods floorspace, given the permission for a new Tesco store, based on current market shares there is no pressing need for further convenience goods floorspace in the short to medium term – based on current market shares. Whilst the introduction of a further main food shopping destination in Berwick-upon-Tweed is likely to increase the overall convenience goods market share of Berwick-upon-Tweed, it is evident that in order to support the turnover of outstanding commitments, it will be necessary for the market share to increase from its current level (from 7% currently to 11% by 2026). Given the strength and proximity of competing provision elsewhere, it is doubtful whether the market share could significantly increase beyond this level. However, should further convenience goods capacity be identified, it is important for the Council to seek to identify in-centre or good edge-of-centre sites in



order to strengthen the convenience goods offer within the town centre and seek to claw back expenditure that is currently directed to out-of-centre facilities elsewhere.

- 10.70 With regard to comparison goods, whilst Berwick-upon-Tweed serves an important role for meeting some of the needs of the local population, the strength and proximity of centres such as Edinburgh, Newcastle-upon-Tyne and The Metrocentre have a strong influence on comparison goods shopping, particularly for 'Clothing & Footwear'.
- 10.71 Existing comparison goods floorspace within Berwick-upon-Tweed is identified to be trading below 'expected' levels. Given this undertrading together with the limited growth in comparison goods expenditure in the short-term, our assessment identifies no clear quantitative need for further comparison goods floorspace until beyond 2014. Whilst retail capacity increases to almost £39m by 2026, most of this capacity will be met by outstanding commitments (if implemented). On this basis, there appears no clear quantitative need for significant further comparison goods floorspace in Berwick-upon-Tweed. However, there appears some scope to approve the overall quality and range of goods available within Berwick-upon-Tweed in order to help reduce the need for local residents to travel elsewhere (e.g. non-bulky goods). Indeed, currently outstanding commitments are restricted to bulky comparison goods floorspace or an ancillary offer within large-format foodstores. Therefore, there is likely to be need for more traditional 'high street' retail floorspace.
- 10.72 Whilst there is scope for further leisure provision within Berwick-upon-Tweed in order to reduce the need for local residents to use facilities elsewhere, it is questionable whether major new leisure development in Berwick-upon-Tweed would be commercially viable. As outlined in Section 10 of this report, there is identified limited capacity for major leisure development within Northumberland (such as cinemas, ten-pin bowling, etc.). Therefore, given its geographic position within the County, we do not believe that Berwick-upon-Tweed would provide the most appropriate location to meet the leisure needs of the resident population of Northumberland. However, WYG considers that it is important that other appropriate leisure uses (such as restaurants) and related tourist facilities are maintained and enhanced in order to contribute to the ongoing vitality and viability of the centre and to develop the town centre's evening economy.

Blyth Town Centre

- 10.73 Blyth is located in the south-east of Northumberland and is located eight miles north-east of Cramlington and nine miles south of Ashington. The town centre (as defined by Experian Goad) is



identified to comprise more than 39,800 sq m of floorspace, including 21,540 sq m within the retail sector (both convenience and comparison goods). Retailing is focused on Regent Street (which includes a Morrison's store), Waterloo Road, Market Street and Bowes Street. Further retail provision is provided by the out-of-centre Asda and Aldi stores on Cowpen Road and the Blyth Valley and Albion retail parks.

Convenience Goods Retailing

- 10.74 Existing convenience goods facilities in Blyth (as a whole) are identified to achieve a turnover of £92.50m in 2009. This equates to a market share of **15.3%** from within the defined Study Area. Existing facilities in Blyth are identified to draw their trade from Zone 12 (which includes Blyth) together with neighbouring Zone 5 (Bedlington). Overall, the Household Survey identifies that existing in Blyth currently attract a main food shopping catchment population of approximately 69,655 people within the Study Area in 2009. Figure 10.7 illustrates the extent of Blyth's convenience goods shopping catchment.

Figure 10.7: Extent of Blyth's Catchment within Study Area – Convenience Goods Shopping



Market Share of Blyth – Convenience Goods Shopping

Survey Zones														
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
0.0	3.0	1.6	28.7	55.3	10.7	0.0	0.0	0.0	0.0	8.3	90.4	6.0	16.6	17.7

- 10.75 Unsurprisingly, within Zone 12, the vast majority (90%) of convenience goods expenditure generated by the local resident population is directed to existing facilities in Blyth. Collectively, zones 5 and 12 of the defined Northumberland Survey Area attract almost three-quarters (74%) of convenience goods expenditure and that area can therefore be defined as Blyth's primary convenience shopping catchment.



- 10.76 Table 10.16 provides a breakdown of the trading performance of existing convenience floorspace in Blyth based on the findings of the Household Survey.

Table 10.16: Trading Performance of Current Foodstores in Blyth

Store	Gross Floorspace – sq m ¹	Net Floorspace – sq m ²	Net Convenience – sq m ³	Benchmark Turnover per sq m – £ ⁴	Benchmark Turnover – £m	Survey Estimate – £m ⁵
Blyth						
Iceland, Market Street	250	200	186	5,545	1.03	0.42
Morrison's, Regent Street	4,088	2,248	1,798	10,597	19.05	16.53
Local Shops, Blyth Town Centre	2,550	2,040	1,836	3,500	6.43	2.84
Out-of-Centre						
Aldi, Cowpen Road	1,217	852	622	3,987	2.48	0.91
Asda, Cowpen Road	6,495	3,973	2,304	14,741	33.96	67.04
Netto, Cowpen Road	1,338	976	810	7,228	5.85	2.27
Lidl, Albion Retail Park	1,224	857	686	3,111	2.13	0.66
Co-op Supermarket, Newcastle Road	1,301	911	756	5,789	4.37	1.59
Sub-Total	18,463	11,877	8,998	-	75.30	92.26
Other Blyth					0.25	0.25
TOTAL	18,4363	11,877	8,998	-	75.55	92.50

Notes: ¹ – Gross Floorspace derived from Experian Goad (2009), IGD Database (2009) or WYG/Council assessment
² – Net floorspace based on WYG judgement
³ – Net convenience floorspace derived from Verdict Grocery Retailers (2009) where available
⁴ – Sales densities derived from Verdict (2009) or Mintel Retail Rankings (2009) for national multiples and WYG assessment for local shops
At 2007 prices

- 10.77 Based on the survey analysis, existing convenience goods facilities within Blyth are identified to be trading above expected levels, by £16.95m (or 22%). The main overtrading is identified to occur predominantly at the existing Asda store on Cowpen Road. In contrast a number of stores elsewhere in Blyth (including the Morrison's store on Regent Street) are identified to be trading below expected levels. However, survey results should be treated with a note of caution as they tend to have a bias towards the largest stores and understate the role of smaller stores. Therefore, our assessment is based on the trading performance of all convenience goods floorspace in Blyth.
- 10.78 Based on a continuation of existing market shares, Table 10.17 identifies that in the short-term (i.e. 2014) there is significant additional convenience goods floorspace potential (c. £23m). Accordingly, there appears scope for further convenience goods floorspace within Blyth based on current market share.

Table 10.17: Estimated 'Capacity' for Convenience Goods Facilities – Blyth

Year	Turnover – £m ¹	Expenditure Available – £m ²	Surplus Expenditure – £m
2009	75.55	92.50	16.95
2014	76.31	99.76	23.45
2019	77.07	105.79	28.72
2024	77.85	112.20	34.35
2026	78.16	115.17	37.01

Notes: ¹ – Allows for increased turnover efficiency of +0.2% per annum
² – Assumes constant market share at 15.3% within the Study Area
At 2007 prices

- 10.79 Whilst the above analysis suggests that there is scope for further convenience goods floorspace within Blyth, it is important to note that any increase in the retail offer in competing centres elsewhere is likely to impact upon current shopping patterns. For example, the retail offer in nearby Ashington is being improved with the development of a replacement larger Asda store. In this respect, it is notable that currently existing convenience goods facilities in Blyth draws convenience goods expenditure from Zone 4 (Ashington West) and Zone 14 (Ashington East). Accordingly, improved provision in Ashington (such as the new Asda store) could reduce the overall market share, and subsequent capacity, of Blyth in the future.
- 10.80 Furthermore, currently the convenience goods offer of Blyth is reasonably well represented, containing an Asda store (which appears to be dominating shopping patterns in the local area) and a Morrison's store together with a range of smaller stores, including an Aldi, Iceland, Lidl, Netto and Co-op. Consequently, existing facilities in Blyth retain almost three-quarters (74%) of expenditure generated in the defined catchment, including 90% within Zone 12 (Blyth). This suggests that there is limited scope to improve the current convenience goods market share of Blyth in the future. Furthermore, the proposed improvement in the convenience goods offer at competing centres nearby (such as the enlarged replacement Asda store in Ashington) is likely to effect convenience goods shopping patterns in the future, although the recent permission to extend the existing Asda store in Blyth may counterbalance to some extent the improvement in the retail offer nearby. On this basis, it is likely that any potential increase in the convenience goods market share of Blyth within the defined catchment is likely to be limited. However, in considering existing convenience goods provision in Blyth it is important to note that the convenience goods offer within the town centre is limited with significant provision being out-of-centre. Indeed, the in-centre convenience goods floorspace in the town centre has reduced in recent years following the closure of the Co-op Foodstore (1,230 sq m) in 2007. The existing Morrison's store in the town centre is of poor quality compared to modern stores built by the leading UK supermarket operators. However, an application is currently before the LPA which proposes to replace the existing store with a larger Morrison's store. That proposal, if permitted, would lead to a substantial improvement in the overall quality of the town centre's retail provision and may act as a catalyst to stimulate further investment to enhance the town centre's retail offer.

Comparison Goods Retailing

- 10.81 Existing comparison goods facilities in Blyth (including out-of-centre facilities such as Blyth Valley Retail Park) are identified to attract a comparison goods turnover of £69.26m in 2009 from the

defined Study Area. This equates to a market share of **6.82%** within the Study Area. This market share increases to more than 45% within Zone 12 (Blyth). Figure 10.8 indicates the extent of Blyth's catchment area for comparison goods (both in-centre and out-of-centre).

Figure 10.8: Extent of Blyth's Catchment within Study Area – Comparison Goods Shopping



Market Share of Blyth – Comparison Goods Shopping

Survey Zones														
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
0.0	2.3	0.6	9.6	21.2	7.1	0.1	0.3	0.3	0.0	4.4	42.6	2.3	6.1	7.3

10.82 The survey results highlight that the strength and proximity of Newcastle City Centre and The Metrocentre have an influenced on comparison goods shopping within the local area. Indeed, the



market share achieved within Zone 12 for comparison goods (45%) is notably lower than that achieved for convenience goods (90%).

- 10.83 Table 10.18 provides a summary of the trading performance of existing comparison goods facilities within Blyth and the surrounding area derived from the survey analysis.

Table 10.18: Trading Performance of Current Comparison Goods Floorspace in Blyth

Store	Gross Floorspace – sq m ¹	Net Floorspace – sq m ²	Net Comparison – sq m ³	Benchmark Turnover per sq m - £ ⁴	Benchmark Turnover - £m	Survey Estimate - £m ⁵
Blyth						
Blyth Town Centre	15,340	11,505	10,930	3,500	38.26	58.47
Morrison's, Regent Street	4,088	2,248	450	9,232	4.15	0.00
Sub-Total	19,428	13,753	11,380	-	42.41	58.47
Out-of-Centre						
Blyth Valley Retail Park	5,667	4,558	4,330	2,000	8.66	2.47
Albion Retail Park (excluding Lidl)	2,168	1,734	1,648	2,000	3.30	0.00
Asda, Cowpen Road	6,495	3,973	1,669	8,888	14.83	8.31
TOTAL	33,758	24,018	19,027		69.20	69.26

Notes: ¹ – Gross Floorspace derived from Experian Goad (2009) or WYG assessment
² – Net floorspace based on WYG judgement
³ – Net comparison floorspace derived from Verdict Grocery Retailers (2009) where available and includes comparison goods element of foodstores
⁴ – Sales densities derived from Verdict (2009) or Mintel Retail Rankings (2009) for national multiples and WYG assessment for local shops
At 2007 prices

- 10.84 Overall, existing comparison goods facilities within Blyth are identified to be trading marginally above expected levels (by £0.06m or 1%).
- 10.85 Given this marginal overtrading together with the forecast growth in available comparison goods expenditure, there is identified to be limited capacity for additional comparison goods floorspace in the short-term (c. £8m). However, in the longer term (on the basis of existing market shares) this capacity is identified to increase more than £25m by 2019 and to nearly £60m by 2026 (Table 10.19).

Table 10.19: Estimated 'Capacity' for Comparison Goods Facilities – Blyth

Year	Turnover - £m ¹	Expenditure Available - £m ²	Surplus Expenditure - £m
2009	69.20	69.26	0.06
2014	72.73	81.11	8.38
2019	78.35	104.05	25.70
2024	84.41	132.58	48.17
2026	86.96	146.56	59.60

Notes: ¹ – Allows for increased turnover efficiency of +1.0% per annum between 2009 and 2014 and +1.5% per annum post 2014 to reflect the higher increase in expenditure forecast
² – Assumes constant market share at 6.82% within the Study Area
Allows for growth in non-store retail sales
At 2007 prices

- 10.86 These levels of capacity equate to a potential floorspace requirement of 2,280 sq m (net) by 2014, which is forecast to increase to 6,485 sq m (net)/8,645 sq m (gross) by 2019 and to 13,551 sq m (net)/18,067 sq m (gross) by 2026 – although growth in the long-term should be treated with

caution given the uncertainties of a number of variables that may have implications on future capacity. Indeed, the latest FOCUS Report for Blyth identifies requirements from only four comparison retailers requiring up to 1,070 sq m (gross) of floorspace. Retailers seeking representation in Blyth include The Works (bookshop) and Peacocks.

10.87 Although dependent upon the quality of any new retail development and the potential improvement in the retail offer nearby, there appears some scope to improve the current market share through 'clawing back' expenditure from facilities elsewhere. Currently, within zones 5 and 12 (which represent the primary catchment of Blyth) existing comparison goods facilities retain 34% of comparison goods expenditure (including only 45% within Zone 12 - Blyth). Accordingly, more than half (55%) of comparison goods expenditure generated in the local area is currently directed to facilities elsewhere, most notably to Newcastle City Centre. On this basis, there does appear some scope to improve the market share. However, in considering any potential increase in the comparison goods market share of Blyth, it is inevitable that retail expenditure will continue to be directed to Newcastle City Centre and The Metrocentre given their strength as comparison goods retail destinations.

10.88 In addition, given the ongoing aspirations for further retail development within nearby Cramlington and Ashington, any new retail development in Blyth will (in part) be competing for the same local expenditure. Consequently, the scale of any future retail development within Blyth will be affected by the new development in nearby Ashington and Cramlington. Despite this, there still appears an opportunities for development in Blyth to capture some trade lost to higher order centres outside the County in the future. Such opportunities might include the expansion of the Keel Row Shopping Centre in Blyth.

Leisure

10.89 The existing leisure offer of Blyth includes the Mecca Bingo on Post Office Square and the Phoenix Theatre, together with a leisure centres (including Blyth Leisure Centre), pubs and restaurants. Given existing leisure provision within Blyth, local residents who wish to visit the cinema or ten-pin bowling have to travel to facilities elsewhere, most notably to the Odeon Cinema in Wallsend or XS Superbowl in Longbenton.

10.90 In terms of other leisure activities, Table 10.20 provides a summary of participation rates and the market share of facilities in Blyth for different leisure activities.

Table 10.20: Leisure Activity within the Blyth Zone (Zone 12)

Activity	Participation Rate (%)	Market Share to Facilities in Blyth (%)
Health and Fitness	22.6	82.6
Pubs, Bars, Nightclubs	53.7	64.2
Bingo	12.9	61.5
Restaurants	76.2	42.7
Cultural Activities	33.6	9.1
Cinema-going	42.7	0.0
Sporting Events	15.8	0.0
Ten-pin Bowling	17.8	0.0

Notes: Derived from Northumberland Household Survey (2009)

- 10.91 The survey results suggest that over half of respondents within Zone 12 (Blyth) of the defined Study Area who use health and fitness facilities, bingo facilities and pubs, bars, nightclubs, etc., use facilities in Blyth. This is considered relatively strong. Indeed, in nearby Cramlington less than half of respondents within the local area travel to pubs, bars and nightclubs in Cramlington.

Summary

- 10.92 Blyth serves an important convenience goods shopping role for the local population. Blyth contains two large format foodstores (Morrison's and Asda) together with a range of smaller national and independent traders. Furthermore, existing convenience facilities in Blyth are identified to be trading strongly (particularly the out-of-centre Asda store), suggesting a need for further convenience goods floorspace. In this respect, our assessment identifies a need for a further large-format foodstore in Blyth to address the identified overtrading and providing increased consumer choice. Furthermore, existing provision within Blyth is generally located out-of-centre with a lack of strong convenience goods presence within the town centre. Therefore, it is important to seek to accommodate convenience goods floorspace within the town centre in order to claw back expenditure currently directed to out-of-centre facilities to more central locations where there are better opportunities for 'linked trips' to take place, which will have the positive effect on the vitality and viability of the town centre. In that respect the proposals to replace the existing town centre Morison store should be supported in principle.
- 10.93 Existing comparison goods floorspace within Blyth is identified to be trading well. Accordingly, there is identified to be a need for further comparison goods floorspace. Based on existing market shares there is identified capacity for a notable increase in the comparison goods offer of Blyth, particularly in the longer-term. Furthermore, there also appears some scope to improve the overall market share by reducing the need for local residents to travel to competing facilities elsewhere.



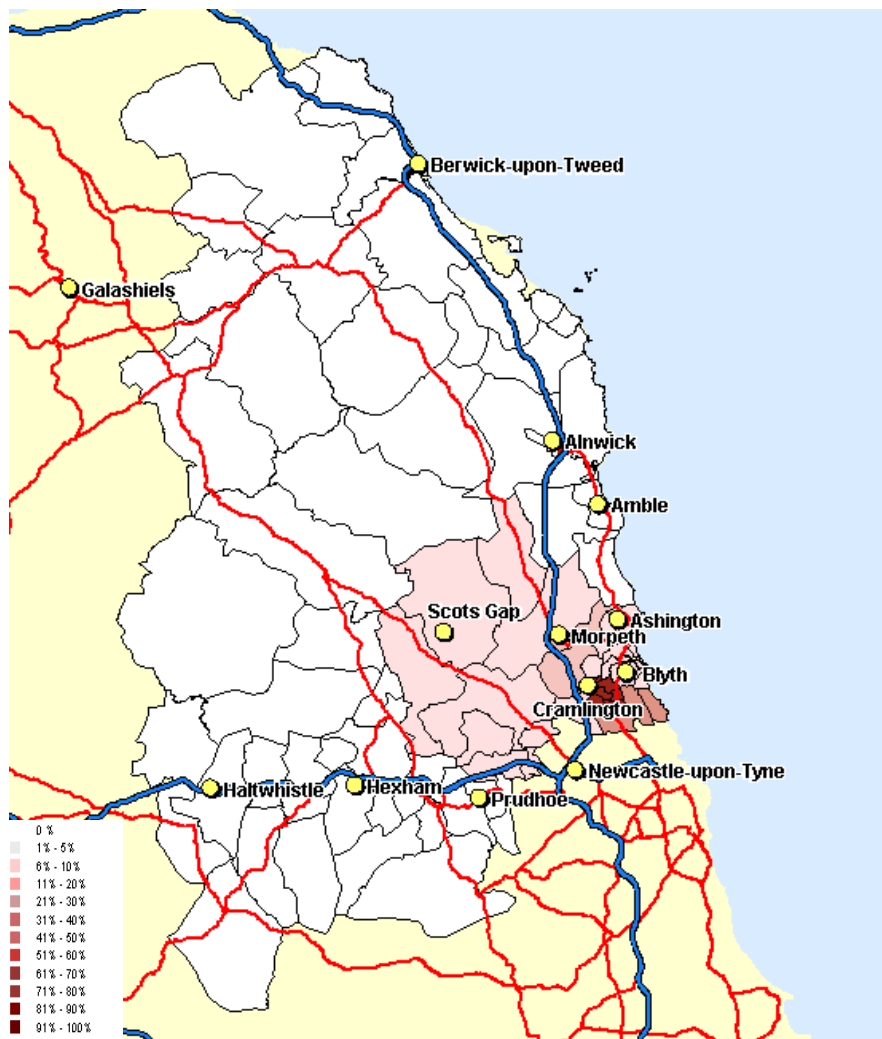
Cramlington Town Centre

- 10.94 Cramlington Town Centre is located in south Northumberland some 12 miles north of Newcastle and seven miles south-west of Blyth. The town centre is identified to comprise 50,610 sq m of floorspace (Experian Goad, August 2009), including 28,970 sq m falling within the convenience and comparison retail sector. Retailing is focused within Manor Walks Shopping Centre, a purpose built covered shopping centre, which is anchored by a Sainsbury's and Asda. Further retailing is provided by Westmoreland Retail Park, adjacent to the Manor Walks Shopping Centre.

Convenience Goods Retailing

- 10.95 Existing convenience goods stores within Cramlington principally draw their trade from Zone 11 (Cramlington) of the defined Study Area and the neighbouring Zone 6 (Seaton Delaval). Limited expenditure attracted from elsewhere in the Study Area. Collectively, existing convenience goods facilities in Cramlington attract a convenience goods turnover of £52.77m in 2009, of 85% is identified to be derived from Zone 6 (Seaton Delaval) and Zone 11 (Cramlington). This equates to a market share within the Study Area of **8.7%**. This is identified to increase to 56% within Zone 6 and Zone 11.
- 10.96 The Household Survey identifies that existing facilities in Cramlington attract a main food shopping catchment population within the Study Area of approximately 33,910 people in 2009. Figure 10.9 illustrates the extent of Cramlington's convenience goods catchment.

Figure 10.9: Extent of Cramlington's Catchment within Study Area – Convenience Goods Shopping



Market Share of Cramlington– Convenience Goods Shopping

Survey Zones														
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
0.0	0.0	4.7	2.2	4.8	25.4	1.5	0.0	0.0	0.0	80.7	2.7	6.2	1.1	0.0

10.97 Table 10.21 provides a breakdown of the trading performance of existing convenience goods floorspace within Cramlington based on the findings of the Household Survey.

Table 10.21: Trading Performance of Current Foodstores in Cramlington

Store	Gross Floorspace – sq m ¹	Net Floorspace – sq m ²	Net Convenience – sq m ³	Benchmark Turnover per sq m – £ ⁴	Benchmark Turnover – £m	Survey Estimate – £m ⁵
Cramlington						
Asda, Manor Walks Shopping Centre	4,506	2,709	1,571	14,741	23.16	31.92
Iceland, New Cramlington Shopping Centre	460	368	342	5,545	1.90	0.48
Sainsbury's, Manor Walks Shopping Centre	4,943	2,902	2,177	9,218	20.07	15.48
Local Shops, Cramlington Town Centre	330	264	238	3,000	0.71	2.20
Out-of-Centre						
Aldi, Cumbrian Road	1,467	1,027	750	3,987	2.99	1.08
Somerfield, Brockwell Centre	1,191	879	721	7,758	5.59	1.48
Sub-Total	12,897	8,149	5,799	-	54.42	52.64
Other Cramlington					0.13	0.13
TOTAL	12,897	8,149	5,799	-	54.55	52.77

Notes: ¹ – Gross Floorspace derived from Experian Goad (2009), IGD Database (2009) or WYG/Council assessment
² – Net floorspace based on WYG judgement
³ – Net convenience floorspace derived from Verdict Grocery Retailers (2009) where available
⁴ – Sales densities derived from Verdict (2009) or Mintel Retail Rankings (2009) for national multiples and WYG assessment for local shops
At 2007 prices

10.98 Our analysis identifies that existing convenience goods floorspace in Cramlington is trading marginally below expected levels by 3% (or £1.78m). In considering the performance of individual stores, although should be treated with a note of caution, the survey results indicate that whilst the Asda store is trading well (overtrading by 38%) the larger Sainsbury's store is identified to be trading some 23% below expected levels.

10.99 Table 10.22 identifies that in the short-term (i.e. 2014) there is limited capacity for additional convenience goods floorspace in Cramlington (c. £2m). In the longer term, this capacity is identified to increase to £4.95m by 2019 and to £9.61m by 2026.

Table 10.22: Estimated 'Capacity' for Convenience Goods Facilities – Cramlington

Year	Turnover – £m ¹	Expenditure Available – £m ²	Surplus Expenditure – £m
2009	55.47	53.69	-1.78
2014	56.03	58.03	2.00
2019	56.59	61.54	4.95
2024	57.16	65.27	8.11
2026	57.39	67.00	9.61

Notes: ¹ – Allows for increased turnover efficiency of +0.2% per annum
² – Assumes constant market share at 8.7% within the Study Area
At 2007 prices

10.100 Based on current market shares, the identified capacity in the longer-term could support a notable extension to one of the existing supermarkets or a medium-sized foodstore (c. 1,800 sq m net convenience by 2026) dependent upon the end-operator¹⁵.

10.101 In considering potential changes in future convenience goods market share in Cramlington, it is notable that the existing convenience goods offer is relatively strong. Cramlington contains two

¹⁵ Based on applying an average sales density of £5,000 per sq m and allowing for increased productivity of +0.2% per annum.



superstores (as defined by PPS4), the Asda and Sainsbury's, together with representation from Aldi, Iceland, Somerfield and a number of smaller retailers. The strong convenience goods offer is reflected by the findings of the Household Survey, which identified that within Zone 11 (Cramlington) of the defined Study Area, existing facilities absorb 81% of convenience goods expenditure generated within this zone. This suggests that limited convenience goods expenditure generated in the local area is directed to facilities elsewhere. Of expenditure that is directed to facilities elsewhere, most is directed to nearby Blyth.

- 10.102 Given the existing convenience goods offer in Cramlington and existing shopping patterns in the local area, there appears no pressing need (either quantitative or qualitative) for significant additional convenience goods floorspace in Cramlington. However, we are aware of the aspirations of the current Manor Walks centre owners, Hammerson, to redevelop the centre to incorporate, inter alia, a larger floorplate supermarket. In principle, such a proposal is acceptable in retail planning policy terms, subject to evidence to demonstrate that the proposal is of an appropriate scale in relation to the size of the centre and its role in the hierarchy of centres.

Comparison Goods Retailing

- 10.103 Existing comparison goods facilities in Cramlington are identified to attract a comparison goods turnover of £62.03m in 2009. This equates to a market share of **6.1%** within the Study Area. This market share increases to 28% within zones 6 and 11, including 39% within Zone 11 (Cramlington). Figure 10.10 illustrates the extent of Cramlington's catchment for comparison goods within the Study Area. Although existing facilities within Cramlington are identified to draw expenditure from a broad area, the market shares achieved in a number of survey zones that comprise the defined Study Area is very limited.

Figure 10.10: Extent of Cramlington's Catchment within Study Area – Comparison Goods Shopping



Market Share of Cramlington –Convenience Goods Shopping

Survey Zones														
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
0.2	0.7	3.4	6.0	8.8	14.6	1.8	0.2	0.0	0.1	29.0	4.7	6.8	4.0	3.4

10.104 It is evident that the strength of Cramlington as a comparison goods destination (achieving a market share of 39% within Zone 11) is less than that identified for convenience goods shopping, where existing facilities achieve a market share of 81% within Zone 11. The influence of regional shopping destinations such as The Metrocentre and Newcastle City Centre, attract notable trade from the Cramlington area – 44% of comparison goods expenditure generated within Zone 11.

10.105 Table 10.23 provides a summary of the trading performance of existing comparison goods floorspace within Cramlington.

Table 10.23: Trading Performance of Current Comparison Goods Floorspace in Cramlington

Store	Gross Floorspace – sq m ¹	Net Floorspace – sq m ²	Net Comparison – sq m ³	Benchmark Turnover per sq m – £ ⁴	Benchmark Turnover – £m	Survey Estimate – £m ⁵
Cramlington						
Cramlington Town Centre	18,960	14,220	13,509	3,500	50.60	59.53
Asda, Manor Walks Shopping Centre	4,506	2,709	1,138	9,368	10.66	1.75
Sainsbury's, Manor Walks Shopping Centre	4,943	2,902	725	7,686	5.57	0.00
Sub-Total	29,739	20,829	16,320	-	66.83	61.28
Other					0.75	0.75
TOTAL	29,739	20,829	16,320		67.58	62.03

Notes: ¹ – Gross Floorspace derived from Experian Goad (2009) or WYG assessment
² – Net floorspace based on WYG judgement
³ – Net comparison floorspace derived from Verdict Grocery Retailers (2009) where available and includes comparison goods element of foodstores
⁴ – Sales densities derived from Verdict (2009) or Mintel Retail Rankings (2009) for national multiples and WYG assessment for local shops
At 2007 prices

10.106 Overall existing comparison goods floorspace in Cramlington is identified to be trading below expected levels (by £5.55m, or 8%). Given the undertrading of existing floorspace and the limited forecast growth in comparison goods expenditure through to 2014, our assessment (Table 10.24) identifies limited capacity for additional comparison goods floorspace in the short-term – based on existing market shares. However, in the longer term, there is demonstrable capacity of more than £28m by 2024, increasing to almost £38m (or 8,560 sq m net/11,415 sq m gross) by 2026. This level of capacity compares to the latest FOCUS Report for Cramlington identifies requirements from ten retailers seeking up to 3,670 sq m (gross) of floorspace. Retailers seeking representation in Cramlington include B&M Bargains, The Body Shop and Superdrug.

Table 10.24: Estimated 'Capacity' for Comparison Goods Facilities – Cramlington

Year	Turnover – £m ¹	Expenditure Available – £m ²	Surplus Expenditure – £m
2009	67.58	62.03	-5.55
2014	71.03	71.46	0.43
2019	76.52	87.02	10.50
2024	82.43	110.88	28.45
2026	84.92	122.57	37.65

Notes: ¹ – Allows for increased turnover efficiency of +1.0% per annum between 2009 and 2014 and +1.5% per annum post 2014 to reflect the higher increase in expenditure forecast
² – Assumes constant market share at 6.1% within the Study Area
Allows for growth in non-store retail sales
At 2007 prices

10.107 Although dependent upon the end-operator, the identified capacity could support 2,650 sq m (net) of additional comparison goods floorspace in 2019, increasing to 6,665 sq m (net) by 2024 and to 8,560 sq m (net) by 2026. Although retail capacity in the long term should be treated with some caution, the analysis does demonstrate that there is a need for further comparison goods floorspace in Cramlington. Furthermore, this assessment is based on existing market shares being maintained

through to 2026. As previously highlighted, within the local area (i.e. Zone 11 of the Study Area), only 39% of comparison goods expenditure is retained locally. This market share reduces to only 29% for 'Clothing and Footwear.'

- 10.108 Whilst it is inevitable that The Metrocentre and Newcastle City Centre will continue to draw comparison goods expenditure from the Cramlington area, there does appear some scope to improve the current market share of Cramlington through improved provision. Any improvement in the retail offer in nearby centres such as Blyth and Ashington may have some impact on market shares within Zone 11 in the future, however the limited level of interaction, in terms of shopping activity, between Blyth, Ashington and Cramlington zones currently would suggest that such impacts may be relatively low.

Leisure

- 10.109 The existing leisure offer in Cramlington comprises a Gala Bingo on Forum Way, together with a range of other facilities such as health and fitness clubs (including Cramlington Leisure Centre), pubs and restaurants. Accordingly, as with most centres in Northumberland, local residents who wish to visit a number of commercial leisure facilities such as cinema, ten-pin bowling, etc. have to travel to competing facilities elsewhere, most notably the Odeon in Wallsend, and XS Superbowl in Longbenton. Despite the lack of facility in Cramlington, the participation rate for ten-pin bowling within Zone 11 (Cramlington) is identified to be the highest in the Study Area at more than 21% of respondents.
- 10.110 Table 10.25 identifies the market shares and participation rates for different leisure activities within Zone 11 (Cramlington) of the defined Study Area.

Table 10.25: Leisure Activity within the Cramlington Zone (Zone 11)

Activity	Participation Rate (%)	Market Share to Facilities in Cramlington (%)
Health and Fitness	42.3	93.1
Bingo	13.9	71.4
Pubs, Bars, Nightclubs	53.7	41.8
Restaurants	74.8	39.4
Cinema-going	50.4	0.0
Cultural Activities	47.1	0.0
Sporting Events	18.6	0.0
Ten-pin Bowling	21.4	0.0

Notes: Derived from Northumberland Household Survey (2009)



10.111 The survey results suggest that over half of respondents within Zone 11 (Cramlington) of the defined Study Area who visit pubs, bars, restaurants, etc., typically use facilities elsewhere rather than Cramlington. The most popular destination is identified to be Newcastle City Centre.

Summary

10.112 Cramlington provides an important retail destination for local residents, particularly for convenience goods shopping. The centre is anchored by two large-format stores (Asda and Sainsbury's). The strength of the convenience goods provision is reflected by the local shopping patterns. Within the Cramlington area, the Household Survey identifies that relatively limited convenience goods expenditure is directed to competing facilities elsewhere.

10.113 The survey evidence suggests that limited local convenience goods expenditure is identified to be directed to facilities elsewhere. Despite this, existing convenience floorspace in Cramlington is identified to be trading below expected levels. Given this undertrading and the strength of existing provision there does not appear a pressing need for further convenience goods floorspace in Cramlington, at least in the short-term. In the longer-term, there is a need for additional convenience goods floorspace. Whilst the market share of Cramlington may increase in the future through improved provision, the scale of market share increase that can be achieved will be affected by the improvements in the retail offer in nearby centres elsewhere, such as Ashington and Blyth.

10.114 In terms of comparison goods, based on current market shares there is no clear quantitative need for further comparison goods in the short term. However, there is identified to be a need for further retail floorspace in the longer-term. There also appears a need to improve the quality of the overall offer in Cramlington and reduce the need for local residents to travel to centres outside the County, such as Newcastle City Centre.

10.115 Through discussions with Hammerson who own the Manor Walks Shopping Centre and the Westmorland Retail Park, it is apparent that they still harbour aspirations for achieving a phased regeneration of Cramlington Town Centre in order to enhance the quality of the centre's retail offer, to make more effective use of the land available in the centre and to substantially increase the amount of retail floorspace within the centre. Representations were submitted to the emerging Blyth Valley Core Strategy on behalf of Hammerson explaining the basis for the regeneration proposals and justifying the scale of new development considered appropriate for delivery over the Core Strategy period. This led to a substantial level of new comparison retail floorspace being

allocated for Cramlington Town Centre in the adopted Core Strategy. The onset of economic recession since then, which has led to substantial reductions in predicted consumer expenditure growth and business confidence, has undermined the justification for the scale of development proposed in the former Blyth Valley Core Strategy for Cramlington Town Centre and has introduced delays to the timing and phasing of proposed new development. Nevertheless, the principle of regenerating the centre still carries substantial support and the qualitative benefits arising from proposals should be given weight, notwithstanding the reduced quantitative need for those proposals arising from the current downturn in the economy.

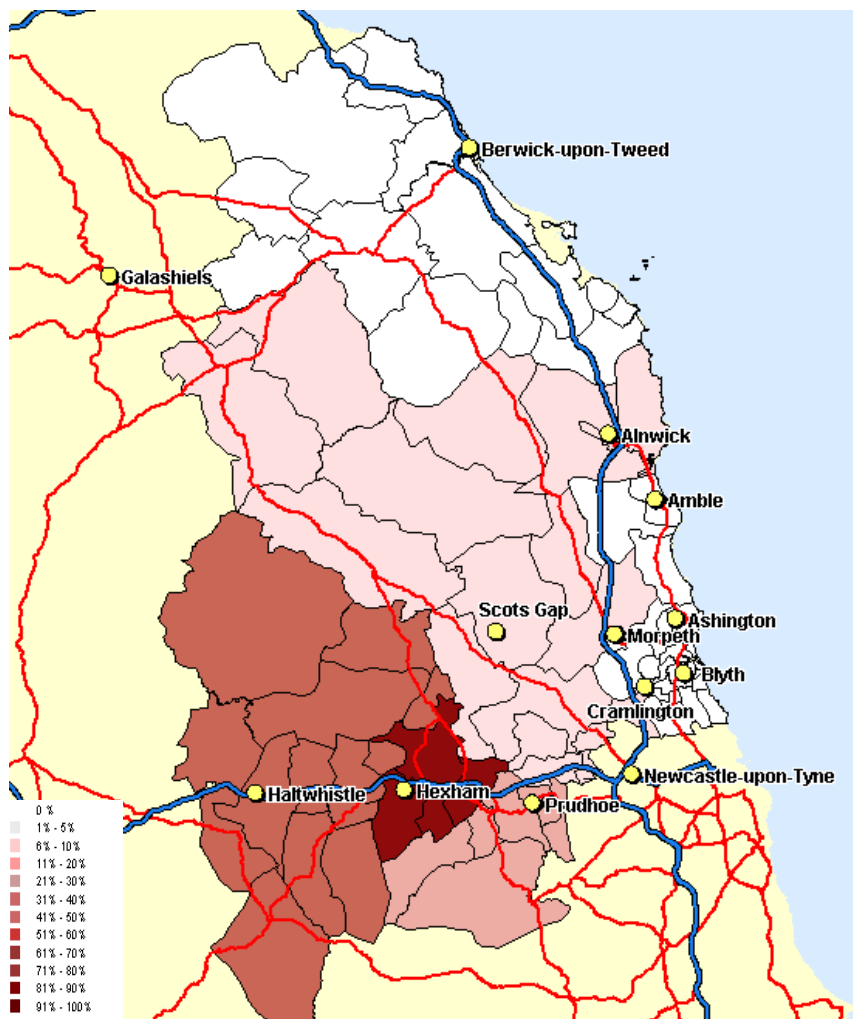
Hexham Town Centre

- 10.116 Hexham is an historic market town located in some 22 miles west of Newcastle-upon-Tyne, which is accessed via the A69. The town centre is identified to comprise some 50,660 sq m of floorspace (as identified by Experian Goad, August 2009), including 29,800 sq m of retail floorspace (both convenience and comparison). The town has a well defined shopping centre to the south of the River Tyne and the main shopping area is focused on Fore Street and Market Street. Further retailing is provided along Cattlemarket, Priestpopple, Maidens Walk (where Marks & Spencer is located), St Mary's Chare, Hencotes and Battlehill. Further retailing is provided outside the town centre, including a large-format Tesco Extra store on Alemouth Road and a Waitrose store at Wentworth Park.

Convenience Goods Retailing

- 10.117 Existing convenience goods facilities within Hexham primarily draw their trade from neighbouring Zone 8 (Prudhoe), Zone 9 (Hexham) and Zone 10 (Haltwhistle). Collectively existing convenience goods facilities in Hexham are identified to attract a convenience goods turnover of £51.41m in 2009 from the defined Study Area. This equates to a market share within the Study Area of 8.5%. This market share increases to almost 45% within zones 8, 9 and 10. The Household Survey identifies that existing facilities in Hexham (both in-centre and out-of-centre) attract a main food shopping catchment population of approximately 36,995 people in 2009. Figure 10.11 illustrates the extent of Hexham's convenience goods catchment.

Figure 10.11: Extent of Hexham's Catchment within Study Area – Convenience Goods Shopping



Market Share of Hexham– Convenience Goods Shopping

Survey Zones														
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
0.0	2.6	4.6	0.0	0.0	0.0	4.5	17.8	85.9	45.5	0.0	0.0	0.0	0.0	0.0

10.118 Figure 10.11 highlights that existing facilities within Hexham almost exclusively attract convenience goods expenditure from the western part of the Study Area. Indeed, of the convenience goods expenditure directed to all facilities in Hexham, more than 92% is derived from zones 8, 9 and 10.

10.119 Further 'local' provision is also located nearby at Corbridge, Allendale and Haydon Bridge, which collectively attract more than £5m of convenience goods expenditure generated in the Study Area in

2009. By including these facilities the overall market share within the Study Area of facilities in Hexham and the surrounding area increases to **8.8%**.

10.120 Table 10.26 provides a breakdown of the trading performance of existing convenience goods floorspace within Hexham and the surrounding area.

Table 10.26: Trading Performance of Current Foodstores in Hexham

Store	Gross Floorspace – sq m ¹	Net Floorspace – sq m ²	Net Convenience – sq m ³	Benchmark Turnover per sq m – £ ⁴	Benchmark Turnover – £m	Survey Estimate – £m ⁵
Hexham						
Local Shops, Hexham Town Centre	2,270	1,816	1,634	3,500	5.72	4.77
Out-of-Centre						
Tesco Extra, Alemouth Road	8,299	4,847	3,199	12,069	38.61	30.73
Marks & Spencer, Maidens Walk	2,137	1,496	299	10,630	3.18	1.26
Waitrose, Wentworth Park	2,632	1,668	1,468	11,261	16.53	9.76
Aldi, Haugh Lane Industrial Estate	1,220	854	623	3,987	2.48	4.89
Sub-Total	16,558	10,681	7,223	-	66.52	51.41
Corbridge	325	260	234	3,000	0.70	1.83
Allendale	598	419	377	3,500	1.32	2.52
Haydon Bridge	722	542	487	3,000	1.46	0.77
TOTAL	18,203	11,902	8,321	-	69.99	53.24

Notes: ¹ – Gross Floorspace derived from Experian Goad (2009), IGD Database (2009) or WYG/Council assessment
² – Net floorspace based on WYG judgement
³ – Net convenience floorspace derived from Verdict Grocery Retailers (2009) where available
⁴ – Sales densities derived from Verdict (2009) or Mintel Retail Rankings (2009) for national multiples and WYG assessment for local shops
At 2007 prices

10.121 Our analysis (Table 10.26) identifies that existing convenience goods facilities within Hexham are trading below expected levels by £16.75m (or 24%). In particular the two largest stores (the Tesco Extra and the Waitrose) are identified to be undertrading by 20% and 41% respectively. Given this undertrading, Table 10.27 identifies that there is no quantitative need for further convenience goods floorspace within Hexham through to 2026, based on current market shares.

Table 10.27: Estimated 'Capacity' for Convenience Goods Facilities – Hexham

Year	Turnover – £m ¹	Expenditure Available – £m ²	Surplus Expenditure – £m
2009	69.99	53.24	-16.75
2014	70.69	57.38	-13.31
2019	71.40	60.84	-10.56
2024	72.12	64.53	-7.59
2026	72.41	66.24	-6.17

Notes: ¹ – Allows for increased turnover efficiency of +0.2% per annum
² – Assumes constant market share at 8.8% within the Study Area
At 2007 prices

10.122 Whilst our assessment is based on current market shares, it is evident that relatively limited convenience goods expenditure generated in the core catchment of Hexham (i.e. zones 8, 9 and 10) is directed to facilities outside these three areas (c. 39%). Of the expenditure directed elsewhere, the Asda store at The Metrocentre is identified to be the most popular destination particular from Zone 8 (Prudhoe). Notably, within Zone 9 (Hexham), existing facilities within Hexham and the

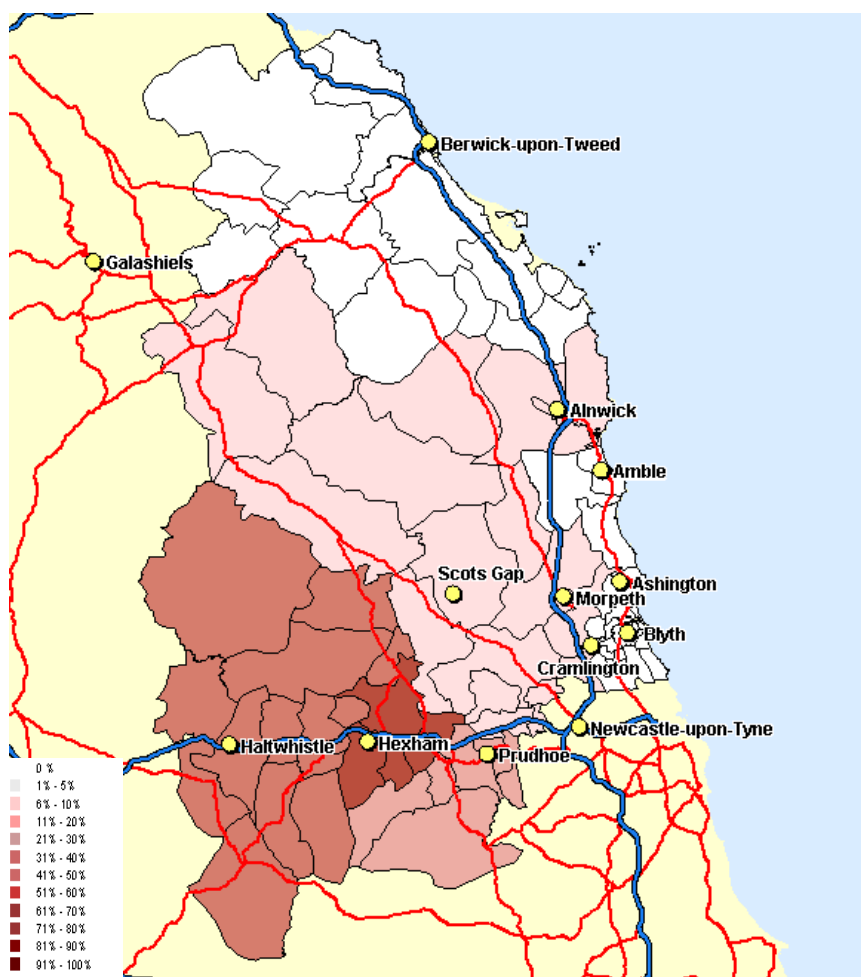


surrounding area are identified to attract more than 90% of convenience goods expenditure generated. This suggests that there is limited convenience goods expenditure generated in Zone 9 directed to competing facilities. Accordingly, there appears limited scope to significantly improve the market share of Hexham in the future. Indeed, planning permission has been granted for a new foodstore in nearby Prudhoe (4,366 sq m gross). In this respect, currently facilities in Hexham attract more than £8m from Zone 8 (Prudhoe). It is likely that the improvement in the convenience goods offer in Prudhoe will reduce the level of expenditure directed to facilities in Hexham in the future. On this basis, it is not considered that there is a clear need for further convenience goods provision within Hexham over the period to 2026. Whilst the Tesco store does dominate shopping patterns, existing provision within Hexham is relatively strong with representation from Waitrose, M&S and Aldi. Furthermore, since the completion of the Household Survey, Iceland has re-occupied the former Woolworths store on Fore Street (490 sq m gross). In addition, planning permission exists for a new foodstore in nearby Prudhoe. Therefore, expenditure from this part of the County to facilities in Hexham is likely to reduce in the future, which will have an impact on the need for further convenience goods floorspace in Hexham.

Comparison Goods Retailing

- 10.123 Existing comparison goods facilities within Hexham are identified to attract a turnover within the Study Area of £60.43m in 2009. This equates to a market share of 5.9% within the Study Area. As with convenience goods shopping, facilities in Hexham are identified to principally draw their trade from zones 8, 9 and 10 of the defined Study Area. Within this narrower area, the market share of Hexham increases to 30%, including 53% within Zone 9 (Hexham). Figure 10.12 illustrates the extent of Hexham's catchment for comparison goods shopping.

Figure 10.12: Plan indicating the Extent of Hexham's Catchment within Study Area – Comparison Goods Shopping



Market Share of Hexham – Comparison Goods Shopping

Survey Zones														
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
0.0	1.3	5.0	0.0	0.0	0.0	3.6	11.4	53.5	36.5	0.0	0.0	0.1	0.0	0.0

10.124 Further comparison goods provision is provided nearby, including at Corbridge, Allendale and Haydon Bridge, which collectively achieve a comparison goods turnover in the Study Area of more than £3m. By including this turnover, existing facilities in Hexham and the surrounding area attract **6.3%** (or £64.07m) of comparison goods expenditure generated in the Study Area.

10.125 Table 10.28 provides a summary of the trading performance of existing comparison goods facilities within Hexham and the surrounding area derived from the Household Survey.

Table 10.28: Trading Performance of Current Comparison Goods Floorspace in Hexham

Store	Gross Floorspace – sq m ¹	Net Floorspace – sq m ²	Net Comparison – sq m ³	Benchmark Turnover per sq m – £ ⁴	Benchmark Turnover – £m	Survey Estimate – £m ⁵
Hexham						
Hexham Town Centre	15,970	11,978	11,379	3,500	39.83	58.23
Out-of-Centre						
Marks & Spencer, Maidens Walk	2,137	1,496	1,197	5,244	6.28	0.00
Waitrose, Wentworth Park	2,632	1,668	200	9,028	1.81	0.00
Tesco Extra, Tynedale Retail Park	8,299	4,847	1,648	9,368	15.44	2.20
Sub-Total	29,038	19,989	14,424	-	63.36	60.43
Corbridge	2,152	1,722	1,636	2,500	4.09	1.84
Allendale	468	375	356	2,000	0.71	0.68
Haydon Bridge	111	83	79	2,000	0.16	0.00
Other					1.12	1.12
TOTAL	31,769	22,169	16,495	-	69.28	64.07

Notes: ¹ – Gross Floorspace derived from Experian Goad (2009) or WYG assessment
² – Net floorspace based on WYG judgement
³ – Net comparison floorspace derived from Verdict Grocery Retailers (2009) where available and includes comparison goods element of foodstores
⁴ – Sales densities derived from Verdict (2009) or Mintel Retail Rankings (2009) for national multiples and WYG assessment for local shops
At 2007 prices

10.126 Overall, existing comparison goods facilities in Hexham (both in-centre and out-of-centre) are identified to be trading below expected levels, by 8% (or £5.21m). Given this undertrading and the limited forecast growth in comparison goods expenditure in the short-term, our assessment (Table 10.29) identifies limited capacity (less than £1m) for additional comparison goods floorspace through to 2014.

10.127 Although comparison goods capacity in Hexham is identified to increase to almost £40m by 2026 (or 8,990 sq m net/11,985 sq m gross), part of this capacity will be met by outstanding commitments. These include planning permission for two large non-food units (3,414 sq m gross) on land adjoining the existing Marks & Spencer store. Although dependent upon the eventual end-operator, this floorspace if implemented could achieve a comparison goods turnover of approximately £11m by 2026. Accordingly, most of the identified capacity through to 2019 will be met by outstanding commitments, based on current market shares. Despite this, it is notable that the latest FOCUS Report for Hexham identifies requirements from ten comparison goods retailers seeking up to 20,250 sq m (gross) of floorspace. Notable retailers seeking representation in Hexham include Desire by Debenhams (up to 2,320 sq m), TJ Hughes (up to 13,935 sq m), Peacocks (up to 510 sq m) and Pets at Home (1,115 sq m).

Table 10.29: Estimated 'Capacity' for Comparison Goods Facilities – Hexham

Year	Turnover - £m ¹	Expenditure Available - £m ²	Surplus Expenditure - £m
2009	69.28	64.07	-5.21
2014	72.81	73.80	0.99
2019	78.44	89.87	11.43
2024	84.50	114.52	30.02
2026	87.06	126.59	39.53

Notes: ¹ – Allows for increased turnover efficiency of +1.0% per annum between 2009 and 2014 and +1.5% per annum post 2014 to reflect the higher increase in expenditure forecast
² – Assumes constant market share at 6.3% within the Study Area
 Allows for growth in non-store retail sales
 At 2007 prices

10.128 At current market shares there is no clear quantitative need for further comparison goods floorspace in Hexham (over and above outstanding commitments) in the short to medium term. However, there maybe scope to improve the comparison goods market share of Hexham in the future through appropriate improvement in its retail offer. Indeed, almost half (45%) of comparison goods expenditure generated in Zone 9 (Hexham) is identified to be directed to facilities elsewhere, mostly notably to Newcastle (20%) and The Metrocentre (12%). Whilst it is inevitable that expenditure will be directed to competing facilities given their strength as retail destinations there does appear some scope to improve Hexham's market share in the future through appropriate improvement in its retail offer. However, it is important that any additional retail floorspace in Hexham contributes to the ongoing vitality and viability of the centre. In the longer term (i.e. post 2019) there is identified to capacity for a significant increase in the comparison goods floorspace.

Leisure

10.129 The existing leisure of Hexham includes The Forum Cinema on Market Place, Wentworth Leisure Centre, Hexham Abbey, Queens Hall and the Old Goal, together with a range of evening economy uses such as restaurants, pubs, etc.

10.130 Hexham is one of only three town centres within Northumberland that contains a cinema. Consequently, this facility is well used, particularly from residents within Zone 9 (Hexham) of the Study Area, where almost 73% of respondents who visit the cinema use The Forum Cinema in Hexham.

10.131 In terms of leisure activity and the use of Hexham as a leisure destination, Table 10.30 provides a summary of the market shares and participation for different leisure activities of respondents within Zone 9 (Hexham) of the defined Study Area.

Table 10.30: Leisure Activity within the Hexham Zone (Zone 9)

Activity	Participation Rate (%)	Market Share to Facilities in Hexham (%)
Health and Fitness	45.7	88.9
Cinema-going	55.7	72.7
Restaurants	78.4	61.8
Pubs, Bars, Nightclubs	46.6	48.9
Cultural Activities	52.9	6.1
Bingo	2.7	0.0
Sporting Events	14.7	0.0
Ten-pin Bowling	9.6	0.0

Notes: Derived from Northumberland Household Survey (2009)

10.132 Table 10.30 identifies that Hexham is well used for activities such as health and fitness, going to the cinema and restaurants. However, due to the lack of commercial leisure facilities such as bingo clubs and ten-pin bowling, residents who do wish to participate in these activities have to travel elsewhere, most notably to AMF Bowling in Newcastle-upon-Tyne (67% of respondents) and Gala Bingo at The Metrocentre (67%).

Summary

10.133 Hexham serves an important retail and leisure role for residents within the west of Northumberland. Its convenience goods offer is well represented and limited expenditure generated in the local area (c. 10%) is identified to be directed to facilities elsewhere. Given current convenience goods shopping patterns and the trading performance of existing floorspace together with proposed improvements nearby (most notably in Prudhoe) there is no clear need for further convenience goods floorspace in Hexham.

10.134 With regard to comparison goods, given the undertrading of existing floorspace, limited forecast growth in expenditure and outstanding commitments, in the short to medium term there is no clear need for further comparison goods floorspace in Hexham. However, in the longer terms there is scope for further retail floorspace in Hexham, although it will be important that any future improvement in the retail offer of Hexham contributes positively to the ongoing vitality and viability of the centre.

Morpeth Town Centre

10.135 Morpeth is located off the A1 trunk road some 16 miles north of Newcastle-upon-Tyne and five miles west of Ashington. The town centre is identified to comprises some 40,120 sq m of floorspace (as identified by Experian Goad), including 16,630 sq m of floorspace within the convenience and comparison goods sector. Retailing within the town centre is focused on Newgate Street, Bridge Street and within Sanderson Arcade, which opened in November 2009 and comprises 27 stores. It

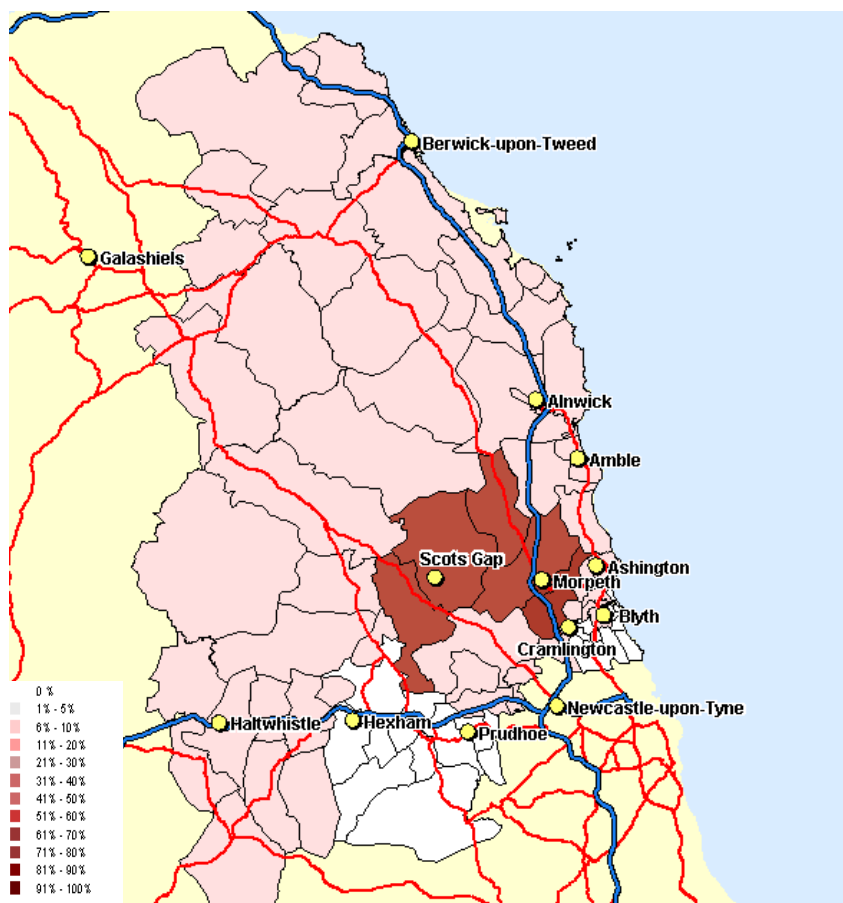


is important to note that the Household Survey undertaken as part of this study was completed prior to the opening of the Sanderson Arcade.

Convenience Goods Retailing

- 10.136 The convenience sector is currently dominated by the existing Morrison's store at the edge-of the town centre on Stanley Terrace. Further convenience goods provision is provided by food hall in M&S (NB - at the time of the survey M&S food was represented by a 'Simply foodstore' and not its new M&S Store), Lidl and Iceland together with a range of smaller national and independent retailers.
- 10.137 Existing convenience facilities in Morpeth principally draw their trade from Zone 3 (Scots Gap) and Zone 13 (Morpeth) of the defined Study Area. Indeed, of the convenience goods expenditure currently directed to facilities in Morpeth (£35.22m), some 80% is derived from these two zones.
- 10.138 Overall, Morpeth is identified to achieve a market share within the defined Study Area of 5.8% in 2009. This equates to a main food shopping catchment population within the Study Area of 20,900 people in 2009. Figure 10.13 illustrates the extent of the convenience goods catchment of existing facilities within Morpeth.

Figure 10.13: Extent of Morpeth's Catchment within Study Area – Convenience Goods Shopping



Market Share of Morpeth – Convenience Goods Shopping

Survey Zones														
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
0.8	4.1	51.6	4.0	1.5	0.0	0.4	0.0	0.0	0.3	0.0	0.0	68.0	0.4	5.5

10.139 Further 'local' provision is provided nearby at Widdrington Station and Pegswood. Although limited, these centres are identified to achieve an additional convenience goods turnover of more than £1m. By including these facilities the overall convenience market share in the Study Area increases to **6.0%**.

10.140 Table 10.31 provides a breakdown of the trading performance of existing convenience goods floorspace in Morpeth and the wider area.

Table 10.31: Trading Performance of Current Foodstores in Morpeth

Store	Gross Floorspace – sq m ¹	Net Floorspace – sq m ²	Net Convenience – sq m ³	Benchmark Turnover per sq m - £ ⁴	Benchmark Turnover - £m	Survey Estimate - £m ⁵
Morpeth						
Morrison's, Stanley Terrace	2,648	1,793	1,434	10,597	15.20	28.33
M&S Simply Food, Market Place	954	620	589	10,630	6.26	2.51
Lidl, Stanley Terrace	1,090	798	638	3,111	1.98	2.33
Iceland, Bridge Street	-	750	698	5,545	3.87	0.54
Local Shops, Morpeth Town Centre*	2,250	1,688	1,519	3,500	5.32	1.51
Sub-Total	-	5,649	4,878	-	32.63	35.22
Widdrington Station	341	256	230	3,000	0.69	0.81
Pegswood					0.33	0.33
TOTAL		5,905	5,108	-	33.65	36.36

Notes: ¹ – Gross Floorspace derived from Experian Goad (2009), IGD Database (2009) or WYG/Council assessment
² – Net floorspace based on WYG judgement
³ – Net convenience floorspace derived from Verdict Grocery Retailers (2009) where available
⁴ – Sales densities derived from Verdict (2009) or Mintel Retail Rankings (2009) for national multiples and WYG assessment for local shops
* - New M&S store in the Sanderson Arcade excluded (at time of survey the M&S food offer was contained in a Simply Foodstore.
At 2007 prices

10.141 Based on the findings of the Household Survey, existing convenience goods facilities in Morpeth are identified to achieve a survey derived turnover of £36.36m in 2009, which compares to an 'expected' turnover of £33.65m. Accordingly, existing facilities are identified to trading some £2.71m (or 8%) above expected levels. In particular the Morrison's store (the largest store in Morpeth) is identified to be trading some 86% above expected levels. Whilst survey results should be treated with some caution in seeking to identify the actual trading performance of individual stores, our visits to the store suggest that it is trading well. Notwithstanding this, overall existing facilities in Morpeth are identified to be overtrading.

10.142 Given this overtrading, based on maintaining current market shares, Table 10.32 identifies an immediate capacity (£2.71m) for additional convenience goods floorspace in Morpeth. This increases to more than £5m by 2014 and to over £10m by 2026. This level of capacity could support a modest extension to an existing facility or a medium-sized foodstore (although dependent upon the end-operator).

Table 10.32: Estimated 'Capacity' for Convenience Goods Facilities – Morpeth

Year	Turnover - £m ¹	Expenditure Available - £m ²	Surplus Expenditure - £m
2009	33.65	36.36	2.71
2014	33.99	39.12	5.13
2019	34.33	41.49	7.16
2024	34.67	44.00	9.33
2026	34.81	45.17	10.36

Notes: ¹ - Allows for increased turnover efficiency of +0.2% per annum
² - Assumes constant market share at 6.0% within the Study Area
At 2007 prices

10.143 Although our assessment identifies capacity for additional convenience goods floorspace in Morpeth, planning permission has been granted to extend the existing Morrison's store (795 sq m net) and M&S Simply Food has relocated as part of the Sanderson Arcade development. These commitments

(if implemented) will meet some of the identified capacity suggesting limited quantitative need for further convenience goods floorspace in Morpeth.

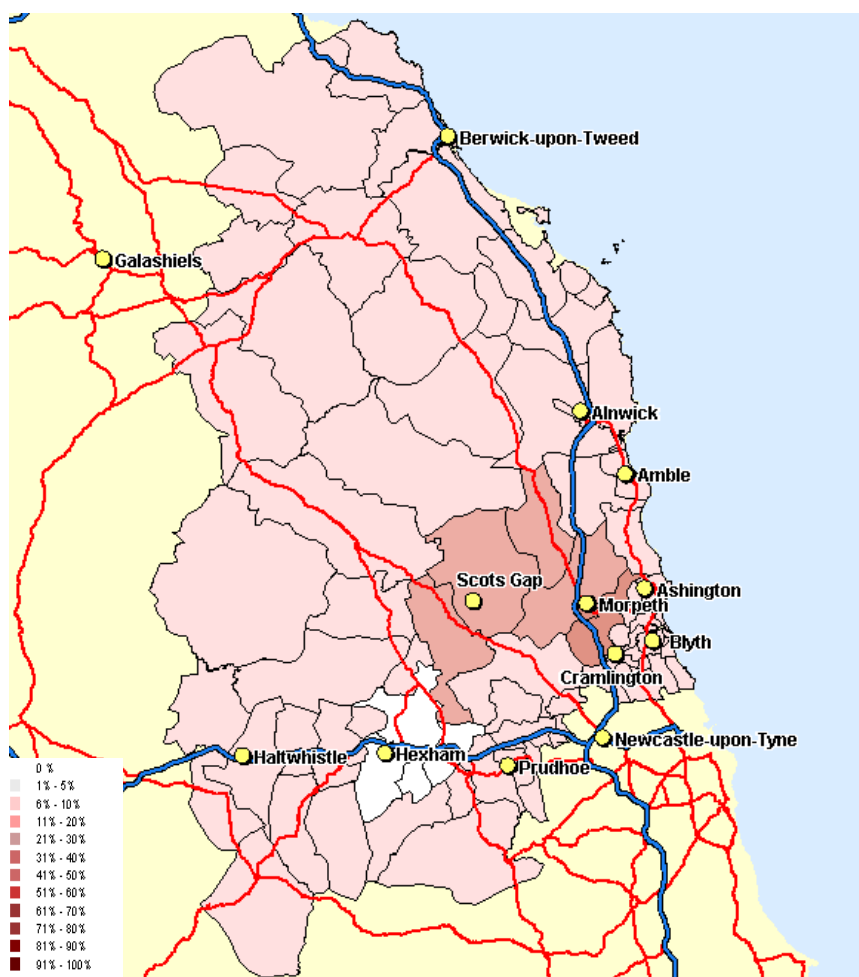
10.144 It is notable that Morpeth currently contains only one large-format foodstore (the Morrison's on Stanley Terrace), which dominates shopping patterns in the local area. Therefore, the introduction of an additional main food shopping destination in Morpeth would provide increased competition and consumer choice and help address the overtrading of the Morrison's store. Accordingly, there appears a strong qualitative need for further convenience goods floorspace in Morpeth. However, it is important that any improvement in the convenience goods offer in Morpeth is appropriate to its role and function and contributes to the continued vitality and viability of the centre. Furthermore, the introduction of a new main food shopping destination in Morpeth is likely to increase the market share achieved by facilities within the identified primary catchment of Morpeth (i.e. zones 3 and 13). Currently, more than a third (37%) of convenience goods expenditure generated in these two zones is directed to facilities elsewhere, most notably to facilities in Ashington (7%) and Newcastle-upon-Tyne (7%).

10.145 In this respect, there is current a proposal to develop the Lower Stanners site at the edge-of the town centre for mixed use development, which is intended to include a new foodstore. A foodstore in this location would be well placed to contribute to the ongoing vitality and viability of the town centre and will help to retain expenditure in the town centre.

Comparison Goods Retailing

10.146 Existing comparison goods facilities within Morpeth and the immediate surrounding area are identified to attract a comparison goods turnover of £30.79m in 2009 from the defined Study Area. This equates to a market share of only **3.0%** within the Study Area. Whilst this market share increases to 25% within Zone 3 (Scots Gap) and Zone 13 (Morpeth), it remains that the majority of comparison goods expenditure generated in the local area is directed to facilities elsewhere, most notably to facilities in Newcastle-upon-Tyne (28%). Figure 10.14 illustrates the extent of Morpeth's catchment for comparison goods shopping. Although existing facilities within Morpeth are identified to draw some trade from a wide area, this is very limited (less than 1%) for many of the survey zones that comprise the Study Area.

Figure 10.14: Plan indicating the Extent of Morpeth's Catchment within Study Area – Comparison Goods Shopping



Market Share of Morpeth –Comparison Goods Shopping

Survey Zones														
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
0.5	2.7	20.2	1.9	2.7	0.4	0.8	0.1	0.0	0.1	0.3	0.5	68.0	0.4	5.5

10.147 Based on the findings of the Household Survey, Table 11.33 provides a summary of the trading performance of existing comparison goods facilities within Morpeth and compares it to expected levels.

Table 10.33: Trading Performance of Current Comparison Goods Floorspace in Morpeth

Store	Gross Floorspace – sq m ¹	Net Floorspace – sq m ²	Net Comparison – sq m ³	Benchmark Turnover per sq m – £ ⁴	Benchmark Turnover – £m	Survey Estimate – £m ⁵
Morpeth						
Morrison's, Stanley Terrace	2,648	1,793	359	9,232	3.31	26.28
Local Shops, Morpeth Town Centre	9,620	7,215	6,854	3,500	23.99	
Sub-Total	12,268	9,008	7,213	-	27.30	26.28
Other					4.51	4.51
TOTAL	12,268	9,008	7,213	-	31.81	30.79

Notes:

- ¹ – Gross Floorspace derived from Experian Goad (2009) or WYG assessment
- ² – Net floorspace based on WYG judgement
- ³ – Net comparison floorspace derived from Verdict Grocery Retailers (2009) where available and includes comparison goods element of foodstores
- ⁴ – Sales densities derived from Verdict (2009) or Mintel Retail Rankings (2009) for national multiples and WYG assessment for local shops

At 2007 prices

10.148 Collectively, existing comparison goods facilities within Morpeth are identified to be trading below expected levels by 3% (or £1.02m) in 2009. Our analysis (Table 10.34) identifies that due to this undertrading there is limited quantitative need for additional comparison goods floorspace until post 2014. Furthermore, planning permission exists for a DIY store (2,447 sq m gross with garden centre) at Coopies Industrial Estate. Although is uncertain whether this permission will be implemented, this commitment will meet part of any future retail capacity in Morpeth.

10.149 Since the completion of the Household Survey the Sanderson Arcade has opened. It is anticipated that this improvement in the retail offer in the town centre will have increased the overall market share achieved by Morpeth. Although any increase in market share would result in an increase in future retail capacity, it is important that the Sanderson Arcade is successful given its important contribution to the ongoing vitality and viability of the town centre. Therefore, the Council should seek to resist retail development that would have an adverse impact on the success of this scheme. Despite this, it is notable that the latest FOCUS Report for Morpeth identifies requirement from eight comparison retailers seeking up to 3,110 sq m (gross) floorspace. Retailers seeking representation in Morpeth include Bon Marche, Peacocks and Pets at Home.

Table 10.34: Estimated 'Capacity' for Comparison Goods Facilities – Morpeth

Year	Turnover – £m ¹	Expenditure Available – £m ²	Surplus Expenditure – £m
2009	31.81	30.79	-1.02
2014	33.43	35.15	1.72
2019	36.02	42.80	6.78
2024	38.80	54.53	15.73
2026	40.00	60.28	20.28

Notes:

- ¹ – Allows for increased turnover efficiency of +1.0% per annum between 2009 and 2014 and +1.5% per annum post 2014 to reflect the higher increase in expenditure forecast
- ² – Assumes constant market share at 3.0% within the Study Area

Allows for growth in non-store retail sales
At 2007 prices

Leisure

- 10.150 Commercial leisure provision in Morpeth is limited, lacking a cinema, ten-pin bowling and bingo facility. Accordingly, local residents who wish to partake in these activities travel to facilities elsewhere, most notably to facilities outside Northumberland, including the Odeon Cinema in Wallsend and XS Superbowl in Longbenton, although for bingo activity facilities in Cramlington, Blyth and Ashington are the most popular destinations for residents within the Morpeth area.
- 10.151 Within Morpeth existing leisure provision is limited to facilities such as restaurants, public houses, health and fitness facilities (including Morpeth Leisure Centre), etc. Table 10.35 identifies the market share and participation rates for different leisure activities within Zone 13 (Morpeth) of the defined Study Area.

Table 10.35: Leisure Activity within the Morpeth Zone (Zone 13)

Activity	Participation Rate (%)	Market Share to Facilities in Morpeth (%)
Pubs, Bars, Nightclubs	56.2	85.5
Restaurants	74.6	68.1
Health and Fitness	35.6	65.7
Bingo	6.8	0.0
Cultural Activities	52.9	0.0
Sporting Events	23.3	0.0
Cinema-going	44.3	0.0
Ten-pin Bowling	16.7	0.0

Notes: Derived from Northumberland Household Survey (2009)

- 10.152 Table 10.35 illustrates that the 'evening economy' of Morpeth is relatively strong with the majority of local residents who use visit restaurants, pubs, bars, etc. using facilities in Morpeth.

Summary

- 10.153 The retail offer of Morpeth serves an important role in meeting some of the day-to-day needs of the local population. The convenience goods offer is currently dominated by the Morrison's store. Whilst the good edge-of-centre location of this store means that it contributes to the ongoing vitality and viability of the centre, our assessment identifies that there is a need (particularly qualitative) for an additional main food store within Morpeth.
- 10.154 In terms of comparison goods, the recent Sanderson Arcade development has significantly improved the comparison goods retail offer in Morpeth Town Centre. In this respect, although our assessment identifies capacity for additional comparison goods floorspace, this need will have been met by the Sanderson Arcade development, which opened after the completion of the Household Survey. Whilst this development is likely to have increased the overall market share of Morpeth, it is

important that any future expenditure growth is focused in ensuring that this important development is a success rather than allowing further retail development outside the town centre that may adversely impact on Sanderson Arcade.

District Centres within Northumberland

- 10.155 In addition to the town centres outlined above, WYG have also identified a number of district centres within the County. Set out below is a review of the role of these centres and future retail capacity for each.

Amble

- 10.156 Amble is located at the east coast of Northumberland off the A1068. It is located approximately 12 miles north of Ashington and 13 miles south of Alnwick. The town centre is identified to comprise some 8,330 sq m of floorspace (as identified by Experian Goad, August 2009), including 4,030 sq m of retail floorspace (both convenience and comparison). Amble Town Centre is linear in form with commercial activity focused on Queen Street.

Convenience Goods Retailing

- 10.157 Existing convenience goods stores within Amble are identified to only draw expenditure from Zone 15 (Amble). This is to be expected given the limited convenience goods offer in Amble, which predominantly serve a 'top-up' shopping role. Collectively, existing convenience goods facilities in Amble attract a convenience goods turnover of £4.73m in 2009 from the defined Study Area. This equates to a market share of only **0.8%**. Whilst this market share increases to 13% within Zone 15 (Amble), it is evident that the vast majority of convenience goods expenditure generated locally is directed to facilities elsewhere.
- 10.158 The Household Survey identifies that existing facilities in Amble attract a main food shopping catchment population of only 1,385 people within the Study Area. Again, this is reflective of the lack of main food shopping facilities within Amble. Figure 10.15 illustrates the limited extent of the convenience goods catchment of Amble within the Study Area

Figure 10.15: Extent of Amble's Catchment within Study Area – Convenience Goods Shopping



Market Share of Amble– Convenience Goods Shopping

Survey Zones														
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	13.1

10.159 In terms of the trading performance of existing floorspace, Table 10.36 identifies that existing convenience goods facilities in Amble are trading below expected levels (by £3.05m, or 39%).

Table 10.36: Trading Performance of Current Foodstores in Amble

Store	Gross Floorspace – sq m ¹	Net Floorspace – sq m ²	Net Convenience – sq m ³	Benchmark Turnover per sq m - £ ⁴	Benchmark Turnover - £m	Survey Estimate - £m ⁵
Amble						
Co-op Supermarket, Queen Street	630	441	366	5,789	2.12	2.38
Tesco Express, Queen Street	490	320	288	12,069	3.48	0.64
Local Shops, Amble Town Centre	750	563	506	3,000	1.52	1.05
Sub-Total	1,870	1,324	1,160	-	7.12	4.07
Other Amble					0.66	0.66
TOTAL	1,870	1,324	1,160	-	7.78	4.73

Notes: ¹ – Gross Floorspace derived from Experian Goad (2009), IGD Database (2009) or WYG/Council assessment
² – Net floorspace based on WYG judgement
³ – Net convenience floorspace derived from Verdict Grocery Retailers (2009) where available
⁴ – Sales densities derived from Verdict (2009) or Mintel Retail Rankings (2009) for national multiples and WYG assessment for local shops
At 2007 prices

10.160 Given this undertrading, Table 10.37 identifies that based on current market shares there is no clear demonstrable capacity for additional convenience goods floorspace in Amble through to 2026.

Table 10.37: Estimated 'Capacity' for Convenience Goods Facilities – Amble

Year	Turnover - £m ¹	Expenditure Available - £m ²	Surplus Expenditure - £m
2009	7.78	4.73	-3.05
2014	7.86	5.22	-2.64
2019	7.94	5.53	-2.41
2024	8.02	5.87	-2.15
2026	8.05	6.02	-2.03

Notes: ¹ – Allows for increased turnover efficiency of +0.2% per annum
² – Assumes constant market share at 0.8% within the Study Area
At 2007 prices

10.161 Whilst our analysis demonstrates no clear quantitative for additional convenience goods floorspace in Amble, it is important to note that this is based on maintaining current market shares. As previously highlighted, some 87% of convenience goods expenditure generated in Zone 15 (Amble) is directed to facilities elsewhere, including 91% of main food shopping. The most popular destinations are identified to be facilities in Ashington and Blyth.

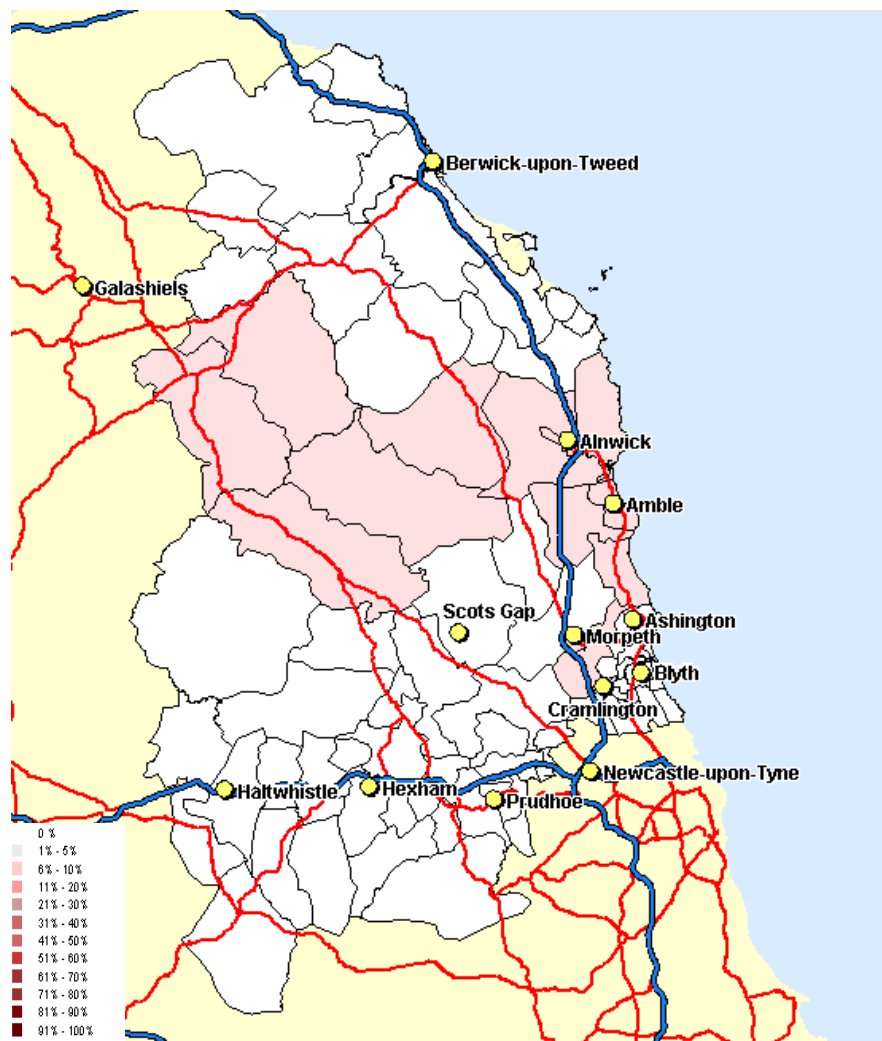
10.162 On this basis, there appears a qualitative need to improve the convenience goods offer in Amble in order to address the deficiency in main food shopping provision. In this respect, outline planning permission does exist for 2,787 sq m (gross) foodstore in Amble. If implemented, this store will help to reduce the need for local residents to travel to facilities elsewhere (such as Ashington, Blyth and Alnwick), thereby providing more sustainable shopping patterns. As previously highlighted, any improvement in the convenience goods offer in Amble will have implications on future capacity in nearby centres.

Comparison Goods Retailing

10.163 Existing comparison goods facilities in Amble are identified to attract a comparison goods turnover of £4.15m within the Study Area in 2009. This equates to a market share of only **0.4%**. This

market share increases to only 5% within Zone 15 (Amble). As with convenience goods shopping, existing facilities in Amble are identified to draw principally from Zone 15. Figure 10.16 illustrates the extent of Amble's catchment for comparison goods.

Figure 10.16: Extent of Amble's Catchment within Study Area – Comparison Goods Shopping



Market Share of Amble – Comparison Goods Shopping

Survey Zones														
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
0.0	0.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	5.4

10.164 Table 10.38 provides a summary of the trading performance of existing comparison goods facilities within Amble.

Table 10.38: Trading Performance of Current Comparison Goods Floorspace in Amble

Store	Gross Floorspace – sq m ¹	Net Floorspace – sq m ²	Net Comparison – sq m ³	Benchmark Turnover per sq m - £ ⁴	Benchmark Turnover - £m	Survey Estimate - £m ⁵
Amble						
Amble Town Centre	2,160	1,664	1,581	2,500	3.95	4.15
Sub-Total	2,160	1,664	1,581	-	3.95	4.15
TOTAL	2,160	1,664	1,581	-	3.95	4.15

Notes: ¹ – Gross Floorspace derived from Experian Goad (2009) or WYG assessment
² – Net floorspace based on WYG judgement
³ – Net comparison floorspace derived from Verdict Grocery Retailers (2009) where available and includes comparison goods element of foodstores
⁴ – Sales densities derived from Verdict (2009) or Mintel Retail Rankings (2009) for national multiples and WYG assessment for local shops
At 2007 prices

10.165 Existing comparison goods floorspace within Amble is identified to be marginally overtrading (by £0.20m, or 5%). Despite this overtrading, given the limited comparison goods market share achieved by Amble, our assessment (Table 10.39) identifies limited capacity for additional comparison goods floorspace through to 2026 – based on current market shares. Furthermore, this capacity is likely to be met by the comparison goods turnover of the proposed new foodstore in Amble.

Table 10.39: Estimated 'Capacity' for Comparison Goods Facilities – Amble

Year	Turnover - £m ¹	Expenditure Available - £m ²	Surplus Expenditure - £m
2009	3.95	4.15	0.20
2014	4.15	4.69	0.54
2019	4.47	5.71	1.24
2024	4.82	7.27	2.45
2026	4.96	8.04	3.08

Notes: ¹ – Allows for increased turnover efficiency of +1.0% per annum between 2009 and 2014 and +1.5% per annum post 2014 to reflect the higher increase in expenditure forecast
² – Assumes constant market share at 0.4% within the Study Area
Allows for growth in non-store retail sales
At 2007 prices

Bedlington/Bedlington Station

10.166 Bedlington and Bedlington Station are located a short distance apart (approximately one mile) in close proximity to Ashington (five miles) and Morpeth (six miles). Retailing within Bedlington is focused on Front Street West and is anchored by a Tesco store. A Netto store is also located on Choppington Road. Within nearby Bedlington Station, retailing is focused along Station Road.

Convenience Goods Retailing

10.167 Collectively existing convenience goods floorspace within Bedlington and Bedlington Station are identified to achieve a convenience goods turnover of £12.42m in 2009 (£11.64m to Bedlington and £0.79m to Bedlington Station). This equates to a market share of **2.1%** within the Study Area. Whilst this increases to 27% within Zone 5 (Bedlington), it is evident that most convenience goods

expenditure within the local area is directed to competing facilities elsewhere – most notably to Blyth.

10.168 The vast majority (81%) of convenience goods expenditure that is directed to these centres is derived from Zone 5 (Bedlington), with limited trade being derived from the neighbouring Zone 4 (Ashington East) and Zone 11 (Cramlington). Overall, existing facilities within Bedlington and Bedlington Station are identified to achieve a main food shopping catchment of approximately 6,130 people in 2009, most of which is directed to the Tesco store in Bedlington. Figure 10.17 illustrates the extent of the convenience goods catchment of Bedlington/Bedlington Station within the Study Area.

Figure 10.17: Extent of Bedlington/Bedlington Station's Catchment within Study Area – Convenience Goods Shopping





Market Share of Bedlington/Bedlington Station– Convenience Goods Shopping

Survey Zones														
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
0.0	0.0	0.0	4.1	26.7	0.0	0.0	0.0	0.0	0.0	1.5	0.4	0.4	1.1	0.0

10.169 Table 10.40 identifies that existing convenience goods floorspace in Bedlington and Bedlington Station is trading below expected levels (by 22% and 78% respectively).

Table 10.40 Trading Performance of Current Foodstores in Bedlington/Bedlington Station

Store	Gross Floorspace – sq m ¹	Net Floorspace – sq m ²	Net Convenience – sq m ³	Benchmark Turnover per sq m – £ ⁴	Benchmark Turnover – £m	Survey Estimate – £m ⁵
Bedlington						
Tesco, Market Place	1,670	1,169	818	12,069	9.87	7.27
Netto, Choppington Road, Bedlington	1,090	763	633	7,228	4.57	3.49
Local Shops, Bedlington Town Centre	250	200	180	3,000	0.54	0.88
Sub-Total	3,010	2,132	1,631	-	14.98	11.64
Bedlington Station						
Co-op Supermarket, Station Road	581	436	362	5,789	2.10	0.34
Local Shops, Bedlington Station	714	536	482	3,000	1.45	0.45
Sub-Total	1,295	972	844	-	3.55	0.79
TOTAL	4,305	3,104	2,475	-	18.53	12.42

Notes: ¹ – Gross Floorspace derived from Experian Goad (2009), IGD Database (2009) or WYG/Council assessment
² – Net floorspace based on WYG judgement
³ – Net convenience floorspace derived from Verdict Grocery Retailers (2009) where available
⁴ – Sales densities derived from Verdict (2009) or Mintel Retail Rankings (2009) for national multiples and WYG assessment for local shops
At 2007 prices

10.170 Given this undertrading, our assessment (Table 10.41) identifies that based on current market share there is no clear demonstrable need for additional convenience goods floorspace in Bedlington/Bedlington Station. However, there is the potential to improve the convenience market share through improved provision within Bedlington/Bedlington Station in order to reduce the need for local residents to travel to competing facilities elsewhere, in particular the Asda store at Blyth, which is identified to be trading strongly. In this respect, although not yet a formal commitment, there is currently a proposal to increase the existing Tesco store in Bedlington to approximately 2,787 sq m (gross), together with providing some 929 sq m (gross) of additional retail/office space. If permitted the enlarged Tesco store would increase the attraction of this store and help to retain shopping trips within the local area.

Table 10.41 Estimated 'Capacity' for Convenience Goods Facilities – Bedlington/Bedlington Station

Year	Turnover – £m ¹	Expenditure Available – £m ²	Surplus Expenditure – £m
2009	18.53	12.42	-6.11
2014	18.72	13.69	-5.03
2019	18.90	14.52	-4.38
2024	19.09	15.40	-3.69
2026	19.17	15.81	-3.36

Notes: ¹ – Allows for increased turnover efficiency of +0.2% per annum
² – Assumes constant market share at 2.1% within the Study Area
At 2007 prices

Comparison Goods Retailing

10.171 Existing comparison goods facilities within Bedlington/Bedlington Station are identified to achieve a turnover of only £3.02m in 2009 (£2.38m to Bedlington and £0.64m to Bedlington Station). This equates to a market share of only **0.3%** within the Study Area. This market share increases to only 4% within Zone 5 (Bedlington). Figure 10.18 illustrates the extent of the comparison goods catchment of Bedlington/Bedlington Station within the Study Area. Although the survey suggests that existing facilities within Bedlington/Bedlington Station draw from a relatively wide area, the market share achieved by existing comparison goods facilities within each of the 15 survey zones is very limited. This reflects the retail offer of both Bedlington and Bedlington Station.

Figure 10.18: Extent of Bedlington/Bedlington Station's Catchment within Study Area – Comparison Goods Shopping



Market Share of Bedlington/Bedlington Station – Comparison Goods Shopping

Survey Zones														
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
0.0	0.1	0.4	0.1	3.6	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.6	0.4	0.0

10.172 Table 10.42 provides a summary of the trading performance of existing comparison goods facilities in Bedlington/Bedlington Station.

Table 10.42: Trading Performance of Current Comparison Goods Floorspace in Bedlington/Bedlington Station

Store	Gross Floorspace – sq m ¹	Net Floorspace – sq m ²	Net Comparison – sq m ³	Benchmark Turnover per sq m – £ ⁴	Benchmark Turnover – £m	Survey Estimate – £m ⁵
Bedlington						
Tesco, Market Place	1,670	1,169	351	9,368	3.29	2.38
Local Shops, Bedlington Town Centre	1,110	833	790	2,000	1.58	
Sub-Total	2,780	2,002	1,141	-	4.87	2.38
Bedlington Station						
Local Shops, Bedlington Station	1,075	806	765	2,000	1.53	0.64
Sub-Total	1,075	806	765	-	1.53	0.64
TOTAL	3,855	2,808	1,906	-	6.40	3.02

Notes: ¹ – Gross Floorspace derived from Experian Goad (2009) or WYG assessment
² – Net floorspace based on WYG judgement
³ – Net comparison floorspace derived from Verdict Grocery Retailers (2009) where available and includes comparison goods element of foodstores
⁴ – Sales densities derived from Verdict (2009) or Mintel Retail Rankings (2009) for national multiples and WYG assessment for local shops
At 2007 prices

10.173 Existing comparison goods floorspace within both Bedlington and Bedlington Station is identified to be trading below expected levels (by 51% and 58% respectively). Given this undertrading, Table 10.43 identifies that based on current market share there is no clear capacity for additional comparison goods floorspace within Bedlington/Bedlington Station through to 2026.

Table 10.43: Estimated 'Capacity' for Comparison Goods Facilities – Bedlington/Bedlington Station

Year	Turnover – £m ¹	Expenditure Available – £m ²	Surplus Expenditure – £m
2009	6.40	3.02	-3.38
2014	6.72	3.51	-3.21
2019	7.25	4.28	-2.97
2024	7.81	5.45	-2.36
2026	8.04	6.03	-2.01

Notes: ¹ – Allows for increased turnover efficiency of +1.0% per annum between 2009 and 2014 and +1.5% per annum post 2014 to reflect the higher increase in expenditure forecast
² – Assumes constant market share at 0.30% within the Study Area
Allows for growth in non-store retail sales
At 2007 prices

10.174 Furthermore, although more than 95% of comparison goods expenditure generated in Zone 5 (Bedlington) is directed to facilities elsewhere (most notably Blyth and Newcastle City Centre) it is unlikely given the proximity and strength of competing destinations that the comparison goods market share of either Bedlington or Bedlington Station will significantly increase in the future. However, through appropriate improvement in the retail offer of Bedlington/Bedlington Station, given the high level of expenditure being directed to facilities elsewhere there does appear some



scope to claw back expenditure being directed elsewhere. In this respect, as previously highlighted above, there is currently a proposal for an enlarged Tesco store, which will include an element of additional convenience goods floorspace together with approximately 929 sq m of additional comparison goods floorspace.

Haltwhistle

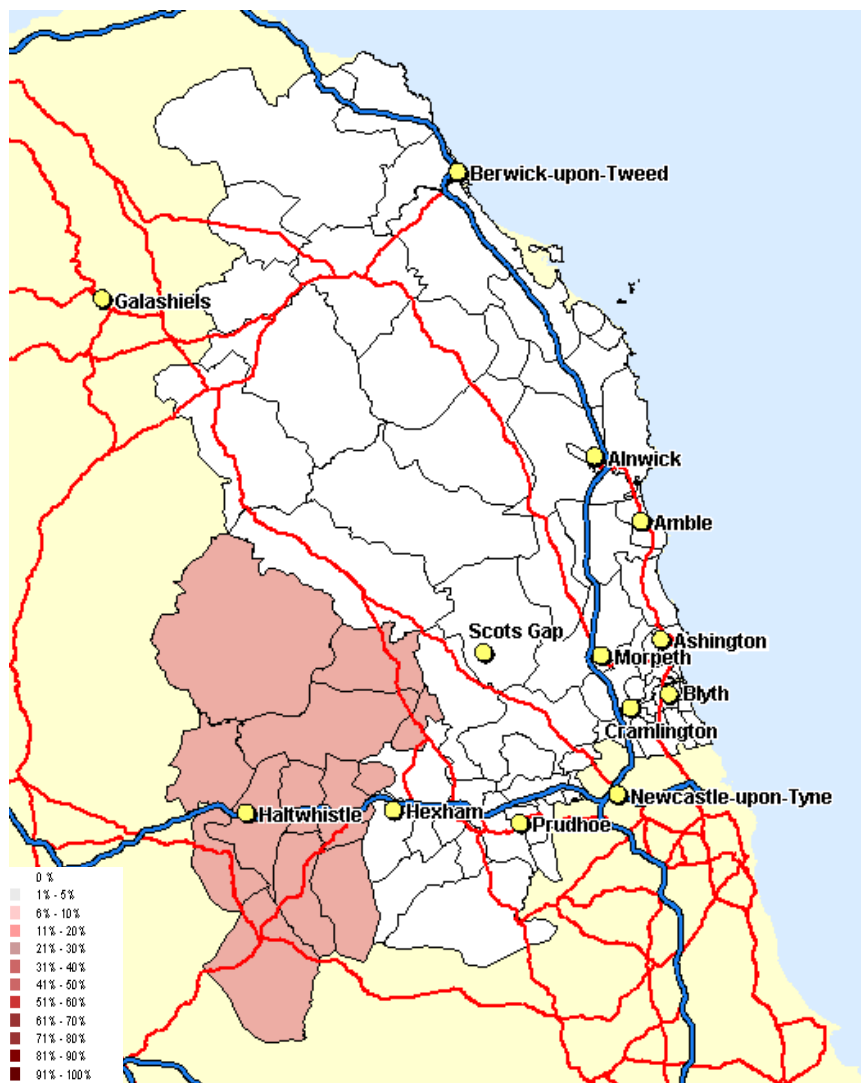
10.175 Haltwhistle is a small centre located at the western edge of Northumberland along the A69, some 16 miles from Hexham and 22 miles from Carlisle. Retailing and commercial activity totals 7,850 sq m of floorspace and is focused on Westgate and Main Street, although a Sainsbury's Local is located on Aesica Road.

Convenience Goods Retailing

10.176 Existing convenience goods floorspace within Haltwhistle comprises small-format facilities that predominantly serve a 'top-up' food shopping role. Indeed, the Household Survey identifies that existing facilities in Haltwhistle achieve a main food shopping catchment of only 1,210 people within the Study Area.

10.177 As would be expected Haltwhistle draws from a narrow catchment with all convenience goods expenditure directed to the centre being derived from Zone 10 (Haltwhistle). Figure 10.19 illustrates the extent of the convenience goods catchment of Haltwhistle within the Study Area.

Figure 10.19: Extent of Haltwhistle's Catchment within Study Area – Convenience Goods Shopping



Market Share of Haltwhistle– Convenience Goods Shopping

Survey Zones														
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	12.5	0.0	0.0	0.0	0.0	0.0

10.178 Overall existing convenience goods facilities within Haltwhistle are identified to achieve a convenience goods turnover of £3.97m in 2009. This equates to a market share of **0.7%** within the defined Study Area. Whilst this market share increases to 12% within Zone 10 (Haltwhistle), given the limited convenience goods offer in Haltwhistle (particularly for main food shopping) most

residents within the local area (i.e. Zone 10) look towards facilities in Hexham (46%) for their convenience goods shopping needs.

10.179 Table 10.44 identifies the trading performance of existing convenience goods floorspace in Haltwhistle and compares this to 'expected' turnover.

Table 10.44: Trading Performance of Current Foodstores in Haltwhistle

Store	Gross Floorspace – sq m ¹	Net Floorspace – sq m ²	Net Convenience – sq m ³	Benchmark Turnover per sq m – £ ⁴	Benchmark Turnover – £m	Survey Estimate – £m ⁵
Haltwhistle						
Co-op Foodstore, Main Street	570	399	331	5,789	1.91	1.12
Sainsbury's Local, Aesica Road	650	520	468	9,218	4.31	2.30
Local Shops, Haltwhistle Town Centre	470	376	338	3,000	1.01	0.55
Sub-Total	1,690	1,295	1,137	-	7.23	3.97
TOTAL	1,690	1,295	1,137	-	7.23	3.97

Notes: ¹ – Gross Floorspace derived from Experian Goad (2009), IGD Database (2009) or WYG/Council assessment
² – Net floorspace based on WYG judgement
³ – Net convenience floorspace derived from Verdict Grocery Retailers (2009) where available
⁴ – Sales densities derived from Verdict (2009) or Mintel Retail Rankings (2009) for national multiples and WYG assessment for local shops
At 2007 prices

10.180 Existing facilities within Haltwhistle is identified to be trading below expected levels. Accordingly, based on maintaining existing market shares there is no clear need for additional convenience goods floorspace in Haltwhistle through to 2026 (Table 10.45). However, as previously highlighted, the vast majority of local residents within the Haltwhistle area have to travel to facilities nearby to undertake their food shopping. On this basis, the improvement in the convenience goods offer in Haltwhistle would help to reduce the need for local residents to travel elsewhere.

Table 10.45: Estimated 'Capacity' for Convenience Goods Facilities – Haltwhistle

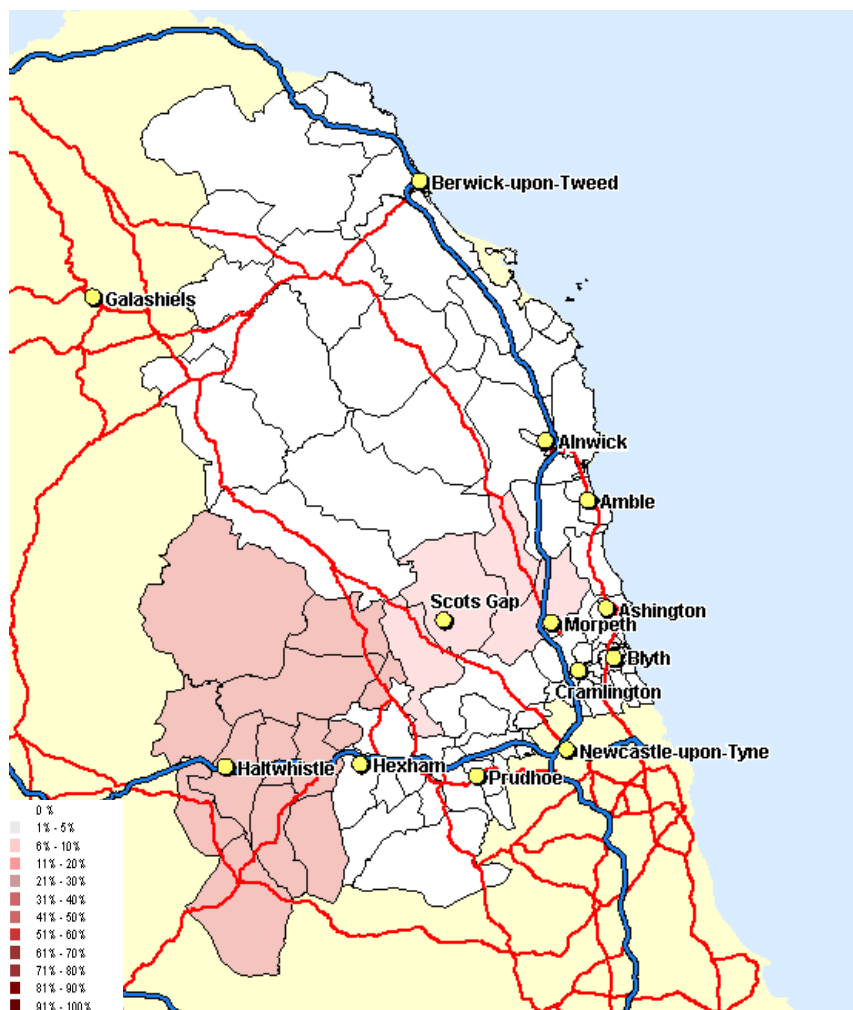
Year	Turnover – £m ¹	Expenditure Available – £m ²	Surplus Expenditure – £m
2009	7.23	3.97	-3.26
2014	7.30	4.30	-3.00
2019	7.38	4.56	-2.82
2024	7.45	4.84	-2.61
2026	7.48	4.97	-2.51

Notes: ¹ – Allows for increased turnover efficiency of +0.2% per annum
² – Assumes constant market share at 0.66% within the Study Area
At 2007 prices

Comparison Goods Retailing

10.181 Existing comparison goods floorspace in Haltwhistle is limited, achieving a turnover of £3.86m in 2009. This represents a market share of only **0.4%** within the Study Area. As reflected for convenience goods shopping, existing facilities in Haltwhistle draw from a limited area, primarily Zone 10 (Haltwhistle). Figure 10.20 illustrates the extent of the comparison goods catchment of Haltwhistle within the Study Area.

Figure 10.20: Extent of Haltwhistle's Catchment within Study Area – Comparison Goods Shopping



Market Share of Haltwhistle – Comparison Goods Shopping

Survey Zones														
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	6.8	0.0	0.0	0.0	0.0	0.0

10.182 Table 10.46 provides a summary of the trading performance of existing comparison goods facilities within Haltwhistle.



Table 10.46: Trading Performance of Current Comparison Goods Floorspace in Haltwhistle

Store	Gross Floorspace – sq m ¹	Net Floorspace – sq m ²	Net Comparison – sq m ³	Benchmark Turnover per sq m - £ ⁴	Benchmark Turnover - £m	Survey Estimate - £m ⁵
Haltwhistle						
Haltwhistle Town Centre	1,890	1,418	1,347	2,500	3.37	3.86
Sub-Total	1,890	1,418	1,347	-	3.37	3.86
TOTAL	1,890	1,418	1,347		3.37	3.86

Notes:

- ¹ – Gross Floorspace derived from Experian Goad (2009) or WYG assessment
- ² – Net floorspace based on WYG judgement
- ³ – Net comparison floorspace derived from Verdict Grocery Retailers (2009) where available and includes comparison goods element of foodstores
- ⁴ – Sales densities derived from Verdict (2009) or Mintel Retail Rankings (2009) for national multiples and WYG assessment for local shops

At 2007 prices

10.183 Existing comparison goods floorspace in Haltwhistle is identified to be trading above expected levels (by £0.49m, or 15%). Given this overtrading together with the forecast growth in comparison goods expenditure, there is demonstrable capacity for a notable increase in the comparison goods retailer offer in Haltwhistle just to maintain current market share.

Table 10.47: Estimated 'Capacity' for Comparison Goods Facilities – Haltwhistle

Year	Turnover - £m ¹	Expenditure Available - £m ²	Surplus Expenditure - £m
2009	3.37	3.86	0.49
2014	3.54	4.45	0.91
2019	3.81	5.42	1.61
2024	4.10	6.91	2.81
2026	4.22	7.64	3.42

Notes:

- ¹ – Allows for increased turnover efficiency of +1.0% per annum between 2009 and 2014 and +1.5% per annum post 2014 to reflect the higher increase in expenditure forecast
- ² – Assumes constant market share at 0.38% within the Study Area

Allows for growth in non-store retail sales
At 2007 prices

Ponteland

10.184 Ponteland is located in the south of Northumberland approximately eight miles north of Newcastle. Within Ponteland commercial activity is focused on Main Street, Merton Road and Bell Villa. The retail offer is dominated by the existing Waitrose store on Main Street and the Sainsbury's Local on Bell Villa.

Convenience Goods Retailing

10.185 Existing convenience goods facilities within Ponteland are identified to draw the bulk (96%) of their trade from Zone 7 (Ponteland) of the defined Study Area. Figure 10.21 highlights the extent of the convenience goods catchment of Ponteland.

Figure 10.21: Extent of Ponteland's Catchment within Study Area – Convenience Goods Shopping



Market Share of Ponteland– Convenience Goods Shopping

Survey Zones														
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
0.0	0.0	1.5	0.0	0.0	0.0	12.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

10.186 Overall existing convenience goods facilities within Ponteland are identified to achieve a convenience goods turnover of £5.73m in 2009. This equates to a market share of **0.9%** within the Study Area. This market share is identified to increase to 13% within Zone 7 (Ponteland) and convenience goods facilities within Ponteland are identified to achieve a main food shopping catchment of 1,450 people within the Study Area.

10.187 Table 10.48 identifies that existing convenience goods floorspace in Ponteland is trading well below expected levels (by £9.96m or 63%).

Table 10.48: Trading Performance of Current Foodstores in Ponteland

Store	Gross Floorspace – sq m ¹	Net Floorspace – sq m ²	Net Convenience – sq m ³	Benchmark Turnover per sq m – £ ⁴	Benchmark Turnover – £m	Survey Estimate – £m ⁵
Ponteland						
Sainsbury's Local, Bells Villa	730	511	460	9,218	4.24	1.84
Waitrose, Main Street	1,550	1,008	887	11,261	9.99	1.16
Local Shops, Ponteland Town Centre	770	539	485	3,000	1.46	2.73
TOTAL	3,050	2,058	1,832	-	15.69	5.73

Notes: ¹ – Gross Floorspace derived from Experian Goad (2009), IGD Database (2009) or WYG/Council assessment
² – Net floorspace based on WYG judgement
³ – Net convenience floorspace derived from Verdict Grocery Retailers (2009) where available
⁴ – Sales densities derived from Verdict (2009) or Mintel Retail Rankings (2009) for national multiples and WYG assessment for local shops
At 2007 prices

10.188 Of the identified undertrading, the Waitrose store on Main Street in particular, is identified to be performing particularly poorly. It is unlikely that this store is trading as poorly as the survey evidence suggested. As previously highlighted, the actual trading performance of individual store derived from survey evidence should be treated with a 'note of caution'. Furthermore, the Waitrose store in Ponteland (which re-occupied the former Somerfield store) only opened in May 2009. Therefore, at the time of the Household Survey the store had only been trading for three months and it is unlikely that established trading patterns had been achieved. Since the completion of survey trading patterns will be more established and it is likely that the actual trading performance of the store will be greater than that identified by the Household Survey.

10.189 On this basis, it is likely that the level of convenience goods capacity within Ponteland identified in Table 10.49 has been underestimated. However, it is unlikely that there is a pressing quantitative need for further convenience goods floorspace in Ponteland.

Table 10.49: Estimated 'Capacity' for Convenience Goods Facilities – Ponteland

Year	Turnover – £m ¹	Expenditure Available – £m ²	Surplus Expenditure – £m
2009	15.69	5.73	-9.96
2014	15.85	6.19	-9.66
2019	16.01	6.57	-9.44
2024	16.17	6.97	-9.20
2026	16.23	7.15	-9.08

Notes: ¹ – Allows for increased turnover efficiency of +0.2% per annum
² – Assumes constant market share at 0.95% within the Study Area
At 2007 prices

10.190 In considering future need for additional convenience goods floorspace in Ponteland, it is evident that approximately 87% of convenience goods expenditure generated in Zone 7 is directed to facilities elsewhere (most notably the Tesco Extra store at Kingston Park). Therefore, there could

be scope to improve the market share of Ponteland through appropriate improvement in its convenience goods offer.

Comparison Goods Retailing

10.191 Existing comparison goods facilities in Ponteland are identified to achieve a turnover of £4.10m in 2009. This equates to a market share of **0.4%** within the Study Area. This identified to increase to only 4% within Zone 7 (Ponteland). As reflected for convenience goods shopping, existing comparison goods facilities in Ponteland are identified to attract the bulk of their turnover from Zone 7 (Ponteland). Figure 10.22 identifies the extent of the comparison goods catchment of Ponteland within the Study Area.

Figure 10.22: Extent of Ponteland's Catchment within Study Area – Comparison Goods Shopping





Market Share of Ponteland– Comparison Goods Shopping

Survey Zones														
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
0.0	0.0	0.3	0.0	0.1	0.0	4.0	0.2	0.2	0.3	0.1	0.2	0.3	0.2	0.0

10.192 Table 10.50 provides a summary of the trading performance of existing comparison goods floorspace in Ponteland and compares this with expected turnover levels.

Table 10.50: Trading Performance of Current Comparison Goods Floorspace in Ponteland

Store	Gross Floorspace – sq m ¹	Net Floorspace – sq m ²	Net Comparison – sq m ³	Benchmark Turnover per sq m - £ ⁴	Benchmark Turnover - £m	Survey Estimate - £m ⁵
Ponteland						
Ponteland Town Centre	690	483	459	2,500	1.15	2.81
Waitrose, Main Street	1,550	1,008	121	9,028	1.09	
Sub-Total	2,240	1,491	580	-	2.24	2.81
Other Ponteland					1.29	1.29
TOTAL	2,240	1,491	580		3.53	4.10

Notes: ¹ – Gross Floorspace derived from Experian Goad (2009) or WYG assessment
² – Net floorspace based on WYG judgement
³ – Net comparison floorspace derived from Verdict Grocery Retailers (2009) where available and includes comparison goods element of foodstores
⁴ – Sales densities derived from Verdict (2009) or Mintel Retail Rankings (2009) for national multiples and WYG assessment for local shops
At 2007 prices

10.193 Our assessment identifies that existing comparison goods floorspace within Ponteland is trading above expected levels (by £0.57m, or 16%). Given this overtrading, our assessment (Table 10.51) identifies capacity for additional comparison goods floorspace within Ponteland through to 2026. The level of capacity identified in the long-term, though, should be treated with caution, as it would potentially represent an almost doubling of the existing comparison goods offer in Ponteland.

Table 10.51: Estimated 'Capacity' for Comparison Goods Facilities – Ponteland

Year	Turnover - £m ¹	Expenditure Available - £m ²	Surplus Expenditure - £m
2009	3.53	4.10	0.57
2014	3.71	4.69	0.98
2019	4.00	5.71	1.71
2024	4.31	7.27	2.96
2026	4.44	8.04	3.60

Notes: ¹ – Allows for increased turnover efficiency of +1.0% per annum between 2009 and 2014 and +1.5% per annum post 2014 to reflect the higher increase in expenditure forecast
² – Assumes constant market share at 0.40% within the Study Area
Allows for growth in non-store retail sales
At 2007 prices

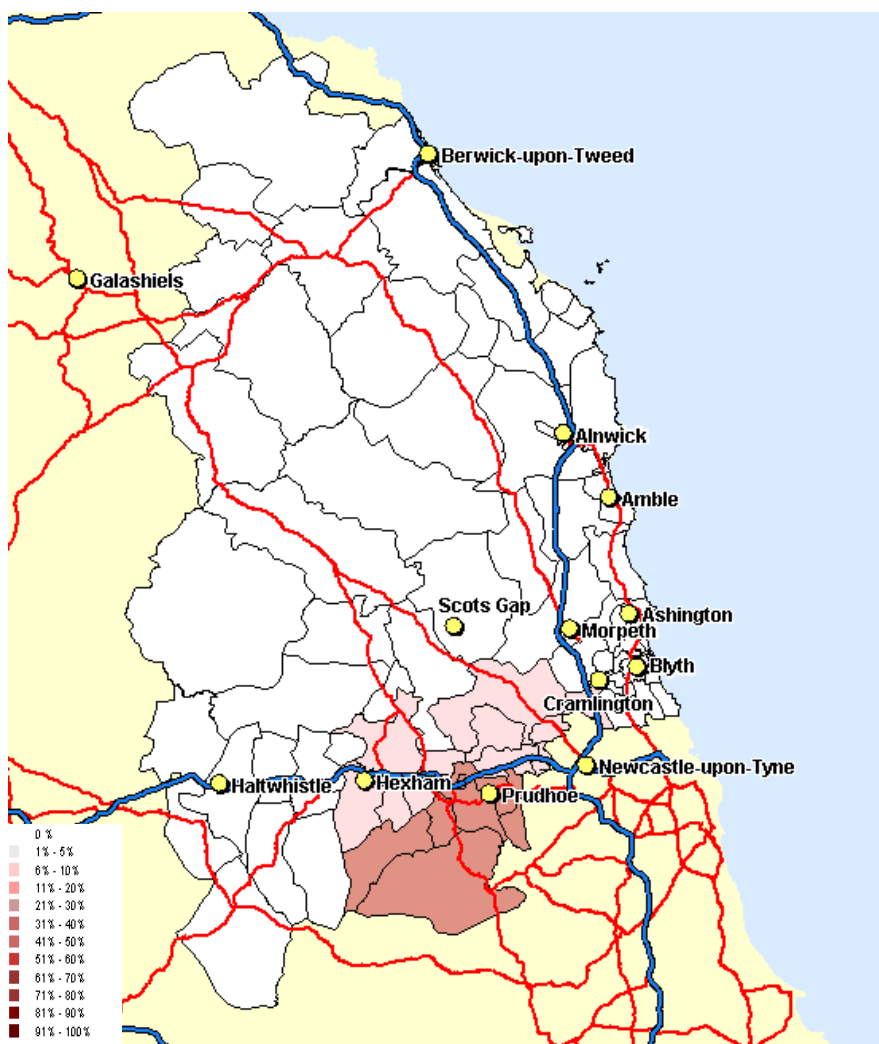
Prudhoe

10.194 Prudhoe is located in the south of the County, to the west of the urban area of Newcastle-upon-Tyne, approximately 13 miles east of Hexham and 13 miles west from Newcastle. The centre is linear with retailing focused along Front Street and its retail offer is dominated by the existing Co-op store on Oakfield Terrace. The town centre (as identified by Experian Goad) is identified to comprise 11,810 sq m of commercial floorspace, including 5,480 sq m within the retail sector.

Convenience Goods Retailing

10.195 Existing convenience goods facilities within Prudhoe are identified to draw the vast majority (93%) of their trade from Zone 8 (Prudhoe) of the defined Study Area. Overall, facilities in Prudhoe attracts a convenience goods in Prudhoe achieve a convenience goods turnover of £11.77m. This represents a market share of **1.9%**. This market share is identified to increase to 24% within Zone 8 (Prudhoe). Figure 10.23 illustrates the extent of the convenience goods catchment of Prudhoe within the Study Area.

Figure 10.23: Extent of Prudhoe's Catchment within Study Area – Convenience Goods Shopping





Market Share of Prudhoe – Convenience Goods Shopping

Survey Zones														
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
0.0	0.0	0.0	0.0	0.0	0.0	1.5	24.1	0.8	0.0	0.0	0.0	0.0	0.0	0.0

10.196 Given Prudhoe's limited catchment, existing facilities are identified to achieve a main food shopping catchment within the Study Area of 6,110 people in 2009.

10.197 Table 10.52 identifies the trading performance of existing convenience goods floorspace in Prudhoe. In this respect, existing facilities are identified to be trading above expected levels (by £2.87m, or 32%).

Table 10.52: Trading Performance of Current Foodstores in Prudhoe

Store	Gross Floorspace – sq m ¹	Net Floorspace – sq m ²	Net Convenience – sq m ³	Benchmark Turnover per sq m – £ ⁴	Benchmark Turnover – £m	Survey Estimate – £m ⁵
Prudhoe						
Co-op Superstore, Oakfield Terrace	2,070	1,456	1,208	5,789	6.99	11.09
Local Shops, Prudhoe Town Centre	860	606	545	3,500	1.91	0.68
Sub-Total	2,930	2,062	1,753		8.90	11.77
TOTAL	2,930	2,062	1,753	-	8.90	11.77

Notes: ¹ – Gross Floorspace derived from Experian Goad (2009), IGD Database (2009) or WYG/Council assessment
² – Net floorspace based on WYG judgement
³ – Net convenience floorspace derived from Verdict Grocery Retailers (2009) where available
⁴ – Sales densities derived from Verdict (2009) or Mintel Retail Rankings (2009) for national multiples and WYG assessment for local shops
At 2007 prices

10.198 Given this overtrading together with the forecast growth in expenditure, Table 10.53 identifies capacity of £3.40m in 2014, increasing to £5.09m by 2026.

Table 10.53: Estimated 'Capacity' for Convenience Goods Facilities – Prudhoe

Year	Turnover – £m ¹	Expenditure Available – £m ²	Surplus Expenditure – £m
2009	8.90	11.77	2.87
2014	8.99	12.39	3.40
2019	9.08	13.14	4.06
2024	9.17	13.93	4.76
2026	9.21	14.30	5.09

Notes: ¹ – Allows for increased turnover efficiency of +0.2% per annum
² – Assumes constant market share at 1.9% within the Study Area
At 2007 prices

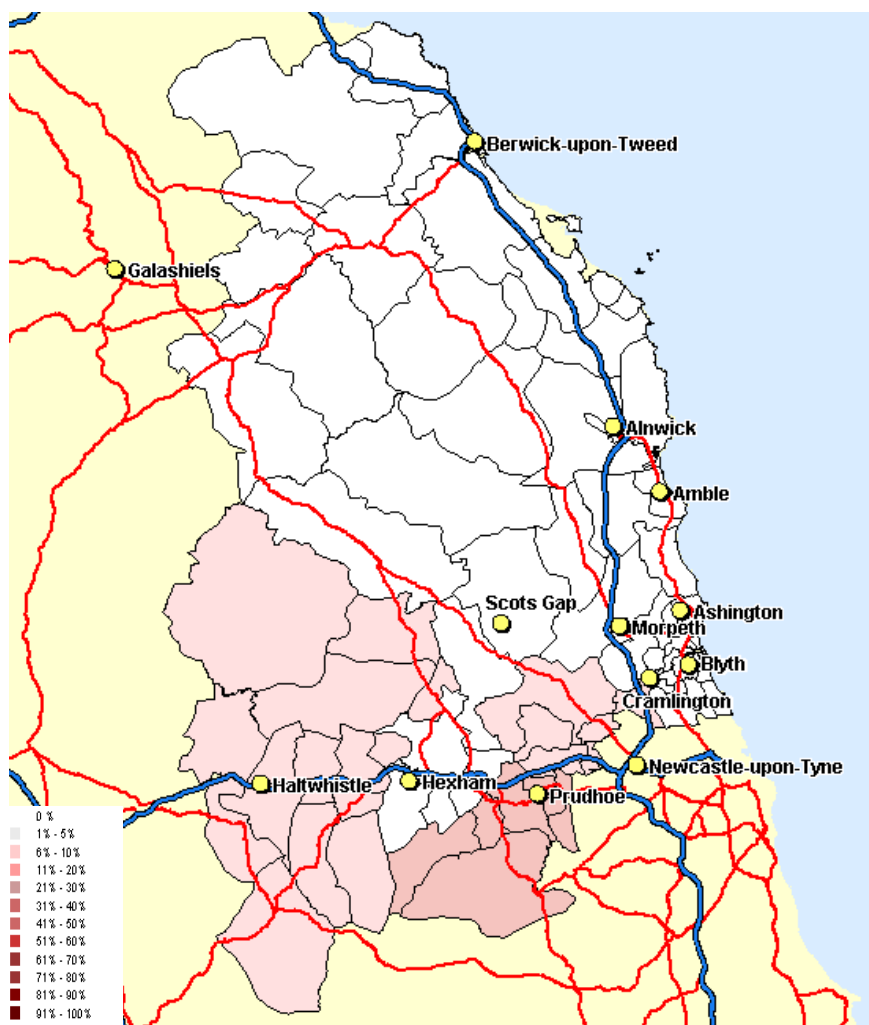
10.199 In considering future need for additional convenience goods floorspace within Prudhoe, it is important to note that planning permission was granted for a new foodstore on Front Street (4,366 sq m gross). However, following a High Court ruling this permission has since been overturned. However, the reasons for this High Court decision were due primarily to the lack of an Environmental Assessment being prepared in support of the application rather than due to the principle of retail development being inappropriate. Accordingly, should a revised scheme be submitted in the future (and we understand that a proposal is imminent), this would meet the identified need for additional convenience goods floorspace within Prudhoe, by reducing current

overtrading and reducing the need for local residents to travel elsewhere, most notably to Hexham and to the Asda store at The Metrocentre.

Comparison Goods Retailing

10.200 Existing comparison goods facilities in Prudhoe are identified to attract £6.30m of expenditure generated the Study Area in 2009. This equates to a market share of only **0.6%**. Although this market share increases to 7% within Zone 8 (Prudhoe), it is evident that the vast majority of residents within this part of the County use facilities elsewhere. This is reflective of the limited comparison goods offer within Prudhoe. Figure 10.24 indicates the extent of the comparison goods catchment of Prudhoe.

Figure 10.24: Extent of Prudhoe's Catchment within Study Area – Comparison Goods Shopping





Market Share of Prudhoe – Comparison Goods Shopping

Survey Zones														
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
0.0	0.0	0.0	0.0	0.0	0.0	0.3	7.4	0.0	0.3	0.0	0.0	0.0	0.0	0.0

10.201 Table 10.54 provides a summary of the trading performance of existing comparison goods facilities within Prudhoe.

Table 10.54: Trading Performance of Current Comparison Goods Floorspace in Prudhoe

Store	Gross Floorspace – sq m ¹	Net Floorspace – sq m ²	Net Comparison – sq m ³	Benchmark Turnover per sq m – £ ⁴	Benchmark Turnover – £m	Survey Estimate – £m ⁵
Prudhoe						
Prudhoe Town Centre	2,550	1,913	1,817	3,000	5.45	6.30
Co-op Superstore, Oakfield Terrace	2,080	1,456	248	2,258	0.56	
Sub-Total	4,630	3,369	2,068	-	6.01	6.30
TOTAL	4,530	3,369	2,068		6.01	6.30

Notes: ¹ – Gross Floorspace derived from Experian Goad (2009) or WYG assessment
² – Net floorspace based on WYG judgement
³ – Net comparison floorspace derived from Verdict Grocery Retailers (2009) where available and includes comparison goods element of foodstores
⁴ – Sales densities derived from Verdict (2009) or Mintel Retail Rankings (2009) for national multiples and WYG assessment for local shops
At 2007 prices

10.202 The findings of the Household Survey suggest that existing comparison goods floorspace in Prudhoe is trading above expected levels (by £0.29m, or 5%). Given this overtrading our assessment identifies capacity for a notable increase in the comparison goods offer in Prudhoe by 2026. However, the retail scheme at Front Street, permission for which was overturned by the High Court, included 3,807 sq m (gross) of comparison goods floorspace, together with the comparison goods element of the new foodstore. Therefore, should that proposal be resubmitted and approved, there would be no pressing need for additional comparison goods floorspace within Prudhoe.

Table 10.55: Estimated 'Capacity' for Comparison Goods Facilities – Prudhoe

Year	Turnover – £m ¹	Expenditure Available – £m ²	Surplus Expenditure – £m
2009	6.01	6.30	0.29
2014	6.32	7.02	0.70
2019	6.80	8.56	1.76
2024	7.33	10.91	3.58
2026	7.55	12.06	4.51

Notes: ¹ – Allows for increased turnover efficiency of +1.0% per annum between 2009 and 2014 and +1.5% per annum post 2014 to reflect the higher increase in expenditure forecast
² – Assumes constant market share at 0.6% within the Study Area
Allows for growth in non-store retail sales
At 2007 prices



Recommendations concerning definition of town centre and primary shopping area boundaries

- 10.203 Policy EC3.1c of PPS4 required LPAs to define the extent of centres and the primary shopping areas within centres (as defined at Annex B of PPS4) after having considered distinguishing between realistically defined primary and secondary frontages in designated centres. The definition of a town centre in Annex B includes the Primary Shopping Area (PSA) and areas of predominantly leisure, business and other town centre uses within or adjacent to the PSA. The extent of the town centre should be defined on the proposals map.
- 10.204 The PSA is defined as an area where retail development is concentrated (generally comprising the primary and secondary frontages which are contiguous with and closely related to the primary frontage). Again, it is a requirement to define the extent of the PSA on the proposals map.
- 10.205 Primary frontages are defined as those likely to include a high proportion of retail use, whereas secondary frontages have a greater opportunity for accommodating a diversity of uses. There is no express requirement to show the extent of either primary or secondary frontage on the proposals map. We interpret the advice at Policy EC3.1c of PPS4 to mean that policies relating town centres and PSA's should make it clear what uses will be permitted in those areas, rather than what uses will be permitted in primary and secondary frontages. In that respect there appears to be no support in PPS4 for the type of restrictive policies that have traditionally been used in development plans to regulate the amount of units in primary frontages changing from Class A1 to other A Class use or to other (non A Class) uses.
- 10.206 As part of this commission, we are required to review the town centre boundaries, and to propose primary shopping areas, for the existing main centres within the county, namely Cramlington, Ashington, Blyth, Hexham, Morpeth, Berwick on Tweed and Alnwick. For the identified district and local centres we would recommend that the Council at least identify a 'centre boundary' as a minimum policy requirement and to help guide future judgements as to what is in-centre, edge of centre and out of centre. Within certain larger district centres it may also be possible to identify a Primary Shopping Area boundary following the guidelines set out in PPS4.
- 10.207 In carrying out that exercise, we have:



- Taken into account the above advice in PPS4 as to what constitutes the PSA;
- As a starting point, reviewed the centre boundaries and extent of primary and secondary shopping frontages for those centres in the various relevant adopted local plans and reflected any changes that may have occurred since these were defined;
- Taken account of planned new retail developments under construction or yet to be implemented;
- Reviewed the delineation, structure and retail occupation of those town centres as defined by Experian Goad; and
- Taken into account the information derived from the Infonet health checks and site visits.

10.208 While we have taken the above factors into account for each centre, it must be noted that the recommended boundaries are ultimately a matter of professional judgement and there is no standardised methodology that can be applied to such a wide range of centres with different roles and characters. The resulting recommended centre boundaries (town centre and PSA) are shown on the plans at [Appendix 9](#).

11.0 PRINCIPAL FINDINGS AND RECOMMENDATIONS

Introduction

- 11.01 This section of the report seeks to summarise the evidence gathered as part of this study. As can be seen from the analysis undertaken there is anticipated to be notable 'capacity' across Northumberland for additional retail floorspace through to the year 2026. In addition, the analysis identifies that there is a qualitative need within parts of Northumberland to enhance and improve existing retail provision in order to provide more sustainable shopping patterns.
- 11.02 Similarly, there is a need to improve the commercial leisure offer within Northumberland in order to reduce the need for local residents to travel to competing facilities elsewhere.
- 11.03 With this in mind, it is important that Northumberland County Council are pro-active in seeking to accommodate the need identified whilst also ensuring that the vitality and viability of existing centres within Northumberland is maintain and enhanced. This section therefore summarises the key findings of the assessment of need and provides recommendations on the most appropriate strategy for incorporation within the Local Development Framework.

Towards a future strategy for town centre uses

- 11.04 The future strategy for retail and commercial leisure development in Northumberland County should be determined by taking account of a number of relevant factors, as follows:
- (v) The extent of quantitative and qualitative need for a new retail and commercial leisure floorspace identified in this study.
 - (vi) Whether it is feasible to plan to meet the full extent of the needs identified, taking into account the effects of the current severe economic downturn and considerable uncertainties over the short to medium term economic outlook; the impact on an investment in regeneration arising through planned significant cut backs in public expenditure, in a part of the country where public sector pump priming investment has traditionally been a substantial and important driver of regeneration.
 - (vii) Linked to the above, the extent of future commitment to existing regeneration strategies already being pursued for different settlements within the County, many of which are legacies inherited from the former Boroughs and Districts of Northumberland.

- (viii) Whether it is desirable to plan to meet the full extent of needs identified in the study, taking into physical and viability constraints to achieving substantial redevelopment within or on the edge of certain centres in the County. In that respect, in certain centres where the level of assessed vitality and viability is not strong, the allocation of sites for substantial retail development in out of centre locations in order to meet identified quantitative need (due to the absence of suitable, available and viable in centre or edge of centre sites) could result in a harmful impact on those centres.
- 11.05 The household shopping survey confirmed that there is considerable leakage of available expenditure from the Study area to higher order shopping locations outside the study area, particularly in terms of comparison goods. The influence of Newcastle City Centre, the Metrocentre, Gateshead and the Silverlink Shopping Park (North Tyneside) on comparison shopping patterns of residents living in the survey zones in the south and centre of the study area, is very strong. Similarly the centres of Edinburgh and Galashiels are important attractors of comparison expenditure generated in the northern study zones. This would suggest that there would be substantial benefits, when developing a retail strategy for Northumberland, to seek to claw back as much of that expenditure as possible in order to achieve more sustainable shopping related travel patterns and potentially to generate spin-off economic benefits to existing centres within the County. The assessment of floorspace needs carried out in this retail study is based on a relatively conservative, retention of existing market shares approach. The recommendations regarding strategy in this report are based on that “steady state” scenario.
- 11.06 PPS4 requires LPA’s to set out a strategy for the management and growth centres over the plan period (Policy EC 3.1) and to define a network and hierarchy of centres, having made choices about which centres will accommodate any identified need for growth in town centre floorspace, considering their expansion where necessary (Policy EC3.1 d (i)). Policy EC5.5 requires LPA’s to allocate sufficient sites in development plan documents to meet at least the first 5 years identified need.
- 11.07 In the light of that advice, the main focus of this part of the study is:
- (iv) To provide recommendations on the proposed centre hierarchy for the County.
 - (v) In the context of that hierarchy, to consider which centres should be the main focus for accommodating new town centre floorspace development.



- (vi) To provide advice on the most appropriate general areas within and on the edge of centres (or potentially out of centre locations) to search for allocation sites to meet at least the first 5 years of identified need for new retail and commercial leisure developments.

Retail Hierarchy

- 11.08 In formulating a proposed centre hierarchy for the County we have taken into account into account a number of factors:
- f) The hierarchy of centres in the adopted North East Regional Spatial Strategy (now revoked).
 - g) The definition of centres used in the various adopted development plans prepared by the constituent authorities of the new Northumberland County.
 - h) The proposed Regional retail centre hierarchy in the North East Retail and Leisure Study prepared on behalf of One North East by DTZ.
 - i) The Venuescore ranking of centres prepared by the Javelin Group.
 - j) Data on centre turnover, floorspace and market share derived from this retail study.
- 11.09 We have examined these various sources in the context of the over-arching definitions of different types of centres in Annex B of PPS4 i.e. city, town, district and local. The resulting proposed hierarchy set out below uses the PPS4 Annex B definitions in order to ensure consistency with national planning policy. The table at [Appendix 10](#) compares the designations of the 28 centres reviewed within this Study provided in the North East of England Plan, the various development plans of the former authority areas in which they sit, and in Venuescore. The final column of the table sets out the proposed designation under PPS4.
- 11.11 In reaching the conclusions on the appropriate designation of centres within the County we have taken into account the household shopping survey derived turnover of centres and also market share information and also information on the growth retail floorspace of the centres derived from the health check assessments. That information is shown at Table 11.1 below

Sub-Regional Hierarchy by centre size, turnover and market share

Table 11.1: Hierarchy and Market Share of the Main Centres within Northumberland County

Centre	Gross Retail Floorspace (sq m)	Convenience Turnover (£m)	Comparison Turnover (£m)	Total Turnover (£m)	Market Share in Study Area (%)	Market Share Amongst Centres (%)
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1. Cramlington	29,200	50.08	61.28	111.36	6.9	17.6
2. Ashington	24,250	51.40	56.22	107.62	6.6	17.0
3. Blyth	22,230	19.79	58.47	78.26	4.8	12.3
4. Hexham	18,240	4.77	58.23	63.00	3.9	10.0
5. Morpeth*	16,630	35.22	26.28	61.50	3.8	9.7
6. Berwick-upon-Tweed	22,290	4.70	55.70	60.40	3.7	9.5
7. Alnwick	13,860	22.38	30.10	52.48	3.2	8.3
8. Prudhoe	5,480	11.77	6.30	18.07	1.1	2.9
9. Bedlington	4,120	11.64	2.38	14.02	0.9	2.2
10. Ponteland	5,480	5.73	2.81	8.54	0.5	1.3
11. Amble	4,030	4.07	4.15	8.22	0.5	1.3
12. Haltwhistle	3,580	3.97	3.86	7.83	0.5	1.2
13. Newbiggin	2,720	1.57	4.32	5.89	0.4	0.9
14. Wooler	2,200	3.23	2.15	5.38	0.3	0.8
15. Seahouses	2,530	1.87	2.34	4.21	0.3	0.7
16. Rothbury	3,120	1.16	3.02	4.18	0.3	0.7
17. Corbridge	2,475	1.83	1.84	3.67	0.2	0.6
18. Allendale	1,065	2.52	0.68	3.20	0.2	0.5
19. Seaton Delaval	1,810	1.29	1.77	3.06	0.2	0.5
20. Guide Post	1,425	1.07	1.43	2.50	0.2	0.4
21. Hadston	575	1.98	0.46	2.44	0.2	0.4
22. Bellingham	830	1.38	0.76	2.14	0.1	0.3
23. Bedlington Station	2,370	0.79	0.64	1.43	0.1	0.2
24. Lynemouth	640	0.13	0.71	0.84	<0.1	0.1
25. Wriddington Station	340	0.81	0.00	0.81	<0.1	0.1
26. Haydon Bridge	835	0.77	0.00	0.77	<0.1	0.1
27. Belford	830	0.32	0.35	0.67	<0.1	0.1
28. Ellington	245	0.26	0.00	0.26	<0.1	<0.1
TOTAL	193,400	246.50	386.25	632.75	39.0	100.0

Notes: WYG (2009)

Floorspace derived from Experian Goad (August 2009) but excludes out-of-centre provision based on guidance set out in PPS4

* Does not take into account Sanderson Arcade, which was not open at the time of the survey

At 2007 prices



11.12 From the above analysis we suggest the following hierarchy of centres in the County:

- (iv) **Town centres** - Alnwick, Ashington, Berwick on Tweed, Blyth, Cramlington, Hexham and Morpeth.
- (v) **District centres** – Amble, Ponteland, Prudhoe, Haltwhistle and Bedlington.
- (vi) **Local centres** – Seahouses, Wooler, Rothbury, Belford, Seaton Delaval, Hadston, Ellington, Lynemouth, Wriddrington Station, Allendale, Bellingham, Corbridge, Haydon Bridge, Bedlington station, Guide Post and Newbiggin.

Key Recommendations and the Future Role of Proposed Town Centres

11.13 In this part of the report we set out our main recommendations relating to the future role of existing centres within the county, starting with the centres which we consider merit the status of town centre.

Alnwick Town Centre

- 11.14 The research undertaken by Infonet informing this study confirms that the centre of Alnwick is particularly vital and viable. The vacancy rate within the centre is currently well below the national average and there is a strong mix of convenience and comparison goods retailers albeit focussed more on the independent sector rather than major national multiples found in higher order centres.
- 11.15 Similar to Berwick-upon-Tweed, Alnwick also has a strong leisure offer (restaurants, cafés, bars and pubs) which seek to service both the needs of the local community and tourists who frequently visit the centre and surrounding area.
- 11.16 Similar to other historic market towns within Northumberland, Alnwick's primary shopping area is dominated by its historic core and important conservation area. As a result, the opportunities for comprehensive retail and leisure development are particularly limited. Therefore, it will continually prove difficult to accommodate large scale retail developments within the centre which leads to the provision of facilities beyond the PSA and town centre boundary once the sequential approach has been applied. A recent example of this is the new Sainsbury's store in Alnwick which could clearly not be accommodated within the town centre.

- 11.17 However, this does not rule out the potential for any future retail and leisure development within the town centre over the plan period.
- 11.18 Clearly, the findings of this study appear to suggest that there will be some modest need for additional convenience and comparison goods retail facilities in the medium to long-term (i.e. by 2019). As the current primary shopping area is effectively focussed on three streets including Bondgate Within, Market Street, and Fenkle Street, the opportunities for further development within the PSA are clearly constrained. Furthermore, the low vacancy rate within the town centre means that nay opportunity for the redevelopment of groups of vacant properties is also limited in the short to medium-term. However, there are a number of sites to the west of the town centre primarily focussed on Lagny Street which might have some potential for future redevelopment. This may also include the current bus station off Clayport Street and land including and to the rear of the Telephone Exchange off Fenkle Street. Beyond this, it is difficult to see how further redevelopment opportunities could be accommodated within the historic core without removing or significantly altering current buildings fronting onto the primary shopping streets.
- 11.19 As a result, whilst there may be opportunities for further incremental development over time within Alnwick, we do not believe that it would be sensible to plan for major retail expansion in and around Alnwick, as any significant development would have to occur in an out-of-centre location which could prove damaging to the future vitality and viability of the town centre as a whole.
- 11.20 The Practice Guidance accompanying PPS4 makes it quite clear that in historic centres, it is often more appropriate to adopt a cautious strategy to new retail and leisure development so as to ensure that the vitality and viability of the established historic core is not undermined by large scale retail and leisure developments in an out-of-centre location.

Ashington Town Centre

- 11.21 Ashington town centre is a second most important centre within the county as measured by growth retail floor space, total turnover and market share. As assessed by Infonet, the health check of the centre indicates reasonable levels of vitality and viability in terms of low vacancy rates, good level of accessibility by car and public transport. However, in respect of a number of other indicators the centre is perceived to be performing less well, such as relatively high retail yields, mediocre shopping environment, poor choice and range of shops and poor level of cleanliness.



- 11.22 The household shopping survey results showed a high level of expenditure leakage in terms of comparison goods from Zone 14 and Zone 4, the main area from which Ashington town centre attracts customers. For convenience goods within the same zones the market share of existing facilities rises to just over 60%. However that level of market share for convenience goods within Ashington core catchment area is relatively low and reflects the significant attraction of the existing large Asda store at Cowpen Road, Blyth for local shoppers.
- 11.23 However it should be noted that the household shopping survey predates the opening of the new replacement Asda store on Lintonville Road, which is well linked to the primary shopping area of the town centre and which provides a substantially enhanced convenience and comparison offer compared to the store it replaced. Hence the market share retention for convenience goods within Zones 4 and 11 and potentially also for comparison goods, is likely to have risen since the household shopping survey was carried out.
- 11.24 That large store redevelopment is an initial and vital stage in the planned regeneration of Ashington town centre, as set out in the adopted Ashington Town Centre Supplementary Planning Document (February 2010). That document proposes substantial land use changes within the defined town centre SPD area, which is somewhat smaller in its extent than the Experian Goad defined town centre area. Important proposals in that document are the creation of several substantial redevelopment sites for accommodating comparison retail development, on the site of the old Asda store and current bus station and depot, coupled with the relocation of the bus station. A range of physical improvement works are proposed to ensure strong linkage between the proposed new retail areas, the new Asda store and the traditional shopping core of the town centre located along Woodhorn Road and Station Road.
- 11.25 The needs assessment carried out in this study, which is based on a steady state market share approach, identifies substantial capacity for additional convenience goods facilities in the short term. However, most of that capacity, particularly in the short term, will be absorbed by the replacement Asda store. In terms of comparison goods, the estimated capacity for new floor space is relatively limited in the short term but becomes more substantial in the period to beyond 2019.
- 11.26 While the quantitative and qualitative need for new convenience retail floor space is likely to be met in the short term by the replacement Asda store (the effect of which increase the market share of

convenience goods expenditure retained within Zones 4 and 14) we consider that there is more substantial scope to achieve improved market share retention of comparison goods expenditure in Ashington town centre, should the planned investment proposed in the Ashington town centre SPD, be realised. One helpful factor which provides some optimism that the regeneration strategy can be realised is the relatively high level of retail operator demand for a new retail floor space within Ashington as described in paragraph 10.63 of the Study. Nevertheless, there are some fairly significant hurdles to overcome in order to achieve the preferred re-development strategy described in Figure 4 of the SPD, including the successful relocation of the bus station and depot, potentially requiring the use of CPO powers to overcome difficulties in acquisition.

- 11.27 While the aspiration to achieve substantial improvements to the retail offer within Ashington town centre are acceptable in principle, the potential effects of consequent changes in market share on the potential to achieve regeneration proposals within nearby Cramlington and Blyth will need to be addressed. As such, any new major retail proposals coming forward in conjunction with the town centre SPD would need to provide evidence on the potential impact on other centres, in accordance with Policy EC14.6 of PPS4.
- 11.28 Overall, it is concluded that its scope to accommodate substantial increased in comparison retail floor space within Ashington town centre in accordance with the adopted town centre SPD, so that there is no requirement to identify any alternative sites outside that area for additional retail floorspace over the period to 2026.

Berwick-upon-Tweed Town Centre

- 11.29 Similar to many of the historic market towns within North Northumberland, Berwick's potential for expansion is significantly constrained by its historic environment and important conservation area status. As a result, many of the modern retail developments that have taken place within Berwick have occurred beyond the town centre, as opportunities for comprehensive redevelopment within the primary shopping area are clearly constrained/limited. Also, the role and function of Berwick-upon-Tweed Town Centre is clearly constrained by the proximity of regional shopping destinations such as Edinburgh to the north, which will always have a strong influence on non-food shopping patterns within Berwick's wider catchment.



- 11.30 Despite this, the evidence gathered by Infonet confirms that Berwick-upon-Tweed is a relatively healthy centre which performs an important role in meeting both the needs of its local community/rural hinterland, as well as servicing the requirements of the many visitors to the centre throughout the year.
- 11.31 In 2006, several applications were received by the Council for further retail development within and around Berwick. The planning applications were for both convenience and comparison goods floorspace which sought to address any quantitative and qualitative deficiency which existed at that stage. The numerous applications were dealt with at a Public Inquiry which resulted in the granting of planning permission for a new Tesco foodstore, an extension to the existing Morrison's foodstore, and a new non-food retail park on North Road. In granting planning permission for the three retail developments, the Inspector concluded that Berwick-upon-Tweed was a vital and vibrant centre and that there were no sequentially superior sites available within the town centre that could accommodate the development proposed.
- 11.32 Whilst at this stage none of the schemes permitted have yet been implemented and opened for trading, it is evident that these permissions are significant material considerations when assessing the need for future redevelopment opportunities within Berwick-upon-Tweed.
- 11.33 The analysis undertaken as part of this study confirmed that convenience goods shopping patterns are still currently dominated by the existing Morrison's foodstore to the north of the town. Since the survey was completed, Asda have now occupied the existing Co-op store which will clearly provide greater competition for the existing Morrison's store, but is unlikely to fully address the qualitative deficiency identified by the Inspector when granting planning permission for the Tesco foodstore.
- 11.34 On the basis that the Morrison's extension will be implemented, and that the Tesco foodstore is now open, combined with the rebranding of the Co-op store and the previous opening of an M&S Simply foodstore, we anticipate that there will be no requirement to identify any further sites or opportunities for convenience goods floorspace development over the next plan period.
- 11.35 With regard to comparison goods floorspace, it is evident that the extension of the Morrison's store and the new Tesco foodstore will include a proportion of non-food goods. As a result, the limited medium-term need identified by the study will be more than addressed through these developments. Furthermore, although the implementation of the non-food retail park at North Road



may be more uncertain, even if that development is not implemented and planning permission lapses, the Council will only have to consider the implications of this post-2019. Therefore, it is recommended at this stage that it is unnecessary for the Council to identify significant comparison goods retail sites/opportunities within Berwick-upon-Tweed given that any need through to 2019 and beyond will be met by the existing foodstore proposals regardless of what happens to the retail warehouse scheme at North Road.

- 11.36 However, this does not rule out the potential for bringing forward small scale redevelopment opportunities within the town centre over the plan period whereby a mix of uses might be more appropriate and at a scale which can respond positively to the limited size of opportunities available within the town centre and the constraints of the conservation area.

Blyth Town Centre

- 11.37 Blyth town centre is the third most important centre within the County as measured by floorspace, total turnover and market share within the study area. In respect of the health check assessment carried out by Infonet, the centre scores relatively well in terms of a number of vitality and viability indicators including relatively low commercial yields, reasonably high shopping rents, reasonably low vacancy rates as compared to the UK average (although there are areas within the centre where vacancy levels are concentrated and relatively high). In contrast to Cramlington and Ashington, there are fewer centre visitors who are dissatisfied with the choice of shops available within the centre. The centre is viewed as being accessible by car and by public transport. Indeed it is only really in terms of the centres' cleanliness that the perception of the centres' vitality and viability is rated as relatively poor.
- 11.38 The results of the household shopping survey indicate that within Zones 5 and 12, which is the primary convenience shopping catchment area for Blyth there is a reasonably high level of expenditure retention for convenience goods expenditure (74%), although that market share is heavily influenced by the strong attraction of the out of centre Asda store Cowpen Road, on the edge of the town, which has a wide influence on convenience shopping patterns. The existing town centre convenience provision is relatively modest and the anchor store, Morrison's, is in qualitative terms, very poor. In respect of comparison retailing, as is common with most of the other settlements within Northumberland, the household shopping survey reveals substantial leakage of comparison expenditure from Blyth's shopping catchment area (Zone 12), particularly to Newcastle



City Centre. This suggests that there would be benefits in pursuing a strategy which seeks to enhance the comparison expenditure market share within Blyth. Nevertheless, even based on the steady market share approach adopted in this study, there is assessed to be substantial expenditure capacity to support new comparison retail floorspace within Blyth town centre particularly in the period from 2019 onwards.

- 11.39 We have reviewed the various public regeneration initiatives for Blyth town centre contained in the adopted development briefs for Commissioners Quay, Dun Cow Quay, the Bus Depot site and the supermarket site. The latter brief relates to the existing centre Morrison's store and adjoining land and that initiative is currently being pursued by virtue of a planning application proposing a replacement Morrison's store in accordance with the main aim of the brief. As such, the proposal should be supported in principle.
- 11.40 In respect of the Commissioners Quay and Dun Cow Quay redevelopment proposals, both of these sites are somewhat remote from the town centre and have little or no commercial presence which would render them of interest to potential retail or commercial leisure investors. Sensibly, neither of the development briefs envisage retail or commercial leisure uses as forming a major part of the proposed mixed use developments on those sites and we do not recommend their allocation for retail or major commercial leisure use.
- 11.41 The Bus Depot site, however, is within the Experian Goad defined town centre area and is well related to the existing bus station and the enclosed Keel Row shopping centre, which is the main attractor in the centre. Therefore, the redevelopment of this site provides a realistic opportunity for accommodating town centre uses, particularly comparison retail or major commercial leisure development. We understand that the key to unlocking this site in terms of availability is to identify an alternative location for the existing bus depot, which to date has proved difficult. Subject to that constraint being overcome, we would recommend that this site be safeguarded to accommodate the short to medium term requirements for comparison goods retailing within Blyth.
- 11.42 In addition, we are aware that there have been discussions over recent years with the owners of the Keel Row shopping centre regarding proposals to extend the shopping centre into the car parking area to the north. While we understand that the ownership of the Keel Row shopping centre has recently changed, the principle of extending that shopping mall in order to encourage a greater diversity of retail operators into the centre should be encouraged, subject to consideration of

alternative car parking provision. In addition to those opportunity sites, we believe there are further opportunities for redevelopment of parts of the existing centre involving existing poor quality and vacant premises on either side of Union Street.

11.43 While the level of comparison retail expenditure leakage from Zones 5 and 12 to Newcastle City Centre would suggest that it would be beneficial to adopt a strategy seeking to increase the level of market share by claw back of expenditure, we would suggest the following factors would counter that approach:

- (iv) There is no evidence of any current retail operator demand for location within Blyth.
- (v) Notwithstanding the evidence of popularity of the centre for the local people who currently shop there, it is not perceived as a priority location by the type of mainstream and higher order national multiple retailers represented in Newcastle city centre and the Metrocentre, Gateshead. Therefore, the chances of Blyth town centre attracting the critical mass of such high street retailers into the town centre to represent a realistic alternative of shopping destinations to those high order centres, is virtually nil.
- (vi) Other than the opportunity sites identified above suitable to accommodate the retail floorspace needs arising from this study, there are no obvious commercially viable, suitable and available sites within or on the edge of the town centre that could accommodate large scale comparison goods retail developments likely to be occupied by high street retailers. Therefore, any such operator requirements, arising from higher levels of quantitative need (as a result of planned increases in market share) are most likely to be met in out of centre locations, probably in the form of a retail park located close to the strategic road network (the A189). Such a development would be potentially harmful not only to Blyth town centre, but also Cramlington and Ashington.

Cramlington Town Centre

11.44 Cramlington is the largest centre in the County by floor space and turnover and has the largest market share (combined convenience and comparison expenditure) of all of the town centres in Northumberland. The health check assessment carried out by Infonet indicates that the centre is performing relatively strongly in terms of a number of the PPS4 vitality and viability indicators including the offer of a wide diversity of town centre uses; low vacancy rates; good accessibility by car and public transport and an attractive and safe shopping environment. However, there are



negative consumer perceptions of the choice of shops available in the centre and views that the centre parking could be improved as well as a perceived need for enhanced leisure facilities, including a cinema and bowling alley.

- 11.45 The household shopping results showed that the response of many residents in the defined Cramlington shopping zone (11) to the perceived lack of choice of retailing in the centre was to shop elsewhere, particularly for comparison goods, with considerable levels of comparison expenditure leakage being identified, mainly to Newcastle City Centre. In contrast, Cramlington is highly self-contained in terms of convenience shopping. The household survey reveals that very high proportion (81%) of the expenditure generated in Zone 11 (centred on Cramlington) is retained by existing stores in that zone.
- 11.46 Our assessment of need has identified a quantitative requirement for a new medium sized foodstore, or substantial extension to one of the existing foodstores over the period to 2026 and substantial quantitative capacity for new comparison floorspace has been identified over the same period, although towards the latter end (post-2019). Additional qualitative requirements for a cinema and bowling alley have been identified.
- 11.47 The assessed quantitative capacity for new floor space is based on an assumption of a steady state market share. While that is a reasonable assumption in this case for forecasting future convenience floor space capacity, the high level of leakage in comparison in goods expenditure from Zone 11 suggest that there would be major benefits in seeking to achieve a step change in the quantum and quality of comparison retail provision in Cramlington town centre. This would encourage greater numbers of local people to spend more on comparison goods retailing within that centre, resulting in a higher market share.
- 11.48 In the case of Cramlington, there is a relatively favourable set of circumstances prevailing which are likely to assist in the achievement of that objective, such as:
- (iv) The willingness of the owners of the major part of the centre (Hammerson) to achieve that step change through investment in the centre. Aspirations and emerging strategies to develop the town centre have been discussed with the Council for a number of years and we understand that a detailed, costed and phased re-development strategy, which could



potentially result in a substantial net increase in retail floor space, plus substantive improvements to leisure facilities, has been prepared.

- (v) While the existing (Experian Goad defined) town centre area is fully occupied by existing town centre uses and associated car parking, there appears to be no overriding physical or policy constraints (e.g. listed buildings/ conservation areas) to achieving redevelopment through reconfiguration, intensification and relocation of uses. Due to the planned development of the settlement as a new town, the capacity of the road system leading to and around the centre is likely to be adequate to accommodate the additional traffic movements associated with major new retail development within the centre.
- (vi) Due to the fact that the settlement has been planned as a new town, and that the town centre area is physically well defined, there is scope to achieve substantial new town centre floor space development within the (Experian Goad defined) town centre area without needing to expand those boundaries or search for out of centre locations to meet the requirements of any new developments for major retail floor space.

11.49 While supporting the principal of achieving a step change in the quantity and quality of comparison retail development in Cramlington town centre, a few notes of caution should be raised, as follows:

- (a) Detailed consideration should be given, in the context of any submitted proposals, regarding the extent to which the resulting increase in market share of comparison expenditure associated with the new development could impact on the health of other important centres within Northumberland and future planned public and private sector investment in those centres, in accordance with policy EC14.6 of PPS4.
- (b) We have some reservations about whether any redevelopment scheme for Cramlington town centre would be able to attract the critical mass of quality high street retailers to affect a significant and lasting change in the current pattern of shopping by local people in the context of the strength of the attraction of major destinations such as Newcastle City Centre and the Gateshead Metrocentre.



Hexham Town Centre

- 11.50 Hexham Town Centre again shows clear signs of being a vital and viable centre with a low vacancy rate and a good mix of independent and national multiple retailers. The town centre is clearly underpinned by a strong convenience offer, much of which is located on the edge of the town centre, including the Tesco Extra, Aldi and Waitrose supermarkets. The centre also benefits from the key anchors underpinning the retail offer including M&S and the well established Robb's department store.
- 11.51 Like many of the historic centres within Northumberland, Hexham benefits significantly from the quality of its environment and the strong presence of independent retailers which, whilst adding to the overall mix of retailers found within the town, add a quality of service which commands a loyal local catchment.
- 11.52 Although concerns were raised in the Infonet research as to a lack of car parking within the town centre, it is evident that there are a number of large car parks serving the existing foodstore and town centre which are located just a short walk from the primary shopping area. Therefore, Hexham is a highly accessible centre benefiting from its proximity to the A69 and major bus routes which serve the central core.
- 11.53 It is unsurprising, given the strong offer within the convenience goods sector to find that Hexham achieves a significant market share within its immediate catchment (Zone 9 of the Study Area). However, the strong provision of retail floorspace within Hexham when compared to the capacity/need generated by its catchment and hinterland, it would appear that there is an over-supply of convenience goods floorspace within the centre as a whole. The growth in population and expenditure through to 2026 is not significant enough to address this over-supply and therefore, it is apparent that there will be no need to identify any further sites for convenience goods floorspace within Hexham over the next plan period.
- 11.54 This position will be further reinforced by the proposed new developments within Prudhoe whereby a new foodstore will be implemented and will clearly claw back trade currently lost to Hexham reinforcing the current over-supply of floorspace identified within this study.



- 11.55 In terms of the future need for comparison goods floorspace, it is evident that Hexham again achieves a strong market share within its immediate catchment and has a significant role to play within this part of the sub-region. However, with the limited forecast growth in comparison goods expenditure over the short to medium-term (i.e. the next five to 10 years), it is anticipated that any significant need for additional comparison goods floorspace will only arise at post-2019.
- 11.56 As with the other important historic centres within Northumberland, the opportunities for comprehensive redevelopment at the very heart of the centre are extremely limited. However, there are significant areas of land located between the primary shopping area and the key edge-of-centre retail destinations which could accommodate additional retail development in the longer-term. Whilst much of this land is currently used for car parking, this does not rule out the potential opportunity for comprehensive redevelopment which would provide replacement car parking either as part of the scheme, or elsewhere within the town centre. Clearly, any expansion of the centre towards the existing Tesco Extra and Waitrose supermarket would help reinforce future linkages between these edge-of-centre retail attractors and the primary shopping core, thereby hopefully facilitating additional linked trips.
- 11.57 However, given the current limited demand in the non-food retail sector and the current over-supply of convenience goods floorspace within Hexham, we would not envisage that Hexham Town Centre would be under significant pressure to identify potential redevelopment opportunities in the short to medium-term. Clearly, the majority of town centre and edge-of-centre redevelopment is currently being driven by the convenience goods sector. Therefore, as we anticipate there will be limited demand for comparison goods retail development within Hexham in the short-term, it would appear that the Council has sufficient time to carefully consider the future expansion and development of the town centre, whereby suitable redevelopment opportunities are identified that will help reinforce the future vitality and viability of the centre, by encouraging linked trips between any new development and the established retail core focussed on Fore Street and Battlehill/Cattle Market.

Morpeth Town Centre

- 11.58 The Health Check Assessment prepared by Infonet on behalf of Northumberland County Council was prepared at a transitional period in Morpeth Town Centre's ongoing development. At that time, the key town centre redevelopment opportunity known as Sanderson Arcade had not yet been completed and was therefore not open for trading or fully let. Since the health check was



undertaken, the scheme is now up and trading and includes major high street anchor retailers such as M&S, Waterstone's, New Look, Laura Ashley, Paperchase, etc. Clearly, such a development will have had a significant impact on the health and fortunes of Morpeth Town Centre and these positive benefits are unlikely to have been fully reflected within Infonet's analysis.

- 11.59 It is evident from visiting the scheme implemented by Dransfield Properties that this is a high quality town centre redevelopment which connects directly into the existing primary shopping area with a direct route through to Bridge Street. The Arcade also provides an important link from Bridge Street through to the main car park in the town centre which also serves the existing Morrison's supermarket. By attracting major anchors including M&S, the scheme will have certainly impacted upon Morpeth's attraction within its immediate catchment and will have met a significant part of the town's needs in relation to comparison goods development within the medium to long-term.
- 11.60 The analysis undertaken as part of this report has identified that the need for future comparison goods floorspace within Morpeth through to 2026 is clearly tempered by its current market share within the wider sub-region, and the fact that the town performs an important local role serving the needs, primarily, of its local catchment/community. However, it is important to note that with the opening of Sanderson Arcade, it is likely that Morpeth will also appeal to a wider audience given the inclusion of key high street national multiples which are not present in any of the centres in the northern part of the County. As a result, it is highly likely that people living within the catchments of other centres such as Alnwick could be drawn to Morpeth Town Centre to visit key retailers including, M&S, Laura Ashley, New Look, etc.
- 11.61 Despite this, we would not expect the market share of Morpeth Town Centre to change dramatically over the emerging plan period and therefore, the town centre would still be primarily seeking to serve the needs of its local community and rural inter-land.
- 11.62 As a result, we would not anticipate the need for any major comparison goods redevelopment opportunities to be identified within the short to medium-term, i.e. within the next 10 years. The scale and quality of the Sanderson Arcade scheme provides a development which in a centre the size of Morpeth is often something that is secured once in a generation, rather than every five years. As a result, whilst there may be other opportunities to pursue further comparison goods development in the future, we do not anticipate that there will be a need to identify opportunities at this stage.



- 11.63 The analysis undertaken in relation to convenience goods floorspace identifies that current provision within Morpeth is broadly in line with current demand. However, we note that within its immediate catchment (i.e. Zones 13 and 3); there is the potential for Morpeth to increase its market share to retain a greater proportion of convenience goods shopping trips locally. Clearly, the choice at present within Morpeth Town Centre is limited to Morrison's, M&S, Lidl, and Iceland, as well as other independent convenience stores. Given that only one of the "big four" supermarkets is present within the town, it is not surprising that trade is currently leaking elsewhere, particularly if local residents do not like the Morrison's brand.
- 11.64 In order to address this qualitative shortfall, three new supermarket proposals were put before the Council this year. The Council resolved to grant planning permission for a new supermarket, again promoted by Dransfield Properties, on Staithes Lane in Morpeth Town Centre.
- 11.65 Whilst this development is currently in its early stages, it is evident that the proposed store will address the current qualitative need within Morpeth and provide greater choice and competition for local residents. The location of the proposed development will also mean that there will still be opportunities for linked trips to occur between the new foodstore and the primary shopping area within Morpeth Town Centre. This is fundamental to securing the ongoing vitality and viability of Morpeth Town Centre, given that the other two proposals would have taken valuable trade away from the existing Morrison's store which currently forms an important part of the overall town centre retail offer.
- 11.66 As the proposed new foodstore will also include an element of comparison goods floorspace, it would appear that the current proposals being pursued by Dransfield Properties will meet both the comparison goods and convenience goods needs of the town centre in the short to medium-term.
- 11.67 Therefore, at this stage we do not believe that it is necessary to identify additional sites within or on the edge of Morpeth Town Centre until greater clarity is provided as to the implementation of the proposed foodstore, and the consequences for any additional need for retail floorspace beyond this.



Key Recommendations and the Future Role of Proposed District Centres

- 11.68 In certain district centres there are existing commitments or proposals which would appear to meet the identified need in this study (such as Prudhoe and Amble). In the other centres (Bedlington, Haltwhistle and Ponteland) there would appear to be no pressing need for the Council to be allocating sites for significant retail development in the future. However, as highlighted below, there are a number of qualitative arguments that could be pursued to support additional provision in the future. As these would tend to be 'operator driven' it is possible that there will be further future commercial demand for new retail floorspace, most likely in the form of new foodstores, within those settlements. We therefore recommend that the retail strategy also incorporates a criterion based policy (reflecting on the key tests for retail development in PPS4) in order to consider the appropriateness of any such proposals over the plan period. Under Policy EC3.1d of PPS4, the opportunity is provided to set local level thresholds for the scale of edge of centre or out of centre development which should be the subject of an impact assessment under EC16.1. The default scale of development over which an impact assessment is required is 2,500 sq m gfa. Given the relatively modest scale of the various proposed district centres in Northumberland a development smaller than that size could have a potentially substantial effect on the role and function of the centre. We therefore suggest that it may be more sensible to adopt a local threshold of 1,000 sqm (gross floor area) for which the proposed criterion based policy for determining unplanned future retail proposals in those towns would apply.
- 11.69 A summary of the centres recommended to perform the role of district centres within the overall hierarchy is set out below.

Amble District Centre

- 11.70 Whilst our analysis demonstrates no clear quantitative for additional convenience goods floorspace in Amble, it is important to note that this is based on maintaining current market shares. As outlined in Section 10, some 87% of convenience goods expenditure generated in Zone 15 (Amble) is directed to facilities elsewhere, including 91% of main food shopping trips. Unsurprisingly, the most popular destinations are existing main food shopping destinations in Ashington and Blyth.
- 11.71 In summary therefore, there would appear to be a qualitative need to improve the convenience goods offer in Amble in order to address the current deficiency in main food shopping provision.



However, we are aware that outline planning permission currently exists for a 2,787 sq m (gross) foodstore in Amble. If implemented, this store will help to reduce the need for local residents to travel to facilities elsewhere (such as Ashington, Blyth and Alnwick), thereby providing more sustainable shopping patterns. The store will also include an element of comparison goods which will help meet the identified need for Amble.

Bedlington District Centre

- 11.72 There are no requirements for additional retail floorspace (convenience or comparison goods) in Bedlington, based on a continuation of an existing market shares. The estimated turnover of existing facilities are projected to outstrip the expenditure available over the whole of the period assessed. Moreover, the market share achieved by the existing shopping facilities is low, even within Zone 5 wherein Bedlington sits.
- 11.73 There is a current proposal to replace the existing Tesco store within the centre of Bedlington with a larger store and this qualitative improvement will enable a higher market share to be achieved within Zone 5 for convenience retailing, by clawing back expenditure currently being directed principally to the out of centre Asda store at Cowpen Road, Blyth. Apart from that development, we consider there is no realistic scope to achieve further quantitative or qualitative enhancement of retail provision in the short to medium term and we therefore do not recommend allocation of any sites for future retail development within Bedlington. A larger Tesco store plus the existing Netto (now owned by Asda) would provide a reasonable range in quality of food retailing for a settlement of this size. The modest scale of the centre, its proximity to Morpeth and Ashington, both higher order centres, and the evident lack of retail demand, combine to restrict the opportunity to achieve further comparison retail growth in the centre.

Haltwhistle District Centre

- 11.74 Existing facilities within Haltwhistle are identified to be trading below expected levels – particularly the Sainsbury's Local. Therefore, based on maintaining existing market share there is no clear need for additional convenience goods floorspace in Haltwhistle through to 2026. However, as previously highlighted, the vast majority of local residents within the Haltwhistle area have to travel to facilities nearby to undertake their main food shopping because of the lack of provision locally. The existing Co-op and Sainsbury's Local stores only really perform a top-up shopping role which cannot



compete with other larger foodstores elsewhere (such as Hexham). On this basis, there would appear to be a strong qualitative argument for improving the convenience goods offer in Haltwhistle (particularly focused on meeting main food shopping needs) which in turn would help to reduce the need for local residents to travel elsewhere.

- 11.75 Such a facility could also provide additional comparison goods floorspace that would also help meet the need identified in this sector.

Prudhoe District Centre

- 11.76 A combination of reasonable market share retention within Zone 8 and overtrading in the existing Co-op store, gives rise to a quantitative requirement for a modest sized new supermarket, with a turnover equivalent to a typical discount foodstore (by 2019) based on a continuation of current market shares. Such a store would bring competition and choice to the established centre which is currently dominated by a single retailer. This in turn would result in some claw back of convenience expenditure lost to the Asda store in the Metrocentre and foodstore in Hexham.

- 11.77 However, it is noted that there is the prospect of the re-submission of a proposal for large scale convenience and comparison retail floorspace on land to the rear of Front Street, within the town centre, following a High Court ruling which overturned the previous planning permission on that site.

- 11.78 Should such a large scale mixed use development (including a large foodstore) come forward, the effect would be a significant increase in retail market share within Zone 8. This could increase the overall turnover of Prudhoe town centre and the floorspace within it, to the point where it begins to operate at a higher level than the district centre status we are currently recommending for it. As such, any new proposals coming forward at Front Street will require careful scrutiny to ensure that the resulting scale of the centre and its function does not undermine the future role of Hexham as an established town centre.

Ponteland District Centre

- 11.79 Ponteland is an attractive location, offering a reasonable range and quality of convenience retail provision and retail services within a somewhat unstructured and dispersed shopping area. The main attraction within the centre is the recently opened Waitrose store, although there is also a



Sainsbury's Local store. The comparison goods market share is low within Zone 7, with considerable leakage of expenditure to higher order centres.

- 11.80 Based on the assessment of need carried out on the basis of retaining existing market shares, there is no requirement to allocate any sites for new convenient or comparison retail development within Ponteland.

Key Recommendations and the Future Role of Proposed Local Centres

- 11.81 Future demand for new retail floorspace within local centres in the county is also most likely to arise from food retailers. The appropriateness of such proposal can be assessed using a criterion based policy as suggested above. An important consideration will be whether the scale of the development proposed would be proportionate and in keeping with the role and function of the local centre, or whether it would elevate the status of the centre to the next level, potentially affecting the vitality and viability of existing district centres within the catchment area. For that reason we would suggest a local threshold of 750 sq m gfa, within the criterion based policy to apply to all of the local centres.



GLOSSARY OF TERMS

Capacity -	Retail capacity in terms of this report refers to surplus/deficit of expenditure (£m) which represents the difference between the expenditure and turnover of the identified facilities.
Study Area -	This represents the household survey area, which is based on postal sectors.
MapInfo (AnySite) -	The database used to identify population, expenditure and socio-economic breakdown of the study area population.
Comparison Goods -	Comparison goods relate to items not obtained on a frequent basis, these include clothing, footwear, household and recreational goods (Annex B, PPS4).
<i>Furniture Goods -</i>	<i>Includes all consumer expenditure on furniture, floor coverings and household textiles such as beds, sofas, tables , cupboards, bed linen, curtains, towels, lamps, mirrors, etc. – as defined by MapInfo – Explanatory Volume 2005 Expenditure.</i>
<i>DIY Goods -</i>	<i>Includes all consumer expenditure on hardware, DIY, decorators’ supplies and garden centre type goods. This category includes products such as hammers, saw, screwdrivers, wallpaper, plumbing items, floorboards, ceramic tiles, plants, pots, turf for lawns, etc.</i>
<i>Electrical Goods -</i>	<i>All consumer retail expenditure on domestic electrical and gas appliances, such as washing machines, dryers, dishwashers, ironing and press machines, cookers, freezers and fridge-freezers, coffee makers, radios, televisions, DVD players, etc.</i>
<i>Clothing & Footwear –</i>	<i>All consumer retail expenditure on shoes and other footwear, garments for men, women, children and infants either ready-to-wear or made-to-measure, underwear, ties, handkerchiefs, scarves, etc.</i>



CDs, DVDs, Books, etc. – *Includes pre-recorded and blank media such as records and compact discs; pre-recorded and unrecorded tapes, cassettes, video cassettes, diskettes and CD-ROMs, books, scrapbooks, dictionaries, etc.*

Household Goods – *Includes household textiles and soft furnishings, china, glassware, jewellery and other miscellaneous goods such as greeting cards, notebooks, pens, pencils, etc.*

Recreational Goods – *All consumer retail expenditure on bicycles and tricycles (excluding toy bicycles), musical instruments, sports equipment, camping equipment, toys of all kinds including dolls, soft toys, etc.*

Chemist Goods - *All consumer retail expenditure on prescription and non-prescription drugs, adhesive and non-adhesive bandages, first-aid kits, hot-water bottles, toilet shops, sponges, etc.*

Convenience Goods - Convenience goods relate to everyday essential items including confectionary, food, drinks, newspapers and magazines (Annex B, PPS4).

Expenditure per Capita - This is the average spend of each person within the defined study area on a variety of retail goods.

Expenditure - Expenditure is calculated by taking the population within a defined area and then multiplying this figure by average annual expenditure levels for various forms of goods.

Expenditure Forecasts - This assessment has been undertaken using the 'goods based' approach as prescribed in PPS4, the information on consumer retail expenditure forecasts have been derived from MapInfo (2008).

Forecasts based on the anticipated increase in expenditure per annum for a both convenience and comparison goods as identified by MapInfo (+1.5%



per annum (2007 to 2018) for convenience goods, +4.0% per annum (2007 to 2018) for comparison goods.

Gross Floorspace -	This represents the level of total floorspace or footprint of a specific development (i.e. sales area, storage, checkouts, café, display, etc).
Net Floorspace -	This entails the level of internal area devoted to the sale of goods.
Market Share -	Market shares derived from the household survey results, which are based on either the proportion of shopping trips or the proportion of expenditure attracted to a particular centre/facility.
National Multiple -	This is a retail or service operator which is part of a network of nine or more outlets.
Price Base -	The price base for the study is 2005; all prices are or have been adjusted to 2005 in order to be consistent.
Rates of Productivity -	This takes into account the potential for existing retail floorspace to improve their turnover productivity (e.g. smaller goods could be sold from a smaller area for more money, increased opening hours, etc.).
Sales Density -	Retail capacity figures are expressed in term of floorspace, relying on the application of assumed sales density figures to the surplus expenditure identified. This is based on the typical turnover of a store by square metre/foot.
Special Forms of Trading -	Defined by MapInfo as expenditure not directed to traditional floorspace such as the internet, mail order, party plan and vending machines and other non-store activity such as market and road-side stalls.
Trade Draw -	This refers to the level of trade attracted to a particular facility/centre.



Turnover -	The turnover figure relates to the annual turnover generated by existing facilities.
Prime A Rents -	Zone A rents (the rental value of the first six metres depth of floorspace in retail outlets from the shop window). It provides a comparable indicator of the strength of individual outlets. As retailers consider rent to reflect the margin between turnover and operational costs (plus profit), the better the trading prospects the higher the rent that the operator will be willing to pay.
Yield -	A 'yield' represents the relationship between the rental income that a property is likely to command and its capital value, expressed as a percentage.
GOAD Plans-	Provide accurate retail information on town centres, shopping areas, out-of-town retail parks and outlet villages in the UK. Provides information on fascia name, retail category, floorspace, and exact location of all retail outlets and vacant premises.
GOAD Reports -	Provide a snap-shot of the retail status or demographic make-up of Goad surveyed town centres. Provides a comprehensive breakdown of floor space and outlet count for all individual trade types in the Convenience, Comparison, Retail Service, Leisure, Financial/Business Services and Vacancy sectors.
Convenience (GOAD) -	GOAD defines this category as land uses including bakers, butchers, CTN, fishmongers, convenience store, frozen foods, greengrocers, grocers and delicatessens, health foods, markets, off licences, shoe repairs and supermarkets.
Comparison (GOAD) -	GOAD defines this category as antique shops, art and art dealers, booksellers, carpets and flooring, catalogue showrooms, charity shops, chemist and drugstores, children's and infants wear, clothing general,



crafts, gifts, china and glass, cycles and accessories, department and variety stores, DIY and home improvement, electrical and other durable goods, florists, footwear, furniture fitted, furniture general, gardens and equipment, greeting cards, hardware and household goods, jewellery, watches and silver, ladies and menswear and acc., ladies wear and accessories, leather and travel goods, menswear and accessories, music and musical instruments, music and video recordings, newsagents and stationers, office supplies, other comparison goods, photographic and optical, second-hand goods, books, etc., sports, camping and leisure goods, telephones and accessories, textiles and soft furnishings, toiletries, cosmetics and beauty products, toys, games and hobbies, vehicle and motorcycle sales and vehicle accessories.

Retail Service -

GOAD defines this clothing and fancy dress hire , dry cleaners and launderettes, filling stations, health and beauty, opticians, photo processing, photo studio, post offices, repairs, alterations and restoration, travel agents, TV, cable and video rental, vehicle rental, vehicle Repairs and Services and video tape rental.

Leisure Service -

GOAD defines this category as bars and wine bars, bingo and amusements, cafes, casinos and betting offices, cinemas, theatres and concert halls, clubs, disco, dance and nightclubs, fast food and take away, hotels and guest houses, public houses, restaurants, and sports and leisure facilities.

Financial Service -

GOAD defines this category as building societies, building supplies and services, business goods and services, employment and careers, financial services, legal services, other business services, printing & copying, property services and retail banks.

FOCUS Report-

Is a database which is used by the commercial development industry. It provides market information on retail availability within specific town centres and retail parks. Up to date retailer requirements and deals is available.



Management Horizons - Management Horizons Europe: UK Shopping Index (2008) considers approximately 7,000 retail venues in the UK, including town centres, stand alone malls, retail warehouse parks and factory outlet centres, based on a scoring system that considers the strength of multiples and anchor stores located within each venue.

City City centres are the highest level of centre identified in development plans. In terms of hierarchies, they will often be a regional centre and will serve a wide catchment. The centre may be very large embracing a wide range of activities and may be distinguished by areas which may perform different functions. (Annex B, PPS4).

Town Town centre will usually be the second level of centres after city centres and, in many cases, they will be the principal centre of centres in a local authority's area. In rural areas they are likely to be market towns and other centres of similar size and role which function as important service centres, providing a range of facilities and services for extensive rural catchment areas. In planning the future of town centres, local planning authorities should consider the function of different parts of the centre and how these contribute to its overall vitality and viability. (Annex B, PPS4).

District District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library. (Annex B, PPS4).

Local 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



laundrette. In rural areas, large villages may perform the role of a local centre. (Annex B, PPS4).

Town Centre

Defined area, including the primary shopping area and areas of predominantly leisure, business and other main town centre uses within or adjacent to the primary shopping area. The extent of the town centre should be defined on the proposals map. (Annex B, PPS4).

Primary Shopping Area

Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are contiguous and closely related to the primary shopping frontage). The extent of the primary shopping area should be defined on the proposals map. Smaller centres may not have areas of predominantly leisure, business and other main town centre uses adjacent to the primary shopping area, therefore the town centre may not extend beyond the primary shopping area. (Annex B, PPS4).

Primary Frontage

Primary frontages are likely to include a high proportion of retail uses. (Annex B, PPS4).

Secondary Frontage

Secondary frontages provide greater opportunities for a diversity of uses. (Annex B, PPS4).

Edge-of-Centre

For retail purposes, a location that is well connected to and within easy walking distance (i.e. up to 300 metres) of the primary shopping area.

For all other main town centre uses, this is likely to be within 300 metres of a town centre boundary.

In determining whether a site falls within the definition of edge-of-



centre, account should be taken of local circumstances. For example, local topography will affect pedestrians' perceptions of easy walking distance from the centre. Other considerations include barriers, such as crossing major roads and car parks, the attractiveness and perceived safety of the route and the strength of attraction and size of the town centre. A site will not be well connected to a centre where it is physically separated from it by a barrier such as a major road, railway line or river and there is no existing or proposed pedestrian route which provides safe and convenient access to the centre. (Annex B, PPS4).

Out-of-Centre

A location which is not in or on the edge of a centre but not necessarily outside the urban area. (Annex B, PPS4).

Out-of-Town

An out-of-centre development outside the existing urban area. (Annex B, PPS4).
