

Harrogate



BOROUGH COUNCIL

Harrogate Retail Study 2016 Update

Peter Brett Associates
December 2016

Document Control Sheet

Project Name: **Harrogate Retail Study**

Report Title: **2016 Update**

Project Ref: **39875**

	Name	Position	Signature	Date
Prepared by:	J Wadcock	Senior Associate	JW	15/12/16
Reviewed by:	B Greep	Equity Director	BG	20/12/16
Approved by:	B Greep	Equity Director	BG	22/12/16
For and on behalf of Peter Brett Associates LLP				

Peter Brett Associates LLP disclaims any responsibility to the client and others in respect of any matters outside the scope of this report. This report has been prepared with reasonable skill, care and diligence within the terms of the contract with the client and taking account of the manpower, resources, investigations and testing devoted to it by agreement with the client. This report has been prepared for the client and Peter Brett Associates LLP accepts no responsibility of whatsoever nature to third parties to whom this report or any part thereof is made known. Any such party relies upon the report at their own risk.

© Peter Brett Associates LLP 2016

THIS REPORT IS FORMATTED FOR DOUBLE-SIDED PRINTING.

CONTENTS

- 1 INTRODUCTION..... 1**
- 2 KEY FINDINGS FROM THE PREVIOUS STUDY 2**
 - Introduction 2
 - Study Area 2
 - Performance Analysis 3
 - Comparison Goods Shopping Patterns 4
 - Convenience Goods Shopping Patterns..... 4
 - Quantitative Need for Retail Floorspace 5
- 3 CHANGES TO DATA INPUTS..... 7**
 - Introduction 7
 - Population Projections..... 7
 - Expenditure Growth Rates 7
 - Special Forms of Trading 8
 - Sales Density Growth..... 9
 - Retail Floorspace Commitments..... 9
- 4 UPDATED RETAIL CAPACITY FORECASTS11**
 - Introduction11
 - Structure of the Quantitative Assessment.....11
 - Comparison Goods Floorspace Requirements12
 - Convenience Goods Floorspace Requirements12
- 5 CONCLUSIONS AND RECOMMENDATIONS14**
 - Retail Floorspace Requirements14
 - Recommendations14

TABLES

- Table 2.1 Quantitative Need in the Comparison Goods Sector..... 5
- Table 2.2 Quantitative Need in the Convenience Goods Sector 5
- Table 3.1 Population Projections to 2026 7
- Table 3.2 Special Forms of Trading..... 8
- Table 3.3 Sales Density Growth Rates 9
- Table 4.1 Structure of the Quantitative Assessment11
- Table 4.2 Summary of Comparison Floorspace Requirements.....12
- Table 4.3 Summary of Convenience Floorspace Requirements12

FIGURES

Figure 2.1 Study Area 2

APPENDICES

APPENDIX A QUANTITATIVE ASSESSMENT

1 INTRODUCTION

- 1.1 Harrogate Borough Council (HBC) has commissioned PBA Planning (PBA) to provide an update to the quantitative retail capacity forecasts for the district over the development plan period. The Council wishes to refresh its retail evidence base, in order to bring the study up to date with current forecasts of population growth, expenditure growth, and other key inputs which can affect the need for future retail floorspace, such as online shopping and other 'special forms of trading'.
- 1.2 This report updates the data presented at Appendix C of the Harrogate Retail Study, completed by PBA in January 2014 (hereafter referred to as the 2014 Retail Study). Our revised assessment of retail floorspace capacity should be read alongside the findings of the previous study. The remit of this update extends solely to updating the quantitative retail capacity forecasts which the 2014 Retail Study identified, and we have not been asked to update any of the other components of the previous study (for example, 'health checks' of centres in the district). The findings of both studies should therefore be considered together.
- 1.3 No new household telephone survey of shopping patterns has been undertaken in support of this update. That is because, since the previous household survey was undertaken in September 2013, there have not been any major retail developments within the study area that are likely to have had a significant impact on the shopping patterns of its residents. We therefore continue to use the findings from the household telephone survey conducted by NEMS Market Research in 2013 as the basis of our updated capacity assessment. Any new retail developments which have taken place subsequent to the completion of the telephone survey are treated as 'commitments' for the purposes of this update.
- 1.4 The remainder of our report is structured as follows:
 - **Section 2** provides a summary of the key findings of the 2014 Retail Study;
 - **Section 3** discusses the adjustments we have made to the key data inputs used for forecasting retail floorspace capacity as part of this update;
 - **Section 4** sets out the updated forecasts for new comparison and convenience retail floorspace; and
 - **Section 5** sets out a summary of our findings and our recommendations.
- 1.5 Our full data tables are contained at Appendix A.

2 KEY FINDINGS FROM THE PREVIOUS STUDY

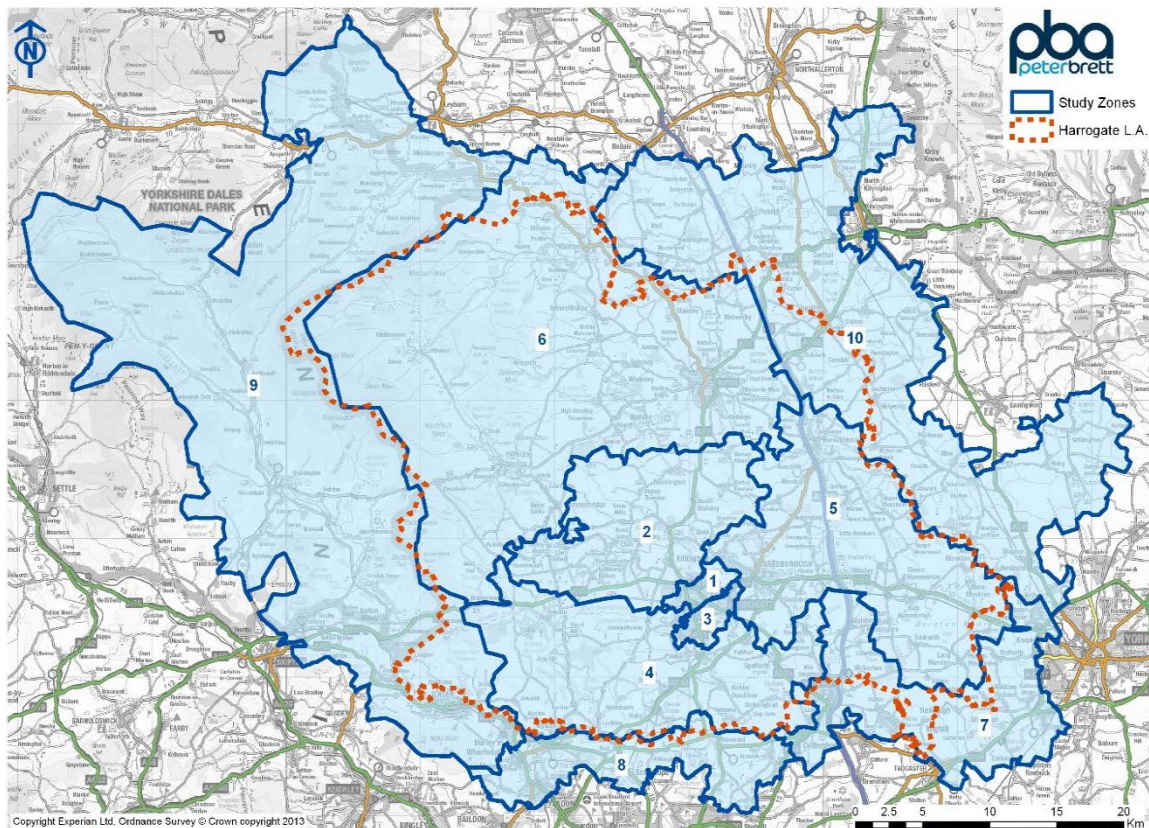
Introduction

2.1 In this section we summarise the findings of the Harrogate Retail Study ('the 2014 Retail Study') to provide context for the updated capacity forecasts which we set out in Section 4 of this report.

Study Area

2.2 The study area which forms the basis of our assessment is unchanged from that used in the 2014 Retail Study. The boundaries of the study area took account of the findings of previous retail studies that were prepared on behalf of the Borough Council and largely reflect the potential trade draw of Harrogate Town Centre. In order to get an accurate picture of shopping patterns, the study area is divided into ten survey zones, which have been defined on the basis of postcode sectors. For continuity, the boundaries and numbering of the survey zones is unchanged for the purposes of this update. A map of the study area is shown below at Figure 2.1.

Figure 2.1 Study Area



Performance Analysis

Harrogate Town Centre

- 2.3 The previous study found Harrogate Town Centre to be in very good health. It was performing well for a centre of its size and was holding its own against competing centres and destinations. Harrogate's key strengths were considered to be the quality and diversity of its comparison retail offer with excellent representation from high end national retailers and independent operators. The good performance of these sub-sectors was reflected in the town centre's low vacancy rate.
- 2.4 The convenience retail offer of the town centre was also considered to be good with Asda and Waitrose foodstores located on the edges of the centre and providing opportunities for linked shopping trips with the rest of the town centre. There was a good selection of bakers, confectioners, grocers and delicatessens that provide a distinctive and bespoke offer for residents and visitors.
- 2.5 Harrogate's town centre environment was found to be very attractive with imposing Victorian architecture and well maintained buildings and public spaces. We suggested that the priority for Harrogate Town Centre should be to consolidate its existing strengths and to ensure that it can continue to grow despite its physical constraints. We note that since the time of the previous study, the Borough Council has adopted the Harrogate Town Centre Strategy and Masterplan – also produced by PBA - as a supplementary planning document.

Other Centres

- 2.6 Ripon City Centre was found to be an attractive centre with a good convenience retail offer, a good range of services and a below average vacancy rate. However, its comparison retail offer was relatively weak and had been exacerbated by the loss of national multiples from the city centre. The priority for Ripon was considered to be the need to strengthen the range and diversity of its comparison retail offer. We suggested that this could be achieved by providing additional modern floorspace for comparison retailers and by nurturing the city centre's independent retail offer.
- 2.7 The town centre at Knaresborough was performing an important role in meeting the day-to-day shopping and service needs of the local population. We considered it to be an attractive and well-maintained market town with some good quality shops and a strong food and drink offer. However, despite the town centre's relatively low vacancy rate we considered it to be vulnerable to erosion of its offer as a result of competition from other destinations.
- 2.8 The district's other town centres at Boroughbridge, Masham and Pateley Bridge are considerably smaller than Harrogate, Ripon and Knaresborough. However, the 2014 Retail Study found that they were generally performing well as rural service centres meeting local shopping needs. Boroughbridge was a particularly vital and vibrant town centre containing a good range of comparison retail and service uses for a centre of its size.

Comparison Goods Shopping Patterns

- 2.9 Overall, the 2014 Retail Study found that 68.1 per cent of the comparison goods expenditure available to residents of the study area was retained by town centres, retail parks and freestanding stores located within the study area. Harrogate Town Centre was by far the dominant centre in terms of its comparison goods turnover which equated to £225.2 million of available expenditure (a market share of 29.3 per cent within the study area). It was a dominant centre in six of the ten study zones and had a market share of more than 10 per cent in all but one zone.
- 2.10 Ripon City Centre was the dominant destination for comparison retail expenditure within its own zone (with a market share of 39.4 per cent in Zone 6) but did not draw any significant market share from any other zone within the study area. Knaresborough Town Centre achieved a market share of 14 per cent in its own zone (Zone 5) but did not enjoy any significant market share in any other zone.
- 2.11 Approximately a third of the total comparison goods expenditure available within the study area was found to 'leak' to destinations beyond the study area. Leakage to Leeds and York accounted for almost 20 per cent of residents' comparison goods expenditure, which was to be expected given the strong influence of these larger centres over parts of the study area.

Convenience Goods Shopping Patterns

- 2.12 The 2014 Retail Study found that 84 per cent of the convenience goods expenditure available to residents of the study area was retained by town centres, retail parks and freestanding stores located in the study area. There was less leakage than in the comparison sector, because convenience shopping is generally undertaken on a more localised basis.
- 2.13 The Asda, Morrisons and Sainsbury's stores in Harrogate achieved the highest individual convenience goods market shares within the study area. There were no acute localised deficiencies in convenience goods provision, although residents located in Zones 2, 4 and 10 were served by a more limited local food and grocery offer and were found to have to travel further for their food and grocery shopping. There were no town centres located within these zones, although residents of all three areas were within easy travelling distance of existing convenience retail provision in neighbouring zones.
- 2.14 The majority of Harrogate and Ripon residents' convenience retail expenditure was spread amongst a number of convenience stores in and around the respective towns. However, the Morrisons stores in Ripon and Boroughbridge both benefited from high market shares indicating that there may be scope for some additional competition within the convenience retail market in these locations. Knaresborough was not served by any large foodstore and the 2014 Retail Study identified this as a deficiency in local provision.

Quantitative Need for Retail Floorspace

- 2.15 The quantitative need for additional comparison goods floorspace identified by the 2014 Retail Study is summarised in Table 2.1 below. These figures assumed that the amount of residents' expenditure retained by destinations within the study area remained constant over the plan period to 2026.

Table 2.1 Quantitative Need in the Comparison Goods Sector

Period	Floorspace Requirement (sq. m sales area)
2013-2016	-5,784
2016-2021	4,426
2021-2026	8,541
2013-2026	6,184

- 2.16 Table 2.1 shows that the comparison retail floorspace requirement was expected to be negative in the period up to 2016. There was, however, a positive comparison retail floorspace requirement after 2021 with the 'oversupply' in comparison goods floorspace gradually reduced by expenditure growth in the 2016-2021 period. Table 2.1 shows that there was expected to be capacity for approximately 6,184 sq. m over the entire study period.
- 2.17 The quantitative need for additional convenience goods retail floorspace (also based on a constant retention rate) is summarised in Table 2.2.

Table 2.2 Quantitative Need in the Convenience Goods Sector

Period	Floorspace Requirement (sq. m sales area)
2013-2016	-3,853
2016-2021	983
2021-2026	1,516
2013-2026	-1,353

- 2.18 Table 2.2 shows that for the catchment area as a whole, the quantitative need for additional convenience retail floorspace over the entire study period was negative. The turnover of existing commitments had a particularly significant impact on floorspace requirements by absorbing expenditure capacity.

2.19 The 2014 Retail Study also identified particular qualitative needs within the district for:

- The provision of a new foodstore in Knaresborough. This was considered to be the most obvious deficiency in convenience goods provision within the district. If located within the town centre, it was suggested that such a facility could play a key role in reinforcing its vitality and viability, as well as promoting more sustainable shopping patterns.
- Additional modern retail units in Ripon City Centre to accommodate the requirements of 'high street' comparison operators. The City Centre was under-represented in several key comparison goods sub-sectors and had limited representation from national multiples. In order to address these deficiencies and bolster the performance of the centre, it was considered important to ensure that Ripon remained competitive and was able to offer the appropriate type of floorspace required to attract new occupiers.

3 CHANGES TO DATA INPUTS

Introduction

3.1 In this section we set out the changes to the data inputs which inform our retail floorspace capacity update of the 2014 Retail Study. The changes relate to the following inputs:

- population projections;
- expenditure growth rates;
- Special Forms of Trading (such as online shopping);
- sales density growth of existing retail floorspace; and
- retail floorspace commitments.

Population Projections

3.2 Our update makes use of the most recent 2014-based population projections for each of the seven survey zones which make up the study area, provided by Experian (as per the previous study update). A summary of the resultant population growth in each of the survey zones by 2026, at the study base year of 2016, and the interval year of 2021, is shown at Table 1 of Appendix A. For ease of reference, we summarise the population growth across the study area below in Table 3.1. This shows that the total population is expected to increase by 10,067 persons over the period between 2016 and 2026, based on the Experian projections. Table 3.1 also summarises population projections from the 2014 Retail Study, showing that the total population of the study area is expected to be higher than previously assumed in each of the interval years.

Table 3.1 Population Projections to 2026

Population of Study Area	2016	2021	2026
2014 Retail Study	292,788	297,487	302,477
2016 Retail Study Update	295,068	300,018	305,135

Expenditure Growth Rates

3.3 Updated, 2015-based per capita spending on comparison and convenience goods is provided by Experian for each of the study area zones. In order to calculate how much per capita spending is likely to increase over the course of the study period, we apply expenditure growth rates sourced from Experian's Retail Planner Briefing Note 14 (RPBN 14, November 2016) to the base year figures.

3.4 In the 2014 Retail Study, we adopted comparison goods expenditure growth rates that averaged 3 per cent per annum between 2016 and 2020, and 2.9 per cent per annum from 2021 to 2026. Experian's RPBN 14 now forecasts a comparison goods

expenditure growth rate which averages 2.3 per cent per annum between 2016 and 2020, which then increases to 3.1 per cent per annum from 2021 to 2026. The lower short-term forecasts are as a result of uncertainty associated with the UK's exit from the European Union (i.e. Brexit).

- 3.5 For convenience retail goods, the 2014 Retail Study adopted an average growth rate of 0.8 per cent per annum for the period 2016 to 2026. Experian's forecasts of expenditure growth in the convenience goods sector from October 2016 have been applied to this update resulting in annual growth rates that average -0.2 per cent per annum between 2016 and 2020, and 0 per cent from 2021 to 2026. These changes reflect the ongoing price competition in the convenience goods sector and economic uncertainty associated with Brexit.
- 3.6 Full details of the growth rates applied to the base year per capita expenditure figures are set out in Table 2a (for comparison goods) and Table 2b (for convenience goods) of Appendix A.

Special Forms of Trading

- 3.7 'Special Forms of Trading' (SFT) is expenditure which is diverted from traditional retail outlets towards channels such as online shopping. SFT therefore acts as a 'claim' on the amount of expenditure that is available to support the trading of physical retail floorspace, and so it is removed from the total expenditure 'pot' in order to ensure that the residual expenditure (i.e. that which is left over having removed the SFT) is entirely available to existing and new retail floorspace.
- 3.8 Market shares for SFT were identified on a zone-by-zone basis by the household survey undertaken to support the 2014 Retail Study. We applied rates of growth implied by Experian forecasts to these existing market shares to estimate future SFT market shares over the study period. We adopt the same approach for this update, using the market shares for SFT forecast by Experian within RPN 14. The overall market shares for SFT used to inform the previous study and this update are set out below in Table 3.2. This shows that growth in SFT in the comparison retail sector is largely unchanged from the previous study, whilst market shares for SFT in the convenience retail sector are expected to grow at a slower rate over the period to 2026.

Table 3.2 Special Forms of Trading

	Comparison goods			Convenience goods		
	SFT Market Share (2014 HRS)	SFT Market Share (this study)	Difference (percentage points)	SFT Market Share (2014 HRS)	SFT Market Share (this study)	Difference (percentage points)
2016	17.4%	17.6%	+0.2	10.8%	10.1%	-0.7
2021	20.9%	20.8%	-0.1	15.2%	13.0%	-2.2
2026	21.3%	21.5%	+0.2	17.1%	15.4%	-1.7

Sales Density Growth

- 3.9 It is also necessary to make allowance for sales density growth (also known as floorspace productivity growth) for existing comparison and convenience retail floorspace within the study area. This is based on the assumption that existing stores will trade at increasingly efficient levels of turnover per sq.m over the course of the study period. Allowances for sales density growth are linked to expenditure growth and so there are a number of slight changes to sales density figures relative to those used in the 2014 Retail Study. Table 3.3 summarises the sales density growth rates we have used for the purposes of our assessment.
- 3.10 Given the continuing falls in expenditure on convenience goods, we reduce sales density rates to 0 per cent for the remainder of the period to 2026. We retain a sales density growth rate of 1.5 per cent per annum for comparison goods floorspace, reflecting overall expenditure growth rates over the period to 2026 and our view of the quality of existing retail floorspace within the study area.

Table 3.3 Sales Density Growth Rates

Sales Density Growth Allowance	Comparison goods		Convenience goods	
	2014 Study (% per annum)	This Study (% per annum)	2014 Study (% per annum)	This Study (% per annum)
	1.5%	1.5%	0.3%	0%

Retail Floorspace Commitments

- 3.11 The household survey used to inform our updated capacity assessment was undertaken in October 2013 to support the 2014 Retail Study. In order to provide an accurate indication of the amount of surplus comparison and convenience goods expenditure that is available to support new floorspace, it is necessary to deduct the estimated turnovers of retail developments which have been granted permission subsequent to October 2014, because no new household survey of shopping patterns has been undertaken. Such commitments can include developments which have commenced trading subsequent to the completion of the household survey, or sites that benefit from extant planning permissions that have not yet been implemented.

Comparison Retail Commitments

- 3.12 Table 6 of Appendix A shows the comparison retail commitments which we have included for the purposes of this update. The 2014 Retail Study accounted for eight individual comparison retail commitments that were expected to provide total sales area retail floorspace of approximately 8,369 sq. m. Of these commitments, only the new Marks & Spencer store at Leeds Road, Harrogate has been implemented. We continue to treat this development as a commitment as it was not trading at the time of the household survey undertaken to inform the 2014 Retail Study.
- 3.13 In terms of the remaining commitments, two planning permissions are considered to have expired. These are the proposed extension to the Asda store at Harrogate, and the Co-op proposals at Chain Lane, Knaresborough, both of which are now removed

from this updated assessment. The largest commitment included within the previous study was planning permission for a Tesco superstore in Harrogate. Tesco has now confirmed that it will not be proceeding with this development and its seeking to dispose of the site. This commitment has therefore also been removed. Although not implemented, planning permission for a Morrisons foodstore and a DIY store at Ripon remains extant and so these continue to be included as commitments.

- 3.14 Since the time of the previous study there have been no significant new comparison retail commitments. However, planning permission has been granted for three new foodstores in Harrogate, Knaresborough and Ripon (discussed further below) which will contain an element of comparison goods floorspace and have therefore been included in this updated assessment. The new foodstore commitment at Knaresborough also includes a number of smaller units which could potentially be used for comparison retail uses and are therefore included within our assessment.

Convenience Retail Commitments

- 3.15 Table 6 of Appendix A also shows the convenience retail commitments which we have taken account of as part of this update. As with comparison retail commitments, we continue to treat the convenience retail floorspace within the new Marks & Spencer store in Harrogate as a commitment and remove the expired Co-op permission at Knaresborough, as well as the proposed Tesco store at Harrogate.
- 3.16 In addition to the commitments previously considered, planning permission has been granted since the publication of the 2014 Retail Study for two medium-sized foodstores at Stonebridgeway, Ripon, and Manse Farm, Knaresborough. Planning permission has also been granted for a new foodstore at Oakbeck Retail Park, Harrogate, including the extension of an existing retail unit (this facility is now trading). Convenience goods floorspace within all three of these developments is included as commitments within our updated assessment.

4 UPDATED RETAIL CAPACITY FORECASTS

Introduction

- 4.1 In the previous section we set out the key changes to the data inputs which inform our updates to the comparison and convenience goods capacity forecasts for Harrogate. Based on these inputs, we set out in this section the revised comparison and convenience goods capacity forecasts for the study area. The findings of this section should be read in conjunction with the data tables set out at Appendix A.

Structure of the Quantitative Assessment

- 4.2 The data tables set out at Appendix A follow the format adopted in the 2014 Retail Study and are organised as shown in Table 4.1.

Table 4.1 Structure of the Quantitative Assessment

Table	Description
Table 1	Summarises the updated population projections in the study area zones, at the base year of 2016, and the interval years of 2021 and 2026.
Tables 2a & 2b	Show the per capita expenditure on comparison goods (2a) and convenience goods (2b) for the seven zones, at the base and interval years.
Tables 3a & 3b	Sets out updated estimates of total comparison goods spending (3a) and convenience goods spending (3b) for the study area, by multiplying the population figures in Table 1 with the per capita expenditure figures in Tables 2a and 2b. A discount is applied at each interval period for 'Special Forms of Trading' such as online shopping, as discussed in the previous section.
Table 4a	Shows the current market shares (in percentage terms) for comparison goods shopping destinations in the study area. These are unchanged from those in the 2014 Retail Study, as no new household survey has been undertaken in support of this update.
Table 4b	Applies the percentage market shares from Table 4a to the total available comparison goods expenditure shown in Table 3a, to show the turnover ¹ for each comparison goods shopping destination in monetary terms.
Tables 5a & 5b	Show the breakdown of spending on sub-categories of comparison goods.
Tables 5c & 5d	Provide a detailed breakdown of spending patterns and market shares for the key comparison goods categories of clothing and shoes, and electrical and domestic items.
Table 6	Sets out a summary of the retail planning commitments which act as a 'claim' on the total available comparison goods expenditure.
Table 7	Sets out the revised comparison goods retail capacity forecasts for the study area. Floorspace requirements are calculated on the basis of the average sales density for 2013 adopted by the 2014 Retail Study and increased to 2026 on the basis of updated assumptions in respect of sales density growth.

¹ We assume no material changes in shopping patterns between the period of the household survey (in support of the 2014 Retail Study) and this Update.

Table	Description
Tables 8a & 8b	Repeat Tables 4a and 4b but for convenience goods, showing current market shares for each individual destination and their turnover which is calculated by applying the percentage market shares to the total available convenience good expenditure identified in Table 3b.
Table 9	Sets out the revised convenience goods retail capacity forecasts for the study area. Floorspace requirements are calculated on the basis of the average sales density for 2013 adopted by the 2014 Retail Study and has been kept constant over the study period, taking account of revised assumptions in terms of sales density growth. We note that the 2014 Retail Study made an allowance for over-trading of £23.9 million in 2016. This has been removed from this update as overtrading is expected to have been reduced by the opening of committed convenience retail schemes since the time of the previous study.

Comparison Goods Floorspace Requirements

- 4.3 Table 7 of Appendix A sets out our updated assessment of comparison goods floorspace requirements over the remainder of the study period to 2026. These findings are summarised below in Table 4.2.

Table 4.2 Summary of Comparison Floorspace Requirements

	2016-21 (sq.m sales area)	2021-26 (sq.m sales area)	Total 2016-26 (sq.m sales area)
Floorspace Requirement	-5,685	9,465	3,779

- 4.4 In the short-term period to 2021, there is no requirement for additional comparison retail floorspace, with a negative capacity figure due to relatively low rates of expenditure growth, rising market shares for SFT and assuming the delivery of existing planning commitments. However, between 2021 and 2026 there is a requirement for over 9,000 sq. m of additional comparison retail sales floorspace, meaning that over the study period to 2026 there is a total requirement of approximately 3,800 sq. m sales area.

Convenience Goods Floorspace Requirements

- 4.5 Table 9 of Appendix A provides our updated assessment of convenience goods floorspace requirements over the remainder of the study period and these are summarised below in Table 4.3.

Table 4.3 Summary of Convenience Floorspace Requirements

	2016-21 (sq.m sales area)	2021-26 (sq.m sales area)	Total 2016-26 (sq.m sales area)
Floorspace Requirement	-1,883	462	-1,421

- 4.6 Our updated assessment finds that, as with comparison floorspace requirements, there is no capacity for additional convenience retail floorspace in the period to 2021,

after which there is only a modest requirement of around 450 sq. m sales area floorspace in the period 2021-2026. Over the study period to 2026 the total requirement therefore remains negative, mainly due to low or negative expenditure growth rates and the expenditure capacity claimed by existing planning commitments and rising markets shares for SFT.

5 CONCLUSIONS AND RECOMMENDATIONS

- 5.1 This report provides our updated assessments of quantitative retail capacity for Harrogate district, and serves as a refresh of the quantitative capacity forecasts set out in the Harrogate Retail Study of 2014. Specifically, it updates estimates of population growth, per capita expenditure growth, 'special forms of trading' such as online shopping, and commitments for new retail development. Given that no new household telephone survey of shopping patterns has been undertaken in support of this update, we continue to use the findings of the survey undertaken in support of the 2014 Retail Study as the basis of our assessment.

Retail Floorspace Requirements

- 5.2 As summarised in Section 4 of this report, and Tables 7 and 9 of Appendix A, we have identified a requirement for additional comparison retail sales floorspace of approximately 3,800 sq. m over the study period to 2026. In the 5-year period to 2021, there is no capacity for additional floorspace due to low rates of expenditure growth and the expected implementation of existing planning commitments. The requirements identified therefore arise in the subsequent period between 2021 and 2026.
- 5.3 In terms of convenience retail floorspace requirements, our updated assessment has found no capacity for additional floorspace over the period to 2026. This conclusion reflects that of the 2014 Retail Study, which also found no capacity for convenience goods floorspace over the study period. The negative figure results from negative rates of expenditure growth forecast in the period to 2020, rising market shares for special forms of trading and the implementation of existing planning commitments.

Recommendations

- 5.4 The retail floorspace requirements identified in this report are provided as guidelines only and do not represent maximum limits on the quantum of retail floorspace that can be developed in Harrogate in the period to 2026. Should proposals over and above the identified requirements come forward, then these will need to be assessed against the wider policies and objectives of the development plan and national planning policy.
- 5.5 As with the 2014 Retail Study, and assuming no significant changes to the health of the district's town centres over the past two years, we recommend that additional comparison retail floorspace requirements in the period after 2021 should be directed to Ripon City Centre in the first instance to support the strengthening of its comparison retail offer and its overall vitality and viability. The 2014 study provided recommendations in terms of how these requirements could be accommodated and the Borough Council will wish to review these findings.
- 5.6 This update has found no capacity for additional convenience retail floorspace within the study area in the period to 2026. We also note that some of the new commitments

that have come forward since the time of the previous study will serve to address the qualitative deficiency identified for improved convenience goods provision within Knaresborough (although they will not provide the anchor store that the previous study suggested was needed to support the vitality and viability of the town centre). The negative capacity for convenience goods floorspace over the period to 2026 should be taken into account when considering the impact of any future proposals for additional convenience goods floorspace in out-of-centre locations.

- 5.7 We recommend that the floorspace capacity figures for the period beyond 2021 should be treated as indicative, and that the capacity forecasts should be subject to regular updates throughout the study period. This is particularly the case given the inevitable uncertainty over the delivery of some existing retail floorspace commitments and the economic uncertainty created by the UK's decision to leave the European Union.

APPENDIX A QUANTITATIVE ASSESSMENT

Table 1 — Population of study area to 2026

		Harrogate Catchment										
		Zone 1 persons	Zone 2 persons	Zone 3 persons	Zone 4 persons	Zone 5 persons	Zone 6 persons	Zone 7 persons	Zone 8 persons	Zone 9 persons	Zone 10 persons	Overall total persons
2016	estimate	27,636	23,206	25,333	23,993	31,062	32,088	31,817	38,045	37,771	24,117	295,068
2021	estimate	28,111	23,588	25,697	24,387	31,501	32,630	32,471	38,935	38,280	24,418	300,018
2026	estimate	28,453	24,039	26,033	24,744	31,962	33,163	33,274	39,881	38,912	24,674	305,135

Population projections sourced from Experian Micromarketer

Table 2a — Comparison goods expenditure forecasts (per capita)

		Harrogate Catchment									
		Zone 1 £	Zone 2 £	Zone 3 £	Zone 4 £	Zone 5 £	Zone 6 £	Zone 7 £	Zone 8 £	Zone 9 £	Zone 10 £
2016	estimate	3,223	3,768	3,576	3,944	3,891	3,606	3,774	3,784	3,963	3,886
2021	estimate	3,607	4,217	4,002	4,414	4,354	4,036	4,224	4,235	4,435	4,348
2026	estimate	4,206	4,917	4,666	5,147	5,077	4,706	4,925	4,938	5,171	5,070

Applied annual expenditure growth rates:

2016 -17	3.30%
2017-18	1.40%
2018-19	1.00%
2019-23	3.00%
2024+	3.20%

Baseline (2016) data source: Experian Micromarketer (2015 prices)

Growth rates source: Experian Retail Planner 14

Table 2b — Convenience goods expenditure forecasts (per capita)

		Harrogate Catchment									
		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10
		£	£	£	£	£	£	£	£	£	£
2016	estimate	2,043	2,230	2,099	2,287	2,275	2,228	2,192	2,180	2,273	2,286
2021	estimate	2,020	2,206	2,076	2,262	2,250	2,203	2,168	2,156	2,248	2,261
2026	estimate	2,026	2,213	2,082	2,269	2,256	2,210	2,174	2,163	2,255	2,268

Applied annual expenditure growth rates:

2016-17	0.00%
2017-18	-0.20%
2018-19	-0.90%
2019-23	0.00%
2024+	0.10%

Baseline (2016) data source: Experian Micromarketer (2015 prices)
 Growth rates source: Experian Retail Planner 14

Table 3a — Comparison goods expenditure forecasts (total)

		Harrogate Catchment										
		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Overall total
		£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m
2016	Base	89.08	87.44	90.59	94.64	120.85	115.72	120.08	143.98	149.68	93.71	1105.75
	less SFT	13.65	10.77	17.02	17.62	24.77	19.46	30.97	33.45	36.39	19.78	223.87
	Residual	75.43	76.66	73.57	77.02	96.08	96.26	89.11	110.52	113.29	73.93	881.88
2021	Base	101.41	99.46	102.83	107.65	137.15	131.69	137.14	164.89	169.76	106.18	1258.17
	less SFT	18.36	14.48	22.83	23.69	33.22	26.17	41.81	45.28	48.77	26.48	301.09
	Residual	83.04	84.98	80.00	83.96	103.93	105.52	95.34	119.62	120.99	79.70	957.08
2026	Base	119.68	118.19	121.47	127.36	162.27	156.06	163.87	196.94	201.22	125.11	1492.18
	less SFT	22.40	17.79	27.87	28.97	40.63	32.06	51.64	55.90	59.75	32.25	369.25
	Residual	97.28	100.40	93.60	98.39	121.64	124.01	112.24	141.05	141.46	92.85	1,122.92
Total expenditure growth excluding SFT											241.04	

Source: Table 1 applied to Table 2a

Reduction for Special Forms of Trading (e.g. online shopping) applied as follows:

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10
2013 HHS SFT %ages	13.49%	10.85%	16.54%	16.40%	18.05%	14.81%	22.72%	20.46%	21.41%	18.59%
2016	15.32%	12.32%	18.78%	18.62%	20.50%	16.81%	25.79%	23.23%	24.31%	21.10%
2021	18.11%	14.56%	22.20%	22.00%	24.22%	19.87%	30.48%	27.46%	28.73%	24.94%
2026	18.72%	15.05%	22.95%	22.74%	25.04%	20.54%	31.51%	28.38%	29.70%	25.78%

	Experian SFT Figures	SFT % Growth	
2013	15.50%	2013-2016	13.55%
2016	17.60%	2016-2021	18.18%
2021	20.80%	2021-2026	3.37%
2026	21.50%		

Source: Experian Retail Planner 14, Estimated and forecast market share of non-store retail sales

Table 3b — Convenience goods expenditure forecasts (total)

		Harrogate Catchment										
		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Overall total
		£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m
2016	Base	56.45	51.76	53.17	54.87	70.66	71.48	69.74	82.94	85.86	55.14	652.1
	less SFT	0.67	1.53	1.88	3.13	3.87	1.99	3.59	4.41	3.08	4.64	28.8
	Residual	55.78	50.23	51.29	51.75	66.79	69.49	66.15	78.53	82.78	50.49	623.3
2021	Base	56.79	52.03	53.34	55.16	70.87	71.89	70.39	83.95	86.06	55.21	655.7
	less SFT	0.87	1.99	2.42	4.05	5.00	2.58	4.66	5.74	3.97	5.98	37.3
	Residual	55.92	50.05	50.91	51.12	65.87	69.31	65.73	78.20	82.09	49.23	618.4
2026	Base	57.65	53.19	54.20	56.14	72.12	73.29	72.35	86.24	87.75	55.96	668.9
	less SFT	1.04	2.40	2.92	4.88	6.03	3.11	5.67	6.99	4.80	7.18	45.0
	Residual	56.61	50.79	51.28	51.26	66.10	70.17	66.68	79.26	82.95	48.77	623.9
Total expenditure growth excluding SFT												0.6

Reduction for Special Forms of Trading (e.g. online shopping) applied as follows:

Reduction for Special Forms of Trading (e.g. online shopping) applied as follows:

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10
2013 HHS SFT %ages	0.84%	2.08%	2.48%	4.01%	3.85%	1.96%	3.61%	3.74%	2.52%	5.92%
2016	1.19%	2.96%	3.53%	5.70%	5.48%	2.79%	5.14%	5.31%	3.59%	8.42%
2021	1.53%	3.82%	4.54%	7.34%	7.05%	3.59%	6.62%	6.84%	4.62%	10.84%
2026	1.81%	4.52%	5.38%	8.69%	8.35%	4.25%	7.84%	8.10%	5.47%	12.84%

	Experian SFT Figures	SFT % Growth	
2013	7.10%	2013-2016	42.3%
2016	10.10%	2016-2021	28.7%
2021	13.00%	2021-2026	18.5%
2026	15.40%		

Source: Experian Retail Planner 14, Estimated and forecast market share of non-store retail sales

Table 4a — Comparison goods market shares, 2016

	Harrogate Catchment									
	Zone 1 %	Zone 2 %	Zone 3 %	Zone 4 %	Zone 5 %	Zone 6 %	Zone 7 %	Zone 8 %	Zone 9 %	Zone 10 %
Stores and centres in Zone 1										
Harrogate Town Centre	57.6%	57.7%	55.2%	35.3%	32.0%	31.2%	12.6%	10.4%	10.0%	3.8%
B&Q, Skipton Road, Harrogate	2.3%	4.0%	0.7%	1.7%	0.8%	1.5%	0.5%	0.1%	0.3%	0.1%
Asda, Bower Road, Harrogate	4.0%	2.2%	4.0%	0.5%	0.1%	1.1%	0.3%	0.0%	0.3%	0.0%
Other destinations, Zone 1	1.8%	2.0%	2.2%	0.6%	1.3%	0.8%	0.2%	0.1%	0.4%	0.0%
Sub-total, survey zone 1	65.7%	65.9%	62.1%	38.2%	34.2%	34.5%	13.6%	10.6%	10.9%	3.9%
Stores and centres in Zone 2										
Harrogate Retail Park (Oak Beck Retail Park)	0.7%	0.8%	0.7%	0.4%	1.2%	0.2%	0.3%	0.0%	0.0%	0.0%
Other destinations, zone 2	0.4%	0.2%	0.3%	0.0%	0.2%	0.5%	0.1%	0.0%	0.0%	0.0%
Sub-total, survey zone 2	1.1%	1.0%	1.1%	0.4%	1.4%	0.8%	0.4%	0.0%	0.0%	0.0%
Stores and centres in Zone 3										
Plumpton Retail Park, Harrogate	10.5%	9.6%	14.9%	9.0%	5.9%	3.1%	3.6%	0.3%	0.0%	0.2%
Other destinations, zone 3	3.5%	1.4%	4.7%	0.6%	0.9%	0.1%	3.0%	0.8%	0.0%	0.3%
Sub-total, survey zone 3	14.0%	11.0%	19.6%	9.6%	6.8%	3.2%	6.6%	1.2%	0.0%	0.5%
Stores and centres in Zone 4										
Co-operative Food, 119 Otley Road, Harrogate	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other destinations, Zone 4	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total, survey zone 4	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Stores and centres in Zone 5										
Knaresborough Town Centre	1.9%	1.1%	2.7%	1.1%	14.0%	1.5%	3.4%	0.4%	0.2%	0.3%
St James Retail Park , Knaresborough	1.8%	1.8%	5.3%	3.1%	5.0%	2.2%	4.0%	0.7%	0.3%	0.8%
Boroughbridge Town Centre	1.1%	0.2%	0.2%	0.2%	3.9%	0.7%	0.0%	0.0%	0.0%	0.1%
Other destinations, survey zone 5	0.0%	0.0%	0.2%	0.0%	2.1%	0.3%	0.0%	0.0%	0.0%	0.1%
Sub-total, survey zone 5	4.8%	3.1%	8.3%	4.4%	25.0%	4.7%	7.4%	1.1%	0.5%	1.3%
Stores and centres in survey zone 6										
Ripon City Centre	1.3%	2.7%	0.6%	0.1%	3.3%	39.4%	0.2%	0.0%	0.0%	3.8%
Pateley Bridge Town Centre	0.0%	0.0%	0.0%	0.3%	0.0%	3.3%	0.0%	0.0%	0.0%	0.0%
Other destinations, Zone 6	0.0%	0.0%	0.1%	0.0%	0.2%	1.9%	0.0%	0.0%	0.1%	0.0%
Sub-total, survey zone 6	1.3%	2.8%	0.7%	0.4%	3.4%	44.5%	0.2%	0.0%	0.2%	3.8%
Stores and centres in survey zone 7										
Wetherby Town Centre	0.2%	1.3%	0.2%	1.7%	1.2%	0.3%	14.0%	0.7%	0.0%	0.0%
Morrisons, Horsefair, Wetherby	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	3.3%	0.0%	0.0%	0.0%
Other destinations, survey zone 7	0.0%	0.0%	0.0%	0.1%	0.2%	0.0%	1.8%	0.0%	0.0%	0.0%
Sub-total, survey zone 7	0.2%	1.3%	0.2%	2.0%	1.4%	0.3%	19.1%	0.8%	0.0%	0.0%
Stores and centres in survey zone 8										
Guiseley Retail Park, Guiseley	0.1%	0.0%	0.0%	6.0%	0.0%	0.0%	0.0%	18.8%	8.2%	0.0%
Otley Town Centre	0.0%	0.0%	0.1%	12.3%	0.0%	0.0%	0.2%	10.9%	2.4%	0.0%
Guiseley Town Centre	0.0%	0.0%	0.0%	4.2%	0.0%	0.0%	0.0%	11.3%	5.9%	0.0%
Other destinations, Zone 8	0.5%	0.0%	0.4%	1.3%	0.8%	0.1%	2.4%	1.7%	0.2%	0.0%
Sub-total, survey zone 8	0.6%	0.0%	0.5%	23.8%	0.8%	0.1%	2.6%	42.6%	16.7%	0.0%
Stores and centres in survey zone 9										
Ilkley Town Centre	0.4%	0.0%	0.0%	1.8%	0.0%	0.6%	0.0%	5.1%	18.5%	0.0%
Other destinations, Zone 9	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	0.0%
Sub-total, survey zone 9	0.4%	0.0%	0.0%	1.8%	0.0%	0.6%	0.0%	5.1%	20.7%	0.0%
Stores and centres in survey zone 10										
Bedale Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	1.7%
Other destinations, Zone 10	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%
Sub-total, survey zone 10	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	2.2%
Sub-total for study area	88.3%	85.1%	92.5%	80.6%	72.9%	88.7%	50.1%	61.3%	49.5%	11.7%
Locations outside study area										
York										
Clifton Moor Retail Park, York	1.5%	3.8%	0.6%	0.6%	8.6%	0.4%	9.3%	0.2%	0.0%	25.6%
York City Centre	1.7%	1.7%	0.6%	1.7%	7.4%	1.4%	13.8%	0.5%	0.4%	20.2%
Monks Cross Retail Park, York	0.5%	0.4%	0.0%	0.2%	2.2%	0.7%	4.9%	0.0%	0.0%	10.0%
Other locations, York	0.5%	0.0%	0.7%	1.1%	2.8%	1.5%	5.7%	0.8%	0.2%	4.2%
Sub-total, York	4.3%	5.9%	1.9%	3.7%	21.1%	4.1%	33.8%	1.5%	0.6%	60.1%
Leeds										
Leeds City Centre	2.3%	4.6%	2.3%	5.5%	1.6%	2.3%	9.4%	18.4%	11.9%	1.8%
Other locations, Leeds	0.4%	0.1%	0.0%	0.9%	0.0%	0.0%	0.7%	2.3%	0.9%	0.2%
Sub-total, Leeds	2.7%	4.7%	2.3%	6.3%	1.6%	2.3%	10.1%	20.7%	12.8%	1.9%
Skipton										
Skipton Town Centre	0.0%	0.0%	0.1%	1.3%	0.0%	0.1%	0.0%	0.1%	10.0%	0.0%
Other locations, Skipton	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%	0.0%
Sub-total, Skipton	0.0%	0.0%	0.1%	1.3%	0.0%	0.1%	0.0%	0.1%	11.7%	0.0%
Northallerton										
Northallerton Town Centre	0.0%	0.5%	0.5%	0.0%	0.8%	1.3%	0.0%	0.2%	1.6%	7.1%
Other locations, Northallerton	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	0.3%	1.0%
Sub-total, Northallerton	0.0%	0.5%	0.5%	0.0%	0.8%	1.6%	0.0%	0.2%	1.8%	8.1%
Thirsk										
Thirsk Town Centre	0.4%	0.2%	0.3%	0.2%	0.2%	0.7%	0.0%	0.0%	0.0%	3.7%
Other locations, Thirsk	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Sub-total, Thirsk	0.4%	0.2%	0.3%	0.2%	0.2%	0.7%	0.0%	0.0%	0.0%	3.8%
Other locations										
Keighley Town Centre	0.2%	0.0%	0.0%	0.7%	0.0%	0.2%	0.0%	0.2%	6.6%	0.0%
Easingwold Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.5%
Bradford City Centre	0.0%	0.1%	0.0%	1.6%	0.2%	0.0%	0.0%	3.7%	2.9%	0.2%
All other locations outside study area	4.1%	3.7%	2.4%	5.7%	3.3%	2.3%	6.0%	12.1%	14.1%	9.7%
Sub-total for outside study area	11.7%	14.9%	7.5%	19.4%	27.1%	11.3%	49.9%	38.7%	50.5%	88.3%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: NEMS Household Survey market shares (composite results), September 2013

Table 4b — Comparison goods spending patterns, 2016

Harrogate Catchment												Overall total £m	Overall Market Share %
Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Zone 6 £m	Zone 7 £m	Zone 8 £m	Zone 9 £m	Zone 10 £m	Overall total £m	Overall Market Share %		
Total expenditure available to study area, 2016												881.88	
Stores and centres in Zone 1													
Harrogate Town Centre	43.47	44.20	40.63	27.18	30.77	30.00	11.25	11.49	11.28	2.82	253.1	28.7%	
B&Q, Skipton Road, Harrogate	1.72	3.08	0.48	1.33	0.77	1.46	0.45	0.12	0.29	0.07	9.78	1%	
Asda, Bower Road, Harrogate	3.00	1.70	2.94	0.42	0.10	1.03	0.24	0.00	0.30	0.00	9.73	1%	
Other destinations, Zone 1	1.34	1.52	1.62	0.50	1.23	0.75	0.21	0.08	0.45	0.00	7.70	1%	
Sub-total, survey zone 1	49.53	50.50	45.67	29.43	32.87	33.24	12.16	11.69	12.31	2.89	280.31	32%	
Stores and centres in Zone 2													
Harrogate Retail Park (Oak Beck Retail Park)	0.55	0.60	0.54	0.27	1.13	0.24	0.25	0.00	0.00	0.00	3.57	0%	
Other destinations, zone 2	0.27	0.16	0.24	0.00	0.19	0.50	0.13	0.00	0.00	0.00	1.49	0%	
Sub-total, survey zone 2	0.82	0.77	0.77	0.27	1.32	0.73	0.38	0.00	0.00	0.00	5.06	1%	
Stores and centres in Zone 3													
Plumpton Retail Park, Harrogate	7.93	7.36	10.94	6.91	5.63	2.95	3.24	0.35	0.00	0.13	45.45	5.2%	
Other destinations, zone 3	2.61	1.10	3.46	0.45	0.91	0.09	2.66	0.92	0.00	0.25	12.46	1%	
Sub-total, survey zone 3	10.55	8.46	14.41	7.36	6.54	3.04	5.90	1.27	0.00	0.38	57.91	7%	
Stores and centres in Zone 4													
Co-operative Food, 119 Otley Road, Harrogate	0.04	0.00	0.00	0.02	0.00	0.00	0.00	0.00	0.00	0.00	0.06	0%	
Other destinations, Zone 4	0.14	0.00	0.00	0.00	0.00	0.00	0.04	0.00	0.00	0.00	0.18	0%	
Sub-total, survey zone 4	0.19	0.00	0.00	0.02	0.00	0.00	0.04	0.00	0.00	0.00	0.24	0%	
Stores and centres in Zone 5													
Knaresborough Town Centre	1.41	0.86	2.01	0.85	13.42	1.45	3.07	0.47	0.24	0.23	24.0	2.7%	
St James Retail Park, Knaresborough	1.39	1.38	3.87	2.36	4.85	2.12	3.52	0.75	0.31	0.57	21.1	2.4%	
Boroughbridge Town Centre	0.82	0.13	0.11	0.13	3.72	0.72	0.00	0.00	0.00	0.10	5.73	0.6%	
Other destinations, survey zone 5	0.00	0.03	0.14	0.03	1.99	0.26	0.00	0.00	0.00	0.05	2.50	0%	
Sub-total, survey zone 5	3.62	2.40	6.13	3.37	23.97	4.54	6.59	1.23	0.56	0.95	53.37	6%	
Stores and centres in survey zone 6													
Ripon City Centre	1.01	2.09	0.45	0.10	3.12	37.89	0.16	0.00	0.03	2.84	47.7	5.4%	
Pateley Bridge Town Centre	0.00	0.00	0.00	0.21	0.00	3.16	0.00	0.00	0.00	0.00	3.37	0%	
Other destinations, Zone 6	0.00	0.03	0.08	0.00	0.16	1.79	0.00	0.00	0.15	0.00	2.21	0%	
Sub-total, survey zone 6	1.01	2.12	0.53	0.31	3.28	42.84	0.16	0.00	0.18	2.84	53.27	6%	
Stores and centres in survey zone 7													
Wetherby Town Centre	0.13	0.99	0.16	1.27	1.13	0.32	12.51	0.81	0.00	0.00	17.32	2.0%	
Morrisons, Horsefair, Wetherby	0.00	0.00	0.00	0.25	0.00	0.00	2.93	0.03	0.00	0.00	3.21	0%	
Other destinations, survey zone 7	0.00	0.00	0.00	0.05	0.17	0.00	1.61	0.00	0.00	0.00	1.83	0%	
Sub-total, survey zone 7	0.13	0.99	0.16	1.57	1.31	0.32	17.06	0.83	0.00	0.00	22.36	3%	
Stores and centres in survey zone 8													
Guiseley Retail Park, Guiseley	0.09	0.00	0.00	4.63	0.00	0.00	0.00	20.74	9.34	0.00	34.81	3.9%	
Otley Town Centre	0.00	0.00	0.08	9.47	0.00	0.00	0.16	12.02	2.77	0.00	24.5	2.8%	
Guiseley Town Centre	0.00	0.00	0.00	3.24	0.00	0.00	0.00	12.45	6.66	0.00	22.4	2.5%	
Other destinations, Zone 8	0.39	0.00	0.28	0.97	0.74	0.09	2.16	1.86	0.19	0.00	6.68	1%	
Sub-total, survey zone 8	0.48	0.00	0.36	18.31	0.74	0.09	2.32	47.08	18.97	0.00	88.34	10%	
Stores and centres in survey zone 9													
Ilkley Town Centre	0.29	0.00	0.00	1.39	0.00	0.56	0.00	5.65	21.01	0.00	28.91	3.3%	
Other destinations, Zone 9	0.00	0.00	0.00	0.02	0.00	0.00	0.00	0.00	2.44	0.00	2.46	0%	
Sub-total, survey zone 9	0.29	0.00	0.00	1.41	0.00	0.56	0.00	5.65	23.45	0.00	31.37	4%	
Stores and centres in survey zone 10													
Bedale Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.57	1.28	1.85	0%	
Other destinations, Zone 10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.32	0.32	0%	
Sub-total, survey zone 10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.57	1.60	2.17	0%	
Sub-total for study area												594.41	67.4%
Locations outside study area													
York													
Clifton Moor Retail Park, York	1.16	2.88	0.42	0.48	8.29	0.42	8.25	0.26	0.00	18.94	41.12	4.7%	
York City Centre	1.30	1.32	0.44	1.34	7.15	1.39	12.32	0.59	0.43	14.95	41.23	4.7%	
Monks Cross Retail Park, York	0.35	0.28	0.00	0.16	2.16	0.67	4.40	0.00	0.00	7.42	15.45	1.8%	
Other locations, York	0.40	0.00	0.53	0.86	2.65	1.46	5.12	0.84	0.21	3.12	15.20	2%	
Sub-total, York	3.21	4.49	1.39	2.84	20.25	3.94	30.10	1.69	0.65	44.44	112.99	12.8%	
Leeds													
Leeds City Centre	1.75	3.51	1.69	4.21	1.54	2.17	8.41	20.37	13.45	1.30	58.39	6.6%	
Other locations, Leeds	0.30	0.09	0.00	0.66	0.00	0.00	0.63	2.54	1.01	0.14	5.38	1%	
Sub-total, Leeds	2.05	3.60	1.69	4.88	1.54	2.17	9.03	22.91	14.46	1.44	63.8	7.2%	
Skipton													
Skipton Town Centre	0.00	0.00	0.11	0.97	0.00	0.11	0.00	0.13	11.31	0.00	12.63	1.4%	
Other locations, Skipton	0.00	0.00	0.00	0.00	0.00	0.03	0.00	0.00	1.99	0.00	2.02	0%	
Sub-total, Skipton	0.00	0.00	0.11	0.97	0.00	0.14	0.00	0.13	13.30	0.00	14.6	1.7%	
Northallerton													
Northallerton Town Centre	0.00	0.35	0.35	0.00	0.77	1.28	0.00	0.24	1.77	5.26	10.02	1%	
Other locations, Northallerton	0.03	0.00	0.00	0.00	0.00	0.31	0.00	0.00	0.32	0.71	1.36	0%	
Sub-total, Northallerton	0.03	0.35	0.35	0.00	0.77	1.59	0.00	0.24	2.08	5.97	11.39	1%	
Thirsk													
Thirsk Town Centre	0.31	0.12	0.20	0.14	0.16	0.72	0.00	0.00	0.00	2.75	4.40	0%	
Other locations, Thirsk	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.08	0.08	0%	
Sub-total, Thirsk	0.31	0.12	0.20	0.14	0.16	0.72	0.00	0.00	0.00	2.82	4.48	1%	
Other locations													
Keighley Town Centre	0.15	0.00	0.00	0.51	0.00	0.17	0.00	0.26	7.49	0.00	8.59	1%	
Easingwold Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.33	3.33	0%	
Bradford City Centre	0.00	0.05	0.00	1.20	0.16	0.00	0.00	4.11	3.25	0.13	8.91	1%	
All other locations outside study area	3.06	2.81	1.80	4.42	3.15	2.17	5.37	13.42	16.02	7.14	59.37	7%	
Sub-total for outside study area												287.47	32.6%
Total												881.9	100%

Source: Table 4a, Table 3a

Table 5a — Percentage Splits of Comparison Goods Expenditure

	Harrogate Catchment									
	Zone 1 %	Zone 2 %	Zone 3 %	Zone 4 %	Zone 5 %	Zone 6 %	Zone 7 %	Zone 8 %	Zone 9 %	Zone 10 %
Clothing and footwear	27.5%	25.8%	26.3%	26.8%	25.3%	25.3%	25.5%	26.2%	26.1%	24.9%
Furniture, floorcoverings, household textiles	11.5%	12.3%	11.9%	12.0%	12.2%	12.4%	12.1%	11.9%	12.2%	12.6%
Audio-visual equipment	29.5%	28.1%	29.7%	28.5%	27.9%	27.9%	28.8%	28.9%	28.4%	27.4%
Hardware, DIY	5.9%	7.0%	6.5%	6.7%	7.4%	7.5%	7.0%	6.6%	7.2%	7.8%
Chemist goods	2.8%	3.0%	2.9%	2.8%	2.9%	2.8%	3.1%	3.0%	2.9%	2.6%
Recreational goods	10.5%	11.1%	10.5%	10.2%	11.2%	10.9%	10.8%	10.7%	10.2%	11.2%
Other non-food	12.3%	12.8%	12.3%	13.0%	13.1%	13.2%	12.7%	12.6%	13.0%	13.6%

Source: Experian MMG3 (2012)

Table 5b — Total Expenditure on Different Categories of Comparison Goods in 2016

	Harrogate Catchment										Overall total £m
	Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Zone 6 £m	Zone 7 £m	Zone 8 £m	Zone 9 £m	Zone 10 £m	
Clothing and footwear	20.78	19.79	19.33	20.66	24.35	24.37	22.70	28.94	29.54	18.41	228.9
Furniture, floorcoverings, household textiles	8.66	9.40	8.76	9.28	11.69	11.92	10.76	13.13	13.84	9.29	106.7
Audio-visual equipment	22.24	21.55	21.83	21.92	26.81	26.90	25.70	31.93	32.14	20.24	251.3
Hardware, DIY	4.43	5.34	4.79	5.16	7.08	7.24	6.27	7.33	8.13	5.75	61.5
Chemist goods	2.15	2.27	2.10	2.17	2.79	2.69	2.75	3.36	3.30	1.90	25.5
Recreational goods	7.93	8.50	7.75	7.84	10.75	10.47	9.59	11.88	11.58	8.28	94.6
Other Goods (books, CDs, jewellery, glass and china, etc)	9.25	9.81	9.01	9.99	12.61	12.67	11.34	13.96	14.77	10.06	113.5
Total Comparison Goods Expenditure	75.43	76.66	73.57	77.02	96.08	96.26	89.11	110.52	113.29	73.93	881.9

Source: Table 3a, Table 5a

Table 5c — Total Expenditure on Clothing and Shoes Goods in 2016

Harrogate Catchment												Total £m	All Zones Market Share %
Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Zone 6 £m	Zone 7 £m	Zone 8 £m	Zone 9 £m	Zone 10 £m	£m	%		
Destinations in Zone 1													
Harrogate Town Centre	12.04	12.57	13.15	9.02	10.11	11.68	5.14	6.09	5.51	1.46	86.8	37.9%	
Marks & Spencer, 36-38 Cambridge Street, Harrogate	1.34	0.88	0.86	0.38	0.68	0.60	0.21	0.00	0.45	0.00	5.4	2.4%	
Other destinations, Zone 1	1.51	0.27	0.22	0.00	0.00	0.27	0.20	0.00	0.16	0.00	2.6	1.2%	
Sub total, Zone 1	14.90	13.71	14.23	9.40	10.80	12.55	5.54	6.09	6.12	1.46	94.8	41.4%	
Destinations in Zone 2													
Other destinations, zone 2	0.00	0.00	0.18	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.2	0.1%	
Sub total, Zone 2	0.00	0.00	0.18	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.2	0.1%	
Destinations in Zone 3													
Sainsbury, Wetherby Road, Harrogate	1.04	0.00	0.52	0.10	0.13	0.00	0.27	0.12	0.00	0.00	2.2	0.9%	
Other destinations, zone 3	0.00	0.00	0.09	0.00	0.12	0.00	0.00	0.00	0.00	0.00	0.2	0.1%	
Sub total, Zone 3	1.04	0.00	0.61	0.10	0.24	0.00	0.27	0.12	0.00	0.00	2.4	1.0%	
Destinations in Zone 4													
Other destinations, zone 4	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0	0.0%	
Sub total, Zone 4	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0	0.0%	
Destinations in Zone 5													
Knaresborough Town Centre	0.60	0.24	0.37	0.49	2.38	0.55	1.01	0.00	0.16	0.00	5.8	2.5%	
St James Retail Park, Knaresborough	0.48	0.54	1.42	0.65	1.82	1.16	0.86	0.00	0.00	0.13	5.8	2.5%	
Other destinations, Zone 5	0.00	0.00	0.00	0.00	0.27	0.00	0.00	0.00	0.00	0.00	0.3	0.1%	
Sub total, Zone 5	1.08	0.77	1.79	1.14	4.46	1.71	1.87	0.00	0.16	0.13	13.1	5.7%	
Destinations in Zone 6													
Ripon City Centre	0.81	0.50	0.00	0.09	0.47	4.41	0.00	0.00	0.00	0.42	6.7	2.9%	
Other destinations, Zone 6	0.00	0.00	0.00	0.19	0.00	1.62	0.00	0.00	0.00	0.00	1.8	0.8%	
Sub total, Zone 6	0.81	0.50	0.00	0.28	0.47	6.04	0.00	0.00	0.00	0.42	8.5	3.7%	
Destinations in Zone 7													
Wetherby Town Centre	0.00	0.31	0.00	0.35	0.13	0.00	1.66	0.49	0.00	0.00	2.9	1.3%	
Other destinations, Zone 7	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0	0.0%	
Sub total, Zone 7	0.00	0.31	0.00	0.35	0.13	0.00	1.66	0.49	0.00	0.00	2.9	1.3%	
Destinations in Zone 8													
Guiseley Retail Park, Guiseley	0.00	0.00	0.00	0.60	0.00	0.00	0.00	1.93	1.69	0.00	4.2	1.8%	
Otley Town Centre	0.00	0.00	0.00	1.33	0.00	0.00	0.00	1.33	0.83	0.00	3.5	1.5%	
Guiseley Town Centre	0.00	0.00	0.00	0.70	0.00	0.00	0.00	1.65	1.44	0.00	3.8	1.7%	
Other destinations, Zone 8	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0	0.0%	
Sub total, Zone 8	0.00	0.00	0.00	2.63	0.00	0.00	0.00	4.91	3.96	0.00	11.5	5.0%	
Destinations in Zone 9													
Ilkley Town Centre	0.10	0.00	0.00	1.05	0.00	0.37	0.00	1.31	4.55	0.00	7.4	3.2%	
Other destinations, Zone 9	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.25	0.00	0.2	0.1%	
Sub total, Zone 9	0.10	0.00	0.00	1.05	0.00	0.37	0.00	1.31	4.80	0.00	7.6	3.3%	
Destinations in Zone 10													
Other destinations, Zone 10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0	0.0%	
Sub total, Zone 10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0	0.0%	
Sub-total for catchment area	17.93	15.30	16.82	14.95	16.10	20.67	9.34	12.92	15.03	2.00	141.1	61.6%	
Destinations outside catchment area													
Leeds													
Leeds City Centre	0.90	1.56	0.63	2.30	0.48	0.50	3.58	10.00	4.82	0.42	25.2	11.0%	
Other locations, Leeds	0.14	0.00	0.00	0.48	0.00	0.00	0.26	0.61	0.78	0.13	2.4	1%	
Sub-total, Leeds	1.03	1.56	0.63	2.78	0.48	0.50	3.84	10.60	5.60	0.55	27.6	12%	
York													
York City Centre	0.75	0.68	0.11	0.86	2.63	0.89	3.64	0.21	0.43	5.94	16.1	7%	
Monks Cross Retail Park, York	0.11	0.16	0.00	0.17	1.51	0.33	2.09	0.00	0.00	3.61	8.0	3%	
Clifton Moor Retail Park, York	0.28	0.85	0.15	0.00	1.05	0.00	0.45	0.00	0.00	1.64	4.4	2%	
Other locations, York	0.11	0.00	0.54	0.67	0.84	1.06	1.94	0.51	0.14	0.78	6.6	3%	
Sub-total, York	1.26	1.68	0.80	1.70	6.04	2.28	8.12	0.71	0.57	11.98	35.1	15.4%	
Skipton													
Skipton Town Centre	0.00	0.00	0.09	0.17	0.00	0.00	0.00	0.13	1.51	0.00	1.9	1%	
Other locations, Skipton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.16	0.00	0.2	0%	
Sub-total, Skipton	0.00	0.00	0.09	0.17	0.00	0.00	0.00	0.13	1.67	0.00	2.1	1%	
Northallerton													
Northallerton Town Centre	0.00	0.25	0.28	0.00	0.16	0.11	0.00	0.00	0.25	0.88	1.9	1%	
Other locations, Northallerton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0	0%	
Sub-total, Northallerton	0.00	0.25	0.28	0.00	0.16	0.11	0.00	0.00	0.25	0.88	1.9	1%	
Other destinations outside catchment area	0.54	1.00	0.72	1.06	1.57	0.82	1.40	4.58	6.42	3.00	21.1	9%	
Sub-total for outside catchment area	2.84	4.49	2.52	5.71	8.25	3.71	13.36	16.02	14.51	16.41	87.8	38%	
Overall total	20.78	19.79	19.33	20.66	24.35	24.37	22.70	28.94	29.54	18.41	228.9	100%	

Source: NEMS Household Survey market shares, April 2013, Table 5b

Table 5d — Total Expenditure on Electrical Items and Domestic Items in 2016

Harrogate Catchment												All Zones Market Share
Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Total		
£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	%
Destinations in Zone 1												
Harrogate Town Centre	10.8	8.5	7.1	4.2	5.8	5.4	1.5	0.6	0.9	0.5	45.1	20.6%
Asda, Bower Road, Harrogate	0.4	0.6	1.1	0.1	0.0	0.4	0.0	0.0	0.0	0.0	2.7	1%
Other destinations, Zone 1	0.0	0.3	0.4	0.0	0.4	0.0	0.0	0.0	0.0	0.0	1.1	1%
Sub total, Zone 1	11.2	9.4	8.6	4.3	6.2	5.8	1.5	0.6	0.9	0.5	49.0	22%
Destinations in Zone 2												
Harrogate Retail Park (Oak Beck Retail Park)	0.41	0.50	0.23	0.25	0.82	0.14	0.21	0.00	0.00	0.00	2.6	1%
Other destinations, zone 2	0.26	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.3	0%
Sub total, Zone 2	0.67	0.50	0.23	0.25	0.82	0.14	0.21	0.00	0.00	0.00	2.8	1%
Destinations in Zone 3												
Plumpton Retail Park, Harrogate	0.4	0.5	0.2	0.2	0.8	0.1	0.2	0.0	0.0	0.0	2.6	1%
Other destinations, zone 3	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0%
Sub total, Zone 3	0.7	0.5	0.2	0.2	0.8	0.1	0.2	0.0	0.0	0.0	2.8	1%
Destinations in Zone 4												
Other destinations, zone 4	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0%
Sub total, Zone 4	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0%
Destinations in Zone 5												
Boroughbridge Town Centre	0.2	0.1	0.1	0.1	2.6	0.3	0.0	0.0	0.0	0.0	3.5	2%
Knaresborough Town Centre	0.0	0.0	0.7	0.1	2.4	0.4	1.1	0.0	0.0	0.1	4.8	2%
St James Retail Park, Knaresborough	0.2	0.5	0.6	0.6	0.7	0.4	1.1	0.3	0.0	0.0	4.4	2%
Other destinations, Zone 5	0.0	0.0	0.0	0.0	0.5	0.2	0.0	0.0	0.0	0.0	0.7	0%
Sub total, Zone 5	0.4	0.6	1.4	0.9	6.2	1.3	2.2	0.3	0.0	0.1	13.3	6%
Destinations in Zone 6												
Ripon City Centre	0.2	0.7	0.2	0.0	1.0	12.9	0.0	0.0	0.0	0.8	15.8	7.2%
Other destinations, Zone 6	0.0	0.0	0.0	0.0	0.1	0.7	0.0	0.0	0.0	0.0	0.8	0%
Sub total, Zone 6	0.2	0.7	0.2	0.0	1.1	13.6	0.0	0.0	0.0	0.8	16.6	8%
Destinations in Zone 7												
Wetherby Town Centre	0.00	0.60	0.00	0.13	0.28	0.00	2.16	0.00	0.00	0.00	3.2	1%
Morrisons, Horsefair, Wetherby	0.00	0.00	0.00	0.12	0.00	0.00	1.06	0.00	0.00	0.00	1.2	1%
Other destinations, Zone 7	0.00	0.00	0.00	0.00	0.00	0.00	0.21	0.00	0.00	0.00	0.2	0%
Sub total, Zone 7	0.00	0.60	0.00	0.25	0.28	0.00	3.43	0.00	0.00	0.00	4.6	2%
Destinations in Zone 8												
Guiseley Retail Park, Guiseley	0.0	0.0	0.0	3.7	0.0	0.0	0.0	12.6	5.3	0.0	21.6	9.9%
Guiseley Town Centre	0.0	0.0	0.0	2.0	0.0	0.0	0.0	6.2	3.9	0.0	12.2	5.6%
Otley Town Centre	0.0	0.0	0.0	1.0	0.0	0.0	0.0	2.0	0.4	0.0	3.4	2%
Other destinations, Zone 8	0.1	0.0	0.0	0.3	0.2	0.0	1.4	0.6	0.0	0.0	2.7	1%
Sub total, Zone 8	0.1	0.0	0.0	7.1	0.2	0.0	1.4	21.5	9.6	0.0	39.9	18%
Destinations in Zone 9												
Ilkley Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.8	1.3	0.0	2.1	1%
Other destinations, Zone 9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	0.0	0.9	0%
Sub total, Zone 9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.8	2.3	0.0	3.0	1%
Destinations in Zone 10												
Other destinations, Zone 10	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.6	0.8	0%
Sub total, Zone 10	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.6	0.8	0%
Sub-total for catchment area	18.50	17.92	19.17	17.80	18.62	22.16	11.20	24.08	13.06	2.25	164.8	75.1%
Destinations outside catchment area												
Leeds												
Leeds City Centre	0.30	0.38	0.24	0.37	0.00	0.27	1.28	2.15	3.18	0.20	8.4	3.8%
Other locations, Leeds	0.00	0.00	0.00	0.12	0.00	0.00	0.00	0.00	0.00	0.00	0.1	0%
Sub-total, Leeds	0.30	0.38	0.24	0.49	0.00	0.27	1.28	2.15	3.18	0.20	8.5	4%
York												
Clifton Moor Retail Park, York	0.3	0.6	0.0	0.0	2.4	0.0	3.5	0.0	0.0	7.7	14.6	6.7%
York City Centre	0.0	0.0	0.0	0.0	1.0	0.0	2.1	0.0	0.0	1.4	4.5	2.0%
Tesco Extra, Clifton Moor, York	0.0	0.0	0.0	0.0	0.8	0.0	1.1	0.0	0.0	0.8	2.8	1%
Other locations, York	0.0	0.0	0.0	0.0	0.0	0.0	1.2	0.0	0.0	0.2	1.5	1%
Sub-total, York	0.3	0.6	0.0	0.0	4.2	0.0	8.0	0.0	0.0	10.2	23.4	11%
Skipton												
Skipton Town Centre	0.00	0.00	0.00	0.27	0.00	0.00	0.00	0.00	3.17	0.00	3.4	2%
Other locations, Skipton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.24	0.00	0.2	0%
Sub-total, Skipton	0.00	0.00	0.00	0.27	0.00	0.00	0.00	0.00	3.41	0.00	3.7	2%
Northallerton												
Northallerton Town Centre	0.00	0.00	0.00	0.00	0.12	0.00	0.00	0.17	0.37	1.08	1.7	1%
Other locations, Northallerton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0	0%
Sub-total, Northallerton	0.00	0.00	0.00	0.00	0.12	0.00	0.00	0.17	0.37	1.08	1.7	1%
Other Towns												
Keighley Town Centre	0.00	0.00	0.00	0.47	0.00	0.00	0.00	0.24	2.47	0.00	3.2	1%
Other destinations outside catchment area	1.3	0.5	0.3	1.2	0.4	0.3	1.1	1.6	4.7	2.7	14.1	6%
Sub-total for outside catchment area	2.0	1.5	0.5	2.4	4.8	0.5	10.4	4.2	14.1	14.2	54.6	24.9%
Overall total	20.49	19.42	19.72	20.20	23.39	22.70	21.56	28.23	27.19	16.44	219.3	100%

Source: NEMS Household Survey market shares, September 2013, Table 5b

Table 6 — Retail planning commitments

Comparison goods planning commitments

	Application ref	Gross Floorspace sq.m	Net floorspace sq.m	Turnover per sq.m (2016) £	Total turnover (2016) £m	Turnover from study area	Turnover from study area (2016) £m
Morrisons, Harrogate Rd, Ripon	11/01947/FULMAJ		651	4,239	2.8	95%	2.6
DIY Store, Harrogate Rd, Ripon	11/01974/FULMAJ	4,237	3,601	2,060	7.4	90%	6.7
Garden Centre, Harrogate Rd, Ripon	11/01974/FULMAJ	1,035	1,035	1,030	1.1	90%	1.0
M&S, 91-97 Leeds Rd, Harrogate	12/00816/FULMAJ	3,017	692	11,839	8.2	95%	7.8
Manse Farm, Knaresborough	13/00535/EIAMAJ	2,788	906	6,274	5.7	95%	5.4
Aldi, Oakbeck Retail Park, Harrogate	14/00205/DVCON	1,368	210	7,025	1.5	95%	1.4
Aldi Stonebridgigate, Ripon	14/00969/FULMAJ	1,536	228	7,025	1.6	95%	1.5
Total			7,323	-	28.2		26.4

Convenience goods planning commitments							
Morrisons, Harrogate Rd	11/01947/FULMAJ		710	12,051	8.6	95%	8.1
M&S, 91-97 Leeds Rd	12/00816/FULMAJ	3,017	846	9,983	8.4	95%	8.0
Manse Farm, Knaresborough	13/00535/EIAMAJ	2,788	692	10,000	6.9	95%	6.6
Aldi, Oakbeck Retail Park, Harrogate	14/00205/DVCON	1,368	840	9,089	7.6	95%	7.3
Aldi Stonebridgigate, Ripon	14/00969/FULMAJ	1,536	912	9,089	8.3	95%	7.9
Total			4,000	-	39.85		37.9

Source: Floorspace data from Harrogate Borough Council and turnovers calculated on basis of Mintel data and PBA estimates

Table 7 — Comparison goods capacity forecasts for study area

Constant market share

Row		2016	2021	2026	Incremental Growth		
					2016-21	2021-26	2016-26
	Total Retained Expenditure						
A	Total Population	295,068	300,018	305,135	4,950	5,117	10,067
B	Total Expenditure £m	881.88	957.08	1122.92	75.20	165.84	241
C	Retained Expenditure %	67.4%	67.4%	67.4%			
D	Retained Expenditure £m	594.41	645.10	756.88	50.69	111.78	162.47
	Turnover of Comparison Stores in OCA Drawn from Catchment Area						
E	Total Comparison Retail Turnover of Stores in OCA £m	594.41	669.60	721.35	75.19	51.75	126.94
	Commitments						
F	Comparison Retail Commitments £m	10.71	29.70	32.00	18.99	2.30	21.29
G	Initial Residual Comparison Retail Expenditure £m	-10.71	-54.20	3.54	-43.50	57.74	14.24
	Inflow of Expenditure from Outside the Catchment Area						
H	Inflow (%)	10%	10%	10%			
I	Inflow £m	59.44	64.51	75.69	5.07	11.18	16.25
	SUMMARY						
J	Initial Residual Comparison Retail Expenditure £m				-43.50	57.74	14.24
K	Growth in Inflow £m				5.07	11.18	16.25
L	FINAL RESIDUAL COMPARISON RETAIL EXPENDITURE £m				-38.43	68.92	30.49
	Conversion to floorspace requirement						
M	Turnover per sq m (assumed)				6,759	7,281	-
N	Floorspace Requirement for study area (sq.m net)				-5,685	9,465	3,779
O	Floorspace Requirement for study area (sq.m gross)				-8,122	13,521	5,399

Assumed Sales efficiency growth of 1.5% per annum

Turnover per sq.m at 2016 PBA estimate. Turnover per sq.m increased to 2026 in line with sales efficiency growth rates shown above

Total requirement shown is cumulative. Gross: net ratio of 70%

Table 8a — Convenience goods market shares, 2016

	Harrogate Catchment									
	Zone 1 %	Zone 2 %	Zone 3 %	Zone 4 %	Zone 5 %	Zone 6 %	Zone 7 %	Zone 8 %	Zone 9 %	Zone 10 %
Foodstores in Zone 1										
Asda, Bower Road, Harrogate	33.5%	34.8%	16.5%	7.5%	3.5%	3.3%	2.6%	0.3%	0.4%	0.0%
Harrogate Town Centre	7.5%	4.6%	8.3%	3.1%	0.5%	1.0%	0.6%	0.3%	0.5%	0.0%
Waitrose, 92 Station Parade, Harrogate	6.8%	7.9%	4.4%	5.4%	0.3%	1.0%	1.2%	0.3%	0.3%	0.0%
Other destinations, Zone 1	5.5%	4.8%	2.3%	3.2%	1.1%	1.2%	1.4%	0.6%	0.2%	0.4%
Sub-total, survey zone 1	53.3%	52.1%	31.4%	19.1%	5.5%	6.5%	5.8%	1.5%	1.4%	0.4%
Foodstores in Zone 2										
Co-operative Food, Jennyfield Drive, Harrogate	1.6%	5.1%	0.6%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other destinations, Zone 2	1.8%	3.5%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total, survey zone 2	3.4%	8.6%	0.8%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Foodstores in Zone 3										
Morrisons, Plumpton Park, Hookstone Chase, Harrogate	20.4%	13.2%	37.8%	7.2%	12.9%	1.8%	0.5%	0.4%	0.0%	0.0%
Sainsbury, Wetherby Road, Harrogate	13.2%	14.6%	19.9%	10.6%	13.8%	2.8%	2.5%	4.1%	0.0%	0.0%
Other destinations, Zone 3	2.3%	0.3%	8.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total, survey zone 3	35.9%	28.1%	65.7%	18.9%	26.8%	4.6%	3.0%	4.5%	0.0%	0.0%
Foodstores in Zone 4										
Sainsbury's Local, 67-71 Cold Bath Road, Harrogate	0.5%	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%
Other destinations, Zone 4	1.3%	0.0%	0.1%	2.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total, survey zone 4	1.8%	0.0%	0.1%	4.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%
Foodstores in Zone 5										
Morrisons, Stump Cross, Boroughbridge	0.0%	2.4%	0.0%	0.0%	33.2%	5.1%	0.5%	0.0%	0.0%	14.9%
Lidl, York Road, Knaresborough	1.0%	0.1%	0.6%	0.7%	5.9%	0.0%	1.0%	0.0%	0.0%	0.0%
Knaresborough Town Centre	0.5%	0.3%	0.4%	0.1%	4.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Boroughbridge Town Centre	0.0%	0.0%	0.0%	0.1%	3.4%	0.6%	0.0%	0.0%	0.0%	0.4%
Other destinations, Zone 5	1.4%	0.4%	0.1%	0.0%	5.6%	0.0%	0.1%	0.3%	0.0%	0.0%
Sub-total, survey zone 5	2.9%	3.1%	1.1%	0.9%	52.5%	5.7%	1.6%	0.3%	0.0%	15.2%
Foodstores in Zone 6										
Morrisons, Harrogate Road, Ripon	0.0%	6.0%	0.0%	0.0%	0.0%	40.1%	0.0%	0.0%	0.0%	1.0%
Sainsbury, 5 Market Place South, Ripon	0.0%	0.0%	0.0%	0.0%	0.4%	18.3%	0.0%	0.0%	0.0%	0.6%
Booths, Marshall Way, Ripon	0.0%	0.6%	0.3%	0.0%	0.4%	7.9%	0.0%	0.0%	0.0%	0.6%
Ripon City Centre	0.1%	0.4%	0.0%	0.0%	0.2%	5.9%	0.0%	0.0%	0.0%	0.0%
Pateley Bridge Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	4.0%	0.0%	0.0%	0.0%	0.0%
Other destinations, Zone 6	0.0%	0.2%	0.0%	0.0%	0.0%	2.3%	0.0%	0.0%	0.0%	0.9%
Sub-total, survey zone 6	0.1%	7.2%	0.3%	0.0%	1.0%	78.5%	0.0%	0.0%	0.0%	3.0%
Foodstores in Zone 7										
Morrisons, Horsefair, Wetherby	0.0%	0.0%	0.0%	6.7%	2.8%	0.3%	42.2%	4.4%	0.0%	0.0%
Sainsbury, Mill Lane, Tadcaster	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	7.3%	0.0%	0.0%	0.0%
Wetherby Town Centre	0.0%	0.0%	0.1%	1.1%	0.4%	0.0%	6.8%	0.1%	0.0%	0.0%
Sainsbury's Local, 13 Crossley Street, Wetherby	0.0%	0.0%	0.0%	4.7%	1.1%	0.0%	1.6%	0.0%	0.0%	0.0%
Other destinations, Zone 7	0.0%	0.0%	0.0%	0.4%	0.3%	0.0%	7.9%	0.4%	0.0%	0.3%
Sub-total, survey zone 7	0.0%	0.0%	0.1%	12.9%	5.1%	0.3%	65.8%	5.0%	0.0%	0.3%
Foodstores in Zone 8										
Morrisons, 89 Otley Road, Guiseley	0.0%	0.0%	0.0%	5.1%	0.0%	0.0%	0.0%	34.0%	6.8%	0.0%
Sainsbury, 11 Bondgate, Otley	0.0%	0.0%	0.0%	13.0%	0.0%	0.0%	0.0%	17.7%	5.2%	0.0%
Waitrose, 60 Westgate, Otley	0.0%	0.6%	0.0%	12.0%	0.1%	0.0%	0.0%	10.3%	4.2%	0.0%
Otley Town Centre	0.0%	0.0%	0.0%	4.8%	0.0%	0.0%	0.0%	5.0%	0.2%	0.0%
Other destinations, Zone 8	0.0%	0.0%	0.0%	2.2%	0.0%	0.0%	0.0%	7.5%	3.6%	2.4%
Sub-total, survey zone 8	0.0%	0.6%	0.0%	37.2%	0.1%	0.0%	0.0%	74.4%	19.9%	2.4%
Destinations in Zone 9										
Tesco, Springs Lane, Ilkley	0.0%	0.3%	0.0%	0.7%	0.0%	0.1%	0.0%	0.1%	20.0%	0.0%
Booths, Leeds Road, Ilkley	0.0%	0.0%	0.3%	0.0%	0.0%	0.3%	0.0%	0.5%	12.2%	0.0%
Ilkley Town Centre	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	5.7%	0.0%
Other destinations, Zone 9	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	7.1%	0.0%
Sub-total, Zone 9	0.2%	0.3%	0.3%	0.7%	0.0%	0.4%	0.0%	0.9%	45.0%	0.0%
Destinations in Zone 10										
Bedale Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%
Other destinations, Zone 10	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	4.3%
Sub-total, Zone 10	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	5.2%
Overall sub-total for study area										
	97.6%	100.0%	99.8%	94.1%	91.0%	96.0%	76.2%	86.7%	66.3%	27.1%
Foodstores outside study area										
Tesco Extra, Clifton Moor, York	0.0%	0.0%	0.0%	0.4%	2.6%	0.3%	6.2%	0.0%	0.0%	29.4%
Tesco, Station Road, Thirsk	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%	0.0%	0.0%	0.0%	10.4%
Tesco, Craven Street, Skipton	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	9.2%	0.0%
Easingwold Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.8%
Morrisons, Broughton Road, Skipton	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	7.3%	0.0%
Tesco Extra, Tadcaster Road, York	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	6.1%	0.0%	0.0%	0.7%
Keighley Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.4%	0.0%
Other foodstores outside study area	2.4%	0.0%	0.2%	5.4%	6.4%	1.6%	11.4%	13.1%	12.8%	24.6%
Overall sub-total for outside study area	2.4%	0.0%	0.2%	5.9%	9.0%	4.0%	23.8%	13.3%	33.7%	72.9%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: NEMS Household Survey market shares (composite results), September 2013

Table 8b — Convenience goods spending patterns, 2016

Harrogate Catchment												
	Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Zone 6 £m	Zone 7 £m	Zone 8 £m	Zone 9 £m	Zone 10 £m	Overall total £m	Overall Market Share %
Total expenditure available to study area	55.78	50.23	51.29	51.75	66.79	69.49	66.15	78.53	82.78	50.49	623.3	
Foodstores in Zone 1												
Asda, Bower Road, Harrogate	18.7	17.5	8.4	3.9	2.4	2.3	1.7	0.2	0.3	0.0	55.5	8.9%
Harrogate Town Centre	4.2	2.3	4.3	1.6	0.4	0.7	0.4	0.3	0.4	0.0	14.5	2%
Waitrose, 92 Station Parade, Harrogate	3.8	4.0	2.2	2.8	0.2	0.7	0.8	0.2	0.3	0.0	15.0	2.4%
Other destinations, Zone 1	3.0	2.4	1.2	1.7	0.7	0.8	0.9	0.5	0.1	0.2	11.7	2%
Sub-total, survey zone 1	29.7	26.2	16.1	9.9	3.6	4.5	3.9	1.2	1.2	0.2	96.5	15%
Foodstores in Zone 2												
Co-operative Food, Jennyfield Drive, Harrogate	0.9	2.6	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.8	1%
Other destinations, Zone 2	1.0	1.8	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.8	0%
Sub-total, survey zone 2	1.9	4.3	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.7	1%
Foodstores in Zone 3												
Morrisons, Plumpton Park, Hookstone Chase, Harrogate	11.4	6.6	19.4	3.7	8.6	1.2	0.3	0.3	0.0	0.0	51.6	8.3%
Sainsbury, Wetherby Road, Harrogate	7.4	7.3	10.2	5.5	9.2	1.9	1.7	3.2	0.0	0.0	46.5	7.5%
Other destinations, Zone 3	1.3	0.2	4.1	0.6	0.0	0.0	0.0	0.0	0.0	0.0	6.1	1%
Sub-total, survey zone 3	20.0	14.1	33.7	9.8	17.9	3.2	2.0	3.5	0.0	0.0	104.2	17%
Foodstores in Zone 4												
Sainsbury's Local, 67-71 Cold Bath Road, Harrogate	0.3	0.0	0.0	1.0	0.0	0.0	0.0	0.0	0.0	0.2	1.5	0%
Other destinations, Zone 4	0.7	0.0	0.1	1.2	0.0	0.0	0.0	0.0	0.0	0.0	2.0	0%
Sub-total, survey zone 4	1.0	0.0	0.1	2.2	0.0	0.0	0.0	0.0	0.0	0.2	3.5	1%
Foodstores in Zone 5												
Morrisons, Stump Cross, Boroughbridge	0.0	1.2	0.0	0.0	22.2	3.5	0.3	0.0	0.0	7.5	34.8	5.6%
Lidl, York Road, Knaresborough	0.6	0.0	0.3	0.3	3.9	0.0	0.6	0.0	0.0	0.0	5.8	1%
Knaresborough Town Centre	0.3	0.2	0.2	0.1	3.0	0.0	0.0	0.0	0.0	0.0	3.7	1%
Boroughbridge Town Centre	0.0	0.0	0.0	0.1	2.3	0.4	0.0	0.0	0.0	0.2	3.0	0%
Other destinations, Zone 5	0.8	0.2	0.0	0.0	3.7	0.0	0.1	0.3	0.0	0.0	5.0	1%
Sub-total, survey zone 5	1.6	1.6	0.5	0.5	35.1	4.0	1.1	0.3	0.0	7.7	52.2	8%
Foodstores in Zone 6												
Morrisons, Harrogate Road, Ripon	0.0	3.0	0.0	0.0	0.0	27.9	0.0	0.0	0.0	0.5	31.4	5.0%
Sainsbury, 5 Market Place South, Ripon	0.0	0.0	0.0	0.0	0.3	12.7	0.0	0.0	0.0	0.3	13.3	2.1%
Booths, Marshall Way, Ripon	0.0	0.3	0.2	0.0	0.2	5.5	0.0	0.0	0.0	0.3	6.5	1.0%
Ripon City Centre	0.0	0.2	0.0	0.0	0.1	4.1	0.0	0.0	0.0	0.0	4.5	0.7%
Pateley Bridge Town Centre	0.0	0.0	0.0	0.0	0.0	2.8	0.0	0.0	0.0	0.0	2.8	0%
Other destinations, Zone 6	0.0	0.1	0.0	0.0	0.0	1.6	0.0	0.0	0.0	0.4	2.1	0%
Sub-total, survey zone 6	0.0	3.6	0.2	0.0	0.7	54.6	0.0	0.0	0.0	1.5	60.6	10%
Foodstores in Zone 7												
Morrisons, Horsefair, Wetherby	0.0	0.0	0.0	3.5	1.9	0.2	27.9	3.5	0.0	0.0	36.9	5.9%
Sainsbury, Mill Lane, Tadcaster	0.0	0.0	0.0	0.0	0.3	0.0	4.8	0.0	0.0	0.0	5.1	1%
Wetherby Town Centre	0.0	0.0	0.1	0.6	0.3	0.0	4.5	0.1	0.0	0.0	5.5	1%
Sainsbury's Local, 13 Crossley Street, Wetherby	0.0	0.0	0.0	2.4	0.8	0.0	1.1	0.0	0.0	0.0	4.2	1%
Other destinations, Zone 7	0.0	0.0	0.0	0.2	0.2	0.0	5.3	0.4	0.0	0.2	6.2	1%
Sub-total, survey zone 7	0.0	0.0	0.1	6.7	3.4	0.2	43.5	3.9	0.0	0.2	57.9	9%
Foodstores in Zone 8												
Morrisons, 89 Otley Road, Guiseley	0.0	0.0	0.0	2.6	0.0	0.0	0.0	26.7	5.6	0.0	34.9	5.6%
Sainsbury, 11 Bondgate, Otley	0.0	0.0	0.0	6.7	0.0	0.0	0.0	13.9	4.3	0.0	24.9	4.0%
Waitrose, 60 Westgate, Otley	0.0	0.3	0.0	6.2	0.0	0.0	0.0	8.1	3.5	0.0	18.1	2.9%
Otley Town Centre	0.0	0.0	0.0	2.5	0.0	0.0	0.0	3.9	0.1	0.0	6.6	1%
Other destinations, Zone 8	0.0	0.0	0.0	1.1	0.0	0.0	0.0	5.9	3.0	1.2	11.2	2%
Sub-total, survey zone 8	0.0	0.3	0.0	19.2	0.0	0.0	0.0	58.5	16.5	1.2	95.8	15%
Destinations in Zone 9												
Tesco, Springs Lane, Ilkley	0.0	0.2	0.0	0.4	0.0	0.1	0.0	0.1	16.5	0.0	17.2	2.8%
Booths, Leeds Road, Ilkley	0.0	0.0	0.2	0.0	0.0	0.2	0.0	0.4	10.1	0.0	10.9	2%
Ilkley Town Centre	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.2	4.7	0.0	5.0	1%
Other destinations, Zone 9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	5.9	0.0	5.9	1%
Sub-total, Zone 9	0.1	0.2	0.2	0.4	0.0	0.3	0.0	0.7	37.2	0.0	39.1	6%
Destinations in Zone 10												
Bedale Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.5	0%
Other destinations, Zone 10	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	2.1	2.2	0%
Sub-total, Zone 10	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	2.6	2.7	0%
Overall sub-total for study area	54.44	50.23	51.21	48.69	60.77	66.69	50.44	68.10	54.91	13.67	519.1	83.3%
Foodstores outside study area												
Tesco Extra, Clifton Moor, York	0.00	0.00	0.00	0.23	1.73	0.23	4.09	0.00	0.00	14.85	21.1	3.4%
Tesco, Station Road, Thirsk	0.00	0.00	0.00	0.00	0.00	1.08	0.00	0.00	0.00	5.26	6.3	1.0%
Tesco, Craven Street, Skipton	0.00	0.00	0.00	0.00	0.00	0.36	0.00	0.00	7.59	0.00	8.0	1.3%
Easingwold Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.96	4.0	0.6%
Morrisons, Broughton Road, Skipton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.14	6.03	0.00	6.2	1.0%
Tesco Extra, Tadcaster Road, York	0.00	0.00	0.00	0.04	0.00	0.00	4.06	0.00	0.00	0.34	4.4	0.7%
Keighley Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.67	0.00	3.7	0.6%
Other foodstores outside study area	1.34	0.00	0.08	2.79	4.28	1.12	7.57	10.30	10.58	12.41	50.5	8.1%
Overall sub-total for outside study area	1.34	0.00	0.08	3.06	6.01	2.80	15.71	10.43	27.87	36.82	104.1	16.7%
Total	55.78	50.23	51.29	51.75	66.79	69.49	66.15	78.53	82.78	50.49	623.3	100%

Source: Table 3b, Table 7a

Table 9 — Convenience goods capacity forecasts for study area

Constant market share scenario

Row		2016	2021	2026	Incremental Growth		
					2016-21	2021-26	2013-26
Total population and expenditure							
A	Total Population	295,068	300,018	305,135	4,950	5,117	10,067
B	Total Expenditure £m	623.28	618.44	623.85	-4.84	5.42	0.58
C	Retained Expenditure %	83.3%	83.3%	83.3%			
D	Retained Expenditure £m	519.1	515.1	519.6	-4.03	4.51	0.48
Turnover of Convenience Stores in OCA Drawn from Catchment Area							
E	Total Convenience Retail Turnover of Stores in OCA £m	519.1	519.1	519.1	0.00	0.00	0.00
Commitments							
F	Convenience Retail Commitments £m	23.15	37.85	37.85	14.70	0.00	14.70
G	Initial Residual Convenience Retail Expenditure £m	-23.15	-41.88	-37.37	-18.73	4.51	-14.22
Inflow of Expenditure from Outside the Catchment Area							
H	Inflow (%)	2.5%	2.5%	2.5%			
I	Inflow £m	12.98	12.88	12.99	-0.10	0.11	0.01
SUMMARY							
J	Initial Residual Convenience Retail Expenditure £m				-18.73	4.51	-14.22
K	Grow in Inflow £m				-0.10	0.11	0.01
L	Allowance for current stores over-trading				0.00		
M	FINAL RESIDUAL COMPARISON RETAIL EXPENDITURE £m				-18.83	4.62	-14.21
Conversion to floorspace requirement							
N	Turnover per sq m (assumed)				10,000	10,000	-
O	Floorspace Requirement for study area (sq.m net)				-1,883	462	-1,421
P	Floorspace Requirement for study area (sq.m gross)				-2,897	711	-2,186

Sales efficiency growth of 0% per annum to 2026.

Turnover per sq.m at 2016 PBA estimate.

Gross: net floorspace ratio: 65%