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APPENDICES

PREFACE

This report has been prepared by Martin Tonks of MT Town Planning who was appointed by Scarborough BC in April 2007 to prepare a boroughwide retail study for the area of the Borough outside the North York Moors National Park. This report updates the boroughwide retail study carried out in 1998 by consultants England & Lyle and its subsequent update in 2003 by RPS. The study determines the health of the main centres of Scarborough, Whitby and Filey using PPS6 indicators of vitality and viability and establishes the need for new comparison and convenience goods shopping floorspace in these centres and the district as a whole in the period to 2016. The study informs the preparation of Local Development Documents and Development Plan Documents to be included within the Local Development Framework and also provides guidance for considering planning applications and proposals for retail and commercial leisure development.

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1.0 Executive Summary

1.1 Retail and leisure are dynamic sectors of the economy. Martin Tonks of MT Town Planning was commissioned by Scarborough BC in April 2007 to prepare this boroughwide retail study to inform the Local Development Framework (LDF) process and to try and ensure policies are supportive whilst directing these dynamic sectors. The study also provides guidance for considering planning applications and proposals for retail and commercial leisure development.

1.2 The summary of recent trends in the retail and leisure industries indicates that these sectors have withstood recessions in the past when other sectors such as manufacturing and production have declined. It is important for the three main town centres to continue to promote these successful national sectors within the local economy.

1.3 The development plan (LDF) must respond quickly to ever changing consumer preferences within the retail and leisure sectors. The LDF should therefore attempt to realise locally the objectives of PPS6 in enhancing consumer choice, supporting efficient, competitive and innovative retail and leisure sectors and improving accessibility.

1.4 In order to accommodate and direct development pressure new town centre and edge-of-town centre sites are identified in this report. Recommendations are also made for the three main town centres on suitable boundaries for shopping frontages, the extent of the Primary Shopping Areas (PSA) and the wider town centre boundaries in order to direct retail development and prioritise the most appropriate frontages for retail and leisure use.

1.5 Specific issues that arise from the review of trends in the retail and leisure sectors include the growth of non-food retailing in supermarkets. Any applications for new superstores or extensions to existing stores are likely to include a considerable amount of non-bulky comparison goods in direct competition with the town centres.

1.6 Another issue is existing retail warehouses with floorspace that are not restricted to bulky goods sales that are likely to be occupied in the future by non-bulky operators who are willing to pay higher rents for this type of location and premises. Likewise those retail warehouses that are restricted are likely to come under pressure to relax restrictive planning conditions. This can have implications for town centre stores that retail similar non-bulky goods.

1.7 There are also likely to be more proposals for small supermarkets in suburban locations including petrol filling stations as the large operators expand further into the local convenience sector and this has implications for independent shops, local centres and parades.

1.8 The report makes recommendations in Section 4 on the current and future hierarchy of shopping centres in Scarborough which is the network of centres national planning guidance (PPS6) advises retail development should be directed to. The report also makes recommendations on the upper limits for acceptable size of retail development in any particular centre within the hierarchy to ensure it is of an appropriate scale to the centre and the catchment it serves as recommended in PPS6. Gaps in the retail hierarchy where there is a limited provision of shops are identified taking into account social exclusion and accessibility considerations. It is recommended local / village centres are identified on the LDF proposals map to afford greater protection than current criteria based policies in the Local Plan.

1.9 Section 4 outlines the need to reconsider the designation of the four district centres in the LDF and to possibly restrict this to Eastfield where the maximum development size threshold for convenience goods might be greater than the other three district centres allocated in the Local Plan. The LDF might continue this designation for Falsgrave and Ramshill Road and possibly Hunmanby or alternatively designate them as hybrid neighbourhood centres along with Victoria Road which is really a peripheral area of the town centre. This is to discourage inappropriate levels of retail development in these potential neighbourhood centres that are a hybrid of the PPS6 definition of local and district centres.

1.10 The study determines the health of the main centres of Scarborough, Whitby and Filey using PPS6 indicators of vitality and viability and establishes the need for new comparison and convenience goods shopping floorspace in these centres and the district as a whole in the period to 2016 and this is summarized for each centre in sections 5 to 7.

1.11 Scarborough town centre performs well on most PPS6 indicators and compares favourably with most competing centres and some sub-regional centres in the region indicating it is a fairly healthy shopping centre. The main strength is the Brunswick Centre mall and town centre environment. The main weaknesses are the lack of diversity, the limited evening economy, parking problems and possibly commercial yields. The main opportunity in the medium term (2016) is the potential development sites along the Westborough / Newborough spine and the extension of the park and ride service. The main threat is the continued development pressure for town centre uses in out-of-centre locations in the Borough.

1.12 Scarborough is well served by large superstores, although mostly out-of-centre, and there is not a quantitative need for a fourth large superstore in Scarborough, only the extension / relocation of the existing edge-of-centre supermarket on the Westwood site. Alternatively, the identified need for 1,700 sq m of convenience goods floorspace by 2016 may be used to support other proposals in the Primary Shopping Area (PSA) and / or in sequentially preferable edge-of-centre sites. There is a quantitative and qualitative need for an additional 13,300 sq m comparison goods floorspace in Scarborough and in the medium term (2016) this could be developed on one or more of the town centre development sites identified in section 5 (North Street, St Thomas Street, Aberdeen Walk and Westwood).

1.13 In Scarborough town centre there may be pressure for non retail uses in the PSA that should ideally be directed to the secondary and tertiary frontages where there is likely to be less retail investment. The secondary / tertiary frontages are good locations for evening economy uses such as café bars and restaurants provided there is no conflict with any residential areas.

1.14 In allocating sites in the LDF for retail development the Council should be mindful of PPS6 (2.46) that indicates sites can be phased for release over the development plan period. This is in order to prevent sequentially less preferable sites being brought forward early in the development plan period. The three town centre development sites along the Westborough / Newborough spine and the Westwood site might be phased for the period to 2016, as they are mostly in multiple ownership and will probably require Council intervention to assemble. The sites are probably best brought forward as master planned action area plans as part of the LDF process to ensure their comprehensive rather than piecemeal redevelopment.

1.15 There may also be a quantitative and qualitative need for new cinema screens in Scarborough to help diversify the centre which currently is its main weakness. All town centre uses including leisure are subject to the sequential approach which should be used to prioritise any competing claims to meet the quantitative and qualitative need in the Borough. The other aspect of diversity that could form part of an urgently needed town centre strategy update is the development of more office space in and around the centre and perhaps some new town centre housing.

1.16 Whitby town centre displays strong PPS6 indicators of vitality and viability and compares reasonably with competing centres and even larger sub-regional centres such as Scarborough so is a very healthy centre for its size. The main strength is the attractive environment and old world charm of the centre and the specialist independent offer. The main weaknesses is the lack of diversity, limited national retailer representation, exacerbated by a shortage of suitable units, congestion and the limited number of car parking spaces. The main opportunities in the short term to address this shortage of suitable commercial premises are the infill development sites and redevelopment of the Endeavour Wharf area. The main threat is the continued congestion and parking problems and also growing pressure for retail development in peripheral locations if town centre sites cannot be brought forward.

1.17 The development would only be brought forward successfully if planned in very sensitive manner, probably as part of a master planned action area plan as part of the LDF process in full consultation with local people. Section 6 outlines how the site could be used for a mixture of retail, leisure and commercial development that will greatly help in the diversification of the town centre bit it is recognised that townscape and heritage issues are paramount and may prevent this.

1.18 Filey is fairly successful as a small town centre but there is a need for a new small supermarket to stem leakage to larger centres such as Scarborough and Bridlington and there is renewed developer / operator interest in Local Plan site S16. There is an issue of the siting and orientation of any supermarket development on this site which should have a pedestrian entrance as close as possible to Station Avenue to encourage combined trips with the rest of the town centre. In addition careful parking management will be required as the site is the main off-street car park for Filey town centre and the resort.

1.19 Section 8 also outlines the need to amend policy S3 on Local Parades not only to encourage local provision but also to protect local centres and parades from threats such as petrol filling station shops (PFSSs) and inappropriate scales of development. In small local centres / parades it is doubtful whether more than one convenience store is of an appropriate level of development and can be supported. With regard to single shops in the urban areas within the Borough but outside the retail hierarchy of centres, it is recommended these are restricted to 100 sq m to ensure they serve a local area and do not compete with local centres and larger parades.

1.20 The three main urban areas are well served by convenience stores and there are no apparent 'food deserts' where people have to travel long distances to shop for food. However, in rural areas where post offices and village shops have closed in recent years there are some social inclusion and access issues particularly in villages away from the main road and tourist areas. In particular the rural area of hamlets to the west and NW of Scarborough has no local shops and also the moorland area to the north of the A171 Whitby Guisborough Road.

1.21 Section 8 also suggests other areas where the Council need to consider how Local Plan policies are carried forward into the LDF and where new policies might be required. These include strengthening policies on retail warehousing to include a definition of bulky goods and to resist attempts to relax these. Retail Park owners often try to replace bulky goods operators with town centre type stores as they are prepared to pay higher rents for this type of unit but this can result in direct competition with shops in the town centres.

1.22 It is also recommended that the Council review the policies on shop frontages and hot food takeaways to reflect the changed Use Classes Order. It is no longer possible for a café (A3) or restaurant (A3) or pub (A4) to become a hot-food takeaway (A5) without planning permission so A3 and A4 uses might now be encouraged in secondary frontages as there is no danger of them becoming A5 hot-food takeaway uses.

1.23 The Council might also want to consider a new policy on PFSSs and reviewing the policy on guiding / encouraging retail development in the countryside to ensure it is compliant with the policy tests in PPS6. PFSSs can undermine local and village centres and proposals require careful consideration. Likewise garden centres and farm shops can grow into more than local attractions competing with local shops if they are not carefully planned and controlled.

1.24 Finally, in drafting all policies for the LDF the Council should be mindful of guidance in PPS1 that advises that LPAs need not replicate the policy guidance contained in PPGs and PPSs other than where local interpretation is needed and then they should only refer to the specific policy guidance and tests. This will make the final LDF document shorter and easier to read and use by members of the public.

2.0 Introduction

2.1 In April 2007 Scarborough Borough Council appointed Martin Tonks of MT Town Planning to prepare a boroughwide retail study to inform the emerging Local

Development Framework for the area of the Borough outside the North York Moors National Park (see the Local Development Scheme 2007). This report and appendices form the main output of this study.

2.2 This study updates the boroughwide retail study carried out in 1998 by consultants England & Lyle and updated in 2003 by RPS. The study advises on the health of the main centres of Scarborough, Whitby and Filey and the need for new comparison and convenience goods shopping floorspace in these centres and the district as a whole in the period to 2016.

2.3 It is intended that the new study will principally provide:

- an evidence base for the emerging LDF by identifying and establishing the future need for and options for the possible distribution of new convenience and comparison retail floorspace across Scarborough Borough Council administrative area.
- an objective and detailed assessment of expenditure flows and need in order to evaluate submissions in support of planning applications.
- guidance for considering planning applications and proposals for retail and commercial leisure development.

2.4 Specific objectives of the study include the following:

- A quantitative assessment of capacity and need for convenience and comparison goods floorspace to 2011 and 2016 based on current market shares and retention of expenditure, and an assessment of whether rates of retention of expenditure are considered acceptable.
- A qualitative analysis and identification of any need for convenience and comparison goods floorspace within the Borough.
- Health checks of the three main centres based on PPS6 indicators of vitality and viability, including town centre user and business surveys, highlighting any changes since the last health check carried out in 2003.
- An assessment of the potential of existing centres to accommodate any anticipated future retail or commercial leisure development, having regard to the centre’s scale and nature and identifying both sites where growth could be accommodated and areas which could not accommodate further development.
- Guidance on town centre boundaries and primary shopping areas and secondary frontages within them for the three main centres.

- Recommendations with regard to a strategy for a network and hierarchy of centres, including village stores and local centres/parades, within the authority area, considering how the role of different centres will contribute to the overall spatial vision for the area.

2.5 The study also includes a qualitative assessment of missing retailers, geographical areas of need and market support to address this. The study concludes with recommendations for future retail provision and town centre development within the framework of the local retail hierarchy.

2.6 This report is structured to reflect the requirements of the brief. Section 3 presents a summary of recent trends in the retail and commercial leisure sectors and also considers current national retail planning and town centre policy that forms a background to the study.

2.7 The local hierarchy of shopping centres is considered in Section 4 including the three main centres, district and local / village centres as well as the importance of local parades. Sections 5 to 7 then present a summary of the health check assessments (appendices 2 to 4) for the three main town centres using PPS6 indicators of vitality and viability and drawing upon the surveys commissioned to inform the study and consultations with key retail agents operating in the local market.

2.8 The quantitative need assessment for convenience and comparison goods is also presented in Sections 5 to 7 for each main centre drawing upon the results of the household survey and with reference to the tables in Appendix 6 and 7. The physical capacity of the three main centres to accommodate this and new retail floorspace is considered in Sections 5 to 7.

2.9 The conclusions and recommendations of the study are presented in the specific town centre Sections 5 to 7 and other general recommendations in Section 8.

3.0 Summary of Recent Trends in the Retail Sector and National Retail Policy

Trends in Retail and Town Centre Uses

The Retail Property Market in the United Kingdom Since 1980

3.1 The retailing and leisure industries have experienced considerable growth in the last two decades in the UK despite two recessions during this period. However, they are now faced with changes in demographics, increasingly restrictive planning policies and technological changes that will influence the future format of retail and leisure development. As an easier alternative many retailers are now looking to the continent and particularly the emerging markets in Eastern Europe to roll out formats such as hypermarkets, out-of-centre malls and Factory Outlet Centres that have proved so successful in the UK.

3.2 During the property boom of the mid to late 1980s, the retail market in the UK experienced high growth generated by strong consumer demand, restricted supply and relaxed planning policies. However, by 1990 this demand began to fall considerably with the onset of the recession and a number of new shopping centres had difficulties letting and some schemes were completely abandoned.

3.3 The increasing uncertainty in the market affected investment as the institutions became more selective and favoured low risk properties on prime sites that were fully let. However, supermarkets continued to perform well during the last two recessions with demand remaining strong particularly for out-of-centre locations.

3.4 Since the mid 1990s, retail property in the UK has witnessed the highest levels of rental growth amongst all property sectors. Average UK prime high street retail yields are now approximately 6.5% (Source VOA) which is between 1 and 2 percentage points lower than during the last recession and there has been an improvement in rental levels in all the major regions.

3.5 The recession of the early nineties led to a complete change in the way property development is funded. Investors are much more cautious of lending money to small developers and funding for speculative schemes is less common without anchor tenants (usually a department store) and significant pre-lets to national retailers. Combined with the difficulty of site assembly in central locations, this has increased the time taken to develop town centre schemes. Conversely, there has been much less investment in secondary and tertiary frontages although this has allowed the development of quality independent shopping and / or café and bar quarters taking advantage of the lower rentals in some larger city centres.

3.6 Since 1995 multiple retailers in particular have improved their performance and are becoming more dominant in the retail market, benefiting from economies of scale and strong purchasing power, they are prepared to pay the higher zone A rentals in the primary pitches where footfall (pedestrian movement) is highest. There has also been a concentration of development in the top 80 retail centres, with flag ship stores in the main regional centres, although certain multiples also target the lower order centres.

3.7 The cyclical pattern of retail development activity in many large cities causes periods of over supply followed by shortages and rental growth as market shares and shopping patterns stabilise.

Increasing Town Centre Shop Sizes

3.8 There is increasing pressure from the shareholders of national multiples to achieve better financial performances from their stores. Retailers have responded by seeking to occupy larger units of 500 - 2,000 sq m (or greater in the larger centres) to achieve greater economies of scale and attract shoppers from a wider area. The result is the polarisation of the higher order retailers into 80 or fewer of the main shopping centres and examples of 'flagship stores' operators include Next and Gap. These larger stores enable operators to reduce costs (£'s per sq m) through economies of scale whilst introducing a greater range of goods to customers. However, as multiples seek increasingly larger floorplates the centre of gravity in many cities has shifted from the traditional high street to the covered malls.

Consumer Preferences

3.9 Despite Government efforts to reduce the amount of carborne shopping that takes place, approximately one third of all retail sales are made in out-of-centre locations (Source: Verdict). Shoppers are becoming more discerning and no longer simply demand good quality products but also a high quality, pleasant shopping environment in which to purchase their goods and accessible free parking in the vicinity. This has helped to rejuvenate some cities which can provide a quality environment and unique visitor experience in comparison to the characterless out-of-centre malls surrounded by acres of tarmac. However, with increased working and commuting hours, the importance of car accessibility still favours the out-of-centre locations.

Sunday Trading and Extended Opening

3.10 A major change to the retail market in Britain has been the introduction of Sunday trading, which is particularly popular in large covered shopping centres such as the Meadowhall and Metro Centres. Sunday trading has made shopping into more of a leisure and family activity, especially since many of these centres provide excellent leisure facilities that can be combined with a shopping trip. Large shops (over 280 sq m net) are currently restricted to 6 hours trading on Sundays.

3.11 Sunday trading is largely restricted to the out-of-centre malls, retail parks and outlet centres. In the city centres the covered malls and shops in the primary frontages usually trade on Sundays but in the secondary frontages and smaller town centres it is often restricted to the Christmas seasonal shopping period. In terms of the impact of Sunday trading on sales, research indicates that many multiples both in and out-of-centre register the majority of takings at the weekend and the early week in particular has low takings. However, this is compounding the decline of secondary retail frontages as these are often occupied by independents that don’t open on a Sunday and even for those stores that do trade, there are insufficient neighbouring shops open to attract significant footfall to these frontages on a Sunday.

3.12 Tesco were the first supermarket to introduce 24 hour opening to their larger stores on the basis that there are shop and security staff present and ambient temperatures have to be maintained within the store regardless of whether it is open or not and therefore trading hours can be spread further. Sainsburys and Asda have now followed suit in some of their larger stores. Most banks and building societies now operate a Saturday service and restrictions on opening hours for pubs, clubs and bars have also been relaxed. The larger town centres and shopping areas are active beyond just 'working hours', and now maintain their activities, and hence vitality, into the evenings and weekends. However, many smaller centres have yet to see the benefits of all these extended opening hours.

Emerging Convenience Retail Markets

3.13 Partly in response to the rising number of city centre residents and in order to develop new markets such as the office worker top-up shopper, Tesco, Sainsbury, M&S and now Asda have placed a renewed emphasis on the town centre foodstore format. These formats are smaller, have no customer parking and have fewer budget ranges compared to the traditional out-of-centre superstores.

3.14 Research by Verdict indicates that Supermarkets now have more than 75% market share of the bakery market; 50% of the grocery and butchers markets and 33% of the off-license trade. This is obviously having an impact on independents that traditionally formed the mainstay of the high street and particularly suburban parades.

3.15 However, the margins in convenience retailing are so tight and the competition so fierce, that the big four supermarket chains are all transferring floorspace to comparison goods sales. Whilst comparison goods retail for less than convenience goods per square metre of floorspace, the margins are greater, there is spin-off into the foodstore element of the stores and the supermarkets can utilise their enormous buying power. It is no coincidence that the two fastest growing supermarket chains in recent years are those with the greatest area of floorspace given over to comparison goods – Asda (44%) and Tesco (35%) (Source Verdict 2007).

3.16 Where supermarkets have been unable to extend and / or open new stores due to planning restrictions, new strategies have been adopted. Until recently mezzanine floors did not require planning consent as long as the external building was not altered, but this loophole has now been closed except for small mezzanines under 200 sq m. Another strategy is to find old retail warehouses and garden centres that have open A1 consents and occupy these although there is competition for this space from clothes retailers many of whom such as Next, Gap and the Arcadia Group (Burtons et al) have developed ‘fashion park formats’. Most LPAs ensure that new developments are suitably conditioned but there is no control over historic consents.

3.17 Despite all the major operators introducing comparison lines, not everyone is successful as witnessed by the Morrison takeover of Safeway. The takeover enabled the largely northern based Morrison Group to acquire a large portfolio of stores in southern England and Scotland where they were previously unrepresented.

3.18 The Co-operative Group has also all but given up competing with the large supermarkets in most locations and has sold on superstores to competitors, in particular Asda, whilst developing its local centre / parade formats including the acquisition of the Alldays group.

3.19 The continental discounters (Aldi, Lidl and Netto) are also reducing their once ambitious expansion plans as the lower end of the convenience market reaches saturation point and the larger supermarkets are now competing with them more effectively with their value ranges, in particular Asda and Tesco.

3.20 The smaller supermarket operators such as Co-op, Somerfield, Waitrose and Spar are concentrating their attention on district / local centres and suburban parades. However, this in turn will impact on the smaller independents that increasingly rely on this market. The lucrative suburban convenience market has also been targeted by the larger supermarkets who have developed local convenience formats such as Tesco Express and Sainsburys Local.

Local Centres and Parades

3.21 The decline of the independent convenience sector is most evident in the smaller shopping centres and local parades where the number of bakers, butchers and grocers has dramatically decreased in recent years. The once dynamic Asian corner shop is also in decline as the educated children of the shopkeepers seek more lucrative / less work intensive careers. The Sunday Trading Laws limit unrestricted opening on Sundays to convenience stores below 280 sq m (net) which helps protect the smaller operators that anchor many small centres and local parades.

3.22 Many local parades now consist of a convenience store / newsagent (that might include a Post Office and off-license), possibly a pharmacy and the remaining units which will usually be occupied by a mixture of service uses such as hair salons, hot food takeaways and betting shops or may be vacant in the less popular parades. The confectioner / tobacconist / newsagent (CTN) is a crucial anchor to nearly every small parade and local centre and this is a sector that is being targeted by the large Supermarkets.

3.23 The off-license is another local parade operator that is being squeezed by the buying power of the large supermarkets and only the national chains can compete with the supermarkets prices. They are also being squeezed by the ‘booze cruise’ market which results in a high level of cheap imported alcohol and cigarettes (also affecting CTN sector). The other local parade operator that is coming under increasing pressure from supermarkets is the pharmacy.

Petrol Filling Station Shops

3.24 A further threat to local centres / parades and independents is the expansion of petrol filling station shop (PFSS) market. These are now being promoted in and out-of-centre by Esso Tesco Express, BP and Elf. The new formats have floorspaces of over 200 sq m and turnovers often in excess of £2million per annum (excluding petrol sales which are almost ancillary) and can impact greatly upon small centres and local shops. PFSSs are open for long hours (often 24 hours) and often have the added attraction of cash dispensing machines (ATMs).

Changing Comparison Goods Retail Markets

3.25 The main trend in comparison retailing is for polarisation of the national multiples into the major shopping centres and the decline of smaller shopping centres which are becoming more convenience goods orientated. Retail warehousing floorspace is continuing to grow despite policy constraints and non-bulky operators continue to locate on retail parks where planning permissions allow a wider range of goods to be sold. Certain comparison goods are more susceptible to competition from electronic shopping ('etailing'), however, the major threat to many sectors is the continuing expansion of the large supermarkets into new comparison goods markets. The Factory Outlet market reached saturation point some years ago in the UK and operators are now looking to Europe for their expansion.

Home Shopping

3.26 Home shopping is the largest component of the non-store retailing sector and is mainly accounted for by mail order, TV Shopping Channels and electronic shopping 'etailing'. Mail order is still the largest element of home shopping. As an increasing number of households get direct internet access mail order will continue declining. Despite the negative publicity (credit card security, delivery problems, etc.), etailing continues to expand particularly in certain sectors (books, DVDs and music).

3.27 Sainsbury and Tesco also report high growth in their internet delivery services although these are from conventional stores and not remote warehouses. All the high street retailers are developing their websites to complement / advertise their store offer and provide pre-purchase information whether the goods are bought online or in store. EBay, although not strictly a retailer, continue to record the highest number of hits and has impacted upon charity shops, car boot sales and specialist retailers as a new outlet for second hand goods.

Market Stall Retailing

3.28 Market stalls selling foodstuffs find it very difficult to compete with the supermarkets in terms of buying power and quality of produce. Whilst the produce stalls manage to compete in traditional market towns, in many urban shopping centres they are associated with low quality foodstuffs. The emergence of farmers' and seasonal continental markets has proved a popular shopping destination for many consumers. These less frequent markets sell at reasonable prices local, specialist and quality products that can't be obtained in the large foodstores.

Town Centre Services

3.29 The recent trend in banking has been the closure of smaller branches in favour of telephone and, more recently, online banking services. There is a major concern at government level that the decline of high street and neighbourhood banking services is contributing to further social exclusion as the least profitable branches are the first to be closed. In the poorest centres, often the banks are not even replaced with Free ATMs yet they proliferate in the major high streets, at large supermarkets, retail parks, motorway service stations and even petrol filling stations. (In poorer areas ATMs are increasingly provided by local shops but there are charges for withdrawals.)

3.30 It is anticipated that major shopping centres will not suffer, except where mergers have resulted in duplication, and where vacancies are occurring they are being successfully converted to restaurants and fashion outlets. However, where banks move out of smaller centres, their former premises often remain vacant longer adding to the spiral of decline and detracting from the local shopping / services offer.

3.31 Another high street market that is facing on-line competition is the travel industry. Budget travellers have used Teletext for several years to find cheap flights and last minute bargains and these are now being offered on the Internet. Conversely, travel agents have been occupying large spaces on retail parks such as the First Choice Holiday Hypermarket.

The Future of Town Centre Entertainment and Leisure

3.32 Like the retail sector, the leisure industry is also very dynamic, in particular the cinema and family entertainment sectors, and it has experienced significant changes in recent years. These are changes driven by demographics, cyclical participation rates, consumer expectations and general market trends. The UK population is ageing and the pattern and pace of age profile change will have a considerable impact upon all aspects of leisure demand and supply. The most significant change has involved relocating entertainment venues such as cinemas away from the high street to out-of-centre locations. National planning policy, in particular PPG/S6, has also been instrumental in refocusing the direction of leisure development back into town centres.

3.33 The cinema industry epitomises the revolution in the leisure sector. The UK cinema industry has undergone a revival after a period of decline since the introduction of multi-screen cinemas in the 1980s and cinema attendances have increased by over 100%. Unlike their predecessors, today's multi-screen cinemas are able to offer more films, provide a high quality purpose built environment and a higher standard of comfort, convenience and service and increasingly IMAX screens.

3.34 However, there is now an oversupply of screens in many urban areas even following the closure of many older town centre and suburban cinemas. Conversely, many smaller towns no longer have a Cinema. To address this gap in the market Warner Villages Cinemas developed its 'Citiplex' format which has eight or less screens and other competitors have followed with smaller cinema developments. Cinemas contribute to the vitality and viability of town centres by generating combined trips, diversifying the leisure offer and anchoring the evening economy.

Eating Out

3.35 Research by Mintel indicates that eating out is one of the fastest growing leisure activities, and this sector has responded to this by producing a range of new formats. The choice is very wide with a vast array of establishments spurred on by the successes of Planet Hollywood, Hard Rock Cafe, All-Star Café and Sports Cafe amongst many others.

3.36 Rapid expansion by large fast food chains over the last decade has seen a rapid increase in turnover within the hot food takeaway market. Market leader McDonalds are now being challenged by other fast food outlets such as KFC, Burger King and Subway. At the local level there has been an increase in the number of independent hot food takeaways in secondary frontages and smaller parades despite strict planning controls. As many of these operators are closed (often shuttered) during the daytime they add little to the shopping offer and, along with any vacancies, can present a depressing, blighted image of a parade or centre.

3.37 There has also been strong growth in the number of coffee shops and sandwich bars, in particular certain brands such as Subway. The advantage for these companies is that these uses are classified as A1 retail and with seating in these outlets generally being small-scale and ancillary, they can trade from existing retail use consents. The main markets for these outlets are office and shop workers in the larger centres and students / tourists in the older centres and university towns. The market has also been targeted by chain 'bakers' such as Greggs for whom this is their main business as they cannot compete with the cheap in-store bakeries at the large supermarkets.

3.38 The nineties witnessed the arrival of the coffee shop on British high streets with American imports such as Starbucks joined by indigenous chains such as Costa Coffee and Café Nero. The most recent trend is the incorporation of Coffee Shops within A1 shops such as Borders and Waterstones in order to achieve prime locations.

3.39 Another recent market trend is the arrival of the cafe bar that have taken advantage of the relaxed licensing laws. This concept mixes an evening drinking bar with daytime cafe to extend trading hours and have been successfully rolled out by chains such as Slug and Lettuce, Pitcher and Piano and All Bar One.

3.40 Generally there is a trend towards increased alcohol consumption at home and reduced patronage of public houses. Amongst young people there is a marked decline in the number of visits to public houses. One exception to this trend is themed public houses such as Walkabout, Barracuda Group and JD Wetherspoons, which are growing in popularity and have ambitious expansion plans. These often locate on the high street in the larger centres in former A1 and A2 retail units, offices, industrial or entertainment premises and / or large refurbished public houses and restaurants.

Health and Fitness Clubs

3.41 Although not traditionally high street occupants, these facilities are associated with the urban area and public sector provision. However, in recent years there has been an increased provision of private sector facilities many of which prefer to locate out-of-centre and are reliant on carborne customers. The first chain in this sector was David Lloyd Tennis Centres, now owned by Whitbread, although competitors such as Fitness First, LA Fitness and Total Fitness rapidly followed.

Retail Planning and Town Centre Policy Guidance (PPS6)

3.42 The national retail planning and town centre policy guidance is contained in Planning Policy Statement 6 (PPS6) entitled Planning for Town Centres that was published in March 2005. It builds on previous guidance (PPG6) and Ministerial Statements and reiterates the Government's commitment to developing and supporting successful town centres. Unlike the guidance it replaced (PPG6), PPS6 is very specific in stating that it relates to all town centre uses including retail, leisure, commercial and public offices, cultural and tourism (para 1.8).

3.43 PPS6 sets out the Government's key objectives for key town centres to promote their vitality and viability by planning for the growth and development and focusing development in centres and encouraging a wide range of services in a good environment accessible to all. The main objectives (para 1.4) which need to be taken into account in development plans include:

- Enhancing consumer choice by making provision for a range of shopping and leisure services which allows for a genuine choice to meet the needs of the entire community and particularly socially excluded groups;
- Supporting efficient, competitive and innovative retail and leisure sectors with improving productivity; and,
- Improving accessibility, ensuring that existing or new development is accessible and well served by a choice of means of transport.

3.44 The Government's wider objectives (para 1.5) include amongst other things:

- Promoting social inclusion and ensuring that communities have access to a main range of town centre uses, and that the deficiencies in provision in areas with poorer customer facilities are remedied;
- Encouraging investment to regenerate deprived areas, create additional employment opportunities and an improved physical environment;
- Promoting economic growth; and,
- Delivering more sustainable patterns of development ensuring locations are fully exploited through high density, mixed use development and promoting sustainable transport choices.

3.45 PPS6 advises LPAs through the Local Development Documents to identify a hierarchy and network of centres and to assess the need for further town centre development. Section 2 of PPS6 provides detailed guidelines on positively incorporating national planning policy into their development plan.

3.46 LPAs are advised to assess the need for new floorspace for town centre uses to meet identified qualitative gaps in existing provision (para 2.16) and to identify a Primary Shopping Area (PSA) from which the distance to edge-of-centre sites can be measured. They are also advised to identify sites for future development and, if appropriate, town centre expansion using the sequential approach and considering the potential impact on the existing centre.

3.47 Section 3 of PPS6 contains guidance for LPAs in considering planning applications for town centre uses. Paragraph 3.4 details that in the context of development control, Local Planning Authorities (LPAs) should require applicants to demonstrate:

1. The need for the development;
2. The development is of an appropriate scale;

3. That there are no more central sites for the development (i.e. the sequential approach to site selection);
4. That there are no unacceptable impacts on existing centres; and,
5. Locations are accessible.

3.48 The first test can be further broken down into demonstrating quantitative and qualitative need so in effect there are six policy tests that applicants must satisfy.

Quantitative Need

3.49 PPS6 advises that quantitative need has primacy over qualitative need. Quantitative assessments in support of planning applications should ideally be based on the development plan capacity assessment, updated if necessary. Development Plan capacity assessments have to take account of the catchment areas of centres outside the LPA boundary (2.32) as do planning applications (3.10).

Qualitative Need

3.50 Considerations that can be taken into account in support of the qualitative need case include providing for consumer choice through an appropriate distribution of locations and the extent to which shops are overtrading. Other material considerations such as regeneration and employment benefits are not indicators of qualitative need.

Appropriateness of Scale

3.51 PPS6 advises LPAs should aim to locate the appropriate type and scale of development in the right type of centre to ensure that it fits into that centre and complements its role and function e.g. large scale developments are inappropriate in local centres. Eventually LPA's are to consider publishing upper limits for acceptable size of retail development in any particular centre.

Sequential Approach

3.52 PPS6 advises that the sequential approach is to apply to all town centre uses including leisure retail i.e. that the preference is for town centre sites, then edge-of-centre and only then out-of-centre. PPS6 (Annex A) advises that for retail uses sites within the PSA are in-centre and sites up to 300m from the PSA (depending upon physical barriers) are edge-of-centre. For all other uses sites within the town centre boundary are in-centre and sites up to 300m from the boundary are edge-of-centre.

3.53 Where sequentially preferable sites are identified they must fail one of the three tests of the sequential approach (availability, suitability and viability) before less favourable sites can be considered. Availability is defined as being within a 'reasonable period of time'. To be unsuitable a site would have to be undevelopable for a proposal even when flexible formats are taken into account. Viability refers to a proposal not being commercially viable on the site.

3.54 When selecting sites as part of the development plan process edge-of-centre sites can be prioritised on their connectivity to the centre (2.44) i.e. they are not all equal status. Para 2.46 of PPS6 advises that development plans might phase the release of sites over the development plan period to ensure that sequentially preferable sites are developed ahead of less central sites.

Impact

3.55 Impact assessments undertaken on a goods based methodology are required in support of all town centre uses not in centre and / or in accordance with an up-to-date development plan. Ideally they should be based upon the development plan capacity assessment and the study period should not normally be more than 5 years. Need does not equate to no impact (para 3.21). Applicants must also consider the impact upon the spatial strategy and retail hierarchy (para 3.22). The scope of impact assessments should be proportionate to the scale of a proposal and have to be undertaken for development over 2,500 sq m (para 3.23).

Access

3.56 S6 para 3.25 advises that developments should be accessible by a choice of means of transport, including public transport, walking, cycling and the car (taking full account of customers likely travel patterns). In determining whether developments are or will become genuinely accessible, LPAs should assess the distance of the proposed developments to the public transport interchange. Frequency and capacity of services are also important considerations (para 3.25). Impact on overall distance travelled by car should also be assessed and the impact of a proposal on congestion (3.27).

Other Material Considerations

3.57 PPS6 (paras 2.51 and 3.28) advise that along with the six policy tests, other relevant matters such as specific local circumstances can be taken into account including:

- Physical Regeneration: the benefits of developing on previously developed sites which may require remediation;
- Employment: the net additional employment opportunities that would arise in a locality as a result of a proposed allocation, particularly in deprived areas;

- Economic Growth: the increased investment in an area, both direct and indirect, arising from economies of scale; and,
- Social inclusion: this can be defined in broad terms and may, in addition to the above, include other considerations, such as increasing the accessibility of a range of services and facilities to all groups.

3.58 PPS6 also recommends LPAs produce town centre strategies to guide future development and it also provides guidance on managing the evening and night-time economy.

3.59 Originally PPS6 advised more guidance was to follow on undertaking retail studies and the sequential approach but this may have been superseded by the Planning White Paper.

Planning for a Sustainable Future – The Planning White Paper

3.60 The Planning White Paper published for consultation on 21 May 2007 indicates that government may be considering replacing the PPS6 'needs test' for a new test that supports town centres and promotes competition and improves consumer choice avoiding the "unintended effects of the current need test".

3.61 According to para 7.53 of the White Paper the 'need test' can have the unintended effect of restricting competition and limiting consumer choice:

"it is possible under current policy for a new retail development on the edge of the town centre to be refused because there is an existing or proposed out-of-town development which meets the identified 'need' even though the new retail development would bring wider benefits and help support the town centre."

Issues for the Scarborough Development Plan in the light of Recent Trends in the Retail Sector and National Planning Policy

3.62 The development plan (LDF) must recognise that both the retail industry and commercial leisure sector are very dynamic responding quickly to ever changing consumer preferences. The LDF should therefore attempt to realise locally the objectives of PPS6 in enhancing consumer choice, supporting efficient, competitive and innovative retail and leisure sectors and improving accessibility.

3.63 Guidance in PPS1 advises that LPAs need not replicate the policy guidance contained in PPGs and PPSs but must provide a local interpretation. As such Scarborough BC should identify a hierarchy of shopping centres within the Borough and address any gaps in provision. This report will inform the LDF of the need for further town centre development and recommendations are made on a suitable boundary for the PSA and the wider town centre boundary in the three main centres.

3.64 With regard to the district, local centres and parades, this report makes recommendations based on the PPS6 definitions on the current and future hierarchy of these centres and also upper limits for acceptable size of retail development in any particular centre to ensure it is of an appropriate scale. Gaps in the retail hierarchy are identified taking into account social exclusion and accessibility considerations.

3.65 Quantitative assessments in support of future planning applications for town centre uses in the Borough should ideally be based on the development plan capacity assessment and for Scarborough BC administrative area this report forms that assessment. This study should not need updating until 2011 but elements may be updated in the interim such as expenditure and demographic information or market share.

3.66 Specific issues that arise from the review of trends in the retail and leisure sectors include the growth of non-food retailing in supermarkets. Any applications for new superstores or extensions to existing stores are likely to retail a considerable amount of non-bulky comparison goods in direct competition with the town centres. Likewise existing retail warehouses with floorspace that are not restricted to bulky goods sales are likely to be occupied in the future by non-bulky operators, possibly foodstores, and those that are restricted are likely to come under pressure to relax restrictive conditions. There are also likely to be more proposals for small supermarkets in petrol filling stations and other suburban locations as the large operators expand further into the convenience sector.

3.67 There will also be pressure for non retail uses in the PSA that should ideally be directed to the secondary frontages where there is likely to be less retail investment. This too is a good location for evening economy / leisure / seasonal uses provided there is no conflict with any residential areas.

3.68 There is also development pressure for a new cinema in Scarborough. These uses are required to demonstrate need and undertake a sequential assessment with regard to the availability of sites in the town centre, as are other town centre uses such as public and commercial offices.

3.69 Scarborough town centre already has an outdated town centre strategy that should be updated as a corporate priority and this report makes some recommendations for the town centre where new issues and policies have emerged for inclusion in any update of this strategy. As a boroughwide study, the report also makes recommendations for the other town centres and direction of retail and leisure development at this wider strategic level.

3.70 With regard to the Planning White Paper recommendations, in the Scarborough context this could manifest itself in expenditure currently spent at the out-of-centre Morrisons being used to support new town or edge-of-centre development in Scarborough. Presumably there will be a reality check of how much expenditure can realistically be redirected to a sequentially preferable development, for example, if very little trade can realistically be diverted then new edge-of-centre proposals could simply divert trade from the town centre thereby undermining the centre rather than supporting it.

3.71 Consultation on the White Paper proposals closed in Summer 2007 and the government is to develop new guidance working with the industry and other important stakeholders. The Government will also consider how best to address competition considerations in town centre policies, taking into account the conclusions of the Competition Commission inquiry into the groceries market. Any changes to the current PPS6 need test will be finalised by Spring 2008.

4.0 Hierarchy of Centres

Introduction

4.1 PPS6 para 2.9 advises higher level city / town centres should be the focus for major retail, leisure, office and other main town centre development of more than local importance, and provide a strategic framework for planning at the local level. Para 2.13 goes on to advise that the regional planning body should develop a strategic framework for the development of a network of centres in their region. Para 2.15 outlines the role of LPAs who should adopt a positive and proactive approach to planning for the future of all types of centres within their areas. Having regard to the regional spatial strategy LPAs should, through the core strategy development plan document, set out a spatial vision and strategy for the network and hierarchy of centres, including local centres, within their area, setting out how the role of different centres will contribute to the overall spatial vision for their area.

4.2 Annex A of PPS6 contains further guidance on defining different types of centre within the hierarchy and their main characteristics. City centres are the highest level of centre identified in development plans and these 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 main functions.

4.3 Town centres are usually the second level of centres after city centres and, in many cases, they will be the principal centre or centres in a local authority's area according to Annex A of PPS6. In rural areas town centres 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.

4.4 Annex A advises 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.

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

Scarborough

4.6 Within the Regional Network of Town Centres Scarborough is designated as a sub-regional centre and it is the main shopping centre within the Borough where there is the greatest development pressure. Using PPS6 Annex A criteria Scarborough town centre is probably slightly higher than a town centre but not quite the equivalent of a city centre. PPS6 Annex A advises town centres are often the principal centre in a local authority's area, which Scarborough is, however the town centre is more than a market town serving an extensive rural catchment, it has a managed shopping mall anchored by a department store and nearly all the 30 Goad key retail attractors (retailers regarded by Experian Goad as being an asset to a shopping centre) are located in the centre.

4.7 The centre is not quite a city centre as defined in Annex A as it is not a regional centre but much of the advice on planning for the various areas within the centre are applicable to Scarborough and so it is probably best considered to be a hybrid between a town and city centre or, as Regional Spatial Strategy defines it, a subregional centre. In particular the guidance in Annex A on bringing forward sites for development through area action plans outlined in the previous section is relevant to the future expansion of the town centre. As a subregional centre there should be no upper limit on the appropriate scale of retail and town centre development within the PSA (or town centre boundary for non-retail development).

4.8 The household survey indicates that there is a qualitative need for an improved fashion offer in Scarborough to reduce leakage to York, in particular as a second choice destination, for these goods. For most other goods Scarborough has a much higher retention level of expenditure although the household survey also found some dissatisfaction with the quality and range of shops in Scarborough, particularly in the PCA. The street survey found that shoppers were mainly satisfied with the offer but many listed missing fashion / clothes shops they would like to see in the centre.

4.9 With regard to the non-retail offer in Scarborough, a high number of trips are made to York for cinema visits particularly from the SCA area. Other leisure activities such as the theatre, restaurants and public houses are better catered for in Scarborough although in the case of the latter the offer is lower order with few quality bars and café bars. In terms of diversity, the greatest need is probably to increase the office market in and around the town centre.

Whitby

4.10 Whitby is designated as a town centre in the Local Plan and Regional Network of Principal Town Centres. Whilst the town centre is not the principal centre within the Borough it is the main shopping centre in the northern part of the extensive administrative area. Whitby is a market town and serves a rural catchment. Guidance in PPS6 in Annex A on planning for different parts of the centre is relevant to Whitby as the one major development site in the Endeavour Wharf area is very sensitive and requires careful planning.

4.11 As a town centre bigger than a district centre which can be anchored by a superstore (supermarket over 2,500 sq m net) in theory there should be no upper limit to development size in the PSA. However, Whitby is a very sensitive historic town with very few, only infill, sites in the centre itself and redevelopment is not an option. Outside of the PSA there is the Endeavour Wharf area where a superstore would be inappropriate but there is a quantitative need for a larger supermarket (up to 2,500 sq m net) i.e. a net extension of the existing supermarket of c. 800 sq m. For the avoidance of doubt there is not capacity for a large supermarket in Whitby and as Endeavour Wharf is edge-of-centre, not in the PSA, a need case will have to be demonstrated as well as the other PPS6 policy tests satisfied.

4.12 There is also a quantitative need for small scale retail warehousing in Whitby and the LDF will have to identify suitable sites. Finally, there is a need for larger town centre units to accommodate the demand for floorspace from national multiples wishing to locate in Whitby and sites should be identified for this. Any proposal in Whitby is of course subject to detailed scrutiny on its contribution to townscape and heritage aspects of the historic town centre.

4.13 The household survey indicates that there is a qualitative need for an improved food and non-food shopping offer in Whitby to reduce leakage to Scarborough and Middlesbrough / Teesside. The household survey found that overall for comparison goods expenditure 56% was spent outside Whitby and a further 10% was spent on internet and mail order purchases (assumed to be mostly from outside the area). For convenience goods 63% of expenditure was spent within the Whitby catchment area. In Whitby PCA 31% of convenience goods expenditure leaks to competing centres, Scarborough and Guisborough in particular, which is an increase on 28% recorded in the 1998 survey despite the recent opening of the Lidl store.

4.14 In the PCA 38% of comparison goods expenditure was retained in 2007 compared to 50% in the 1998 survey indicating a decreasing market share for the town within its own catchment area. In particular there were very high leakage levels for clothes / fashion shopping, however, even for some bulky goods classes there were high levels of leakage – furniture and carpets had the biggest retention level with 64% of PCA expenditure retained within the town compared to 45% for DIY and 31% for electrical goods. Like shopping patterns for convenience goods, most shoppers for bulky goods will shop at their nearest retail park if there is an adequate choice but this is lacking in Whitby with the possible exception of furniture and carpets.

4.15 There is therefore a qualitative need for both comparison and convenience goods floorspace in Whitby as people seem ever more willing to travel considerable distances on shopping trips. Whilst some of these might be linked to other trips such as the commute to work, there has also been an increase in car ownership since 1998 and many people have greater personal mobility. In particular for mainfood and bulky goods shopping trips there should be some scope for retaining more of this expenditure if the local offer can be improved. However, even for clothes / fashion shopping there is potential to retain more expenditure if suitable floorplates can be developed for some of the national multiples seeking representation in Whitby.

4.16 With regard to the non-retail offer in Whitby, around two thirds of those people visiting the cinema do so in Teesside with very few people (5% in the PCA) patronising the Coliseum. There are also quite high numbers of peoples travelling out of Whitby on theatre trips and to Scarborough in particular. Other leisure activities such as the restaurants and public houses are better catered for in Whitby although like Scarborough there are few quality bars and café bars. In terms of diversity, there is also a need to increase the commercial office market in and around the town centre.

Filey

4.17 Filey is designated as a town centre in the Local Plan and Regional Network of Local Service Centres. The town centre is very small and only has a very localised catchment and is probably closer to the PPS6 Annex A definition of a local centre rather than a town centre. However, there is one edge-of-centre development site identified in the Local Plan and developer / operator interest in bringing it forward for a small supermarket. This will help the town retain more expenditure within the local economy and, although not located in the PSA, will strengthen the centre and justify its retention as a small town centre within the retail hierarchy.

4.18 Filey is a small town centre and really forms part of the Scarborough catchment area. The main qualitative need is for an improved supermarket provision in the town centre in particular as much of the leaking expenditure is directed to the out-of-centre Morrisons at Seamer. There is probably not a great deal of scope for attracting multiples into the centre other than this and the leisure offer is probably greater than the town can support due to its resort role.

District Centres

4.19 The Local Plan policy S19 designates Falsgrave, Victoria Road, Ramshill Road and Eastfield as district centres but there are no district centres within Scarborough using the PPS6 Annex A definition – "*groups of shops often containing at least one supermarket or superstore, and with a range of non-retail services, such as banks, building societies and restaurants…*"

4.20 Falsgrave could possibly be classed as a district if the Sainsbury was considered to be within the boundary but it is not particularly well related in terms of pedestrian access and in any case the centre is too close to the town centre to have any banks although there are restaurants. Eastfield has a small supermarket but no bank and Ramshill Road has no supermarket other than a small Sainsburys Local so these centres don't really qualify as district centres under PPS6 guidance. A Tesco Express has recently opened on Castle Road within the area defined as Victoria Road district centre on the proposals map but whilst this is a large convenience store it is far from a supermarket. Victoria Road is really a peripheral town centre shopping area and should not really be designated as a district centre with a distinct catchment area (possibly it could be classed as a hybrid neighbourhood centre).

4.21 There are also some larger village centres such as Hunmanby and Castleton (in the National Park area) that have small supermarkets whereas most local and village centres only have a convenience store and occasionally a specialist shop such as a butchers and / or pharmacy. The LDF could designate Eastfield, Falsgrave, Ramshill Road and possibly Hunmanby as district centres with an explanation in the justification that superstores would be an inappropriate level of development in these centres with a 500 sq m (net) maximum threshold for convenience floorspace and 200 sq m (net) for comparison goods (to ensure larger non-food operators are directed to more appropriate higher order centres).

4.22 Alternatively some or all of the centres including Victoria Road could be designated as a neighbourhood centre with the same suggested maximum floorplate thresholds i.e. a hybrid between the PPS6 local and district centres. Perhaps Eastfield could be retained as a district centre as it has the potential for a larger supermarket provision and extensive housing development is planned at the nearby Middle Deepdale site. Eastfield should have a slightly higher appropriate scale threshold than the other district / neighbourhood centres as it serves a larger catchment and there are tentative proposals to improve the environment there that might be cross-funded by the expansion of the supermarket in that centre. In particular the windowless frontage off the Proudfoot supermarket onto the pedestrianised high street currently presents a very unattractive frontage.

Local Centres

4.23 There are also some larger village and local centres such as East Ayton that have a convenience store and / or a specialist shop such as a butchers and / or pharmacy. In local centres it is recommended that no food shop unit should exceed 280 sq m in net floorspace area. (280 sq m is the maximum size for a convenience store in the Sunday Trading Laws – above this threshold stores have restricted trading hours on a Sunday.) For comparison goods operators it is recommended that the maximum floorplate is 100 sq m to ensure larger non-food operators are directed to more appropriate higher order centres.

4.24 Obviously there are historic reasons for shops above these threshold limits that are already found in local centres and this is what gives the centres their individual character and appeal. The limits are aimed at future development and should not be exceeded without good reason, for example local businesses expanding to larger premises, to ensure the retail hierarchy and distribution of current shops is maintained and protected.

4.25 Local centres are not designated on the local plan proposals map but this may be advisable in the LDF to give them greater protection. The larger supermarkets have already taken a fair share of the top-up market, which many smaller stores and independents rely upon for their livelihood, and now they are moving into the convenience sector with new smaller formats, sometimes in petrol filling stations (PFSSs), that can undermine local and village centres. Designating the local and village centres and only permitting new stores beneath the 280 sq m (net) (Sunday trading threshold), except for exceptional circumstances, will go some way to protecting these important smaller centres from excessive competition.

Local Parades

4.26 PPS6 Annex A has a footnote that indicates small parades of shops of purely neighbourhood significance are not regarded as centres for the purposes of this policy statement. However, as the bottom tier of the shopping hierarchy it is sometimes appropriate to have development plan policies to protect and enhance local parade provision to ensure social inclusion, one of the wider objectives of PPS6 (1.5).

4.27 Policy S3 in the Local Plan encourages local shopping facilities within residential areas. This policy is worth retaining and enhancing in the LDF not only to encourage new development but perhaps also to protect existing. Analysis of local shopping provision in the built up area of Scarborough, Whitby and Filey indicate a good geographical spread of facilities with the possible exception of Woodlands and Sandybed area of Scarborough and as these are fairly affluent areas they do not conform to the typical food desert criteria. In fact the largest residential area in the Borough is Eastfield where a further 1,200 homes are planned at the Middle Deepdale site and, if the out-of-centre Morrisons is discounted, this area is not well served by shopping facilities and the district centre anchored by a small supermarket needs to be expanded.

4.28 The main social inclusion issue in Scarborough Borough probably relates to the rural areas more than the urban areas. In particular the rural area of hamlets to the west and NW of Scarborough without access to local shops and also the moorland area to the north of the A171 Whitby Guisborough Road.

4.29 In small local centres / parades it is doubtful whether more than one convenience store is of an appropriate level of development and can be supported. With regard to single shops in suburban areas it is recommended these are restricted to 100 sq m to ensure they serve a local, mainly walk-in area only and do not compete with local centres and larger parades such as the standalone convenience stores that the larger supermarkets have developed in Scarborough.

4.30 Local parades are often anchored by post offices and in some rural villages the only remaining shop is a PO counter in a convenience store. Although PO counter use is declining many of these convenience stores would not be able to continue trading without the PO counter. The area of hamlets to the west and NW of Scarborough is a case in point where the 1988 OS map shows 3 post offices and now there are none and no shops either. The recent PO review announcement by the government proposes the closure of up to 2,500 more branches.

4.31 The criteria for the closures in rural areas is a target of 95% of the population being within 3 miles of a PO branch. This obviously has implications for branches that are much less than this distance apart such as Fylingdales and Robin Hoods Bay or Cloughton and Burniston. The announcement does indicate that outreach branches i.e. part time facilities will be deployed in areas where a need can be demonstrated but a full time branch cannot be justified. Such a facility might be like the branch at Sawdon that is open for 2 hours on three evenings during the week with a very limited counter service (that couldn't cross subsidise a convenience shop for example).

Petrol Filling Station Shops

4.32 Another factor in the success or otherwise of local centres / parades particularly in the rural areas is their location with regard to passing traffic. It is noticeable that outside the rural tourist villages (Robin Hoods Bay, Goathland and the Eskdale villages) local shops only survive where they are well related to the highway network so that passing trade can subsidise the limited patronage / expenditure of the local population. There are certain exceptions to this rule where specialist shops such as the Butchers in Brompton or the Beacon Ice Cream Farm Shop at Sneaton can draw trade off the main road, however, many villages such as Flixton, Folkton and Muston that do not straddle a main route have long lost their village shops. However, in these cases the closures may have been accelerated by the opening / extension of petrol filling station shops (PFSS) in the vicinity – on the A165 in the case of Muston and a PFSS at Staxton for the other two villages.

4.33 Convenience store developments in PFSS can be a threat to both local villages and parades as they are often operated by the large supermarket operators, open for 24 hours and usually have the benefit of ATMs. PFSS are often promoted on the assumption that they provide for ancillary purchases for motorists but research indicates that petrol sales are almost incidental and they actually provide top-up shopping for residents in the immediate area thereby undermining the retail hierarchy and in particular the smaller centres that rely upon this trade.

4.34 Unless PFSSs are actually located within a designated shopping centre boundary they should therefore be resisted as out-of-centre developments unless the shop is small and ancillary to the main PFS use. A PFSS in a rural area can have an impact upon centres / parades for several miles in either direction. Even if they are located within centre boundaries there are issues of appropriateness of scale as sometimes the PFS shops can be quite extensive and a 280 sq m (net) maximum should be applied.

4.35 There may be occasional exceptions to such a policy approach for example where PFSS are proposed in 'food deserts' where local shops have already closed down or never existed – the Flask Inn PFSS perhaps is an example of this. However, in most rural and urban cases PFSS proposals should be resisted and, if permitted the shops, should be restricted in size and to the sale of ancillary motoring products.

Farm Shops

4.36 Farm shops can play a vital role in 'food deserts' where local shops have already closed down or never existed and can also contribute to farm diversification. Farm shops tend to trade off the back of passing traffic and local trade retailing produce grown / reared on the farm and / or in the locality thereby contributing to more sustainable patterns of distribution and retailing. However, before the Council support proposals for farm shops they should be satisfied that the proposal will not impact upon local village shops, that it will source produce locally and will not be of such a scale that it becomes a destination for shoppers from a wider area than the immediate locality other than passing trade.

5.0 Scarborough Town Centre

5.1 Scarborough Town Centre is a sub-regional centre serving the town itself and surrounding rural areas with a catchment population of around 80,000 people. Its catchment in the wider region is limited by the catchments of three larger sub-regional centres - York, Hull and Middlesbrough (in Northern Region) and to a certain extent the regional centre of Leeds. To a lesser extent, and particularly for convenience goods, the smaller town centres of Whitby and Filey reduce the influence of Scarborough town centre as do the town centres of Bridlington and Malton in neighbouring authorities.

Summary of Vitality and Viability of Scarborough Town Centre

5.2 The methodology for the PPS6 health check of vitality and viability is contained in appendix one and the detailed health check of Scarborough town centre is presented in Appendix Two.

5.3 There is only a limited range of uses other than retail in Scarborough Town Centre that contribute to the vitality and viability of the town. For a sub regional centre, diversity is not good. This partly reflects the fact that Scarborough is a seaside resort and the local economy has largely been based on tourism. The amount of retail, leisure and office floorspace in edge and out-of-centre locations has remained static since 1994 and there has been investment in the town centre. The potential capacity for growth in the immediate future is good with two identified town centre sites and two edge-of-centre sites.

5.4 The town centre environmental quality is quite good and there is a good choice of multiples and specialist independent shops. Towards the periphery of the town centre in the secondary frontages there are a number of charity and discount / bargain shops. However, the number of vacancies and amount of vacant floorspace is quite low.

5.5 Retailer representation and intentions to change representation is a strong indicator in Scarborough. The comparison sector is well represented in the town centre as are banks and financial services but there is a limited choice and range of convenience goods outlets exacerbated by the recent closure of Kwik Save. The town centre appears not to have re-established its convenience role that has declined since the out-of-centre Morrisons and Safeway stores opened in 1994.

5.6 There is also high level of retailer demand particularly from fashion and restaurant businesses. The proportion of vacant street level property has decreased in recent years but not to the point where there a shortage of units. Commercial yields on non-domestic property have recently decreased to a reasonable 7.25% which compares favourably with some but not all competing centres.

5.7 Accessibility is fairly good by most modes although motorists face congestion at peak periods when there is also a shortage of car parking spaces. The lack of a central bus station is also a weakness although the frequent park and ride service does help alleviate congestion and the parking shortage.

5.8 Customer and residents views and behavior indicate reasonable levels of satisfaction with the town centre. The main concern for both visitors and businesses is the availability of car parking spaces and toilet facilities. Perception of safety and crime are reasonably good and local crime levels are generally below the national average.

5.9 In summary, Scarborough town centre performs well on most PPS6 indicators of vitality and viability and compares reasonably with some competing centres and other sub-regional centres in the region. The main strength is the choice and range of clothes and non-food shops and the pleasant pedestrianised high street shopping environment. The main weaknesses are the lack of diversity, the limited evening economy, perceived parking problems and possibly commercial yields. The main opportunity in the short to medium term is the three development sites, the new Park & Ride scheme and development of a “Cultural Quarter”. The main threat is the continued decline of the seaside resort as a holiday destination and also the development of town centre uses including leisure, retail and offices in peripheral locations.

Scarborough Convenience Goods Quantitative Assessment

5.10 The Scarborough study area can be broken down into a primary and secondary catchment as shown on Appendix 6 map 1. The primary catchment is the main urban area of Scarborough that has a population of c. 32,700. The secondary catchment is the surrounding rural areas including Eastfield, Seamer and Burniston. For the purposes of this study Filey is treated as a separate study area but is really a subset of the Scarborough secondary catchment, particularly for comparison goods.

5.11 The broad shopping patterns for convenience goods are shown in tables 27 and 28 in Appendix 8. In the PCA the Tesco Westwood store has the greatest market share (31%) of overall convenience goods expenditure followed by Sainsburys (19%) and Seamer Morrisons (14.5%) and the town centre stores (inc. M&S and Iceland) account for 9% whilst 18% is spent in other stores including those in Ramshill and Falsgrave.

5.12 In the SCA the Seamer Morrisons has a much greater market share (36%) of overall convenience goods expenditure followed by Tesco Westwood (17%) and Sainsburys (13%). There is less expenditure spent in the town centre (7%) and other shops (14%) than in the PCA. There is very little leakage from the study area for convenience goods from either the PCA (1.5%) or SCA (2.5%).

5.13 The town centre has a much greater market share of top-up expenditure (19% in the PCA and 16% in the SCA) as do other local shops (43% in the PCA and 32% in the SCA) although the three larger supermarkets still have a significant share of this market.

5.14 Tesco Westwood store has the greatest market share (31%) of overall convenience goods expenditure followed by Sainsburys (19%) and Seamer Morrisons (14.5%) and the town centre stores (inc. M&S and Iceland) account for 9% whilst 18% is spent in other stores including those in Ramshill and Falsgrave.

5.15 In the Filey area (postcode sectors YO14 0 and YO14 9 that include Hunmanby) Table 29 in Appendix 8 indicates the Seamer Morrisons store has the greatest market share (33%) followed by the Filey Somerfield (17%) and town centre shops (9%). Around 14% of convenience goods expenditure in the Filey area is spent in and around Scarborough town centre with Tesco Westwood being the most popular destination (5%). However, there is greater leakage from the Filey area particularly to the Tesco store in Bridlington (9%).

Expenditure Growth

5.16 Table 2 in Appendix 6 indicates that each resident of Scarborough PCA will generate £1,382 of convenience goods expenditure in 2007. Multiplied by the population of c. 32,700 this generates c. £45m expenditure as shown in table 3. Scarborough SCA generates a further £56m and combined with the PCA the Scarborough catchment generates £101m convenience goods expenditure.

5.17 Expenditure per head projections are also shown in Table 2. These indicate that for convenience goods where there is low growth of 1.2% per annum (pa) above the rate of inflation (held constant by 2004 prices) there is not significant overall growth to 2011 (£6m) as shown in Tables 4 & 5. (Expenditure per head forecasts are taken from Oxford Economic Forecasting (OEF) as set out in MapInfo Brief 07/02 Table 2.) For the period 2005 to 2016 OEF forecast the same low growth rate of 1.2% pa (based on past expenditure trends and assumptions on future economic performance). This results in a total growth in the Scarborough catchment area of £14.2m to 2016 as shown in Tables 4 and 5.

5.18 PPS6 para 2.34 indicates that expenditure growth is the main source of quantitative need and it can be seen from Table 5 that due to low growth rates for convenience goods there is not significant overall expenditure to support new floorspace. However, subsequent Secretary of State decisions (Birmingham, Swindon and Burnham on Sea) indicate that leakage and overtrading can also be taken into account as shown in Tables 5 and 6.

Leakage

5.19 The quantitative assessment was informed by a household survey undertaken by NEMS market research company that recorded very high levels of convenience goods expenditure (98%) retained within the Scarborough catchment area as shown in the penultimate column / row of Table 7 and in more detail in Appendix 8 Tables 28 and 29. There is therefore very little leaking expenditure that can be realistically 'clawed back' to support new floorspace in the catchment area and this source of quantitative need is not drawn upon.

Overtrading

5.20 Overtrading is calculated by comparing the expected or benchmark turnovers based on national company average sales densities (£s turnover per sq m sales area per annum), as recorded and published by Verdict and Mintel, with turnovers derived from the NEMS household survey. Where the survey indicates shops / centres are trading above these expected / benchmark levels that is regarded as overtrading (final column of Table 7).

5.21 It can be seen from the final column of Table 7 that stores in the Scarborough urban area are both under and overtrading, however, the only store that is overtrading significantly is the out-of-centre Morrisons at Seamer. Other peripheral stores in the Scarborough urban area are also overtrading collectively but this will probably be offset by trade going to specific stores recorded as undertrading such as the three Proudfoot stores, the two Sainsburys at Jacksons stores and the Tesco Express.

Quantitative Need for New Convenience Goods Floorspace in Scarborough

5.22 If the projected overtrading at the Seamer Morrison store in 2011 (c. £7m) is added to the expenditure growth this results in c. £13m capacity to support new floorspace in Scarborough. However, there are other claims on this capacity (c. £2m) and in particular

PPS6 (2.34) advises account should be taken of turnover efficiency improvements in existing floorspace.

5.23 MapInfo do not publish guidance on turnover efficiency improvements for use with their expenditure information but Experian Business Strategies (EBS) do. In EBS Retail Planner Briefing Note 4.0 they recommend a rate of 0.75%. However, this would take up nearly all the already limited expenditure growth rate. It is the practice of many retail planners not to allow for any turnover efficiency improvements in convenience goods floorspace but this approach does not reflect the record turnover growth of some operators such as Tesco. A midway point of 0.4% has therefore been used in this study.

5.24 When a turnover efficiency improvement rate of 0.4% is applied to existing convenience goods floorspace shown in Table 7 in Appendix 6 then an allowance of £1.8m has to be made in the period to 2011 and 2% of expenditure growth (£0.1m) that might be expected to 'leak' as with existing expenditure there is a claim of £1.9m on the identified capacity resulting in a revised potential capacity of £11.4m in 2011. In 2016 this is projected to increase to £17.3m.

5.25 In 2011 this capacity would support c. 1,100 sq m (net) of floospace at a 'big four' supermarket company average sales density or c. 2,300 sq m (net) of floospace at a discounter / convenience operator company average sales density. In 2016 this capacity would support c. 1,700 sq m (net) of floospace at a 'big four' supermarket company average sales density or c. 3,500 sq m (net) of floospace at a discounter / convenience operator company average sales density. Further recommendations are set out in this section as to where this quantitative need for convenience goods floorspace might be directed within the Scarborough catchment area.

Scarborough Comparison Goods Quantitative Assessment

5.26 The Scarborough study area can be broken down into a primary and secondary catchment as shown on map 1 in Appendix 6. The primary catchment is the main urban area of Scarborough that has a population of c. 32,700. The secondary catchment is the surrounding rural areas including Eastfield, Seamer and Burniston. For the purposes of this study Filey is treated as a separate study area but is really a subset of the Scarborough secondary catchment, particularly for comparison goods.

5.27 The comparison goods assessment uses the same study area and methodology as the convenience goods assessment. The broad shopping patterns for comparison goods are shown in tables 32 and 33 in Appendix 8. In the PCA 80% of expenditure is retained within the Scarborough area. This can further broken down into 63% spent in the town centre, 12% at Seamer Road Retail Park and 5% elsewhere in Scarborough. 12% of comparison goods leaks to competing centres the most significant being York (7% including retail parks and outlet centre) followed by Leeds (1%) and Hull (1%). 7% of comparison goods expenditure is spent via non-retail outlets (special forms of trading) mainly the internet (4.5%) and mail order (2.5%). The market shares for the various classes of comparison goods are detailed further in Appendix 8 Tables 32 and 33.

5.28 In the SCA Scarborough has a slightly lower market share (78%) of overall comparison goods than in the PCA and there is slightly more leakage (14.5%) mainly to York (9%). The market share for Seamer Road RP (12%) and expenditure spent via non-retail outlets (7%) is similar to the PCA.

5.29 In the Filey area Table 34 indicates 57% of comparison goods expenditure is spent in the Scarborough area – 45% in the town centre, 9% at Seamer Road RP and 3% elsewhere in Scarborough. Although 17% of comparison goods expenditure is spent in Filey town centre the catchment area is really a subset of the Scarborough catchment, however, there is slightly higher leakage (19%) with 7% spent in York, 4% in Bridlington, 1% in Leeds, 1% in Hull and 5% elsewhere.

Expenditure Growth

5.30 Table 15 in Appendix 7 indicates that each resident of Scarborough PCA will generate £2,827 of comparison goods expenditure in 2007. Multiplied by the population of c. 32,700 this generates c. £93m expenditure as shown in table 16. Scarborough SCA generates a further £116m and combined with the PCA the Scarborough catchment generates c. £209m comparison goods expenditure.

5.31 Expenditure per head projections are also shown in Table 15. These indicate that for comparison goods where there is much higher growth (5% pa) than for convenience goods according to OEF (MapInfo Brief 07/02 Table 2). Consequently there is significant overall growth to 2011 (£47m) as shown in Tables 17 & 18. For the period 2005 to 2016 OEF forecast an even higher rate of growth of 5.3% pa resulting in a total growth in the Scarborough catchment area of £133m to 2016 as shown in Tables 17 and 18.

5.32 Expenditure growth is the main source of quantitative need and Tables 17 and 18 indicate that this is fairly significant, however, these high growth rates are offset by high increases in turnover efficiency in existing floorspace and EBS recommend a rate of between 2% and 2.5% for comparison goods and in this study a 2% turnover efficiency rate use is utilised. When 20% leakage (£6.6m) and turnover efficiency improvements in existing floorspace (£16m) the expenditure growth is reduced to £23m in 2011 although when other sources of quantitative need are taken into account this is increased slightly.

Leakage

5.33 The NEMS household survey recorded around 14% of comparison goods expenditure leaking from the Scarborough catchment area as shown in the penultimate column / row of Table 20 and in more detail in Appendix 8 Tables 32 and 33. There is therefore a degree of leakage that can be realistically ‘clawed back’ to support new floorspace in the catchment area.

5.34 For the purposes of this study it is assumed that a quarter of current leakage could be retained in the Scarborough area with an improvement in the qualitative offer in the town centre. This would increase the retention level of the Scarborough area within the catchment from 79% to 82% and is considered to be a realistic market share as a significant percentage of trade will continue to leak to higher order centres such as York, and to a lesser extent, the regional centre of Leeds which are both improving their retail offer. Both centres and surround retail parks / outlets are reasonably accessible by road and rail and in particular to those residents who live on the periphery of Scarborough in the SCA.

Overtrading

5.35 Overtrading is calculated by comparing the expected or benchmark turnovers based on national company average sales densities with turnovers derived from the NEMS household survey as shown in the final column of Table 20. However, this indicates that only the town centre is overtrading significantly. In addition, some of this expenditure is probably being spent in nearby peripheral areas (shown as undertrading significantly in Table 20) that people regard as the town centre. The main out-of-centre facility Seamer Road RP is not overtrading significantly. As a result this source of quantitative need is not drawn upon in the assessment.

Quantitative Need for New Comparison Goods Floorspace in Scarborough

5.36 If the leakage that can be realistically ‘clawed back’ is added to the expenditure growth this results in c. £33m capacity to support new floorspace in Scarborough in 2011 after other claims such as turnover efficiency improvements are taken into account. There are no major commitments in the town to offset against this capacity and at a town centre sales density average this capacity would support c. 6,300 sq m (net) of floospace in 2011.

5.37 By 2016 this potential floorspace has grown to 13,300 sq m. This section suggests possible locations where this potential new floorspace might be directed and recommends that sites might be phased over the period to 2016 in accordance with guidance in PPS6 (2.46) to ensure less sequentially preferable sites are not developed beforehand if these sites cannot be developed any earlier.

Scarborough Town Centre Conclusions and Recommendations

Redevelopment in Scarborough

5.38 A number of possible locations for redevelopment have been identified to address the quantitative and qualitative need for new retail floorspace in Scarborough identified above and these are detailed below. The sites might also be used instead or as well as retailing for other town centre uses such as offices, housing and leisure to help diversify the centre, a weakness identified in the health check section above. Some of the sites will involve the loss of car parking space and can only be brought forward once the extended park and ride system is fully operational.

Site 1 North Street Redevelopment

5.39 The Local Plan identified one major retail development site in the town centre in policy S5. The site is bounded by North Street, Waterhouse Lane and St. Thomas Street and was allocated for predominantly retail and commercial leisure uses. Most of this site has now been built out with the TK Maxx / JJB, Matalan and Opera House Casino development. The northern end of the site is predominantly used for surface car parking and there are some remaining secondary frontages fronting onto St. Thomas Street and Castle Street site. The remainder of this site could be redeveloped for town centre uses although the parking might have to be replaced elsewhere in the centre.

Site 2 St. Thomas Street Redevelopment

5.40 This is another potential development site on the opposite side (east side) of St. Thomas Street and bounded also by Newborough and Queen Street. This site is bounded by small shops and commercial units and the middle of the site is used for car parking operated by the Council. The site will be in multiple ownership and will require proactive site assembly assistance by the council if it is to be brought forward. The site affords an opportunity to create an eastern anchor to the town centre to counterbalance the shift in gravity westwards towards the Brunswick Centre and to encourage new investment at this end of the PSA. The site should be redeveloped predominantly for retail development in unit sizes attractive to national multiples. There is the potential for rear servicing on the site due to the change in levels and possibly the retention of some parking on site.

Site 3 Aberdeen Walk Redevelopment

5.41 A third potential development site is behind Westborough fronting onto Aberdeen Walk currently occupied by the PO sorting office and several shop units. The site depends on the relocation of the PO and the physical extent to which it can be developed again depends on the council assisting with site assembly. The nearby Balmoral Centre also looks very tired but its refurbishment / redevelopment is unlikely to result in a net increase in floorspace in the town centre. Again this site should be redeveloped predominantly for retail development in unit sizes attractive to national multiples.

Site 4 Westwood Redevelopment

5.42 There is also an edge of centre site on Westwood designated BS on the proposals map for a bus station in the Local Plan currently used as a depot and layover area and is understood to be surplus to requirement. The site is probably too far from the PSA to be used as a bus station as designated in the Local Plan. However, the distance to the PSA also means that any development of the site will have to good pedestrian linkages for it not to operate more as an out-of-centre site.

5.43 The convenience goods quantitative assessment outlined in section 7 identifies potential capacity in 2011 to support c. 1,100 sq m (net) of floospace at a 'big four' supermarket company average sales density or c. 2,300 sq m (net) of floospace at a discounter / convenience operator company average sales density. In 2016 this capacity would support c. 1,700 sq m (net) of floospace at a 'big four' supermarket company average sales density or c. 3,500 sq m (net) of floospace at a discounter / convenience operator company average sales density.

5.44 This capacity could be used to support new convenience goods floorspace within the town centre or an expanded / relocated edge-of-centre supermarket. Existing floorspace and / or the three town centre sites outlined above could be used to accommodate this floorspace requirement. Alternatively, or as well, the extension / relocation of the Tesco supermarket onto the edge-of-centre BS bus depot site might be an option for using this capacity. It is also possible that an operator might identify and / or assemble another edge-of-centre site but unless it as well related as the BS site, if not better, to the PSA in terms of pedestrian linkages than this site then it should not be supported unless the BS site cannot be brought forward during the plan period.

5.45 For the avoidance of doubt there is not a quantitative need for a fourth large superstore in Scarborough, only the extension / relocation of the existing edge-of-centre superstore. Alternatively, the capacity required to support this may be used to support other convenience goods proposals in the PSA and / or in sequentially preferable edge-of-centre sites before 2006.

5.46 The comparison goods quantitative assessment outlined in section 7 identifies potential capacity in 2011 to support c. 6,300 sq m (net) of floospace in 2011 and 13,300 sq m in 2016. This development can be accommodated in the three town centre sites identified above. It should also be remembered that if the Tesco store is extended / relocated it is likely to have a considerable element of comparison goods floorspace.

5.47 In allocating sites in the LDF for retail development the Council should be mindful of PPS6 (2.46) that indicates sites can be phased for release over the development plan period. The three town centre development sites and site BS might be programmed for the period to 2016, as they are mostly in multiple ownership and will probably require Council intervention to assemble, to accommodate need identified to that date to ensure that sequentially inferior sites are not brought forward ahead of them.

Shopping Frontages in Scarborough

5.48 It is recommended that the primary frontages identified on the Local Plan proposals map are retained in the LDF but amended to exclude the side of the Brunswick Shopping Centre which are not actually shopping frontages. In these primary frontages policy S12 of the Local Plan can be carried forward into the LDF with amendment to refer to the changes in the use classes order. The council might also consider almost a complete ban on non retail uses in these primary frontages, for example, no more than 10% given over to non-retail.

5.49 The secondary frontages can be retained as shown on the Local Plan proposals map although the council may want to provide a limit for the maximum amount of non-retail use such as up to 35% (one third) of frontages with no more than two non-retail (A2, A3 and A4) uses together. PPS6 does not recommend defining tertiary frontages but these are useful in defining an area where non-retail and evening economy uses might be directed. Therefore these tertiary frontages can remain as shown in the Local Plan and here A5 uses might also be permitted where for example they form no more than 20% of the frontages.

5.50 The primary frontages plus the contiguous secondary frontages on Newborough as far as St. Thomas Street could form the PSA. The PSA might extend a short distance back from the main frontages of Westborough and Newborough, perhaps 20m. In this way two of the three town centre sites identified above will border the PSA and will not have to demonstrate need in support of any retail proposals there. (The advantage of defining a tighter PSA is that it restricts the area that falls within 300m for the definition of edge-of-centre retail sites and gives the Council greater control.)

5.51 The town centre boundary could remain as shown in the Local Plan proposals map. Within 300m of the town centre boundary town centre uses other than retail are classed as potentially edge of centre sites according to PPS6 Annex A Table 2.

Scarborough Town Centre Summary

5.52 Scarborough Town Centre is a sub-regional centre serving the town itself and surrounding rural areas with a catchment population of around 80,000 people. Its catchment in the wider region is limited by the catchments of three larger sub-regional centres - York, Hull and Middlesbrough.

5.53 The town centre performs well on most PPS6 indicators of vitality and viability and compares reasonably with some competing centres and other sub-regional centres in the region. The main weakness is the lack of diversity and the perceived limited number of car parking spaces which the new Park & Ride scheme will hopefully address.

5.54 In 2011 there is capacity to support c. 1,100 sq m (net) of floospace at a ‘big four’ supermarket company average sales density or c. 2,300 sq m (net) of floospace at a discounter / convenience operator company average sales density. In 2016 this capacity would support c. 1,700 sq m (net) of floospace at a ‘big four’ supermarket company average sales density or c. 3,500 sq m (net) of floospace at a discounter / convenience operator company average sales density. This quantitative need for convenience goods floorspace should be directed to sites in and around the town centre.

5.55 There is c. £33m capacity to support new comparison goods floorspace in Scarborough in 2011 after other claims are taken into account. There are no major commitments in the town to offset against this capacity and at a town centre sales density average this would capacity would support c. 6,300 sq m (net) of floospace in 2011. By 2016 this potential floorspace has grown to 13,300 sq m. This potential new floorspace should be directed to the three recommended town centre sites and might be phased over the period in order to ensure less sequentially preferable sites are not developed beforehand if these sites cannot be developed any earlier.

5.56 The Council also need to identify a PSA on Newborough and Westborough and carry forward relevant shop frontages policies from the Local Plan into the LDF.

6.0 Whitby Town Centre

6.1 Whitby Town Centre is a small shopping centre serving the town itself and surrounding rural areas with a catchment population of around 25,000 people for both convenience and comparison goods. Its catchment to the north and west is limited by the catchment of Teesside towns for convenience goods, in particular, Guisborough, and Scarborough to the south. The catchment for non-food goods is restricted by the same centres and in addition the sub-regional centre of Middlesbrough (in the Northern Region) and Teesside Retail Park to the north, and to a certain extent the sub-regional centre of York to the SW.

Summary of Vitality and Viability of Whitby Town Centre

6.2 The methodology for the PPS6 health check of vitality and viability is contained in appendix 1 and the detailed health check of Whitby town centre is presented in Appendix 3.

6.3 There is only a limited range of uses other than retail in Whitby Town Centre that contribute to the vitality and viability of the town although for a small shopping centre diversity is not bad. This partly reflects the Whitby's role as a seaside resort and historic town with all-year round tourism supporting a range of shops and services that might not otherwise locate in town centre of this size. The amount of retail, leisure and office floorspace in edge and out-of-centre locations has increased in recent years with the opening of the edge-of-centre Co-operative supermarket in 1997 and more recently the Lidl store on Stakesby Road. There a number of small infill sites within the centre and one potential, although very sensitive, edge-of-centre site (Endeavour Wharf area).

6.4 The town centre environmental quality is very good and there is a good choice of specialist independent shops although multiples are less well represented and there appears to be a shortage of suitable floorspace units to accommodate those multiples requiring premises in the town. There are a number of charity shops mixed in with the primary frontages although these are mostly at the quality end in terms of goods and frontages. The number of vacancies and amount of vacant floorspace is very low in Whitby indicating a strong centre

6.5 Retailer representation and intentions to change representation is a strong indicator in Whitby. There is a shortage of multiple representation in both the convenience and comparison sectors in the town centre although banks and financial services are well represented. There are unsatisfied requirements from several national multiples wishing to locate in the town centre suggesting a shortage of suitable modern premises and the most recent development was entirely occupied by four multiples.

6.6 The proportion of vacant street level property is very low although it has increased slightly since 2003. It is possible that there is actually a shortage of units suitable for national multiples. Commercial yields on non-domestic property have recently decreased to a reasonable 7.25% which compares very favourably with competing centres including the sub-regional centre of Scarborough.

6.7 Accessibility by car and parking is the main problem in Whitby and this was the main concern for both visitors and businesses in the surveys. The business survey recorded support for park and ride proposals in the town that might help alleviate this. Other modes of transport and access such as walking and buses are much better.

6.8 Customer and residents views and behavior indicate levels of dissatisfaction with the town centre, in particular the limited retail offer. Perception of safety and crime are reasonably good and local crime levels are generally below the national average in the Borough.

6.9 In summary, Whitby town centre displays strong PPS6 indicators of vitality and viability and compares reasonably with competing centres and even larger sub-regional centres such as Scarborough. The main strength is the attractive environment and old world charm of the centre and the specialist independent offer. The main weaknesses are the lack of diversity, limited multiple representations, exacerbated by a shortage of suitable units, congestion and the limited number of car parking spaces. The main opportunity in the short term are the infill development sites and in the longer term a park and ride scheme and redevelopment of the Endeavour Wharf area. The main threat is the continued congestion and parking problems and also growing pressure for retail development in peripheral locations if town centre sites cannot be brought forward.

Whitby Convenience Goods Quantitative Assessment

6.10 The Whitby study is also broken down into a PCA and SCA as shown on Map 1 in Appendix 6, however, unlike Scarborough in its SCA Whitby does not have a significant market share in the SCA. The PCA is the main urban area of Whitby plus the rural areas to south extending to Robin Hoods Bay and Goathland and including Sleights and Sandsend. The SCA is formed by the upper Esk Valley and the area to the NW of Whitby including Staithes and Hinderwell. The SCA is shared with centres in the Teesside area such as Guisborough, Middlesbrough and Redcar that cumulatively have a greater market share than Whitby. This is not only because these are higher order centres than Whitby but also because the SCA forms a commuter hinterland for Teesside.

6.11 The Whitby PCA has a population of c. 21,000 and the SCA c. 5,800 creating a catchment population of 26,800. The broad shopping patterns for convenience goods in the PCA are shown in Tables 30 and 31 in Appendix 8. In the PCA the Coop supermarket at Whitby has the greatest market share (33%) of overall convenience goods expenditure followed by Somerfield (15%) and the new Lidl on Stakesby Road (11%). However, the smaller town centre stores (inc. Heron) account for only 1% of expenditure suggesting an under recording in the household survey.

6.12 In total 69% of convenience goods expenditure is retained within the PCA, however, 21% is spent in Scarborough mainly at the Seamer Morrisons (11%), Tesco (4%) and Sainsburys (2%) and a further 8% leaks elsewhere, mainly to Guisborough and Teesside destinations.

6.13 Leakage is far greater from the SCA (67%) than the PCA (29%) that is mainly going to stores in Guisborough and elsewhere in Teesside with only 4% going to Scarborough. This indicates that for convenience goods the SCA isn't really part of the Whitby catchment and in this area Guisborough and other Teesside centres have a greater influence due to their proximity and superior offer in terms of 'big four' representation.

Expenditure Growth

6.14 Table 2 in Appendix 6 indicates that each resident of Whitby PCA will generate £1,438 of convenience goods expenditure in 2007. Multiplied by the population of c. 21,000 this generates c. £30m expenditure as shown in table 3. Whitby SCA generates a further £8m and combined with the PCA the Whitby catchment generates £38.6m convenience goods expenditure.

6.15 Expenditure growth is the main source of quantitative need and it can be seen from Table 8 that due to low growth rates for convenience goods there is not significant overall expenditure to support new floorspace. However, when leakage and overtrading are taken into account as shown in Tables 8 and 9 this capacity is increased as outlined below.

Leakage

6.16 As indicated above the NEMS household survey recorded fairly high levels of convenience goods expenditure leaking from the Whitby catchment area particularly from the SCA as shown in the penultimate column / row of Table 10 and in more detail in

Appendix 8 Tables 30 and 31. However, it is considered that very little of the leaking expenditure from the SCA can be realistically 'clawed back' to support new floorspace in Whitby as this area is really part of the catchment area of Guisborough and other higher order Teesside shopping centres.

6.17 Therefore only leakage from the PCA is drawn upon although even here not all expenditure that is spent in Scarborough in particular can be drawn upon as some of this will be linked with commuting trips and / or comparison goods shopping trips to this higher order centre. In addition, due to the postcode geography utilised in the study the Whitby PCA extends some way south as far as Ravenscar from where Scarborough will be fairly accessible. Therefore only 50% of the expenditure leaking from the PCA is claimed towards supporting new floorspace in Whitby

Overtrading

6.18 Overtrading is calculated by comparing the expected or benchmark turnovers based on national company average sales densities with turnovers derived from the NEMS household survey. Where the survey indicates shops / centres are trading above these expected / benchmark levels that is regarded as overtrading as shown in the final column of Table 10.

6.19 It can be seen from the final column of Table 10 that stores in the Whitby urban area are both under and overtrading, however, the one store that is overtrading significantly is the edge-of-centre Coop supermarket. This store generates a significant number of linked trips with the town centre with many shoppers using the stores car park and combining shopping trips therefore this overtrading is not claimed to support additional floorspace in Whitby area. The only out-of-centre store in the Whitby area that is overtrading is the new Lidl store and this is claimed to support additional floorspace in Whitby area.

Quantitative Need for New Convenience Goods Floorspace in Whitby

6.20 If the projected overtrading at the Lidl store in 2011 (c. £1.2m) is added to the leakage (c. £4.7m) from the PCA that can be realistically 'clawed back' and expenditure growth (£2.3m) this results in c. £8.2m capacity to support new floorspace in Whitby. However, there are other claims on this capacity such as turnover efficiency improvements in existing floorspace and an allowance of £0.3m has to be made in the period to 2011 and 37% (£0.9m) of expenditure growth that might be expected to 'leak' as with existing expenditure there is a claim of £1.1m on the identified capacity resulting in a revised potential capacity of £7.1m in 2011. In 2016 this is projected to increase to £9m.

6.21 In 2011 this capacity would support c. 700 sq m (net) of floospace at a 'big four' supermarket company average sales density or c. 1,400 sq m (net) of floospace at a discounter / convenience operator company average sales density. In 2016 this capacity would support c. 900 sq m (net) of floospace at a 'big four' supermarket company average sales density or c. 1,800 sq m (net) of floospace at a discounter / convenience operator company average sales density. Further recommendations are set out in this section as to where this quantitative need for convenience goods floorspace might be directed within the Whitby catchment area.

Whitby Comparison Goods Assessment

6.22 The comparison goods assessment uses the same study area and methodology as the convenience goods assessment. The broad shopping patterns for comparison goods are shown in table 35 and 36 in Appendix 8. In the PCA 38% of expenditure is retained within the Whitby area with 28% leaking to Scarborough, mainly to the town centre (24%) area, and 24% leaking elsewhere mainly to Teesside (13%) and York (6%).

6.23 In the SCA Whitby has an even lower market share (21%) of overall comparison goods than in the PCA and there is greater leakage (71%) mainly to Teesside (32%), Scarborough (8%) and York (4%). The survey recorded a high level of leakage (26%) to other destinations from the SCA which are thought to be mainly smaller centres in Teesside and North Yorks.

Expenditure Growth

6.24 Table 15 in Appendix 7 indicates that each resident of Whitby PCA will generate £2,945 of comparison goods expenditure in 2007. Multiplied by the population of c. 21,000 this generates c. £62m expenditure as shown in table 16. Whitby SCA generates a further £17m and combined with the PCA the Whitby catchment generates £79m comparison goods expenditure.

6.25 Expenditure per head projections are also shown in Table 15. These indicate that for comparison goods where there is high annual growth (5% pa) there is significant overall growth to 2011 (c. £18m) as shown in Tables 17 & 21. For the period 2005 to 2016 OEF forecast an even higher rate of growth of 5.3% pa resulting in a total growth in the Whitby catchment area of £50m to 2016 as shown in Tables 17 and 22.

6.26 Expenditure growth is the main source of quantitative need and Tables 17 and 21 indicate that this is fairly significant, however, these high growth rates are offset by high increases in turnover efficiency (2% pa). When 56% leakage (£10m) and turnover efficiency improvements in existing floorspace (£2.3m) are deducted from the expenditure growth it is reduced to £5.5m in 2011 although when other sources of quantitative need are taken into account this increases to c. £15m.

Leakage

6.27 As indicated above the NEMS household survey recorded very high levels of comparison goods expenditure leaking from the Whitby catchment area particularly from the SCA as shown in the penultimate column / row of Table 23 and in more detail in Appendix 8 Tables 35 and 36. However, it is considered that very little of the leaking expenditure from the SCA can be realistically 'clawed back' to support new floorspace in Whitby as this area is really part of the catchment area of Middlesbrough and other higher order Teesside shopping centres.

6.28 Therefore only leakage from the PCA is drawn upon although even here not all expenditure that is spent in Scarborough in particular can be drawn upon as some of this will be linked with commuting trips and / or shopping trips to the large supermarkets in and around Scarborough. In addition, people are prepared to travel much further for certain comparison goods such as clothes and fashion items to higher order centres such as Middlesbrough, York and Scarborough to shops that are unlikely to ever locate in Whitby (a more detailed assessment of the various classes of comparison goods shopping patterns is considered in later in this section).

6.29 For the purposes of this study it is assumed that a quarter of current leakage from the PCA could be retained in the Whitby area with an improvement in the qualitative offer in the town centre. This would increase the retention level of the Whitby area within the catchment from 35% to 45% and is considered to be a realistic market share as a significant percentage of trade will continue to leak to higher order centres.

Overtrading

6.30 Overtrading is calculated by comparing the expected or benchmark turnovers based on national company average sales densities with turnovers derived from the NEMS household survey as shown in the final column of Table 23. However, this indicates that only the comparison element of the supermarkets are overtrading and this is largely accounted for by the edge-of-centre Coop store therefore this source of quantitative need is not drawn upon in the assessment.

Quantitative Need for New Comparison Goods Floorspace in Whitby

6.31 If the leakage that can be realistically 'clawed back' is added to the expenditure growth this results in c. £15m capacity to support new floorspace in Whitby in 2011 after other claims such as turnover efficiency improvements are taken into account. There are no major commitments in the town to offset against this capacity and at a town centre sales density average this would capacity would support c. 4,300 sq m (net) of floospace in 2011.

6.32 By 2016 this potential floorspace has grown to 6,700 sq m, however, this section later suggests where this potential new floorspace might be directed to in Whitby and also recommends that the main development site in Whitby might be phased over the period to 2016 in accordance with guidance in PPS6 (2.46) to ensure less sequentially preferable sites are not developed beforehand if this site cannot be developed any earlier.

Whitby Town Centre Conclusions and Recommendations

Redevelopment in Whitby

6.33 A number of possible locations for redevelopment have been identified to address the quantitative and qualitative need for new retail floorspace in Whitby identified above and these are detailed below. All of the sites will involve the loss of car parking space and can only be brought forward once the proposed park and ride system is fully operational.

6.34 There are a number of infill sites along New Quay Road, one of which (Eve's garage) has been recently built out in a sympathetic manner hiding the rear areas of Baxtergate but respecting the local vernacular. The remaining site on New Quay Road plus another surface car park site on Church Street could be developed in a similar manner for units that could be occupied by some of the many multiples keen to locate in Whitby. However, this potential infill development is insufficient to meet the need for additional comparison and convenience goods floorspace in the town, particularly if current levels of leakage for both goods categories are to be reduced. If no other sites are brought forward then there is likely to be increased pressure for piecemeal out-of-centre development in Whitby that might reduce leakage but will contribute very little to the town centre and will be less sustainable than development on one more central site to meet this development pressure.

6.35 Endeavour Wharf is part of Site L11 in the Local Plan that designates the upper harbour area for mixed use tourism led development. The explanation to the policy refers to the then recently opened Co-operative supermarket but there is no other reference to retail.

6.36 The docks warehouse that detracts from the Endeavour Wharf area, along with the expanse of surface car parking, appears to be surplus to requirement along with the land between it and the wharfside that is used by the Council for overflow car parking in the summer months. In addition there is an extensive area of surface car par to the south of the Co-operative supermarket that could be utlised more efficiently to support the town centre.

6.37 There is scope for the extension / relocation / redevelopment of the existing supermarket which is overtrading and, as indicated earlier, could be greatly expanded although not to the point of a superstore (supermarket over 2,500 sq m net). The area around Endeavour Wharf might be redeveloped sensitively for retail development with floorplates that are attractive to the many operators seeking Whitby locations.

6.38 The key to the success of the regeneration of this area is a sensitive design of an appropriate scale that respects and adds to the local vernacular. Proposals for further development on this area have however proved controversial and will need careful consideration.

Shopping Frontages in Whitby

6.39 It is recommended that the primary frontages identified on the Local Plan proposals map are retained in the LDF but amended to exclude Flowergate where Somerfield is the only retail multiple (Woolworths have a rear entrance onto Flowergate) and this frontage could be redesignated secondary. The same recommendation for Scarborough town centre's primary frontages apply with policy S12 of the Local Plan carried forward into the LDF with amendment to refer to the changes in the use classes order.

6.40 The secondary frontages can be retained as shown on the Local Plan proposals map with the inclusion of Flowergate and possibly extending across the river to include at least Bridge Street, where there are two multiples, and perhaps parts of Church Street where there are also multiples and many quality independents.

6.41 The primary frontages plus the contiguous secondary frontages on St. Ann's Staith as far as Woolworths and Flowergate as far as Somerfield could form the PSA. The town centre boundary could remain as shown in the Local Plan proposals map.

Whitby Town Centre Summary

6.42 Whitby Town Centre is a small shopping centre serving the town itself and surrounding rural areas with a catchment population of around 25,000 people for both convenience and comparison goods. Its catchment to the north and west is limited by the catchment of Teesside towns for convenience goods and Scarborough to the south. Whitby town centre displays strong PPS6 indicators of vitality and viability for a small town centre and compares reasonably with competing centres. The main weakness of the centre is the lack of diversity, limited retailer representation and the limited number of car parking spaces.

6.43 In 2011 there is capacity to support c. 700 sq m (net) of new convenience goods floospace and c. 900 sq m by 2016. There is also capacity to support c. 4,300 sq m (net) of comparison goods floospace in 2011 growing to 6,700 sq m by 2016. There is only one potential development site at Endeavour Wharf capable of accommodating most of this growth and this is reliant upon the park and ride proposals materialising. If this site does not come forward there is likely to be intense development pressure for retail development on out-of-centre sites in the town.

7.0 Filey Town Centre

7.1 Filey Town Centre is a small shopping centre serving the town itself and surrounding rural areas with a catchment population of around 11,000 people for both convenience and comparison goods. Its catchment to the north is limited by the catchment of Scarborough, to the south by Bridlington and to the west by Driffield and Malton. The catchment for non-food goods is restricted by the same centres and in addition the sub-regional centre of York to the west. To a lesser extent, and particularly for convenience goods, the smaller village centre of Hunmanby to the SW reduces the influence of Filey.

Summary of Vitality and Viability of Filey Town Centre

7.2 There is only a very limited range of uses other than retail in Filey Town Centre that contribute to the vitality and viability of the town although for a very small shopping centre diversity is not too bad. This partly reflects the Filey's role as a seaside resort with tourism spending supporting a range of shops and services that might not otherwise locate in town centre of this size. There is one potential development site on the edge of the centre that has remained undeveloped for some years but it is understood there is renewed market interest.

7.3 The town centre environmental quality is quite good and there is a good choice of specialist independent shops although multiples are less well represented. There are a few quality buildings in the centre and a mixture of good and poor quality facades. The number of vacancies and amount of vacant floorspace is very low in Filey indicating a strong centre although there are seasonal fluctuations.

7.4 Retailer representation and intentions to change representation is a strong indicator in Filey. Although there is a shortage of multiple representation in the town centre banks are well represented. The town centre business survey recorded good overall trading performance and a high level of business confidence in the centre. The most notable departure from Filey is probably the Safeway supermarket as part of the national closure / takeover. There are very few retailer requirements for the town centre although it is known a national operator of small supermarkets is seeking a presence.

7.5 Accessibility by car and parking is the main problem in Filey and this was the main concern for both visitors and businesses in the surveys. Other modes of transport and access such as walking and buses are much better. Customer and residents views and behavior indicate levels of dissatisfaction with the town centre, in particular the limited retail offer, parking problems and the availability of toilets. Perception of safety and crime are reasonably good.

7.6 In summary, Filey town centre displays reasonable PPS6 indicators of vitality and viability for a small centre but fails to compete even for convenience goods shopping with larger centres due to a limited offer. The main strength of the centre is the attractive high street shopping environment, seaside location and the specialist independent offer. The main weaknesses is the lack of diversity, limited multiple representations and the limited number of car parking spaces. The main opportunity is the S16 development site identified in the Local Plan, for which there is renewed developer / operator interest, and the holiday park expansions at Primrose Valley and Amtree Park. Another opportunity would be the introduction of further environmental improvements into the centre including a shop frontage scheme. The main threat is the continued and growing leakage of expenditure to higher order competing centres and out-of-centre destinations if the development site is not brought forward.

Filey Convenience Goods Quantitative Assessment

7.7 In the Filey study area comprises the postcode sectors YO14 0 and YO14 9 that include Hunmanby. The Filey area has a population of c. 10,800 and the broad shopping patterns for convenience goods here are shown in table 13 in Appendix 7. As outlined earlier this is really a subset of the Scarborough catchment particularly for comparison goods. Within the Filey area 27% of expenditure is spent in and around the town centre (i.e. including the Somerfield and Station Avenue stores) and a further 11% is spent elsewhere in the area including Hunmanby.

7.8 Table 29 in Appendix 8 indicates there is considerable leakage from the Filey area of convenience goods expenditure and Seamer Morrisons store has the greatest market share (33%) of all expenditure followed by the Filey Somerfield (17%), Hunmanby (8%), Mills (5%) and other town centre shops (5%). Around 14% of convenience goods expenditure in the Filey area is spent in and around Scarborough town centre with Tesco Westwood being the most popular destination (5%). There is greater leakage from the Filey area than any of the other zones except for Whitby SCA and particularly to the Tesco store in Bridlington (9%).

Expenditure Growth

7.9 Table 2 in Appendix 6 indicates that each resident of the Filey area will generate £1,451 of convenience goods expenditure in 2007. Multiplied by the population of c. 10,800 this generates c. £15.7m expenditure as shown in table 3. Expenditure growth is the main source of quantitative need and it can be seen from Table 11 that due to the small population in the area and low growth rates for convenience goods there is not significant overall expenditure to support new floorspace. However, when leakage and overtrading are taken into account as shown in Tables 11 and 12 this capacity is increased slightly as outlined below.

Leakage

7.10 As indicated above the NEMS household survey recorded fairly high levels of convenience goods expenditure leaking from the Filey area particularly to the Morrisons at Seamer (33%), other shops in and around Scarborough (15%) and Bridlington Tesco (9%) as shown in the penultimate column / row of Table 13 and in more detail in Appendix 8 Table 29. Although much of this expenditure is going to 'big four' supermarkets far larger than anything that can be supported in Filey it is considered that up to half the leakage can be realistically 'clawed back' to support new floorspace in Filey if there is a significant improvement in the local retail offer.

Overtrading

7.11 Overtrading is calculated by comparing the expected or benchmark turnovers based on national company average sales densities with turnovers derived from the NEMS household survey. It can be seen from the final column of Table 13 that stores in the Filey area are both under and overtrading, however, two stores in particular appear to be overtrading significantly – the Mills convenience store and the edge/out-of-centre Somerfield supermarket. These stores generate linked trips with other shops in the town centre where other stores, along with those in surrounding areas, appear to be undertrading therefore this overtrading is not claimed to support additional floorspace in the Filey area.

Quantitative Need for New Convenience Goods Floorspace in Filey

7.12 If the leakage (c. £5.3m) from Filey that can be realistically 'clawed back' is added to the expenditure growth (£1.1m) this results in c. £6.4m capacity to support new floorspace in Filey. Other claims on this capacity total to £0.7m and include turnover efficiency improvements in existing floorspace and an allowance of £0.7m in the period to 2011 for expenditure growth that might be expected to 'leak' as with existing expenditure. This results in a revised potential capacity of £5.6m in 2011 growing to £6.2m in 2016.

7.13 In 2011 this capacity would support c. 950 sq m (net) of floorspace at a medium sized supermarket company average sales density and in 2016 this capacity would support c. 1,050 sq m (net) of same type of floospace. Further recommendations are set out in this section as to where this quantitative need for convenience goods floorspace might be directed within the Filey catchment area.

Filey Comparison Goods Quantitative Assessment

7.14 The comparison goods assessment uses the same study area and methodology as the convenience goods assessment. The broad shopping patterns for comparison goods are shown in Table 34 in Appendix 8. In Filey only 17% of expenditure is retained within the Filey area, mainly within the town centre, with 57% leaking to Scarborough, mainly to the town centre (45%) area and Seamer Road RP (9%) with 18% leaking elsewhere but mainly to York (7%) and Bridlington (4%).

Expenditure Growth

7.15 Table 15 in Appendix 7 indicates that each resident of Filey will generate £3,006 of comparison goods expenditure in 2007. Multiplied by the population of c. 10,800 this generates c. £32.5m expenditure as shown in table 16. Expenditure per head projections are also shown in Table 15. These indicate that for comparison goods where there is high annual growth (5% pa) there is overall growth to 2011 (£7.6m) as shown in Tables 17 & 24. For the period 2005 to 2016 OEF forecast an even higher rate of growth of 5.3% pa resulting in a total growth in the Filey area of £21.8m to 2016 as shown in Tables 17 and 25.

7.16 Expenditure growth is the main source of quantitative need and Tables 17 and 25 indicate that this is fairly significant in the local context, however, these high growth rates are offset by high increases in turnover efficiency (2% pa). When 76% leakage (£5.8m) and turnover efficiency improvements in existing floorspace (£0.6m) are deducted from the expenditure growth it is reduced to £1.2m in 2011 although when other sources of quantitative need are taken into account this increases to £3.1m.

Leakage

7.17 As indicated above the NEMS household survey recorded very high levels of comparison goods expenditure leaking from the Filey area as shown in the penultimate column / row of Table 26 and in more detail in Appendix 8 Table 34. However, it is considered that very little of the leaking expenditure from Filey can be realistically 'clawed back' to support new floorspace in Filey as this area is really part of the catchment area of Scarborough and Bridlington to a lesser extent.

7.18 Therefore only 5% of leakage from the area is drawn upon although even here not all expenditure that is spent in Scarborough and Bridlington can be drawn upon as some of this will be linked with commuting trips and / or shopping trips to the large supermarkets in and around Scarborough. In addition, people are prepared to travel much further for certain comparison goods such as clothes and fashion items to higher order centres such as Scarborough and York and to shops that are unlikely to ever locate in Filey.

7.19 For the purposes of this study it is assumed that 5% of current leakage from the area could be retained in the Filey area with an improvement in the qualitative offer in the town centre. This would increase the retention level of the Filey area within the catchment from 17% to 22% and is considered to be a realistic market share as a significant percentage of trade will continue to leak to higher order centres.

Overtrading

7.20 Overtrading is calculated by comparing the expected or benchmark turnovers based on national company average sales densities with turnovers derived from the NEMS household survey as shown in the final column of Table 23. However, this indicates that only the town centre stores are overtrading relative to expected levels and this is may be accounted for by the undertrading in other shops in the area that respondents to the survey regard as being in the town centre. Therefore this source of quantitative need is not drawn upon in the assessment.

Quantitative Need for New Comparison Goods Floorspace in Filey

7.21 If the leakage that can be realistically 'clawed back' is added to the expenditure growth this results in c. £3.1m capacity to support new floorspace in Filey in 2011 after other claims such as turnover efficiency improvements are taken into account. There are no major commitments in the town to offset against this capacity and at a town centre sales density average this would capacity would support c. 1,050 sq m (net) of floorspace in 2011.

7.22 By 2016 this potential floorspace has grown to 1,700 sq m and the following section suggests where this potential new floorspace might be directed to in Filey.

Filey Town Centre

7.23 There is not a great quantitative or qualitative need in Filey other than for an improved convenience goods offer. The Local Plan identifies site S16 as suitable for a supermarket development. This section has identified a quantitative and qualitative need for a small supermarket up to 1,050 sq m net in Filey and this is the only suitable site. Policy S16 can be carried forward into the LDF but the Council should place a size limit on the supermarket to prevent an inappropriate level of development on the site.

7.24 There is also an issue of the siting and orientation of the supermarket which should have a pedestrian entrance as close to Station Avenue as possible to encourage combined trips with the rest of the town centre. In addition the site is the main off-street car park not only for the town centre but also the resort and careful parking management will be required to ensure visitor car parking can still continue but that the supermarket is able to operate efficiently.

Shopping Frontages in Filey

7.25 It is recommended that the primary frontages identified on the Local Plan proposals map are retained in the LDF but amended to exclude John Street and Belle Vue Street where there are no banks or multiples. These frontages could be redesignated secondary and John Street could be included in the PSA along with the primary frontage of Murray Street. The town centre boundary could remain as shown in the Local Plan proposals map. The same recommendation for Scarborough and Whitby town centre's primary frontages apply with policy S12 of the Local Plan carried forward into the LDF with amendment to refer to the changes in the use classes order.

Filey Town Centre Summary

7.26 Filey town centre centre displays reasonable PPS6 indicators of vitality and viability for a small centre but fails to compete even for convenience goods shopping with larger centres due to a limited offer. The main weaknesses is the lack of diversity, limited multiple representations and the limited number of car parking spaces. The main opportunity is the S16 development site identified in the Local Plan, for which there is renewed developer / operator interest. In 2011 there is capacity to support c. 950 sq m (net) of new convenience goods floorspace and c. 1,050 sq m by 2016. The key to bringing this site forward successfully is the layout and siting to ensure maximum pedestrian linkages with the town centre. There is also capacity to support c. 1,050 sq m (net) of comparison goods floorspace in 2011 growing to 1,700 sq m by 2016 and this should be accommodated in and around the town centre.

8.0 0ther Development Plan Issues

Major Shopping Development

8.1 Guidance in PPS1 advises that LPAs need not replicate the policy guidance contained in PPGs and PPSs but must provide a local interpretation. It is therefore suggested that policy S1 in the Local Plan need not be carried forward into the LDF and it can be replaced by a policy that refers to the five policy tests of PPS6.

District Centres

8.2 Section 7 outlined the need to reconsider the designation of the four district centres and to possibly restrict this to Eastfield. Falsgrave and Ramshill Road and possibly Hunmanby could be designated as district centres, even though they don't meet the PPS6 Annex A definition, or alternatively they may be designated as 'hybrid' neighbourhood centres as outlined in section 7 along with Victoria Road.

8.3 The justification to policy S19 will have to be amended to explain the difference between the Local Plan definition and PPS6 Annex A and also to outline the maximum development size thresholds recommended as 500 sq m (net) for convenience floorspace and 200 sq m (net) for comparison goods (to encourage multiples into higher order centres such as the three main town centres). In Eastfield the maximum development size threshold for convenience goods might be increased to 1,500 sq m (net) to allow for the expansions / relocation of the anchor supermarket there. The expanded supermarket would better serve the Middle Deepdale housing development and help attract new expenditure into the district centre.

Local Shopping Facilities

8.4 Section 7 outlined the need to amend policy S3 not only to encourage local provision but also to protect local centres and parades from threats such as PFSSs and inappropriate scales of development. In small local centres / parades it is doubtful whether more than one convenience store is of an appropriate level of development and can be supported. With regard to single shops in urban areas it is recommended these are restricted to 100 sq m to ensure they serve a local area and do not compete with local centres and larger parades. The Council might also consider a separate policy on PFSSs and / or they might be referred to in the justification / explanation to policy S3.

Shop Fronts

8.5 Policy S14 might be carried through to the LDF as currently worded. The only suggested amendment is with regard to shutters. Whilst these can't be controlled in premises with existing shutters new premises and / or proposals for alterations to frontages for shuttering might restrict the type of shuttering to the more transparent / less obtrusive variety and ensure they are opened during daytime regardless of whether the business is open or not

Hot Food Takeaways

8.6 Policy S15 might be also carried through to the LDF as currently worded with some additional text on shuttering to be consistent with the recommended changes to policy S14. The LDF also needs to amend the frontages policy to comply with the revised 2005 Use Classes Order that subdivides the old A3 category into three new classes. This has implications for the shop frontages policies and the Council might want to place limits on the amount of non-A1 in primary frontages, the amount of A2 to A4 in secondary frontages and only permit new A5 in tertiary frontages up to a certain percentage of frontages, subject to the other provisions of policy S15. A 20% maximum threshold is suggested for A5 units in tertiary frontages on the basis that over concentrations of takeaways can be oppressive during the daytime, present a poor image, generate smells and attract anti-social behaviour and can discourage other investment.

8.7 The only suggested amendment is with regard to shutters. Whilst these can't be controlled in premises with existing shutters new premises and / or proposals for alterations to frontages for shuttering might restrict the type of shuttering to the more transparent variety and ensure they are opened during daytime regardless of whether the business is open or not.

8.8 The Local Plan contains a policy S20 on Eastborough although it might not be necessary to retain this in the LDF with the revised 2005 Use Classes Order giving the Council greater control over what is permitted in this area. In addition, most of the street where there is pressure for A5 development is not in the town centre although policy S15 on Hot Food Takeaways still applies. The section of Eastborough that is in the town centre boundary could possibly be redesignated a tertiary frontage.

Existing and Proposed Retail Warehousing

8.9 The review of trends in retail and town centre uses in section 3 highlighted the development of fashion parks in former bulky goods retail parks which can compete directly with town centres. It is therefore recommended that if policy S2 in the Local Plan is carried forward into the LDF it is reworded to provide no exceptions to change of goods and subdivisions will only be permitted where they meet the four criteria.

8.10 With regard to new retail warehousing PPS6 (3.16) indicates that all goods can be retailed from town centres, however, it is clear in certain centres such as Whitby that floorplates of the size required by many bulky goods operators could not be accommodated in any new development. It is therefore recommended that policy S2 might be amended or a new policy included to define bulky goods as bulky electrical goods, furniture and carpets and DIY and that goods such as toys, soft furnishings and pets products are excluded from this definition.

Retail Development in Countryside

8.11 The Local Plan contains policy S18 that permits certain forms or retail development in rural locations. This policy should be amended to reflect guidance in PPS6 on the policy tests including need, appropriate scales of development, sequential approach, impact and accessibility or alternatively it might not be carried forward to the LDF as it could encourage unwanted development, for example, elsewhere in the UK a number of garden centres have been converted to supermarkets. Where rural retail development might be encouraged is in areas that could be classed as food deserts, an example of this is the Beacon Farm shop in Sneaton.

1.0 Town Centre Health Checks Methodology

1.0 PPS6 health checks are a good way of gauging the health or vitality and viability of a town centre. PPS6 emphasizes the need for local planning authorities to gain a proper understanding of the health of the town centres in their area. Para 4.4 sets out the following indicators by which the health of a town centre should be assessed:

- diversity of uses;
- the amount of edge / out-of centre retail / leisure floorspace;
- potential capacity for expansion;
- retailer representation and intentions to change representations;
- shopping rents;
- proportion of vacant street level property;
- commercial yields on non-domestic property;
- pedestrian flows;
- accessibility;
- customer views and behavior;
- perception of safety and crime; and
- state of the town centre environmental quality.

1.2 Although there is some overlap between the PPS6 indicators, they help provide a context for looking at shopping centres. The methodology and data sources behind each of the health check indicators is outlined below. In addition, the household survey used to inform the quantitative assessment is used in the health check to advise on qualitative gaps in provision and possibly perceptions of the main centres. Similarly, the business survey provides valuable background information for the health checks. I also consult with local / regional agents who can advise on market issues and perceptions.

1.3 The PPS6 indicators are brought together to present a picture of the vitality and viability of each centre and are summarised in a SWOT analysis. The qualitative analysis also informs the gaps in market provision and the types of occupier and users the centres should be looking to attract. The health checks also identify other gaps in diversity and provision in the city e.g. commercial / leisure that could be realistically attracted to the centres.

Diversity of uses

1.4 Successful centres are diverse centres that perform a variety of roles to attract a wide range of visitors and shoppers at all times of the day. PPS6 identifies the importance of diversity to the success of a centre. Diversity is measured by site visits, surveys with checklists of functions and with regard to any land-use surveys the Borough Council might hold.

The Amount of Edge / Out-of centre Retail / Leisure Floorspace

1.5 This is a new indicator introduced by PPS6 that advises it can be measured by the amount of land available for new or more intensive forms of town centre development.

Potential capacity for expansion

1.6 This is the second new indicator introduced by PPS6. It can be measured from LPA records, land-use surveys, etc. Successful centres might have an extensive amount of edge and even out-of-centre floorspace but it will be appropriate to the hierarchy position of the centre and not at the expense of in-centre development.

Retailer Representation

1.7 Successful centres also have a good range of shops including specialist independents and national multiples. Representation is measured by site visits, surveys and with reference to Goad Centre Report and Maps for the town centre. Shops are also divided into comparison and convenience businesses to determine how the retail mix compares to national averages (recorded by Experian Goad). Vacancies and shops that have left the centre are also recorded.

Property Market Indicators

1.8 Vacancy rates are recorded on site surveys and compared to national averages published by Experian Goad (2001). Rental Values and Yields are available from the Valuation Office Property Market Report for larger centres such as

Scarborough and regional / local agents hold some additional and anecdotal information.

1.9 The commercial yield on a property investment represents the return, in the form of a rent, on the capital value of a property, expressed as a percentage. The yield represents the return to the investor for risk taking. Therefore investing in the primary shopping area is considered less risky than secondary shopping areas and an investor will demand a lower initial return when investing in the primary shopping area.

1.10 The absolute value of yields at any one time is of limited use since yields are linked to alternative investments in the form of equities and gilts which are determined by broader macro-economic policies. However the trend in yields in a town compared to national and regional trends is important in demonstrating investor confidence in that town.

Pedestrian Flow

1.11 Pedestrian flow surveys are held by the town centre manager for Scarborough but there are none available for Whitby or Filey and here they were undertaken at the same time as the street surveys.

Accessibility

1.12 Access is measured by the location of the centre in relation to the Strategic Highway Network, the quality and frequency of Public Transport Services as well as the number of destinations, and pedestrian linkages to surrounding uses. Orientation within a centre is also a consideration as is any barriers to desire lines and the free movement of pedestrians.

1.13 Car parking provision is also considered under this indicator. Car parks should be safe and secure and within easy reach of shops. Ideally there should be provision for short stay parking on main roads but this isn’t always possible during the day. Where car parks are provided by supermarkets they should enable combined trips with other shops and services in the centre.

1.14 Facilities for cyclists and also access for disabled people with mobility difficulties are considered under this indicator.

Environment and Physical Structure

1.15 This is measured via an urban design appraisal of the centre which considers the built environment, landmarks and quality buildings, the public realm, sense of arrival and place, orientation within the centre, signs of urban decay and neglect, etc. Centres are also considered for their design in relation to crime, opportunities for surveillance, etc. Information can also be gleaned from the household survey and any other survey information the Council may be in possession of e.g. background information for the Community Strategy.

Customer Views and Behavior

1.16 This is provided by the visitor / shopper survey that also confirms the extent of the catchment / study area. The questionnaire includes questions about origin, purpose, frequency, other shopping destinations, likes and dislikes, perceptions, etc. of the min centre visited for non-food shopping.

1.17 In addition commercial information input to the study is gleaned from a business survey followed up by telephone / face-to-face interviews with some key retailers and personnel in the town centre to inform the health checks and qualitative need appraisal.

Perception of Safety and Crime

1.18 This is gleaned from the Chief Constables Annual Report for the area, Home Office Statistics and any survey information the Council may hold. In addition the household survey of shoppers includes questions about perceptions of security and personal safety and use of the town during both night and day.

Summary of Vitality and Viability

1.19 The PPS6 indicators are brought together to present a picture of the vitality and viability of the city centre and the other centres. This can inform a SWOT analysis with key Council staff and stakeholders if the Council think this will be useful. The qualitative analysis also informs the gaps in market provision and the types of occupier and use the centre should be looking to attract. The health checks will also identify other gaps in diversity and provision in the towns e.g. commercial / leisure that could be realistically attracted to the centres.

2.0 The Vitality and Viability of Scarborough Town Centre

Background

2.1 Health checks of Scarborough, Whitby and Filey Town Centres were undertaken based on PPS6 criteria including guidance on suitable primary shopping areas and town centre boundaries.

2.2 A town centre user survey was carried out in each centre with approximately a 200 sample in Scarborough to establish where shoppers are coming from and what they use the centres for and this has also informed the health check and the formation of a study area.

2.3 The health checks also contain an analysis of town centre business survey results. The questionnaire was circulated to approximately 450 businesses in the town centre by the Council and the analysis informs the health check.

2.4 The methodology and data sources for undertaking the Health Checks are contained in Appendix One.

Introduction

2.5 Scarborough Town Centre is a sub-regional centre serving the town itself and surrounding rural areas with a catchment population of around 80,000 people. Its catchment in the wider region is limited by the catchments of three larger sub-regional centres - York, Hull and Middlesbrough (in Northern Region) and to a certain extent the regional centre of Leeds. To a lesser extent, and particularly for convenience goods, the smaller town centres of Whitby and Filey reduce the influence of Scarborough town centre as do the town centres of Bridlington and Malton in neighbouring authorities.

2.6 The town benefits from its historical role as a port and market town guarded by a castle and as a result forms a road hub in the strategic highway network. The rapid expansion of the town as a popular Victorian spa town and resort has resulted in Scarborough having a larger centre in terms of floorspace than the immediate population can probably support. In particular the town centre merges into the seaside frontages at the eastern end of Eastborough.

2.7 In many respects the town centre is constrained by the historic street layout, dense surrounding development and topography. Partly as a result of these constraints there has not been extensive investment in the town centre itself since the Brunswick Square mall was built in the 1990s. More recently there have been smaller additions to the town centre mainly to the area east of Newborough.

Diversity of Main Town Centre Uses

2.8 The vitality and viability of a town centre is dependent not only on its shopping offer but also on the mix of uses which add to the visitor experience and make the centre more attractive to those who live and work there. Offices can generate lunchtime and top-up shopping trips whilst leisure and entertainment facilities, cafes, bars and restaurants add variety and can assist in promoting the evening economy. Educational establishments add to the number of young people in the centre during the week adding to the vibrancy.

2.9 As a sub-regional centre, Scarborough Town Centre is a focus of town centre activity in the surrounding rural areas of North and East Yorkshire and should be able to sustain a good diversity of uses to complement the retail function. In the service sector, these include banks and building societies, hairdressers, dry cleaners, travel agents and estate agents.

2.10 There are also a number of smaller professional offices, and the administrative office of the Borough Council, but Scarborough Town Centre is not traditionally a major office location. The DCLGs 2002 Area of Town Centre Activity Database records around 31,000 sq m of office floorspace in the town centre. There are modern business parks at the peripheral location of Eastfield and the Scarborough Building Society has relocated from the town centre to here.

2.11 Civic and administrative functions are well represented, reflecting the town's sub-regional role, with uses including police station and Crown Court, as well as various Borough Council offices. According to the DCLG's 2002 Area of Town Centre Activity Database (extracting from the 2001 Annual Business Inquiry) 740 people work in civic and public administration in the town centre and 1,680 people in commercial offices. Experian Goad identify financial & business services floorspace in Scarborough (57 on a 100 index) as well below the UK average (100) although Banks and Building Societies are well represented in the town.

2.12 Scarborough has a higher education establishment (Hull University has a small campus at Wheatcroft) and the town's two further education establishments are located out of the centre.

2.13 As might be expected in a seaside resort, Scarborough has a good range of leisure and tourist facilities, although many of these are located in the seaside frontages and some are looking tired. Within the Town Centre are the Stephen Joseph Theatre (that also screens art house films) and the Scarborough Art Gallery (which houses both permanent collections and special exhibitions). Scarborough will greatly benefit from the development of a "Cultural Quarter" with major improvements to the Rotunda Museum (reopening 2008), the Wood End Museum and development of a Creative Industries Centre.

2.14 The evening economy within Scarborough is limited. There are a number of pubs and night clubs in the centre but the main Cinema is located on Foreshore Parade. A small Casino has been built on the site of the former Opera House. Experian Goad identify leisure services (116) as being above the national average (100) which probably reflects the merger of the shopping centre with the resort. However, some facilities are underrepresented such as bars and wine bars (39) restaurants, Cinemas, Theatres & Concert Halls (60), Disco, Dance & Nightclubs (18) and Sports & Leisure Facilities (16). This is not a major qualitative gap for local residents as many of these facilities are located on the seafront and elsewhere in the town although here they obviously contribute much less to the diversity of the centre.

2.15 The town centre is surrounded by residential areas, particularly to the north and west, and there are some areas of housing within the town centre boundary to the north of Westborough / Newborough / Eastborough so this is a strength in terms of diversity.

2.16 In summary, excluding retail there is only a limited range of other uses in Scarborough Town Centre that contribute to the vitality and viability of the town. For a sub regional centre, diversity is not good. This partly reflects the fact that

Scarborough is a seaside resort and many of the leisure facilities are provided in seaside frontages away from the centre. However, the limited office market in and around the town centre is a particular weakness in the overall diversity of the town as the lunchtime and late afternoon shoppers can greatly contribute to footfall and the evening economy.

The Amount of Retail, Leisure and Office Floorspace in Edge and Out-of-Centre Locations

2.17 The retail frontages of Scarborough's town centre extend some considerable distance to the east, merging with the seasonal seaside frontages, and west where they merge into the district centres of Falsgrave and Victoria Road. To the north and south the frontages are curtailed by topography and, particularly to the north, surrounding housing.

2.18 There has been fairly extensive retail development around the town centre in recent years such as the Casino, Matalan and JJB / TK Maxx developments. Along Westwood there has been the older edge-of-centre development of the Tesco supermarket and Comet. To the north of the centre on Northway there is a recent Aldi development and further out along Westborough there is a Sainsburys supermarket. Both the Tesco and Sainsburys supermarket offer a period of free parking (2 and 2.5 hours respectively) that allow short combined trips to be made with the town centre although the connecting pedestrian routes involve crossing busy roads / junctions.

2.19 Further out from the centre there is extensive retail warehousing along Seamer Road where B&Q, MFI and Currys are located. Even further along Seamer Road is the Deans Garden Centre and four miles out of town there is an out-of-centre Morrisons at the Scarborough Business Park Eastfield. Also located at the same business park are the headquarters of the Scarborough Building Society. In terms of leisure, the main Cinema The Futurist is located on the seafront in the South Bay a short but steep walk from the centre.

2.20 With regard to convenience goods, there are no major foodstores in the town centre itself although there is the M&S foodhall, Market Hall and Iceland. The Kwik Save unit on Valley Bridge Road has closed as part of a national closure programme. One of the three district centres is anchored by a small supermarket – Proudfoot at Eastfield, Ramshill Road has a small Sainsburys' Local store and Falsgrave, which is very much overshadowed by the nearby Sainsburys, has a Spar and Co-op store. There is another Sainsburys' Local store on Seamer Road, Proudfoot's at Seamer village and Scalby, and two Tesco Express stores at Castle Road on the periphery of the town centre and another on Burniston Road in the north of the town.

2.21 The review of diversity in the town centre revealed the weakness of the leisure offer in Scarborough town centre. The main cinema in the town is located on the seafront in the South Bay. There are several gyms and health clubs in the town but most of these are also edge or out-of-centre and none of the major national companies is represented in the town. The review also revealed the weakness of the office market in Scarborough town centre. Much of the newly built office developments in the town have been in out-of-centre locations such as Scarborough Business Park.

2.22 In summary there is fairly extensive edge and out-of-centre retailing in Scarborough, particularly for convenience goods, and other town centre uses such as leisure and offices are mainly to be found out-of-centre. The extent of this edge / out-of-centre offer that competes directly with the town centre in many instances is a major weakness.

Opportunities for Physical Growth

2.23 The town centre is fairly elongated and surrounded on two sides by residential areas and the topography on the other sides form a physical barrier to town centre expansion. The Brunswick Shopping Centre anchored by Debenhams is the most recent major expansion of the centre that has had the effect of moving the centre of gravity westwards along Newborough / Westborough. More recently there has been solus retail developments (JJB / TK Maxx, Matalan and Casino) to the north of Newborough.

2.24 The Council have identified other potential sites to the north of Newborough although as these are in multiple ownership some additional intervention will be required by the Council to help assemble development sites.

2.25 There is also a potential edge-of-centre site on Westwood on the site of the current bus depot. Further out of the centre there are development sites on Dean Road which are probably too far out-of-centre to be considered for retail development. These sites are discussed further in section 14.

Retailer Representation and Intentions to Change Representation

2.26 Experian Goad recorded 23 out of 30 key attractors are present in Scarborough (inc. Argos, Boots, Burton, Clarks, Debenhams, Dorothy Perkins, HMV, M&S, New Look, Next, Superdrug, Topman, Topshop, WH Smith, Waterstones, Wilkinsons and Woolworths). Missing key attractors include Bhs, H & M, House of Fraser, John Lewis, River Island, Waitrose and Virgin Megastore.

2.27 The Goad definition of the town centre extends as far as Sainsburys and includes this key attractor store as well as Tesco. The other key attractors are mainly located in and around Brunswick Shopping Centre and along the pedestrianised Newborough / Westborough (inc. M&S).

2.28 One indicator of the success of a town centre is the number of multiple retailers present. Clearly regional and sub-regional centres have the greatest concentration of multiples as they identify store locations on the basis of catchment populations and socio economic profiles. Scarborough Town Centre currently has 185 multiple retailers (26%) out of a total of 716 that is below the Goad UK average of 43%. However, there is an above average representation of comparison retail floorspace and leisure services amongst multiple retailers / businesses but under representation of finance and business services floorspace.

2.29 Scarborough also has a reasonable range of independent traders adding to the shopping offer and countering the 'clone town' syndrome. The independents are mainly located in older premises in peripheral frontages where rental / property overheads are cheaper. However, there is a particular concentration of quality independents in the attractive pedestrIanised streets of Huntriss Row and Bar Street just off Westborough / Newborough. Unfortunately many of the independents in parts of Westborough and in Eastborough are of the discount variety and in the latter there are also a lot of seasonal frontages which close out-of-season.

Table 4.1 A1 Unit Breakdown for Scarborough Town Centre - August 2006

	Total Units		Floorspace		%of Total
	No.	**Percentage**	**sq m**	**sq ft**	**Floorspace**
Convenience	49	11.7%	16,360	176,100	11.7%
Comparison	289	45.3%	63,153	679,800	45.3%
Retail Services	81	5.6%	7,804	84,000	5.6%
Leisure Services	165	25.9%	36,120	388,800	25.9%
Finance & Business Serv.	58	5.6%	7,766	83,600	5.6%
Vacant	74	5.9%	8,203	88,300	5.9%
TOTAL	716	100.0%	139,406	1,500,600	100.0%

Source: Goad Scarborough Town Centre Survey August 2006

2.30 The most recent Goad town centre survey indicates that within the town centre (including the Sainsburys and Victoria Road Area) there is 139,400 sq m (gross) A1 floorspace. Of this around 45% is comparison goods, which compares well to the Goad UK Centre average of 39.1%; 11.7% is in convenience use compared to the Goad UK Centre average of 13.7%; and, 37% is in service use similar to the Goad UK Centre average of 37%. It can be seen from this analysis that there is a higher than average level of comparison floorspace, although this is to be expected for a higher order sub-regional centre, and lower than average level of convenience floorspace.

2.31 Although there is a national average level of services in Scarborough, within this category there is a below average representation of business and financial services compared to national averages. Within the convenience sector there is a below average amount of floorspace given over to high street specialists such as butchers, fishmongers, grocers, off licenses and delis. In the comparison sector there is shortage a garden supplies floorspace, stationers and office supplies.

2.32 According to the Focus Database of retail requirements there are 35 retail / town centre user requirements in Scarborough. These are from a mixture of in and out-of-centre retailers as well as bars and restaurants including Starbucks, KFC, Frankie & Benny's, Harvester Restaurants, Pizza Hut, Toby Carvery, Luminar (Nightclubs) and several public house chains. In addition the Shopproperty database records A3 requirements from Barefruit Juice, Wokmania and the Pizza Express / Ask / Zizzi group.

2.33 Retailers with potential requirements in Scarborough town centre include Netto, Farmfoods, Bay Trading Company, Cellini (Luggage), First Choice, Laura Ashley, Maplin, Peacocks, Poundland, T-mobile, TJ Hughes and The Works. In addition the Shopproperty database reports retail requirements in the town centre for Trespass, Damart, Ottakars, Brighthouse, Camille (Lingerie) and Poundstretcher. The Focus Database also records retailers with retail warehouse space requirements including Bathstore.Com, Staples, Dunelm and Pets at Home and in addition the Shopproperty database reports a retail requirement for United Carpets.

2.34 This is thought to be a fairly comprehensive list of published requirements as consultations with commercial agents active in the town centre have identified few specific requirements in addition to the above. The requirements are a mixture of middle to higher order operators although mainly town centre orientated with a few retail warehouse occupiers. The list of requirements possibly suggests a shortage of modern floorspace in Scarborough town centre as well as a possible shortage of retail warehouse accommodation.

2.35 In the town centre business survey, despite poor overall trading performance only 21 businesses (17%) reported an intention to close (6%) and / or relocate (11%) outside of Scarborough whilst 33 (26%) were planning on expanding / refitting in situ and 7 (6%) were planning on relocating to new premises within Scarborough. This suggests that there are mixed fortunes in the centre but the many businesses planning to invest / expand / relocate indicates a fair degree of business confidence in the centre.

2.36 In summary, Scarborough already has a reasonable comparison goods offer, with the possible exception of a second department store, and there is above average non-food floorspace in the town as to be expected from a town of this size. The convenience goods offer is not as good particularly with the recent closure of the Kwik Save store. The town centre also enjoys reasonable national multiple representation as recognised by the Goad Key Attractors present in and around the centre. There is also fairly strong independent representation adding to the variety and overall offer. There is a good range of unit sizes in the town.

The town centre displays reasonable vitality and viability on this PPS6 indicator of Retailer Representation.

Shopping Rents

2.37 The Valuation Office Agency (VOA) record rental levels achieved for the larger shopping centres in the region but these exclude Scarborough. The VOA use an average of the zone A and zone B rental values in prime position shops in the principal shopping centre. Zone A is the first 20 feet of floorspace from the main entrance and zone B is the next 20 feet. Rental growth is affected by numerous factors including economic factors, turnover performance and floorspace supply.

2.38 National agents Churston Heard report zone A rentals in the primary frontages of between £970 and £1,130 per square metre (psm) that compares favourably with centres recorded by VOA such as Harrogate (£1,400psm) and Hull (£1,400 psm) but less so with York (£1,800psm) and the regional centre of Leeds (£3,250 psm). There are no published rentals for the secondary frontages in Scarborough and in the peripheral areas local agents report shops are rented on a 'per unit' rather than zone A / B basis. Overall rental levels appear to be fairly healthy in Scarborough town centre.

Proportion of Vacant Street Level Property

2.39 The Goad August 2006 survey of A1 floorspace in the town centre found that 74 (10.3%) of A1 units were vacant although as a percentage of total floorspace the 88,300 sq ft of empty floorspace (5.9% of the total) indicates that most vacancies were in smaller (peripheral) units. Although the percentage of vacant units (10.3%) is slightly higher than the UK average recorded by Goad (9.7%) the amount of vacant floorspace (5.9%) compare well with the UK average (8%) indicating that most vacancies are in below average sized units.

2.40 Since the August 2006 Goad survey the Kwik Save store has closed and there is one prominent vacancy in Newborough (former *** unit), another in Westborough (former Dixons Discount unit) and another in the Brunswick Centre (former Gift Centre unit). Despite this most vacancies are peripheral and the number has declined since the August 2006 survey which itself was a decline on the 2003 Goad survey (113,000 sq ft).

2.41 Experian Goad have a slightly wider definition of the town centre that includes Victoria Road District Centre and part of Falsgrave District Centre and also record vacancies in non A1 units. The vacancy levels in Scarborough compare favourably with national levels – 9.7% of units and 8% of floorspace and vital and viable town centres need a certain level of vacant units to allow turnover of occupants and new retailers to locate. There are very few vacancies in the principal shopping frontages and no particular concentrations of vacancies other than in the secondary frontages in peripheral areas such as Victoria Road and Hanover Road. (There is also a number of charity shops to be found in the secondary frontages of Newborough.) The number of vacancies on St. Thomas Street appears to have decreased dramatically since the opening of the Matalan and Casino which appear to have encouraged other investment into this part of the town centre. Overall, the level of vacancies in Scarborough town centre is not a major concern and is a relatively positive indicator.

Commercial Yields on Non-domestic Property

2.42 Yields are calculated by dividing the annual rent, as though it had been received as a single sum at the year end, by the capital value or sale price of the property. The 'all risks yield' recorded by the VOA is a simple benchmark which the property market uses to assess the comparative attractiveness of different shopping centres – the low the (percentage) yield the stronger the centre. The 'all risks yield' is the ratio of rental income to capital value and is expressed in terms of the open market rent of a property as percentage of the capital value.

2.43 The January 2007 VOA Property Market Report recorded a yield of 7.25% for Scarborough town centre. This compares reasonably well with other centres in Yorkshire such as Bridlington (8.75%), Malton (7.25%) and Whitby (7.25%) but less so with the larger centres of Hull (6.25%), York (5%) and Leeds (4.5%).

2.44 Yields have fluctuated in Scarborough since 1994 when they stood at 7% but the overall trend is stable the most recent fall from 8% was in 2004 to 7.5% in 2005. This means that investors are reasonably confident of a return in Scarborough and are prepared to wait longer to achieve it.

Pedestrian Flows

2.45 Pedestrian surveys held by the Town Centre Manager indicate the highest footfall is recorded in the Brunswick Centre and the pedestrianised parts of the Westborough / Newborough between here and M&S. The footfall counts have only be kept since May 2006 so it is too early to determine trends, however, footfall is down on year on year weekly counts. This may attributable to the poor summer in 2007 as the town centre does rely upon the additional seasonal spending. Lower footfall does not necessarily equate to reduced turnover although the business survey did record a high number of respondents who stated turnovers were static (32%) or falling (11%).

2.46 Generally pedestrian activity in the Town Centre during the evening is low. The greatest concentration of evening economy activity is around Westborough, Eastborough, merging into the seafront area, and Castle Road where the highest concentration of pubs and restaurants are to be found.

2.47 In terms of pedestrian circulation the main circuit appears to be around the Brunswick Centre mall which appears to have fairly good vertical integration between the two levels (which both open onto Newborough) via the lifts and escalators and staircases inside Debenhams.

Accessibility

Car Access and Parking

2.48 The street survey identified that most people travel to the centre on foot (40%) or by car (40%) - 27% as a driver 13% as a passenger. Access to the Town Centre for cars is reasonably good, with the main road network facilitating access from all directions. However, traffic congestion is a problem, especially at peak hours and on Saturdays with Seamer Road and Falsgrave being particular bad areas. (In the summer months congestion also occurs in the South Bay in particular.)

2.49 Car parks are relatively convenient and well distributed around the Town Centre although there are only c. 1,570 public parking places available in and on the edge of the town centre (Experian Goad). Over a half of these spaces are located in two multi-storey car parks at the Brunswick Centre (325) and the NCP car park (c. 480) accessed from North Road. Car parking charges vary, with short stay shopper parking being fairly reasonable but charges for longer stays are higher to deter commuter parking. In addition there is around 400 surface spaces at Sainsburys that are free for up to 2.5 hours and 225 at Tesco (135 surface and 90 under the store) that are free for up to 2 hours. On-street parking around the periphery is restricted by a resident / disk parking scheme.

2.50 Access to the town by car scored (105) above average (100) in the visitor / shopper survey. However there was less satisfaction with the availability of car parking spaces (89). In the business survey 60% of respondents felt parking was definitely a problem and a further 19% felt it was very problematic. Only 21% of businesses thought parking was not a problem in the town. In the same business survey 60% of respondents felt congestion was a problem affecting their business, 65% felt car access to the centre was a problem within the town and 60% felt access from the surrounding area was a problem.

2.51 The existing park and ride bus service from Weaponness Coach Park to the town centre that runs frequently at 10 minute intervals from 7am to 9pm is to be replaced in 2008 by an expanded facility on the A64 and another car park on the A165 to the south. The new scheme is linked to new bypass on the A165 and bus priority measures in the town centre and is expected to free up current peak period / seasonal congestion and open up development opportunities in and around the centre. There is also a ‘shopmobility’ scheme in place to assist disabled people in the Town Centre, based behind the Brunswick Shopping Centre and dedicated free parking spaces for disabled people using cars are provided around the centre.

Bus Access

2.52 Scarborough doesn’t have a bus station with buses setting down and leaving from a number of places in the town centre. Longer distance services tend to leave from the Railway Station and local services all travel through the centre on a loop route with the main stops located on York Place, Westborough and St. Thomas Street. Whilst the town centre loop facilitates good access to the centre the lack of a central bus station can present problems for visitors to the town.

2.53 Scarborough has the benefit of its own (former municipal) bus company and the urban area is well served Monday to Saturday with routes radiating from the Town Centre and many routes operating at 15 minute frequency. Most services operate during the evenings, although less frequently and Sunday services are more limited, but better than in many towns of similar size. In addition to urban services there are bus services to neighbouring towns including Filey, Bridlington, Malton, Pickering and Whitby. Longer distance services also operate to York, Leeds, Middlesbrough and Hull.

2.54 The Town Centre Survey found that some 17% of those questioned had travelled to the Town Centre by bus and most respondents were well satisfied with the service (score 120 on 100 average index).

Pedestrian / Cycle Access

2.55 The town is surrounded by residential areas within walking distance of the town centre (40% of respondents in the shopper survey walked to the Town Centre). The visitor survey recorded very high satisfaction levels with pedestrian access (151). However, busy roads around the town centre and junctions on the approach from the west (railway station and supermarket car parks) discourage some linked trips and cycling. Cycling is also discouraged by the topography in and around the centre and the street survey recorded only 1% of visitors arriving by this mode.

Rail Access

2.56 Scarborough’s railway station is located at the western end of the town centre but there is only one suburban station at Seamer. There are hourly and fast services to the larger centres of York and Leeds with connections here to the national rail network (East Coast mainline). There is also a service every 90 minutes to Hull via Filey and Bridlington. One of the advantages of the railway station location is that daytrippers have to walk through the shopping centre to get to the seafront attractions. The town centre therefore has reasonable rail access although the town centre survey recorded few people (1%) arriving by this mode.

Customer and Residents Views and Behavior

2.57 The town centre surveys found that on most indicators the town centre scored positively and in particular for the choice of food and non-food shops (120) reflecting the superior range and offer in the town centre and perhaps some shoppers including Tesco and Sainsburys in their personal town centre definition. The survey was undertaken before the closure of Kwik Save with 7% of respondents stating that they were visiting this store 13% visiting Tesco. The availability of non-food shops was also scored positively by visitors (114). After pedestrian access (151) the availability of banks and financial services (144) scored highest in the survey followed by places to eat and drink (131). The market was less popular than the shops and services but still had a positive score (105).

Table 4.2: Shopper Satisfaction Levels in Scarborough

The ease of walking to the centre	151
Bus services to Scarborough	120
Ease of getting to the centre by car	105
Availability of parking spaces	89
Choice of foodshops & supermarkets	120
Choice of clothes/ non-food shops	114
Quality of the Market	104
Range of banks / financial services	144
Variety of places to eat and drink	131
Choice of leisure facilities	90
Policing / security in the centre	105
Availability / quality of toilets in the centre	58
Attractiveness of the centre	107
Cleanliness of the centre	101
AVERAGE	**100**

Source 2007 Shopper / Visitor Survey

2.58 Generally pedestrian activity in the Town Centre during the evening is low. The greatest concentration of evening economy activity is around *** which has a concentration of pubs and restaurants.

2.59 The business survey indicated a small majority (57%) who trade on Sunday although only 38% did this all year round with an additional 9% in the run-up to Christmas / New Year sales and 11% in the summer season.

Perception of Safety and Crime

2.60 The 2006/7 Home Office Report on Crime Statistics indicates that for four of the six main recorded types of crime per 1,000 population within the Scarborough BC administrative area were below the national average (robbery, burglary, vehicle theft and theft from vehicles). Only for one type of crime (violence against the person) were crime rates slightly higher than the national average. Given that Scarborough is a predominantly urban area where crime rates are usually higher, this indicates that crime levels are below what might be expected for a town of this size.

2.61 Town centres are usually high on the list of reported incidents in any Local Authority area. The street visitor / shopper survey found very high perceptions of personal safety amongst daytime visitors (98%) but slightly lower for evening visitors (83%) although visitor levels at night were still quite high (48%). In terms of evening activities visiting pubs and clubs was the most popular (76%) followed by eating out (40%), visiting the cinema / theatre (21%) and takeaways (16%).

2.62 The town centre found concerns about personal safety and security amongst the business community were not reflected in their priorities for investment. Overall policing and personal security issues appear not to be a major problem in Scarborough but as a seaside resort attracting visitors from a wide area of northern England and Scotland it is bound to be an issue on occasions.

State of the Town Centre Environmental Quality

2.63 A number of streets in the Town Centre have been pedestrianised by the Borough Council providing a safe and pleasant environment for shoppers and visitors and enhancing the townscape quality of the centre. In particular the primary frontages on the section of Westborough / Newborough between York Place and St. Thomas Street provide a very attractive pedestrianised high street shopping environment where many key attractor national multiples are located.

2.64 The Brunswick Shopping Centre mall provides an attractive covered shopping area anchored by Debenhams. Pedestrian routes to bus stops and car parks are convenient and direct. In general the standard of cleanliness of the Town Centre is high, with little evidence of litter, fly-posting or graffiti. The town centre street surveys identified public toilets and car parking availability as the key concerns for both shoppers and businesses in the centre.

2.65 The centre contains a variety of modern and traditional buildings, with some quality frontages particularly in Huntriss Row and Bar Street, and a few attractive historic buildings such as the town hall, market hall, railway station and Grand Hotel. There have also been some inappropriate redevelopments in recent years such as the former Kwik Save next to the attractive Pavilion Square that is currently being refurbished. Surrounding the town centre are some attractive residential streets such as Alma Square, Albermarle Crescent and the Crescent.

2.66 There has been recent investment to the north of Newborough in the form of JJB / TK Maxx, Matalan and the Opera House Casino which has encouraged additional investment in St. Thomas Street in particular. However, some of the frontages at the eastern end of Newborough and in Eastborough are looking very tired and in need of investment. The Balmoral Shopping Centre anchored by Wilkinsons is also looking very tired and the low roofs and poor lighting contrast poorly with the later generation Brunswick Shopping Centre which is light and airy.

2.67 Within the centre itself there are no landmark buildings or other nodes to assist orientation and navigation although this is not difficult due to the predominantly linear nature of the centre along the main frontages of Eastborough / Newborough / Westborough with side roads off this main shopping frontage. The pedestrianised area has been the subject of an environmental improvement scheme which has worn well and the hanging baskets, planting and street furniture in the area contribute positively to the pedestrianised high street shopping environment.

2.68 One of the problems of the centre is the merging of the main frontages with secondary and tertiary areas. To the east the centre merges into the seaside frontages of Eastborough some of which are particularly tacky and there is a poor sense of arrival from this direction. Likewise the approach from the north is poor as the residential areas are mixed up with commercial and residential areas as well as car parking. The approach from the west is also weak as the centre merges info Falsgrave district centre but at least the sense of arrival is stronger with the entrance to the main centre announced by two attractive key buildings – the Joseph Lawrence theatre and the railway station. The entrance from the south is quite strong as the centre is separated from the residential areas there by the valley gorge which is crossed by a road and pedestrian bridge.

2.69 Tertiary frontages on the periphery of the town centre have attracted some investment such as the new Tesco Express on Castle Road, however, other peripheral areas such as Victoria Road have failed to attract investment and have a high turnover of businesses and the greatest concentration of vacancies.

2.70 Overall the town centre is a fairly attractive and particularly the main pedestrianised frontages and the Brunswick Centre. Some parts of the centre are beginning to look tired and in need of investment but the lasting impression of a visit to Scarborough town centre is one of an attractive shopping environment.

Comparison with Competing Centres

2.71 According to respondent to the business survey the main competing centres to the town centre are York (28%), McArthur Glen York Designer Outlet (12%), Leeds (18%), Hull (9%), Seamer Road Retail Park (6%), Morrisons (4%), Malton (3%) and Sainsburys (3%). The evidence from the NEMS household telephone survey is that for comparison goods Seamer Road Retail Park (12%) is the main competing centre in terms of market share followed by York (7%including the designer outlet and retail parks), Leeds (1%) and Hull (1%).

2.72 For convenience goods the Tesco store (23% market share in catchment area) appears to be regarded as in the town centre by most business and street survey respondents. In the NEMS household telephone survey the Seamer Morrisons (27%) followed by Sainsburys (16%) were the main competing centres. Less than 2% of expenditure leaked beyond the catchment area although the extent of this was curtailed to the north by Whitby (Co-op), to the west by Malton (Morrisons) and south by Bridlington (Tesco and Morrisons).

2.73 Scarborough compares reasonably with other centres on the PPS6 yield and rental indicators. (Yields are the market value of a property divided by the annual rental income expressed as a percentage and the lower the yield the greater the market confidence as investors are prepared to wait longer for a return.) Scarborough's yield of 7.25% as recorded by the VOA in the January 2007 Property Market Report is much higher than that of the regional centre of Leeds (4.5%) and the sub regional centre of York (5%) which, although the same tier in the retail hierarchy, has a larger more affluent catchment and is a historic city that has a year-round tourist trade.

2.74 Scarborough compares more favourably with Hull (6.25%) and some of the competing local centres such as Bridlington (8.75%) but less so with other smaller centres such as Malton (7.25%) and Whitby (7.25%). In the wider region Scarborough does not compare well with similar sized sub-regional centres such as Harrogate (5%), Doncaster (5.5%), Wakefield (6.5%) and Bradford (6.5%).

2.75 In terms of rentals, fewer comparisons can be made as the VOA do not record as many centres for this indicator. However, primary pitch zone A rentals in Scarborough are reported by agents to be between £970 and £1,130 psm that compares reasonably well with some sub-regional centres recorded by VOA such as Bradford (£1,300psm), Huddersfield (£1,350psm), Harrogate (£1,400psm) and Hull (£1,400 psm) but less so with York (£1,800psm) and Doncaster (£2,000psm). Zone A rentals in Scarborough are also well below those achieved in the regional centre of Leeds (£3,250 psm).

2.76 In summary, Scarborough doesn't really perform that well in comparison to comparable regional centres and even some smaller competing centres such as Whitby and Malton perform just as well on the commercial yields indicator.

Comparison with Previous Health Check Assessments

2.77 The 1998 England & Lyle study identified Scarborough as having reasonable diversity in terms of cafes and restaurants but less so for business and office premises. This is still the case but with the benefit of the 2005 PPS6 guidance it can also be seen that some of the key leisure attractions in the town such as the main cinema are not located in the centre. There is also lower than average representation of convenience goods floorspace in the town centre if the Tesco and Sainsburys' stores are excluded and particularly now that Kwik Save have closed a second store in the centre.

2.78 Vacancy levels were not a problem in 1998 and have decreased since 2003 when they were below national average levels. However, since the 2006 survey the Kwik Save store has closed. The 1998 England & Lyle study did comment upon the number of charity and bargain / discount shops in secondary frontages and unfortunately this is still the case although there are none in the primary frontages.

2.79 The 1998 study recorded the number of multiples in Scarborough Town Centre as a strength and this is still the case. The 2003 Goad survey recorded 145 multiple retailers in and this has now increased to 185 (based on Goad research and definitions).

2.80 In 1998 the average prime pitch zone A rental in Scarborough was not recorded but the yield at this time was 7% and this has now increased to 7.25% (having stood at 8% in 2004). This suggests investor confidence in Scarborough has decreased since 1998.

2.81 Accessibility has not really changed since 1998 but unfortunately the car parking, which was the main access problem then, hasn't improved either other than the park and ride bus service from Weaponness Coach Park. Pedestrian flows reported in the 1998 study have not really changed either with the highest footfall in Westborough around the entrance to the Brunswick Shopping Centres.

2.82 The town centre environment that was regarded as fair by England & Lyle in 1998 has not changed since then other than the development of sites in the St. Thomas Street area for Matalan, the Casino and JJB / TK Maxx. However, the environment in St. Thomas Street itself has improved with more investment in existing units here following the new developments. The frontages in North Street and Waterhouse Lane that were regarded as poor in 1998 have therefore improved along with the current refurbishment of Pavilion Square that was then a third poor building frontage.

2.83 The 1998 study concluded that Scarborough is an attractive shopping centre with a good range of multiples and specialist shops and this is still the case. The study also concluded that the overall vitality and viability of the town centre was relatively high which, with the exception of diversity and car access, it probably still is. At the time of the 1998 study the impact of the new Morrisons and Safeway (now Sainsburys) stores were being felt and the town centre's convenience offer has declined further with the closure of Tesco (now Wilkinsons) and Kwik Save stores since then. However, the comparison offer has held up and the centre has increased the multiple representation in recent years.

Conclusions on Vitality and Viability

2.84 There is only a limited range of uses other than retail in Scarborough Town Centre that contribute to the vitality and viability of the town. For a sub regional centre, diversity is not good. This partly reflects the fact that Scarborough is a seaside resort and the local economy has largely been based on tourism. The amount of retail, leisure and office floorspace in edge and out-of-centre locations has remained static since 1994 and there has been investment in the town centre. The potential capacity for growth in the immediate future is good with two identified town centre sites and two edge-of-centre sites.

2.85 The town centre environmental quality is quite good and there is a good choice of multiples and specialist independent shops. Towards the periphery of the town centre in the secondary frontages there are a number of charity and discount / bargain shops. However, the number of vacancies and amount of vacant floorspace is quite low.

2.86 Retailer representation and intentions to change representation is a strong indicator in Scarborough. The comparison sector is well represented in the town centre as are banks and financial services but there is a limited choice and range of convenience goods outlets exacerbated by the recent closure of Kwik Save. The town centre appears not to have re-established its convenience role that has declined since the out-of-centre Morrisons and Safeway stores opened in 1994.

2.87 There is also high level of retailer demand particularly from fashion and restaurant businesses. The proportion of vacant street level property has decreased in recent years but not to the point where there a shortage of units. Commercial yields on non-domestic property have recently decreased to a reasonable 7.25% which compares favourably with some but not all competing centres.

2.88 Accessibility is fairly good by most modes although motorists face congestion at peak periods when there is also a shortage of car parking spaces. The lack of a central bus station is also a weakness although the frequent park and ride service does help alleviate congestion and the parking shortage.

2.89 Customer and residents views and behavior indicate reasonable levels of satisfaction with the town centre. The main concern for both visitors and businesses is the availability of car parking spaces and toilet facilities. Perception of safety and crime are reasonably good and local crime levels are generally below the national average.

2.90 In summary, Scarborough town centre performs well on most PPS6 indicators of vitality and viability and compares reasonably with some competing centres and other sub-regional centres in the region. The main strength is the choice and range of clothes and non-food shops and the pleasant pedestrianised high street shopping environment. The main weaknesses are the lack of diversity, the limited evening economy, perceived parking problems and possibly commercial yields. The main opportunity in the short to medium term is the three development sites, the new Park & Ride scheme and development of a “Cultural Quarter”. The main threat is the continued decline of the seaside resort as a holiday destination and also the development of town centre uses including offices, leisure and retail in peripheral locations in the borough.

3.0 The Vitality and Viability of Whitby Town Centre

Background

3.1 Health checks of Scarborough, Whitby and Filey Town Centres were undertaken based on PPS6 criteria including guidance on suitable primary shopping areas and town centre boundaries.

3.2 A town centre user survey was carried out in each centre with approximately a 100 sample in Whitby to establish where shoppers are coming from and what they use the centre for and this has also informed the health check.

3.3 The health check also contains an analysis of a town centre business survey results. The questionnaire was circulated to approximately 250 businesses in the town centre by the Council and the analysis informs the health check.

3.4 The methodology and data sources for undertaking the Health Checks are contained in Appendix One.

Introduction

3.5 Whitby Town Centre is a small shopping centre serving the town itself and surrounding rural areas with a catchment population of around 25,000 people for both convenience and comparison goods. Its catchment to the north and west is limited by the catchment of Teesside towns for convenience goods, in particular, Guisborough, and Scarborough to the south. The catchment for non-food goods is restricted by the same centres and in addition the sub-regional centre of Middlesbrough (in the Northern Region) and Teesside Retail Park to the north, and to a certain extent the sub-regional centre of York to the SW.

Diversity of Main Town Centre Uses

3.6 The vitality and viability of a town centre is dependent not only on its shopping offer but also on the mix of uses which add to the visitor experience and make the centre more attractive to those who live and work there. As a small town centre, Whitby Town Centre is a focus of town centre activity in the town itself and the surrounding rural areas of the North Yorkshire Moors National Park. The historic town is also a seaside resort and tourist destination in its own right and part of the town centre also services this function.

3.7 In the town centre there is a small hospital and there are also a number of smaller professional offices, and some administrative offices of the Borough Council, but Whitby is not a large office location. The DCLGs 2002 Area of Town Centre Activity Database records only 4,500 sq m of office floorspace in the town centre. There are industrial estates on Stainsacre Lane but no B1 offices are located here.

3.8 There are some civic and administrative functions in addition to the hospital including police station and magistrates court as well as some Borough Council offices. According to the DCLG's 2002 Area of Town Centre Activity Database (extracting from the 2001 Annual Business Inquiry) over 300 people worked in commercial offices. Experian Goad identify financial & business services floorspace in Whitby (71 on a 100 index) as well below the UK average (100) although Banks and Building Societies are well represented in the town.

3.9 As might be expected in a seaside resort, Whitby has a good range of leisure and tourist facilities, although some of these are located in the tourist areas such as on the West Cliff and not in the centre. Within the Town Centre are the Coliseum Theatre (that also screens films) and amusements to the north on Pier Road. The Museum and Library are located just outside the centre and there are numerous commercial art galleries in the town centre itself.

3.10 The late evening economy within Whitby is limited as there is only one night club. However, there are numerous pubs and restaurants in the centre. In addition there is the Pavilion on the west cliff where regular concerts are held and this is the centre of many of the themed weekends that Whitby hosts. There is no cinema but the Coliseum Theatre on the edge of the centre shows recent releases.

3.11 Experian Goad identify leisure services (117) as being above the national average (100) which probably reflects the merger of the shopping centre with the resort / historic port. However, some facilities are underrepresented in the Goad defined town centre itself although they are to be found in nearby tourist /

residential areas so this is not a major qualitative gap for local residents although located here they contribute less to the diversity of the centre.

3.12 Whilst the town centre is surrounded by residential areas, particularly to the west and south there are very few people actually living in the centre itself above shops and this is a partial weakness in diversity. However, there are many holiday lets in and around the town centre, particularly on the east cliff, which add greatly to the surveillance and evening footfall in the centre.

3.13 In summary, excluding retail there is only a limited range of other uses in Whitby Town Centre that contribute to the vitality and viability of the town although for a small town diversity is quite good. This partly reflects the fact that Whitby is a seaside resort / historic tourist attraction and many of the leisure facilities are provided in locations away from the centre. However, the limited office market in and around the town centre is a particular weakness in the overall diversity of the town as the lunchtime and late afternoon shoppers can greatly contribute to footfall and the evening economy particularly out of season.

The Amount of Retail, Leisure and Office Floorspace in Edge and Out-of-Centre Locations

3.14 The retail frontages of Whitby town centre do not extend very far beyond the Local Plan / Goad town centre boundaries. The one exception is Pier Road where some retail / leisure frontages continue northwards towards the pier. In all directions the frontages are curtailed by topography.

3.15 There has not been much retail development around the town centre in recent years the most recent being four new units on an infill site on New Quay Road. Across the road is the next most recent development the Co-op supermarket and kiosks adjacent to the tourist information office built in the nineties that might be regarded as edge-of-centre although they are next to the main town centre car park.

3.16 Further out from the centre there is sporadic out-of-centre retailing such as Beevers furniture warehouse and the garden centre on Guisborough Road. There are also some quasi retailing uses such as trade counters in the industrial estates. The most recent out-of-centre retail development in Whitby has been the new Lidl store on Stakesby Road, on the site of a former DIY store, that opened in May 2007 and according to the NEMS household survey already enjoys a significant market share of convenience goods expenditure in the town (this possibly could be a honeymoon period of trading).

3.17 In summary there is only limited edge and out-of-centre retailing in Whitby the new Lidl store being the only planned addition to the retail offer. There are however a number of leisure services and tourist attractions located away from the centre that do not contribute to the overall vitality and viability of Whitby town centre

Opportunities for Physical Growth

3.18 There are a number of Infill sites along New Quay Road and also car park sites on Church Street that would lend themselves to small scale retail / town centre development similar to that which has recently occurred in New Quay Road. The only other possible site is the surplus docks site and council car parking land off Langborne Road that is discussed in section 14. Parts of this have been the subject of controversial proposals in the past that have not been pursued. However, unless this site is brought forward for mixed use development including retail in a sensitive manner of a scale appropriate to the harbour side and historic centre then there will be continuing development pressure for out-of-centre development that is likely to be developed in an unsustainable sporadic and piecemeal fashion.

Retailer Representation and Intentions to Change Representation

3.19 Experian Goad recorded only 4 out of 30 key attractors are present in Whitby (Boots, Clinton Cards, Superdrug and Woolworths). Another indicator of the success of a town centre is the number of multiple retailers present. Goad recorded 78 multiple retailers (22%) out of a total of 362 retail / commercial premises that is below the Goad UK average of 43%. However, for a small centre this is quite a high number of multiples. In addition there is an extensive range of specialist and quality independents and the street survey recorded Judith’s fabrics and Agar’s furniture as being particularly popular stores in the town centre.

3.20 The multiples are mainly located in the primary frontage of the pedestrianised Baxtergate although Woolworths is round the corner on St. Ann's Staith (the upper floor has a door onto Flowergate), Somerfield is on Flowergate and the Co-op is on Langborne Road. There are also independents in Baxtergate and particularly on Flowergate. Across the Bridge the main tourist shopping area is focussed on Church Street where the market is located although there are still a few multiples here such as Julian Graves and Tog 24. In particular Whitby has a number of specialist jet jewellers and also clothes shops catering for the goth subculture that attract visitors and shoppers from all over the country. Whitby has an all year season helped by the various weekend festivals and themed weekends so there are fewer seasonal vacancies than in Scarborough.

3.21 The most recent Goad town centre survey indicates that within the town centre there is 40,600 sq m (gross) A1 floorspace. Of this around 37% is comparison goods, which for a smaller centre compares well to the Goad UK Centre average of 39.1%; 17.8% is in convenience use which is above the Goad UK Centre average of 13.7%; and, nearly 40% is in service use which is above the Goad UK Centre average of 37%.

Table 5.1 A1 Unit Breakdown for Whitby Town Centre - August 2006

	Total Units		Floorspace		%of Total
	No.	**Percentage**	**sq m**	**sq ft**	**Floorspace**
Convenience	44	12.2%	7,237	77,900	17.8%
Comparison	153	42.3%	15,059	162,100	37.1%
Retail Services	31	8.6%	2,220	23,900	5.5%
Leisure Services	89	24.6%	11,705	126,000	28.8%
Finance & Business Serv.	20	5.5%	2,629	28,300	6.5%
Vacant	25	6.9%	1,793	19,300	4.4%
TOTAL	362	100.0%	40,644	437,500	100.0%

Source: Goad Whitby Town Centre Survey August 2006

3.22 It can be seen from this analysis that there is a higher than average level of convenience floorspace, although this is to be expected for a smaller town centre, and lower than average level of comparison floorspace. There is also above average level of services in Whitby reflecting the town's role as historic centre and seaside resort.

3.23 Within the convenience sector there is a below average amount of floorspace given over to butchers, convenience stores (most of these are located in suburban locations outside the centre), frozen foods and market stalls relative to the Goad UK averages. In the comparison sector there is a shortage of bulky goods floorspace (carpet and furniture retailers, DIY, electricals, etc.). In addition there is a shortage of department / variety store floorspace and both ladies and menswear. In the service sector there is a shortage of floorspace given over to bars and wine bars, disco / dance & nightclubs and cinemas / theatres and concert halls. All business services are underrepresented reflecting the limited office market in Whitby with the exception of banks and financial services.

3.24 According to the Focus Database or retail requirements there are 12 retail / town centre user requirements in Whitby. These are mostly from bars and restaurants including Pizza Express, Whitbread, JD Wetherspoons, Barracuda and Zizzi. Retailers with potential requirements in Whitby include Aldi, Farmfoods, Trespass, Peacocks, Pets at Home and the X Catalogue store. In addition the Shopproperty database reports retail requirements in Whitby from the Card Factory, The Factory Shop, Ponden Mill, Barefruit Juice, Holland & Barratt, Argos, Halfords and Poundstretcher. This is thought to be a fairly comprehensive list of published requirements as consultations with commercial agents active in the town centre have identified no additional requirements. The requirements are mixture of middle to higher order operators although mainly town centre orientated with a few retail warehouse occupiers. However, the list does suggest that there is a shortage of modern floorspace in Whitby to accommodate many of these requirements.

3.25 The town centre business survey in Whitby recorded good overall trading performance with only 7 businesses (7%) reported an intention to close (2%) and / or relocate (5%) outside of Whitby whilst 34 (33%) were planning on expanding / refitting in situ and 5 (5%) were planning on relocating to new premises within Whitby. This suggests that most businesses are doing well in Whitby, only 20% reported falling turnover in the last 5 years and fewer (15%) anticipated falling turnover in the next five years, indicating a high level of business confidence in the centre. The most notable departure from Whitby is probably the closure of the specialist Whitby Lighting Centre on Skinner Street (the same firm still have a shop in Ramshill, Scarborough) but this unit was quickly occupied by a deli that has expanded into larger premises.

3.26 In summary, Whitby has a reasonable convenience goods offer with two small supermarkets located in the town centre. The comparison goods offer is not as good in terms of multiple representation but there are some quality independent stores in the town centre, many catering for visitors, that make the overall shopping offer an attractive one. The range of unit sizes in the town is restricted by the historic nature of the town centre and this might hinder attempts to attract more multiples to the town. The recent infill development on New Quay Road attracted four multiples, albeit one betting shop (William Hill) and an upmarket charity shop (Oxfam). However combined with the other two new operators, Specsaver and Subway (a franchise that extends the range of takeaway food options in the town), the new development has contributed to an improved overall offer in the centre.

Shopping Rents

3.27 The Valuation Office Agency (VOA) record rental levels achieved for the larger shopping centres in the region but these exclude Whitby. Local agents report there are very few transactions involving national multiples and most independent shops that aren't owner occupied are rented on a per unit rather than zone A / B basis. Overall rental levels are reported to be fairly healthy in Whitby town centre with a high demand for premises.

Proportion of Vacant Street Level Property

3.28 The Goad August 2006 survey of A1 floorspace in the town centre found that 25 (6.9%) of A1 units were vacant although as a percentage of total floorspace the 19,300 sq ft of empty floorspace (4.4% of the total) indicates that most vacancies were in smaller (peripheral) units. Both the percentage of units and amount of vacant floorspace compare well with UK averages recorded by Goad (9.7% of outlets and 8% of floorspace). However, the level of vacancies has increased slightly (1,300 sq ft) since the previous Goad survey in 2003 which recorded 18,000 sq ft of empty floorspace in the centre.

3.29 The Goad survey indicates that most vacancies are smaller than average sized units and located in peripheral areas. There are no concentrations of vacancies in Whitby. Since the August 2006 Goad survey five new vacancies have occurred but four previous vacancies have been occupied indicating a healthy turnover of premises in the centre. Overall, the level of vacancies in Whitby town centre is a very positive indicator of vitality and viability.

Commercial Yields on Non-domestic Property

3.30 The January 2007 VOA Property Market Report recorded a yield of 7.25% for Whitby town centre. This compares very well with other centres in Yorkshire such as Scarborough (7.25%), Bridlington (8.75%) and Malton (7.25%), Guisborough (7.5%) and Redcar (7.5%) but less so with the larger centres of Middlesbrough (6%), York (5%) and Leeds (4.5%).

3.31 Yields have fallen in Whitby since 1994 when they stood at 10% but this fall has been fairly recent starting in 2004 to 7.5% in 2005. This means that investor confidence is growing in Whitby and the current yield (7.25%) is very good for a town centre of this size.

Pedestrian Flows

3.32 Pedestrian flows in Whitby vary during the season. At the height of season and on Saturdays the busiest areas are New Quay Road, St. Ann's Staith, the Dolphin Bridge / Bridge Street and Church Street towards the 199 steps. This reflects the main visitor circuits from the car parks on Langborne Road to the beach / pier on the west cliff and also over the bridge via Church Street to the east cliff / 199 steps / Abbey. On weekdays outside the season the highest footfall is on the pedestrianised Baxtergate / Golden Lion Bank and the bottom end of Flowergate which is where the key attractors and most multiples are located.

Accessibility

Car Access and Parking

3.33 The street survey identified that most people travel to the centre by car (39%) - 25% as a driver 14% as a passenger. Access to the Town Centre for cars is reasonably good, with four main roads converging on Whitby – the A174 from Redcar / Saltburn to the NW, the A171 from Guisborough / Middlesbrough to the west, A169 from Pickering / Malton to the SW and A171 from Scarborough to the south facilitating access from all directions. These roads and destinations are also well served by busses from Whitby. Although Whitby is a small town, traffic congestion can be a problem particularly during the summer season and the area around the main car park on Langborne Road can get quite congested at times.

3.34 There are around 814 public parking places available in the town centre (Experian Goad). 80% of these spaces are located in Langborne Road area and in addition the Docks Board land off this road is also given over to car parking in the summer increasing the concentration of parking in this one location. Car parking is on a pay and display basis although shoppers at the Co-op can have so many minutes / hours free depending upon how much they spend in the store. There is also tourist parking on the east and west cliffs, free on-street in the latter case, which is within a reasonable stroll of the town centre except for in inclement weather.

3.35 Access to the town by car scored (49) well below the average (100) in the visitor / shopper survey. However, there was even less satisfaction with the availability of car parking spaces (40). In the business survey only 5% of respondents felt parking was not a problem, 18% said it was a problem and 77% definitely a problem In the same business survey 85% of respondents felt congestion was a problem affecting their business, 67% felt car access to the centre was a problem within the town and 56% felt access from the surrounding area was a problem.

3.36 The business survey also recorded support for park and ride proposals (on the Guisborough Road) with 71% of respondents listing this as a key priority. This is currently being pursued by the County Council.

Bus Access

3.37 Whitby has a bus station next to the railway station on the periphery of the town centre which provides local services including circular and suburban routes, services to the rural hinterland as well as routes to more distant destinations including Middlesbrough, Scarborough, York and Leeds. The Town Centre Survey found that some 28% of those questioned had travelled to the Town Centre by bus and most respondents were fairly satisfied with the service (score 104 on 100 average index).

Pedestrian / Cycle Access

3.38 The town is surrounded by residential areas within walking distance of the town centre (32% of respondents in the shopper survey walked to the Town Centre). The visitor survey recorded very high satisfaction levels with pedestrian access (156). However, the topography of Whitby with the town nestling on either side of the estuary beneath the steep valley sides discourages some linked trips and cycling (the street survey recorded no visitors arriving by this mode).

Rail Access

3.39 Whitby's railway station is located at the southern end of the town centre next to the bus station. Although there are no suburban stations the Northern Rail services to Middlesbrough stop at most villages in the Esk Valley and are sufficiently frequent to allow planned shopping trips to Whitby to be made although the time taken to / from Middlesbrough itself (1.5 hours) makes the bus or car a more attractive mode for this journey. In addition to the regular services the NYMR runs steam services to Whitby in the summer months from Pickering via Grosmont that add to the level of services and destinations served. The town centre therefore has reasonable rail access although the town centre survey recorded few people (1%) arriving by this mode.

Customer and Residents Views and Behavior

3.40 The town centre surveys found that on many indicators the town centre scored negatively not only for car access (49) and parking (40) outlined earlier but also for the choice of food (69) and non-food shops (46) and availability / quality of toilets (48). Other negative aspects of the town centre included the quality of the market (61), choice of leisure facilities (83) and policing / security (96). The poor opinion of shoppers to the range of shops and leisure services may surprise tourists and daytrippers to Whitby for whom the specialist independent shops and leisure facilities are part of the overall attraction but for permanent residents (over 95% of respondents) they are considered to be inadequate.

3.41 Positive aspects of the town centre included the overall attractiveness of the centre (157), walk-in access (156), range of banks / financial services, variety of places to eat and drink (131), cleanliness of the centre (118) and bus access (104). The survey indicates that whilst residents appreciate some of the attractions that draw visitors to the centre they are more aware of the limitations of some services and shopping facilities in the town.

Table 5.2: Shopper Satisfaction Levels in Whitby

The ease of walking to the centre	156
Bus services to Whitby	104
Ease of getting to the centre by car	49
Availability of parking spaces	40
Choice of foodshops & supermarkets	69
Choice of clothes/ non-food shops	46
Quality of the Market	61
Range of banks / financial services	135
Variety of places to eat and drink	131
Choice of leisure facilities	83
Policing / security in the centre	96
Availability / quality of toilets in the centre	48
Attractiveness of the centre	157
Cleanliness of the centre	118

Source 2007 Shopper / Visitor Survey

3.42 Bothams bakery / tea room was the most popular shop in the town centre mentioned by 29% of respondents followed by the Co-op Supermarket (25%) Somerfield (17%), the independent shops (13%) and Woolworths (8%).

3.43 In terms of missing shops 49% of respondents mentioned clothes shops of one type or another and 13% specifically mentioned included M&S. 22% of respondents wanted a new supermarket in Whitby, 7% an electricals shop, 6% a department store, 6% a record shop and 3% a grocers store. The street survey was undertaken before the Lidl store opened and 46% of respondents said they intended to use it, 16% said they might and a minority (39%) said they would not. Regarding the leisure offer, 40% of respondents suggested a better cinema and

18% mentioned a better pool / leisure centre whilst 5% referred to indoor bowling.

3.44 In terms of frequency of visits the survey recorded 90% of visitors / shoppers visiting at least once per week which is very high and on average people visited 2.9 times per week. This is possibly skewed slightly by workers who represented only 11% of the sample but probably reflects the size of the town and the proximity / accessibility of the centre to surrounding suburban areas.

3.45 With regard to the purpose of the visit to the town centre, 33% were food shopping, 17% were non-food shopping, 11% there for work, 10% browsing / window shopping, 10% were visiting the bank / building society, 7% were eating out and 5% were meeting friends / relatives. The frequency of visiting also reflects the greater convenience food offer in the centre compared to Scarborough where non-food shopping was the most common purpose of the less frequent trips to that town centre.

3.46 In Whitby the frequent visitor numbers and high footfall levels are reflected in high expenditure levels with more positive responses in terms of past and anticipated future turnover levels – 20% reported decreasing turnover and 15% expected their turnover to decrease in the future. The business survey also indicated that 20% of respondents felt falling footfall was a problems and a further 15% felt it was a serious problem for their business.

3.47 The town centre business survey was returned by 110 businesses out of approximately 300 in the Local Plan defined town centre area representing a return of over 30%. The largest group of respondents were retailers (51%) followed by other services (24%), restaurants / bars (16%), and financial services (2%). Most respondents were fairly long established in Scarborough with 20% having traded here for 25 years or more, 30% over ten years but less than 25, 16% over five years but less than ten, 26% one to five years and 7% less than a year.

3.48 The majority (91%) were small businesses employing less than 10 people and only 1% employed more than 70. The majority of employees (90%) were drawn from within five miles of Whitby. Overall businesses had retained a static permanent workforce in the last two years with decreases (13%) almost matching increasing (14%) staff numbers.

3.49 The survey found that the main reason businesses were located in the town centre was to be in the centre itself (52%), high footfall (45%), it has a ready market (43%) and / or they were long established Whitby businesses i.e. historic reasons (41%). Other reasons including 'the business was already set up' (35%), to be close to other businesses (31%), accessibility of the centre (27%), affordable rent (24%) and availability of short term leases (6%) were much less common reasons given for locating in the town centre.

3.50 The town centre business survey found that the seaside resort location (66%) and historic streets (60%) were the main locational advantages of Whitby town centre. Other positive location advantages included the accessibility of the town centre (47%), local demand for products / services (42%) and the availability / accessibility of workforce (33%). The seasonal nature of trade was a slight problem for 39% of respondents and a big problem for 15% (similar response levels to Scarborough town centre). The main problem with the town centre as outlined earlier is regarded as the parking (77%) and congestion (51%).

3.51 These concerns are reflected in priorities for investment with 88% considering parking improvements to be a high priority, 71% the introduction of park and ride and 65% more / better quality toilet provision. Other priorities include reducing property costs (40%), financial help with building improvements (39%), reducing congestion (39%) and improved public transport (35%).

3.52 In terms of the main attractions in the town centre businesses thought that the old world feel / heritage aspects of the town are the main draw (15%) followed by restaurants and cafes (14%), resort location (13%), independent shops (10%) and pubs and bars (10%). Unlike Scarborough businesses did not widely refer to specific shops as the main attraction the most frequently mentioned being the Co-op, Woolworths, Boyes and Boots (all 4%).

3.53 The business survey indicated the majority of businesses (75%) trading on Sunday although only 54% did this all year round with an additional 6% in the run-up to Christmas / New Year sales and 15% in the summer season.

Perception of Safety and Crime

3.54 The 2006/7 Home Office Report on Crime Statistics relates to whole the Scarborough BC administrative area which the population of the Whitby forms around 20% of therefore the below national average crime figures are probably applicable but cannot be relied upon statistically. The street visitor / shopper survey found very high perceptions of personal safety amongst daytime visitors (97%) but slightly lower for evening visitors (83%) although visitor levels at night were still quite high (55%). In terms of evening activities visiting pubs and clubs was the most popular (44%) followed by eating out (26%), takeaways (15%), late-night shopping (4%) and visiting the cinema / theatre (3%).

3.55 The town centre survey found limited concerns about personal safety and security amongst the business community, 20% thought it was a problem and 3% definitely a problem. (Vandalism and graffiti were seen to be slightly more of a problem.) This limited concern was reflected in business priorities for investment with 37% stating a greater police presence as a priority for investment (compared to 88% who stated car parking), town centre wardens (34%) and more CCTV coverage (34%). Overall policing and personal security issues appear not to be a major problem in Whitby.

State of the Town Centre Environmental Quality

3.56 The historic street layout and heritage environment is seen by the business community as a key attraction and business advantage for Whitby town centre. Visitors to the town centre also appreciate this historic heritage although they are much less satisfied with other aspects that may be constrained by it such as the range of shops (possibly due in part to limited range and availability of premises and sites in Whitby).

3.57 Baxtergate and Wellington Road in the Town Centre are the only streets that have been pedestrianised by the County Council and this is where most of the multiples are located. However, there are other pedestrianised streets and passageways which are too narrow for modern vehicles such as Golden Lion Bank, Sandgate and Grape Lane. In addition the northern part of Church Lane has only limited vehicular access. In the summer season the weight of visitor numbers forces pedestrians onto the streets, particularly along St Ann's Staith /

Pier Road and on the Swing Bridge adding to vehicular congestion. Several respondents in the visitor survey commented they avoided the town centre in summer for this reason.

3.58 The narrow historic street pattern provides an attractive shopping area sheltered from the elements. Pedestrian routes to bus stops and car parks are convenient and direct although in summer visitors have to park some distance from the centre. In general the standard of cleanliness of the Town Centre is high, with little evidence of litter, fly-posting or graffiti. The town centre street surveys identified car parking, congestion and public toilets availability as the key concerns for both shoppers and businesses in the centre.

3.59 The historic centre straddles the steep river banks either side of the harbour and the narrow passageways and fisherman’s cottages with pantiled roofs that climb up from the river provide an attractive and atmospheric environment that is unique to the town. Many of the secondary frontages such as Church Street, Sandgate, Grape Lane, Flowergate and Skinner Street retain the original shop frontages that adds to the attractive shopping environment. There are many attractive historic buildings within the centre but it is the overall historic street pattern and heritage environment that make Whitby a quality shopping centre environment.

3.60 There has been recent investment on New Quay Road in the form of four new units that reflect the local vernacular. There are very few inappropriate buildings in the centre with most post war development being sympathetic to the surrounding historic buildings. The one glaring exception is the docks warehouse on Langborne Road although this now appears to be surplus to requirement as the surrounding land is used for overflow car parking in the summer months.

3.61 Within the centre itself there are several landmark buildings and other nodes to assist orientation and navigation. The dolphin swing bridge is the main landmark linking the two halves of the town but other key buildings include the railway station, market hall, Bagdale Hall and the shambles market. Throughout the centre there are views up to the Abbey and St Mary’s Church from the West Cliff and from the East Cliff there are fleeting views over to St Hilda’s Church, the whale jaws and the Victorian hotels on West Cliff.

3.62 The centre has quite a strong sense of arrival from the two main entrances. Approaching from the north visitors pass Bagdale Hall and then the whole view of the harbour opens up with shops on the left and the railway station and co-op supermarket to the right. Often in summer the tall sailing ship Endeavour is anchored in the harbour providing a striking landmark and adding to the sense of arrival. The approach from the south is equally good as visitors drop down from the A171 Scarborough road the harbour emerges before them. The shopping frontages do not commence until Grape Lane and the pedestrian activity greatly increases as the corner is turned into Bridge Street with a view of the dolphin swing bridge and West Cliff straight ahead.

3.63 Overall the town centre is a very attractive and particularly the main historic / tourist frontages on Church Street, Sandgate and Grape Lane. Shop frontages on the West Cliff are not quite as attractive but this is where most of the multiples are located and there are very good views of the Abbey and St. Mary's from here. Whilst the choice of shops may not be satisfactory for local residents the frontages have been well managed and the town centre presents a very attractive visitor destination combined with the other attractions just outside the town centre. The lasting impression of a visit to Whitby town centre is one of a very attractive historic shopping environment.

Comparison with Competing Centres

3.64 According to respondent to the business survey the main competing centres to the town centre are Scarborough (24%), York (18% or 22% including the Designer Outlet Centre), Middlesbrough (11% or 16% including Teesside Retail Park), business elsewhere in Whitby (10%) and Guisborough (6%). The evidence from the NEMS household telephone survey is that for comparison goods Scarborough (28%) is the main competing centre followed by Teesside towns and retail parks (13%) and York (6%). For convenience goods there is less leakage (31%) but Scarborough (21%) is the main competing centre although most of the expenditure is spent in the supermarket rather than town centre – Seamer Morrisons (11%), Tesco (4%) and Sainsburys (2%). The remaining 8%convenience goods leakage is spent mainly in Guisborough and Teesside destinations.

3.65 Whitby compares very well with other centres on the PPS6 yield and vacancy indicators. Whitby's yield of 7.25% compares very favourably with Scarborough (7.25%) and some of the competing local centres such as Bridlington (8.75%), Guisborough (7.5%) and Redcar (7.5%) but less so with the larger centres of Middlesbrough (6%), York (5%) and Leeds (4.5%). There is no published rental information for Whitby but the vacancy levels (6.9% of A1 units and 4.4% of the total floorspace) compare very well with UK averages recorded by Goad (9.7% of outlets and 8% of floorspace).

3.66 In summary, Whitby performs very well in comparison to comparably sized shopping centres although the limitations of the local offer mean there is considerable leakage particularly of comparison goods expenditure.

Comparison with Previous Health Check Assessments

3.67 The 1998 England & Lyle study identified Whitby as having average vitality and viability although they acknowledged that unlike Scarborough there was a higher degree of tourist spending in the town centre.

3.68 In terms of diversity England & Lyle identified the same weakness in the office market as this report and also the strength of the cafes and restaurant offer with overall the town only having average diversity.

3.69 England & Lyle considered the retailer representation to be 'fair' in Whitby concluding that Whitby has a localised catchment area and that the town was well provided for by supermarkets and convenience stores. The study identified the comparison offer as being a weakness but recommended encouraging high quality specialist shops to serve visitors, many of whom are from higher socio economic groups with greater spending power, and they identified a limited number of multiples and a shortage in some types of non-food shops such as electricals. They also commented upon the high number of charity shops in the town centre. Whilst they are still to be found in the primary frontage of Baxtergate alongside national multiples, because of the low level of vacancies in the town the charity shops will be paying near market rents to be located here presumably because the browsing / impulse buying tourist trade is quite lucrative in Whitby.

3.70 The low vacancy rate was identified as a strength in 1998 by England & Lyle and this is still the case, however, they also referred to around 40 seasonal vacancies and this is no longer the case in Whitby, perhaps reflecting the town's efforts to market itself for a series of themed weeks / weekends throughout the year. England & Lyle couldn't comment on rental performance due to a lack of information but they considered the then 10% yield to be poor although this is now a lot stronger at 7.25%.

3.71 England & Lyle considered pedestrian flows to be good in the primary frontages of Baxtergate and Flowergate but overall only average due to the seasonal nature of the footfall. In particular they commented on the low out-of-season footfall in Church Street. Whilst the footfall here is much lower out-of-season than the crowded summer streets, the all-year-round season, particularly at weekends, means that low seasonal footfall is now much less of an issue in Whitby.

3.72 Accessibility by car and availability of car parking was considered to be a problem in 1998 by England & Lyle and the situation has not improved. However, England & Lyle also considered public transport access to be poor but considering the number of circulars, town and rural services this is no longer the case if it really was in 1998.

3.73 England & Lyle considered that the leakage to Scarborough and elsewhere indicated low satisfaction levels in the town with the shopping provision. The 2007 street survey certainly indicates levels of dissatisfaction with certain aspects of the shopping offer and the NEMS household survey indicates higher levels of comparison goods leakage (%) than in 1998 (50%).

3.74 The England & Lyle report was written just after CCTV had been installed in the town centre and concluded safety and security is not a problem in Whitby and the 2007 business and street surveys appear to confirm this is still the case.

3.75 England & Lyle considered the environmental quality of Whitby to be only average in 1998 but there has since been significant investment in environmental improvement schemes in immediately adjoining areas which will have changed perceptions. Certainly the 2007 street survey recorded high levels of satisfaction with this aspect of the town centre environment along with the cleanliness of the centre. There are a number of infill sites on New Quay Road and Church Street that might be better developed to hide the rear service areas of adjacent properties but apart from this and the Docks Warehouse there is very little to detract from the environmental quality and old world charm of the town centre that attracts so many visitors.

3.76 The 1998 study concluded that Whitby is a less vital and viable centre than Scarborough. Given the identical yields recorded in the towns in 2007, on this indicator Whitby is comparable and in terms of the quality independent offer possibly has the edge over Scarborough. At the time of the 1998 study the impact of the new Co-op supermarket was being felt but this does contribute linked trips to the centre and the convenience offer has steadied and very recently the out-of-centre Lidl has opened. The extension of the season from summer to year round, at least at weekends, has also improved the health of Whitby town centre. The overall conclusion must therefore be that the vitality and viability of the centre has steadily improved since 1998 although there are still remaining problems that need to be addressed in the future.

Conclusions on Vitality and Viability

3.77 There is only a limited range of uses other than retail in Whitby Town Centre that contribute to the vitality and viability of the town although for a small shopping centre diversity is not bad. This partly reflects the Whitby's role as a seaside resort and historic town with all-year round tourism supporting a range of shops and services that might not otherwise locate in town centre of this size. The amount of retail, leisure and office floorspace in edge and out-of-centre locations has increased in recent years with the opening of the edge-of-centre Co-operative supermarket in 1997 and more recently the Lidl store on Stakesby Road. There a number of small infill sites within the centre and one potential, although very sensitive, edge-of-centre site.

3.78 The town centre environmental quality is very good and there is a good choice of specialist independent shops although multiples are less well represented and there appears to be a shortage of suitable floorspace units to accommodate those multiples requiring premises in the town. There are a number of charity shops mixed in with the primary frontages although these are mostly at the quality end in terms of goods and frontages. The number of vacancies and amount of vacant floorspace is very low in Whitby indicating a strong centre.

3.79 Retailer representation and intentions to change representation is a strong indicator in Whitby. There is a shortage of multiple representation in both the convenience and comparison sectors in the town centre although banks and financial services are well represented. There are unsatisfied requirements from several national multiples wishing to locate in the town centre suggesting a shortage of suitable modern premises and the most recent development was entirely occupied by four multiples.

3.80 The proportion of vacant street level property is very low although it has increased slightly since 2003. It is possible that there is actually a shortage of units suitable for national multiples. Commercial yields on non-domestic property have recently decreased to a reasonable 7.25% which compares very favourably with competing centres including the sub-regional centre of Scarborough.

3.81 Accessibility by car and parking is the main problem in Whitby and this was the main concern for both visitors and businesses in the surveys. The business survey recorded support for park and ride proposals in the town that might help alleviate this. Other modes of transport and access such as walking and buses are much better.

3.82 Customer and residents views and behavior indicate levels of dissatisfaction with the town centre, in particular the limited retail offer. Perception of safety and crime are reasonably good and local crime levels are generally below the national average in the borough.

3.83 In summary, Whitby town centre displays strong PPS6 indicators of vitality and viability and compares reasonably with competing centres and even larger sub-regional centres such as Scarborough. The main strength is the attractive environment and old world charm of the centre and the specialist independent offer. The main weaknesses are the lack of diversity, limited multiple representations, exacerbated by a shortage of suitable units, congestion and the limited number of car parking spaces. The main opportunity in the short term are the infill development sites and in the longer term a park and ride scheme and redevelopment of the Local Plan L11 Docks Warehouse area. The main threat is the continued congestion and parking problems and also growing pressure for retail development in peripheral locations if town centre sites cannot be brought forward.

4.0 The Vitality and Viability of Filey Town Centre

Background

4.1 Health checks of Scarborough, Whitby and Filey Town Centres were undertaken based on PPS6 criteria including guidance on suitable primary shopping areas and town centre boundaries.

4.2 A town centre user survey was carried out in each centre with approximately a 50 sample in Filey to establish where shoppers are coming from and what they use the centres for and this has also informed the health checks and the formation of a study area.

4.3 The health checks also contain an analysis of Town centre business survey results from the three main centres. The questionnaire was circulated to approximately 150 businesses in Filey by the Council and the analysis informs the health check of the town centre.

4.4 The methodology and data sources for undertaking the Health Checks are contained in Appendix One.

Introduction

4.5 Filey Town Centre is a small shopping centre serving the town itself and surrounding rural areas with a catchment population of around 11,000 people for both convenience and comparison goods. Its catchment to the north is limited by the catchment of Scarborough, to the south by Bridlington and to the west by Driffield and Malton. The catchment for non-food goods is restricted by the same centres and in addition the sub-regional centre of York to the west. To a lesser extent, and particularly for convenience goods, the smaller village centre of Hunmanby to the SW reduces the influence of Filey.

Diversity of Main Town Centre Uses

4.6 The vitality and viability of a town centre is dependent not only on its shopping offer but also on the mix of uses which add to the visitor experience and make the centre more attractive to those who live and work there. As a small town centre, Filey Town Centre is a focus of town centre activity in the town itself and the surrounding rural areas although the centre's influence does not extend very far into the hinterland. The historic fishing village became a seaside resort in the nineteenth century and part of the town centre also services this tourism function.

4.7 In the town centre there is a medical centre but apart from a few estate agents and solicitors there is no office market reflected in the DCLG's 2002 Area of Town Centre Activity Database that records only 1,130 sq m of office floorspace in the town centre. There are some civic and administrative functions including police station and some Borough Council offices. There are three high street banks (HSBC, Yorkshire and Barclays) and some of the estate agents run agencies for building societies.

4.8 As might be expected in a small seaside resort, Filey has a reasonable range of leisure and tourist facilities, although some of these are located in the tourist areas such as seafront promenade and the old village. Within the town centre there is a tourist information centre and theatre in the adjoining Evron Centre. The Library is located just outside the centre next to the bus station and the museum is located in the old village. The late evening economy within Filey is limited as there is only one bar / nightclub (The Buccaneer). However, there are several pubs and restaurants in and around the centre. There is no longer a cinema in Filey and the building has been converted to a snooker hall and shops. Although the town centre is surrounded by residential areas there are very few people actually living in the centre itself above shops and this is a partial weakness in diversity.

4.9 In summary, excluding retail there is only a limited range of other uses in Filey Town Centre that contribute to the vitality and viability of the town although for a small centre diversity is reasonable. This partly reflects the fact that Filey is a seaside resort and some of the leisure facilities are provided in locations away from the centre.

The Amount of Retail, Leisure and Office Floorspace in Edge and Out-of-Centre Locations

4.10 The retail frontages of Filey town centre extend beyond the Local Plan town centre boundary to the north, where they merge into sporadic residential parades, and the west where the former cinema has been converted into a snooker hall and shops beneath including the town's main supermarket Somerfield. There has not been any new retail development around the town centre in recent years although planning permission was granted for a small supermarket on a site behind the bus station but this was never built out and the permission has recently lapsed. There are some retail developments along the A165 Scarborough Bridlington road that bypasses the town in petrol and former petrol filling stations. However, the out-of-centre Morrisons five miles away at Eastfield is the main competing centre to the town centre.

Opportunities for Physical Growth

4.11 There is only one site allocated in the Local Plan behind the bus station and car park. Until recently this site had consent for a small supermarket but this has now lapsed although it is understood that there is renewed developer / operator interest in bringing the site forward. The surrounding residential areas prevent town centre extension in any other direction except to the east where the land falls away steeply to the seafront promenade below.

Retailer Representation and Intentions to Change Representation

4.12 Experian Goad do not include Filey in their national survey of shopping centres. However, out of 54 shop businesses in the town centre only two (4%) are multiples – Mills convenience store and Cooplands bakery. One of the 4 vacancies in the centre is a former national multiple, the ex Wine Cellar shop. However there is an extensive range of independents from specialist / quality shops through to seasonal / discount orientated stores. Just outside the centre in the former cinema building near the railway station is a small Somerfield store and Heron also have a freezer shop here. In the street survey no one particular stores in the town centre was mentioned frequently as the main attraction but several of the independents were referred to.

4.13 The DCLG's 2002 Area of Town Centre Activity Database that records only 5,610 sq m gross of retail floorspace on the town centre. The Council's 2004 town centre survey indicates that within the town centre there is 2,960 sq m (net) A1 retail floorspace. Of this around 76% is comparison goods, which is high for a smaller centre, and 24% is in convenience goods use. The lower than expected convenience goods use is probably explained by the location of the main supermarket and freezer shop just outside the centre on Station Avenue (where a butcher, greengrocer and baker are also to be found). Within the centre there are also a number of high street specialist convenience shops including two butchers, a greengrocer, two bakers, a confectioners, a delicatesan and, just outside the centre on Mitford Street, a fishmonger. Specialist comparison goods stores in Filey include two hardware stores, a cobblers, a craft shop, one shoe shop and several higher order ladies clothes shops.

4.14 According to the Focus Database of retail requirements there is only one retail / town centre user requirements in Filey – Superdrug. In addition the Shopproperty database reports two retail requirements in Filey from Barefruit Juice and the Factory Shop. These requirements for towns as small as Filey have to be treated with caution as they might be part of an area search / list of several towns. However, consultations with commercial agents active in the town centre have identified only one additional requirement of a national operator of small supermarkets that is seeking a presence in Filey.

4.15 The town centre business survey in Filey recorded good overall trading performance with no businesses intending to close and / or relocate outside of Filey whilst 10 (35%) were planning on expanding / refitting in situ. This suggests that most businesses are doing well in Filey, only 11% reported falling turnover in the last 5 years and fewer (7%) anticipated falling turnover in the next five years, indicating a high level of business confidence in the centre. The most notable departure from Filey is probably the closure of the Wine Cellar on Belle Vue Street. However, as part of the Morrisons takeover of Safeway, Mills have ended up occupying the former Safeway unit on Murray Street and this is a greater loss of an anchor multiple supermarket from the centre itself (even though Mills retail a very similar range of goods).

4.16 In summary, Filey has a limited convenience goods offer in terms of supermarkets with only the small Somerfield store located outside the town centre but there is a good range of high street specialists. There are also some quality comparison goods specialists although there are numerous discount orientated stores as well. The overall offer whilst not bad for a town of this size is insufficient to retain significant levels of local expenditure in either sector.

Shopping Rents

4.17 The Valuation Office Agency (VOA) does not record rental levels in Filey and local commercial agents report there are very few transactions and that many of the units in the town centre are owner occupied.

Proportion of Vacant Street Level Property

4.18 Currently there are 4 vacant A1 units in Filey which is 4% of the total of 103 A1 units in the centre. This is an increase of 100% on the 2 vacant units recorded in the Council's 2004 survey of A1 floorspace in the centre, however, it is still a fairly low number and not that significant. The four vacancies are widely distributed throughout the centre and none are in the primary frontages of Murray Street or John Street. However, there may well be more seasonal vacancies in the winter months as several businesses are understood to close out-of-season.

Commercial Yields on Non-domestic Property

4.19 The VOA does not record yield information for Filey and local commercial agents report there are too few transactions to calculate yields.

Pedestrian Flows

4.20 Pedestrian flows in Filey vary during the season. At the height of season and on Saturdays the busiest areas are on Station Avenue and Murray Street as visitors walk down from the main car park to the beach. Outside the summer season Murray Street remains busy as it is a primary frontage along with John Street. The secondary frontages of Belle Vue Street, Union Street, Hope Street are much quieter although the secondary frontages on Station Avenue enjoy reasonable footfall as the bus station, railway station, library, medical centre and, further out, Somerfield are all located here.

Accessibility

Car Access and Parking

4.21 The street survey identified that most people (54%) walk to the centre followed by those who travel to the centre by car (26%) - 22% as a driver and 4% as a passenger. Access to the Town Centre for cars is reasonably good, with two main roads converging on the centre from Scarborough to the north and

Bridlington to the south facilitating access from surrounding suburbs. These roads and destinations are also well served by buses from Filey. In the season congestion can be a slight problem as cars drive slowly round looking for one of the few on-street parking spaces more readily available out-of-season.

4.22 In addition to the on-street spaces that are time restricted in places but are resident parking schemes, there are around 200 public pay and display parking places available in the main town centre car park behind the bus station and a similar number in the overflow car park beyond that (although this forms part of the supermarket site).

4.23 Access to the town by car scored (116) above the average (100) in the visitor / shopper survey. However, there was less satisfaction with the availability of car parking spaces (75). In the business survey all respondents felt parking was a problem, 39% stating it was somewhat of a problem and 61% definitely a problem. In the same business survey 84% of respondents felt congestion was a problem affecting their business, 59% felt car access to the centre within the town was a problem but fewer felt access from the surrounding area was a problem (33% somewhat of a problem and 10% definitely a problem).

Bus Access

4.24 Filey has a bus station on Station Avenue close next to the railway station on the periphery of the town centre which provides local services including three circular and suburban routes, services to the rural hinterland as well as routes to more distant destinations including Scarborough, Bridlington, Hull, York and Leeds. In addition there is a dial a ride flexi bus system in operation. The Town Centre Survey found that some 20% of those questioned had travelled to the Town Centre by bus and most respondents were very satisfied with the service (score 139 on 100 average index).

Pedestrian / Cycle Access

4.25 The town is surrounded by residential areas within walking distance of the town centre (54% of respondents in the shopper survey walked to the Town Centre). The visitor survey recorded very high satisfaction levels with pedestrian access

(170). The reasonably flat topography of the Filey urban area facilitates cycling although the street survey recorded no visitors arriving by this mode.

Rail Access

4.26 Filey's railway station is located at the western end of the town centre beyond the bus station. Although there are no suburban stations the nine daily Northern Rail services to Hull stop at most villages and towns enroute including Hunmanby, Bridlington, Driffield and Beverley. The ten daily services to Scarborough stop at Seamer where connections to the East Coast mainline at York can be made. The services are therefore sufficiently frequent to allow planned shopping trips to Filey to be made although they are more likely to be made in the opposite direction i.e. to the higher order centres of Scarborough, Hull or Bridlington. The town centre therefore has reasonable rail access although the town centre survey recorded nobody arriving by this mode.

Customer and Residents Views and Behavior

4.27 The town centre surveys found that on several indicators the town centre scored negatively not only for car parking (76) outlined earlier but also for the choice of food (76) and non-food shops (70) and availability / quality of toilets (61) which may reflect the closure of the toilets on Murray Street leaving the bus station toilets the nearest public facility. The other negative aspect of the town centre was the choice of leisure facilities (87). The poor opinion of shoppers to the range of shops and leisure services reflects the view of permanent residents (over 95% of respondents) who consider them to be inadequate.

Table 4.1: Shopper Satisfaction Levels in Filey

The ease of walking to the centre	170
Bus services to Filey	139
Ease of getting to the centre by car	116
Availability of parking spaces	75
Choice of foodshops & supermarkets	76
Choice of clothes/ non-food shops	70

Range of banks / financial services	133
Variety of places to eat and drink	137
Choice of leisure facilities	87
Policing / security in the centre	104
Availability / quality of toilets in the centre	61
Attractiveness of the centre	148
Cleanliness of the centre	129
AVERAGE	**100**

Source 2007 Shopper / Visitor Survey

4.28 Positive aspects of the town centre included the walk-in access (170), overall attractiveness of the centre (148), bus access (139), variety of places to eat and drink (137), range of banks / financial services (133), cleanliness of the centre (129), car access (116) and policing / security (104). The survey indicates that whilst residents appreciate some of the attractions that draw visitors to the centre such as its environmental qualities they are more aware of the limitations of some services and shopping facilities in the town.

4.29 There were no particular favourite stores in Filey amongst respondents although several of the independent high street specialist shops were mentioned. In terms of missing shops 55% of respondents mentioned a better or another supermarket and 38% mentioned clothes shops of one type or another. Regarding the leisure offer, 38% mentioned a better pool / leisure centre whilst 40% of respondents suggested a cinema and 8% referred to indoor bowling.

4.30 In terms of frequency of visits the survey recorded 94% of visitors / shoppers visiting at least once per week which is very high and on average people visited 2.9 times per week. This is possibly skewed slightly by workers who represented only 10% of the sample but probably reflects the size of the town and the proximity / accessibility of the centre to adjacent major holiday centres north and south of the town. The centres south of the town are currently undergoing a major expansion which could lead to a further increase in visitors shopping in the town.

4.31 With regard to the purpose of the visit to the town centre, 63% were food shopping, 38% were non-food shopping, 28% were visiting the bank / building society, 26% were eating out, 12% browsing / window shopping, 10% there for work and 7% were meeting friends / relatives. The frequency of visiting also reflects the greater convenience food offer in the centre compared to Scarborough where non-food shopping was the most common purpose of the less frequent trips to that town centre.

4.32 In Filey the frequent visitor numbers and high footfall levels are reflected in high expenditure levels with more positive responses in terms of past and anticipated future turnover levels – 11% reported decreasing turnover and 7% expected their turnover to decrease in the future. The business survey also indicated that 36% of respondents felt falling footfall was a problem and a further 14% felt it was a serious problem for their business.

4.33 The town centre business survey was returned by 37 businesses out of approximately 103 in the Local Plan defined town centre area representing a return of over 35%. The largest group of respondents were retailers (43%) followed by other services (25%), restaurants / bars (11%), and financial services (5%). Most respondents were fairly long established in Filey with 31% having traded here for 25 years or more, 22% over ten years but less than 25, 6% over five years but less than ten, 25% one to five years and 16% less than a year.

4.34 The majority (97%) were small businesses employing less than 30 people and only one (3%) employed more than 50. The majority of employees (93%) were drawn from within five miles of Filey. Overall businesses had retained a static permanent workforce in the last two years with decreases (14%) almost matching increasing (11%) staff numbers.

4.35 The survey found that the main reason businesses were located in the town centre was to be in the centre itself (57%), they were long established Filey businesses (54%), it has a ready market (46%), historic reasons (46%) and high footfall (42%). Other reasons included to be close to other businesses (35%), accessibility of the centre (26%), affordable rent (21%) and availability of short term leases (12%) were much less common reasons given for locating in the town centre.

4.36 The town centre business survey found that the seaside resort location (60%) and customer access (60%) were the main locational advantages of Filey town centre. Other positive location advantages included local demand for products / services (42%) and the availability / accessibility of workforce (39%). The seasonal nature of trade was a slight problem for 35% of respondents and a big problem for a further 35% (much higher than response levels to Scarborough town centre). Other serious problems included a lack of private investment (32%), the limited range of shops (29%) and poorly maintained properties (27%). The main problem with the town centre as outlined earlier is regarded as the parking (39%) and congestion (38%)

4.37 These concerns are reflected in priorities for investment to a certain extent with 82% wanting more / better quality toilet provision and 71% considering parking improvements to be a high priority. Other priorities include improving the A64 link to the rest of the region (50%), environmental improvements (33%), reducing congestion (28%) and improved public transport (28%)

4.38 In terms of the main attractions in the town centre businesses thought that the resort location (13%), restaurants and cafes (9%) and banks (9%) are the main draw. Unlike Scarborough businesses, respondents did not widely refer to specific shops as the main attraction although cumulatively the various independents totalled 39% of responses indicating their contribution to the town centre.

4.39 The business survey indicated the majority of businesses (71%) trading on Sunday although only 41% did this all year round with an additional 6% in the run-up to Christmas / New Year sales and 24% in the summer season.

Perception of Safety and Crime

4.40 The 2006/7 Home Office Report on Crime Statistics relates to whole the Scarborough BC administrative area which the population of the Filey forms less than 10% of therefore the below national average boroughwide crime figures cannot be used. The street visitor / shopper survey found very high perceptions of personal safety amongst daytime visitors (100%) but slightly lower for evening visitors (91%) although visitor levels at night were fairly high (46%). In terms of evening activities visiting pubs and clubs was the most popular (43%) followed by takeaways (26%) and eating out (23%).

4.41 The town centre survey found limited concerns about personal safety and security amongst the business community, 19% thought it was a problem and 10% definitely a problem. (Vandalism and graffiti were seen to be slightly more of a problem.) This limited concern may reflect the presence of a police station in Murray Street at the heart of the centre. It was also reflected in business priorities for investment with 29% stating a greater police presence as a priority for investment (compared to 82% who stated more / better toilet facilities), extended CCTV coverage (31%) and town centre wardens (4%). Overall policing and personal security issues appear not to be a major problem in Filey town centre.

State of the Town Centre Environmental Quality

4.42 Filey is a town of two halves with the historic fishing village and its small pantiled cottages to the north of the town centre and the Victorian resort to the south with the Crescent and open gardens to the front. The town centre itself has some quality building such as the former Primitive Methodist chapel (now converted to apartments), Three Tuns Hotel, Belle Vue Hotel, the Methodist church and Railway Station and the memorial gardens provide a pleasant open space within the centre. The main shopping streets of Murray Street, John Street and Belle Vue Street provide an attractive high street environment although there are no pedestrianised streets in the centre.

4.43 There are few quality buildings within these main shopping streets and many of the shop frontages and signage is of an inappropriate scale and detracts from attractive buildings above. The most attractive frontages are to be found on Belle Vue Street where the town centre meets the Victorian resort, in particular the small parade that is occupied by the Deli and Bramwell’s Tea Rooms. There are a few decent frontages on Murray Street such as Shoetique and Sterchis. Some of the units on John Street are single storey cabin type buildings although most are well presented and maintained. However, many of the other frontages on Murray Street are loud and garish, particularly those aimed at the passing tourist trade such as the Rock Shop.

4.44 There has been recent investment in the centre in the form of the new Tourist Information Centre and Evron Centre that houses the town's small theatre and this attractive building adds to the street scene. However, the conversion of some of the existing buildings to new uses such as the former cinema on Station Avenue and the former chapel on West Avenue (part of Dixon's Discount store) are less successful contributions to the street scene.

4.45 Pedestrian routes to bus station and car parks are convenient and direct although in summer visitors have to park some distance from the centre. In general the standard of cleanliness of the Town Centre is high, with little evidence of litter, fly-posting or graffiti. The town centre street surveys identified car parking and public toilets availability as the key concerns for both shoppers and businesses in the centre.

4.46 Within the centre itself there are a few landmark buildings and other nodes to assist orientation and navigation. The steeple of the Methodist church provides a good sense of arrival on Station Avenue, the main route into the town and the Belle Vue Hotel provides a good entrance from the Crescent and seafront. Orientation within the town centre is fairly straightforward due to the compact nature of the centre.

4.47 Overall the town centre is a fairly attractive and particularly the area where it merges into the Crescent and seafront gardens. The town provides a pleasant high street shopping experience, there are a number of attractive buildings in the centre and the presence of several high street specialist shops adds to the visitor experience. Unfortunately some of the facades and frontages could have been better presented and managed. Overall the town centre presents an attractive visitor destination and the lasting impression of a visit to Filey town centre is one of an attractive high street shopping environment.

Comparison with Competing Centres

4.48 According to respondent to the business survey the main competing centres to the town centre are Scarborough (52% including retail parks), Bridlington (14%) and York (9% including the Designer Outlet Centre). The evidence from the NEMS household telephone survey is that for comparison goods Scarborough (57%) is the main competing centre followed by York (7%) and Bridlington (4%).

For convenience goods there is slightly less leakage (62%) and again Scarborough (49%) is the main competing centre although most of the expenditure is spent in the supermarkets rather than town centre – Seamer Morrisons (33%), Tesco (5%) and Sainsburys (2%). In addition 9% of local convenience goods expenditure is spent in Bridlington where in addition to the town centre there are Tesco and Morrisons supermarkets.

4.49 There is very little commercial information with which to compare Filey to the competing centres of Scarborough and Bridlington but the vacancy levels (4% of A1 units) compares very well with UK averages recorded by Goad (9.7% of outlets). In summary, Filey performs fairly well in comparison to comparably sized shopping centres although the limitations of the local offer mean there is considerable leakage to nearby higher order centre for both categories of expenditure.

Comparison with Previous Health Check Assessments

4.50 The 1998 England & Lyle study identified Filey as having marginal although not fragile vitality and viability. They acknowledged that unlike Scarborough there was a higher degree of tourist spending in the town centre. In terms of diversity England & Lyle identified the same weakness in the local office market as this report and also the strength of the cafes and restaurant offer giving the overall the town average diversity.

4.51 England & Lyle considered the retailer representation to be ‘poor’ in Filey reflecting the absence of multiple retailers, the high incidence of closures during weekdays and a lack of recent investment. Whilst this is still probably the case there are several specialist independent high street shops that do compensate for the lack of multiples and contribute to the overall shopping offer.

4.52 The low vacancy rate was identified as a strength in 1998 by England & Lyle and this is still the case, however, they also referred to low footfall out-of-season which is also still the case and probably the reason for the higher seasonal vacancies in winter. England & Lyle couldn’t comment on yields and rental performance due to a lack of information that is still not available for this small centre.

4.53 Accessibility by car and availability of car parking was considered to be good in 1998 by England & Lyle but if this was the case then the situation has now deteriorated in the view of local businesses and shoppers (the 1998 study did not have the benefit of a street or business survey). England & Lyle considered that the leakage to Scarborough indicated low satisfaction levels in the town with the shopping provision. The 2007 street survey certainly indicates levels of dissatisfaction with certain aspects of the shopping offer and in particular the lack of a supermarket in the town.

4.54 The 1998 study concluded that Filey is a less vital and viable centre than Scarborough or Whitby but despite the seasonal influence on trade the indicators point to the town centre performing reasonably well but needing improvements in the offer with regard to convenience goods and also to overall shopping environment. This conclusion remains valid in 2007.

Conclusions on Vitality and Viability

4.55 There is only a very limited range of uses other than retail in Filey Town Centre that contribute to the vitality and viability of the town although for a very small shopping centre diversity is not too bad. This partly reflects the Filey's role as a seaside resort with tourism spending supporting a range of shops and services that might not otherwise locate in town centre of this size. There is one potential development site on the edge of the centre that has remained undeveloped for some years but it is understood there is renewed market interest.

4.56 The town centre environmental quality is quite good and there is a good choice of specialist independent shops although multiples are less well represented. There are a few quality buildings in the centre and a mixture of good and poor quality facades. The number of vacancies and amount of vacant floorspace is very low in Filey indicating a strong centre although there are seasonal fluctuations.

4.57 Retailer representation and intentions to change representation is a strong indicator in Filey. Although there is a shortage of multiple representation in the town centre banks are well represented. The town centre business survey recorded good overall trading performance and a high level of business confidence in the centre. The most notable departure from Filey is probably the Safeway supermarket as part of the national closure / takeover. There are very few retailer requirements for the town centre although it is known a national operator of small supermarkets is seeking a presence.

4.58 Accessibility by car and parking is the main problem in Filey and this was the main concern for both visitors and businesses in the surveys. Other modes of transport and access such as walking and buses are much better. Customer and residents views and behavior indicate levels of dissatisfaction with the town centre, in particular the limited retail offer, parking problems and the availability of toilets. Perception of safety and crime are reasonably good.

4.59 In summary, Filey town centre displays reasonable PPS6 indicators of vitality and viability for a small centre but fails to compete even for convenience goods shopping with larger centres due to a limited offer. The main strength of the centre is the attractive high street shopping environment, seaside location and the specialist independent offer. The main weaknesses is the lack of diversity, limited multiple representations and the limited number of car parking spaces. The main opportunity is the development site identified in the Local Plan, for which there is renewed developer / operator interest, and the holiday park expansions at Primrose Valley and Amtree Park. Another opportunity would be the introduction of further environmental improvements into the centre including a shop frontage scheme. The main threat is the continued and growing leakage of expenditure to higher order competing centres and out-of-centre destinations if the development site is not brought forward.

5.0 Quantitative Assessment Methodology

5.1 The methodology for both comparison and convenience goods follows a standard approach that is based on PPS6 guidance (para 2.34) and subsequent Secretary of State decisions that indicate there are three sources of quantitative need although the extent to which they are drawn upon varies for the two broad goods categories:

1. growth in expenditure over and above inflation. This is calculated by multiplying population figures by expenditure per head figures from MapInfo for the study area and projecting this forward to a design year. Allowances for existing and planned floorspace to increase their turnover are then deducted from this growth to arrive at a potential surplus to support new floorspace;
2. overtrading in existing stores. This is gauged by comparing market share derived turnovers with expected or benchmark turnovers extracted from published company averages, however, it is only undertaken for out-of-centre stores; and,
3. increased market share within the catchment area arising from an improved offer and clawback of leakage.

5.2 The methodology adopted to identify market share and quantitative need for new comparison / and convenience goods development is a Retail Capacity Study. This is based upon new market share / survey information in the study area from a 1,200 sample household survey. This is supplemented with 2004 expenditure data / projections (from MapInfo), 2001 Census and 2004 midyear estimates / projections, and store turnovers from 2006 / 7 Retail Rankings and 2007 Verdict Grocery Report. The approach to retail capacity studies is a logical step-by-step progression of sequences outlined in the appended tables (Appendix 3).

Source One: Identify Expenditure Growth

Study Area and Catchment Area

5.3 The first stage is to identify a study area and this is based on the actual catchment of the three main town centres as recorded in the Town Centre visitor survey / shopper surveys. These were cross checked against the Experian Goad defined catchment centres for the two larger centres of Scarborough and Whitby.

Population and Expenditure Information and Projections

5.4 Population information for the study area based on the 2001 Census and projected forward to 2021 using the 2004 ONS mid year projections as extracted by MapInfo is utilised in the study. This is compared with the Councils' own population projections to confirm its accuracy.

5.5 The expenditure information is also extracted from a MapInfo TargetPro Report and projected forward using the cautious Oxford Economic Foundation (OEF) forecasts as recommended in MapInfo in Information Brief 06/02.

Calculate Current and Future Available Expenditure

5.6 This is done by multiplying the population figures and projections by the expenditure levels. The expenditure levels themselves are projected forward to 2007 (base year) and 2011/16/21 using Oxford Economic Foundation forecasts of expenditure growth.

5.7 This identifies the first source of retail expenditure capacity i.e. expenditure growth. However, not all of this expenditure is available to support new floorspace in the town centres as there are other claims on the expenditure growth such as turnover growth in current (efficiency improvements) and planned floorspace (commitments) and re-occupied vacant units. In addition allowances have to be made for some expenditure to continue leaking from the study area to higher order competing centres and (at the periphery) nearer centres. This leakage is identified in the following market share analysis stage.

Source Two: Leakage

Calculate Market Share

5.8 The market shares of the main centres, supermarkets and retail parks, for both goods categories are derived from a household survey divided into postcode sector based subzones that reflect the responses to the town centre shopper / visitor questionnaire survey.

5.9 The questionnaire asks detailed shopping destination questions for around a dozen sub-categories of expenditure. The survey result for each sub-category is then weighted according to the percentage of expenditure spent upon it locally as contained in the MapInfo TargetPro Report. The broad goods category market shares can then be calculated. For convenience goods this is broken down into mainfood and top-up expenditure as the latter forms an important source for local and / or smaller convenience stores. For comparison goods this is broken down into bulky and non-bulky goods, again to assist the qualitative understanding.

5.10 Current and future market shares can then be calculated and turnover levels estimated for each broad goods category, taking into account committed floorspace in the future scenarios. In some cases assumptions are built into the assessment about increasing market share through an improved offer i.e. quantitative need based on clawing back current leakage. However, this can only be done on the basis of lost market share in comparison to historic surveys and also with reference to the current and future retail offer in competing centres such as York and Teesside.

5.11 An assessment also has to be made for inflow expenditure and tourist spending. This is extracted from information in the Council's 2004 Impacts of Tourism in Scarborough Borough Report. This indicates that in 2004 there was an additional £87.5m retail expenditure generated by tourists and daytrippers to the Borough. This is not broken down into food and non-food expenditure but national figures indicate greater spending by tourists and daytrippers on non-food items.

5.12 The majority of the non-serviced accommodation (caravans, camping and self-catering) are in the national park area and it is assumed the majority of these visitors (who are the most likely to visit local convenience shops) will undertake their shopping at home and / or in the nearest large centre with a supermarket (Whitby, Guisborough, Scarborough, Pickering or Malton). Other visitors are much less likely to spend on convenience goods and overall a ratio of 4:1 in favour of non-food shopping is adopted. Therefore in addition to inflow expenditure from other zones identified from the household survey, therefore an allowance of 5% expenditure from beyond the study area in the form of tourist spending is allowed in convenience shops in all centres and 10% for comparison goods floorspace.

Source Three: Overtrading

5.13 Overall current and future (2007, 2011, 2016 and 2021) turnover levels are estimated for comparison and convenience goods floorspace from national company averages published in Mintel 2006 / 7 Retail Rankings and also by Verdict. This is then compared to the expected turnover of existing stores based on the market share analysis (Stage Five) to identify areas of overtrading. However, as stated before, only overtrading from out-of-centre foodstores will be regarded as a source of quantitative need.

5.14 The turnovers are calculated by multiplying the net floorspace (or sales area) by the national company average sales density (£'s per square foot). The turnover figures are adjusted to take account of VAT (and petrol sales in the case of larger supermarkets). The turnovers of shops in the various centres are amalgamated to identify the likely level of turnover of the centres. Likewise the overall comparison goods turnovers of retail parks are also amalgamated to arrive at expected turnover levels for retail warehousing. For convenience goods the major supermarkets are treated individually and the smaller convenience businesses in the shopping centres and local / village centres are amalgamated.

5.15 Once the overall expected or benchmark turnovers have been calculated for the current and planned floorspace these can be compared to expenditure levels retained locally as derived from the survey based market share analysis to identify the second source of retail capacity - overtrading.

Claims on Expenditure Growth & Future Quantitative Need

5.16 The expenditure growth stage has identified the extent of expenditure growth in the study period up to 2011/ 16/ 21. The market share stage has established how much expenditure is retained in the study area and where it is being spent. Overall future quantitative need from the three sources is calculated by identifying expenditure growth for each goods category in the design year(s) by:

1. deducting an allowance for existing centres to improve their turnover efficiency over and above the rate of inflation that is held constant by a 2004 price base (usually between 0% and 2.5% pa depending upon goods type and the strength of the centre);
2. deducting an allowance for any centres trading overall below expected (equilibrium) levels to improve their performance to equilibrium level at least and possibly for vacancies to be reoccupied / converted to alternative non-retail use;
3. deducting the turnovers of commitments identified in stage six (based on national company averages);
4. adding any identified overtrading in out-of-centre stores;
5. adding an allowance for increased market share in the form of clawed back leakage with reference to improvements in the local offer and also that of competing centre; and,
6. adding an allowance for increased / decreased inflows from beyond the study area due to improved retail offer and taking into account seasonal spending.

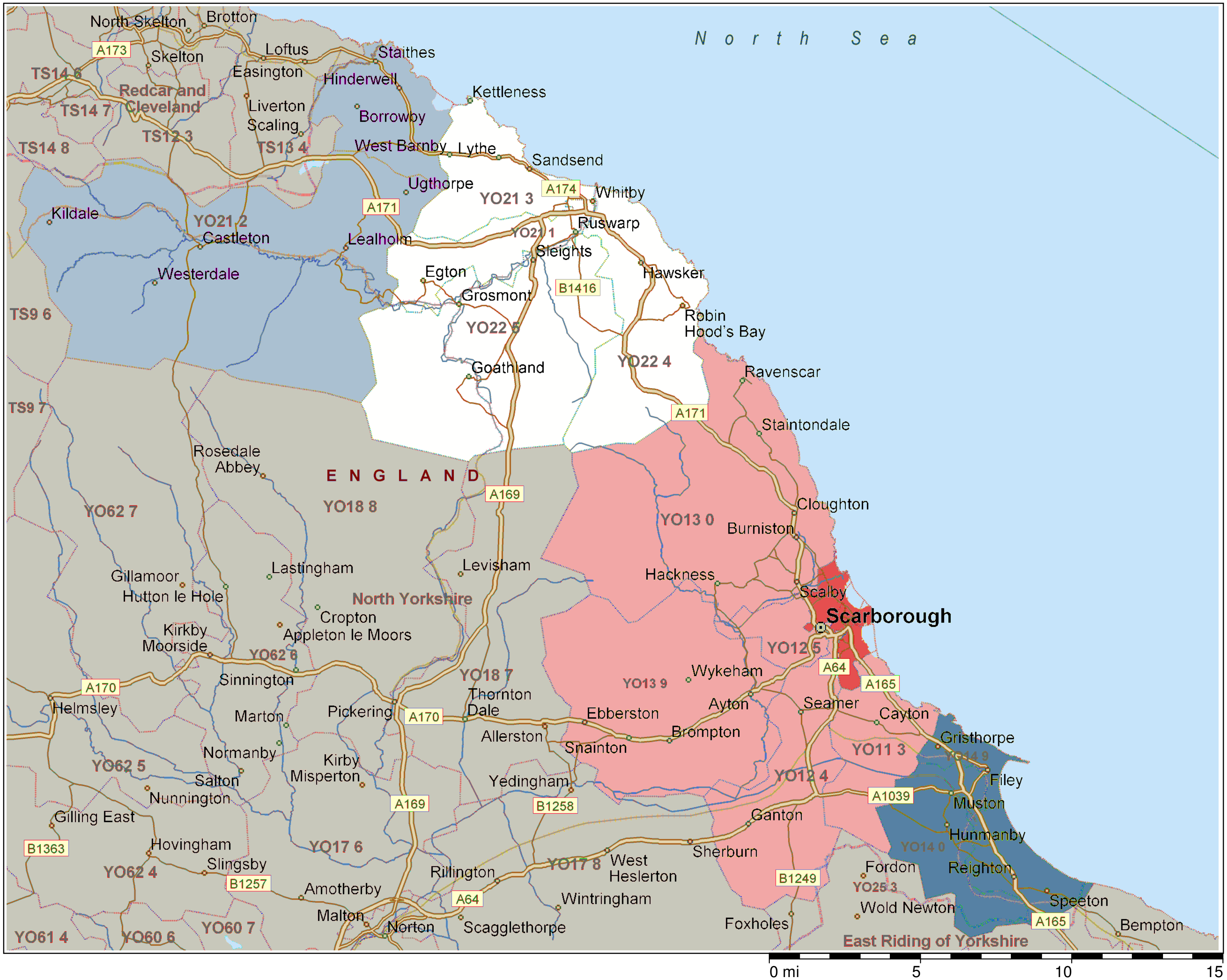
5.17 The assessment is undertaken for both convenience and comparison goods and the former is broken down into mainfood and top-up expenditure and the latter is broken down into bulky goods and town centre goods. The possibility of increasing future market share is considered where it is a realistic possibility.

5.18 The amount of floorspace that can be supported by the identified capacity is calculated using company average sales densities of the leading retailers and also those derived from the market share analysis for the town and district centres. This is then be used to inform the conclusions and recommendations (retail strategy) along with the qualitative assessment and health checks on the amount and type of floorspace / development land that should be planned for the local retail hierarchy in the LDF.

Map 1 Study Area Zones

Map One: Study Area Zones

- Scarborough PCA
- Scarborough SCA
- Whitby PCA
- Whitby SCA
- Filey



Population and Convenience Goods Expenditure Projections

TABLE 1: POPULATION BY ZONE

ZONE & SUBZONE	2004	2007	2011	2016
Scarborough PCA	32,649	32,787	32,972	33,444
Irton Moor	9,207	9,206	9,282	9,456
Seamer	7,913	7,998	8,007	8,064
Eastfield	11,757	11,817	11,840	11,961
Scarborough SCA North	5,159	5,145	5,204	5,324
Scarborough SCA West	5,059	5,073	5,107	5,189
Scarborough SCA TOTAL	39,095	39,239	39,440	39,994
Scarborough Area TOTAL	**71,744**	**72,026**	**72,412**	**73,438**
Filey	**10,905**	**10,821**	**10,967**	**11,262**
Whitby PCA	20,970	21,053	21,181	21,496
Eskdale	3,250	3,281	3,292	3,324
Staithes	2,495	2,508	2,524	2,561
Whitby SCA TOTAL	5,745	5,789	5,816	5,885
Whitby Area TOTAL	**26,715**	**26,842**	**26,997**	**27,381**
STUDY AREA TOTAL	**109,364**	**109,689**	**110,376**	**112,081**

Notes & Source.

1. Population figures extracted from 2001 Census and 2004 Mid Year Estimates in MapInfo TargetPro Report
2. Projections also from MapInfo TargetPro Report cross checked against ONS Districtwide Projections

TABLE 2: CONVENIENCE GOODS EXPENDITURE PER HEAD

ZONE & SUBZONE	2004	2007	2011	2016
Scarborough PCA	£1,353	£1,382	£1,455	£1,544
Irton Moor	£1,421	£1,451	£1,528	£1,622
Seamer	£1,421	£1,451	£1,528	£1,622
Eastfield	£1,353	£1,382	£1,455	£1,544
Scarborough SCA North	£1,421	£1,451	£1,528	£1,622
Scarborough SCA West	£1,421	£1,451	£1,528	£1,622
Scarborough SCA	£1,401	£1,430	£1,506	£1,599
Scarborough Area	**£1,379**	**£1,408**	**£1,483**	**£1,574**
Filey	**£1,421**	**£1,451**	**£1,528**	**£1,622**
Whitby PCA	£1,408	£1,438	£1,514	£1,607
Eskdale	£1,421	£1,451	£1,528	£1,622
Staithes	£1,408	£1,438	£1,514	£1,607
Whitby SCA	£1,415	£1,445	£1,522	£1,615
Whitby Area	**£1,410**	**£1,439**	**£1,516**	**£1,609**
STUDY AREA	**£1,391**	**£1,420**	**£1,495**	**£1,587**

Notes & Source.

1. Expenditure per head figures from ONS Blue Book extracted in MapInfo TargetPro Report
2. Convenience growth rate from Table 2, MapInfo Brief 07/2 (0.1% per annum 2004 - 2005, 1% pa 2005 - 2007 and 1.2%pa 2005 - 2016)
3. Special forms of trading included
4. 2004 Price base

TABLE 3: AVAILABLE CONVENIENCE GOODS EXPENDITURE IN THE STUDY AREA (£m)

ZONE & SUBZONE	2004	2007	2011	2016
Scarborough PCA	£44.2	£45.3	£48.0	£51.6
Irton Moor	£13.1	£13.4	£14.2	£15.3
Seamer	£11.2	£11.6	£12.2	£13.1
Eastfield	£15.9	£16.3	£17.2	£18.5
Scarborough SCA North	£7.3	£7.5	£8.0	£8.6
Scarborough SCA West	£7.2	£7.4	£7.8	£8.4
Scarborough SCA	£54.8	£56.1	£59.4	£63.9
Scarborough Area	**£98.9**	**£101.4**	**£107.4**	**£115.6**
Filey Area	**£15.5**	**£15.7**	**£16.8**	**£18.3**
Whitby PCA	£29.5	£30.3	£32.1	£34.5
Eskdale	£4.6	£4.8	£5.0	£5.4
Staithes	£3.5	£3.6	£3.8	£4.1
Whitby SCA	£8.1	£8.4	£8.9	£9.5
Whitby Area	**£37.7**	**£38.6**	**£40.9**	**£44.1**
STUDY AREA	**£152.1**	**£155.8**	**£165.0**	**£177.9**

Notes & Source.

1. Available expenditure calculated by multiplying population by expenditure per head figures
2. 2004 Price base

TABLE 4: EXPENDITURE GROWTH IN THE STUDY AREA (£m)

ZONE & SUBZONE	2007 - 2011	2007 - 2016
Scarborough PCA	£2.7	£6.3
Irton Moor	£0.8	£2.0
Seamer	£0.6	£1.5
Eastfield	£0.9	£2.1
Scarborough SCA North	£0.5	£1.2
Scarborough SCA West	£0.4	£1.1
Scarborough SCA	£3.3	£7.8
Scarborough Area	**£6.0**	**£14.2**
Filey Area	**£1.1**	**£2.6**
Whitby PCA	£1.8	£4.3
Eskdale	£0.3	£0.6
Staithes	£0.2	£0.5
Whitby SCA	£0.5	£1.1
Whitby Area	**£2.3**	**£5.4**
STUDY AREA	**£9.3**	**£22.1**

Notes & Source.

1. Expenditure figures from Table 3
2. 2004 Price base

Population and Comparison Goods Expenditure Projections

TABLE 14: POPULATION BY ZONE

ZONE & SUBZONE	2004	2007	2011	2016
Scarborough PCA	32,649	32,787	32,972	33,444
Irton Moor	9,207	9,206	9,282	9,456
Seamer	7,913	7,998	8,007	8,064
Eastfield	11,757	11,817	11,840	11,961
Scarborough SCA North	5,159	5,145	5,204	5,324
Scarborough SCA West	5,059	5,073	5,107	5,189
Scarborough SCA TOTAL	39,095	39,239	39,440	39,994
Scarborough Area TOTAL	**71,744**	**72,026**	**72,412**	**73,438**
Filey	**10,905**	**10,821**	**10,967**	**11,262**
Whitby PCA	20,970	21,053	21,181	21,496
Eskdale	3,250	3,281	3,292	3,324
Staithes	2,495	2,508	2,524	2,561
Whitby SCA TOTAL	5,745	5,789	5,816	5,885
Whitby Area TOTAL	**26,715**	**26,842**	**26,997**	**27,381**
STUDY AREA TOTAL	**109,364**	**109,689**	**110,376**	**112,081**

Notes & Source.

1. Population figures extracted from 2001 Census and 2004 Mid Year Estimates in MapInfo TargetPro Report
2. Projections also from MapInfo TargetPro Report cross checked against ONS Districtwide Projections

TABLE 15: COMPARISON GOODS EXPENDITURE PER HEAD

ZONE & SUBZONE	2004	2007	2011	2016
Scarborough PCA	£2,497	£2,827	£3,443	£4,535
Irton Moor	£2,655	£3,006	£3,661	£4,822
Seamer	£2,655	£3,006	£3,661	£4,822
Eastfield	£2,497	£2,827	£3,443	£4,535
Scarborough SCA North	£2,655	£3,006	£3,661	£4,822
Scarborough SCA West	£2,655	£3,006	£3,661	£4,822
Scarborough SCA	£2,607	£2,952	£3,596	£4,735
Scarborough Area	**£2,557**	**£2,896**	**£3,526**	**£4,644**
Filey	**£2,655**	**£3,006**	**£3,661**	**£4,822**
Whitby PCA	£2,601	£2,945	£3,587	£4,724
Eskdale	£2,655	£3,006	£3,661	£4,822
Staithes	£2,601	£2,945	£3,587	£4,724
Whitby SCA	£2,632	£2,980	£3,629	£4,779
Whitby Area	**£2,608**	**£2,953**	**£3,596**	**£4,735**
STUDY AREA	**£2,579**	**£2,921**	**£3,557**	**£4,684**

Notes & Source.

1. Expenditure per head figures from ONS Blue Book extracted in MapInfo TargetPro Report
2. Comparison growth rate from Table 2, MapInfo Brief 07/2 (2.9% per annum 2004 - 2005, 4.9% pa 2005 - 2007, 5%pa 2005 - 2011 and 5.3%pa 2005 - 2016)
3. Special forms of trading included
4. 2004 Price base

TABLE 16: AVAILABLE COMPARISON GOODS EXPENDITURE IN THE STUDY AREA (£m)

ZONE & SUBZONE	2004	2007	2011	2016
Scarborough PCA	£81.5	£92.7	£113.5	£151.7
Irton Moor	£24.4	£27.7	£34.0	£45.6
Seamer	£21.0	£24.0	£29.3	£38.9
Eastfield	£29.4	£33.4	£40.8	£54.2
Scarborough SCA North	£13.7	£15.5	£19.1	£25.7
Scarborough SCA West	£13.4	£15.3	£18.7	£25.0
Scarborough SCA	£101.9	£115.8	£141.8	£189.4
Scarborough Area	**£183.5**	**£208.6**	**£255.3**	**£341.1**
Filey Area	**£29.0**	**£32.5**	**£40.2**	**£54.3**
Whitby PCA	£54.5	£62.0	£76.0	£101.5
Eskdale	£8.6	£9.9	£12.1	£16.0
Staithes	£6.5	£7.4	£9.1	£12.1
Whitby SCA	£15.1	£17.3	£21.1	£28.1
Whitby Area	**£69.7**	**£79.3**	**£97.1**	**£129.7**
STUDY AREA	**£282.1**	**£320.3**	**£392.6**	**£525.0**

1. Available expenditure calculated by multiplying population by expenditure per head figures
2. 2004 Price base

TABLE 17: EXPENDITURE GROWTH IN THE STUDY AREA (£m)

ZONE & SUBZONE	2007 - 2011	2007 - 2016
Scarborough PCA	£20.8	£59.0
Irton Moor	£6.3	£17.9
Seamer	£5.3	£14.8
Eastfield	£7.4	£20.8
Scarborough SCA North	£3.6	£10.2
Scarborough SCA West	£3.4	£9.8
Scarborough SCA	£26.0	£73.6
Scarborough Area	**£46.8**	**£132.5**
Filey Area	**£7.6**	**£21.8**
Whitby PCA	£14.0	£39.5
Eskdale	£2.2	£6.2
Staithes	£1.7	£4.7
Whitby SCA	£3.9	£10.9
Whitby Area	**£17.8**	**£50.4**
STUDY AREA	**£72.2**	**£204.7**

Notes & Source.
1. Expenditure figures from Table 3
2. 2004 Price base

Scarborough Comparison Goods Assessment

TABLE 18: COMPARISON GOODS QUANTITATIVE NEED ASSESSMENT IN 2011 WITH CONSTANT MARKET SHARE

Expenditure Growth 2007 to 2011	£46.8
Claims on Expenditure Growth	
Minus Leakage at 14%	£6.6
Turnover Efficiency Improvement @ 2% pa	£16.0
Total Claims	£22.6
Revised Notional Surplus	£24.2
Overtrading in out-of-centre stores in 2011	£0.0
Leakage that can realistically be clawedback in 2011	£9.0
Potential capacity for new floorspace	£33.2

TABLE 19: COMPARISON GOODS QUANTITATIVE NEED IN 2016 WITH CONSTANT MARKET SHARE

Expenditure Growth 2007 to 2016	£132.5
Claims on Expenditure Growth	
Minus Leakage at 14%	£18.6
Turnover Efficiency Improvement @ 2% pa	£37.9
Total Claims	£56.5
Revised Notional Surplus	£76.0
Overtrading in out-of-centre stores in 2016	£0.0
Leakage that can realistically be clawedback in 2011	£12.0
Potential capacity for new floorspace	£88.0

Notes & Source.

1. Expenditure Growth from Table 17
2. Leakage identified from NEMS 2007 household survey
3. Turnover efficiency improvements for all floorspace at 2% pa above inflation rate held constant at 2004 prices
4. Turnover of existing floorspace efficiency improvements are based upon all comparison goods floorspace in Scarborough (Table 20)
5. 2004 Price base

Table 20: Turnover of Current and Committed Comparison Floorspace in Scarborough Area in 2007

	Floorspace (net) sq. m. (1)	Sales Density (2)	Turnover (£m) (3)	Inflows (4)	Turnover from Study Area (£m) (5)	Turnover (£m) from Survey (6)	Potential Over / Undertrading (%) (7)
SCARBOROUGH TOWN CENTRE	31,000	£4,500	£139.5	25%	£104.6	£129.19	23.5%
SEAMER ROAD	13,139	£2,321	£30.5	20%	£24.4	£24.9	2.0%
Allied Carpets	1,078	£1,400	£1.5	20%	£1.2		
Magnet	1,405	£1,460	£2.1	20%	£1.6		
Currys	1,530	£5,310	£8.1	20%	£6.5		
Carpertright	1,505	£1,520	£2.3	20%	£1.8		
Vacant	903	£0	£0.0	20%	£0.0		
B&Q	4,415	£2,400	£10.6	20%	£8.5		
MFI	1,279	£2,660	£3.4	20%	£2.7		
Halfords	1,024	£2,470	£2.5	20%	£2.0		
SCARBOROUGH PERIPHERY (8)	10,224	£2,100	£21.5	15%	£18.2	£0.2	-98.8%
OTHER LOCAL SHOPS (9)	5,276	£2,100	£11.1	15%	£9.4	£5.3	-43.9%
SUPERMARKET COMPARISON ELEMENT (10)	2,361	£6,458	£15.2	15%	£13.0	£4.8	-62.9%
Internet / mail order deliveries (11)						£14.9	
LEAKAGE (12)						£29.3	
Total	75,139		£248.3	22%	£194.1	£208.6	

Notes & Source.
1. Floorspace from 2004 Scarborough Retail Floorspace Survey updated
2. Sales Densities based on Mintel's 2007 Retail Rankings and 2007 Verdict's Grocery Report
3. Turnover (£m) calculated by multiplying net convenience floorspace (1) by sales density (2)
4. Inflows based on 2007 Street Surveys, expenditure from Filey and Whitby in 2007 NEMS household survey and Scarborough BC 2004 Impacts of Tourism Report
5. Turnover (£m) from Study Area caclulated by deducting inflow expenditure (4) from expected benchmark turnovers (3)
6. Turnover (£m) from Survey based on market shares extracted from 2007 NEMS household survey
7. Potential Over / undertrading calculated by expressing difference between survey based turnover (6) and expected turnover from study area (5) as a percentage
8. Other peripheral area stores include Eastborough, Castle Road / Victoria Road, Ramshill and Falsgrave (Excluding Sainsburys)
9. Other local stores within Study Area include Seamer, East Ayton and Newby
10 Comparison Floorspace in supermarkets based on national company averages recorded in 2007 Verdict's Grocery Report and MT 2007 surveys
11. Internet deliveries for comparison goods assumed to be from outside study area
12. Market share for leakage from 2007 NEMS household survey

Whitby Comparison Goods Assessment

TABLE 21: COMPARISON GOODS QUANTITATIVE NEED ASSESSMENT IN 2011 WITH CONSTANT MARKET SHARE

Expenditure Growth 2007 to 2011	£17.8
Claims on Expenditure Growth	
Minus Leakage at 56%	£10.0
Turnover Efficiency Improvement @ 2% pa	£2.3
Total Claims	£12.3
Revised Notional Surplus	£5.5
Overtrading in out-of-centre stores in 2011	£0.0
Leakage that can realistically be clawedback in 2011	£9.9
Potential capacity for new floorspace	£15.4

TABLE 22: COMPARISON GOODS QUANTITATIVE NEED IN 2016 WITH CONSTANT MARKET SHARE

Expenditure Growth 2007 to 2016	£50.4
Claims on Expenditure Growth	
Minus Leakage at 56%	£28.2
Turnover Efficiency Improvement @ 2% pa	£5.5
Total Claims	£33.8
Revised Notional Surplus	£16.7
Overtrading in out-of-centre stores in 2016	£0.0
Leakage that can realistically be clawedback in 2011	£13.2
Potential capacity for new floorspace	£29.8

Notes & Source.

1. Expenditure Growth from Table 23
2. Leakage identified from NEMS 2007 household survey
3. Turnover efficiency improvements for all floorspace at 2% pa above inflation rate held constant at 2004 prices
4. Turnover of existing floorspace efficiency improvements are based upon all comparison goods floorspace in Whitby (Table 23)
5. 2004 Price base

Table 23: Turnover of Current and Committed Comparison Floorspace in Whitby Area in 2007

	Floorspace (net) sq. m. (1)	Sales Density (2)	Turnover (£m) (3)	Inflows (4)	Turnover from Study Area (£m) (5)	Turnover (£m) from Survey (6)	Potential Over / Undertrading (%) (7)
WHITBY TOWN CENTRE	9,920	£3,000	£29.8	20%	£23.8	£23.3	-2.3%
OTHER LOCAL SHOPS (8)	1,650	£2,500	£4.1	15%	£3.5	£2.5	-30.0%
SUPERMARKET COMPARISON ELEMENT (9)	522	£2,509	£1.3	18%	£1.1	£1.7	56.7%
Internet / mail order deliveries (10)						£7.5	n/a
LEAKAGE (11)						£44.4	
Total	12,092		£35.2	19%	£28.4	£79.2	

Notes & Source.

1. Floorspace from 2004 Scarborough Retail Floorspace Survey updated
2. Sales Densities based on Mintel's 2007 Retail Rankings and 2007 Verdict's Grocery Report
3. Turnover (£m) calculated by multiplying net convenience floorspace (1) by sales density (2)
4. Inflows based on 2007 Street Surveys, expenditure from Scarborough and Filey in 2007 NEMS household survey and Scarborough BC 2004 Impacts of Tourism Report
5. Turnover (£m) from Study Area caclulated by deducting inflow expenditure (4) from expected benchmark turnovers (3)
6. Turnover (£m) from Survey based on market shares extracted from 2007 NEMS household survey
7. Potential Over / undertrading calculated by expressing difference between survey based turnover (6) and expected turnover from study area (5) as a percentage
8. Other Local Shops within Whitby Area include Robin Hoods Bay, Goathland, Sleights, Ruswarp, Sandsend, Castelton, Hinderwell and Staithes
9. Comparison Floorspace in supermarkets based on national company averages recorded in 2007 Verdict's Grocery Report and MT 2007 surveys
10. Internet deliveries for comparison goods assumed to be from outside study area
11. Market share for leakage from 2007 NEMS household survey
12. 2004 Price Base

Filey Comparison Goods Assessment

TABLE 24: COMPARISON GOODS QUANTITATIVE NEED ASSESSMENT IN 2011 WITH CONSTANT MARKET SHARE

Expenditure Growth 2007 to 2011	£7.6
Claims on Expenditure Growth	
Minus Leakage at 76%	£5.8
Turnover Efficiency Improvement @ 2% pa	£0.6
Total Claims	£6.4
Revised Notional Surplus	£1.2
Overtrading in out-of-centre stores in 2011	£0.0
Leakage that can realistically be clawedback in 2011	£1.9
Potential capacity for new floorspace	£3.1

TABLE 25: COMPARISON GOODS QUANTITATIVE NEED IN 2016 WITH CONSTANT MARKET SHARE

Expenditure Growth 2007 to 2016	£21.8
Claims on Expenditure Growth	
Minus Leakage at 76%	£16.6
Turnover Efficiency Improvement @ 2% pa	£1.4
Total Claims	£17.9
Revised Notional Surplus	£3.8
Overtrading in out-of-centre stores in 2016	£0.0
Leakage that can realistically be clawedback in 2011	£2.5
Potential capacity for new floorspace	£6.4

Notes & Source.

1. Expenditure Growth from Table 26
2. Leakage identified from NEMS 2007 household survey
3. Turnover efficiency improvements for all floorspace at 2% pa above inflation rate held constant at 2004 prices
4. Turnover of existing floorspace efficiency improvements are based upon all comparison goods floorspace in Filey (Table 26)
5. 2004 Price base

Table 26: Turnover of Current and Committed Comparison Floorspace in Filey Area in 2007

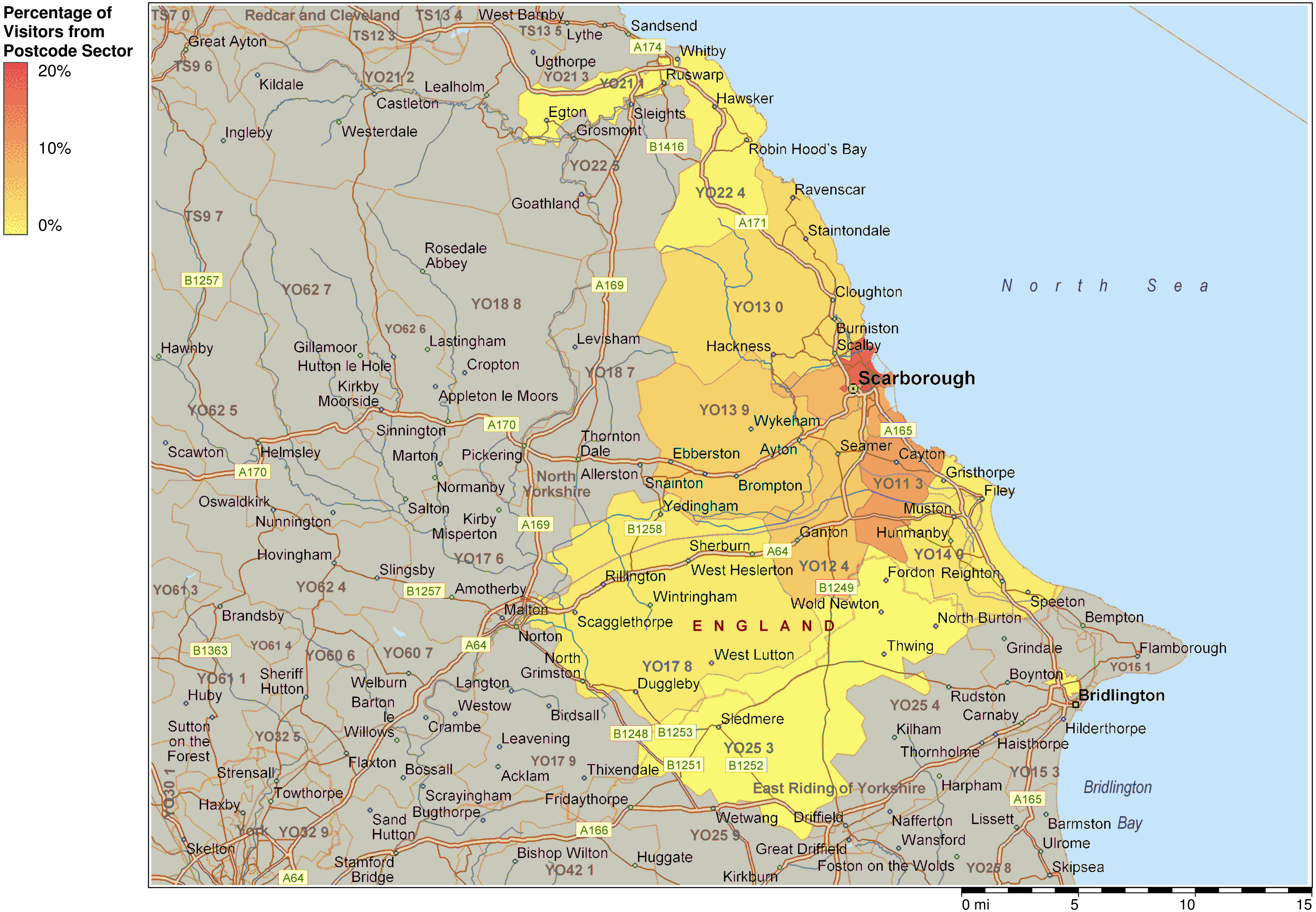
	Floorspace (net) sq. m. (1)	Sales Density (2)	Turnover (£m) (3)	Inflows (4)	Turnover from Study Area (£m) (5)	Turnover (£m) from Survey (6)	Potential Over / Undertrading (%) (7)
FILEY CENTRE	2,260	£2,500	£5.7	15%	£4.8	£5.4	13.2%
OTHER LOCAL SHOPS (8)	1,200	£2,000	£2.4	10%	£2.2	£0.1	-95.3%
SUPERMARKET COMPARISON ELEMENT (9)	70		£0.2	10%	£0.1	£0.0	n/a
Somerfield, Station Avenue, Filey	32	£2,450	£0.1	10%	£0.1	£0.0	
Mills, Filey	38	£2,000	£0.1	10%	£0.1	£0.0	
Internet / mail order deliveries (10)						£2.2	n/a
LEAKAGE (11)						£24.8	n/a
Total	3,530		£8.2	26%	£7.1	£32.6	

Notes & Source.

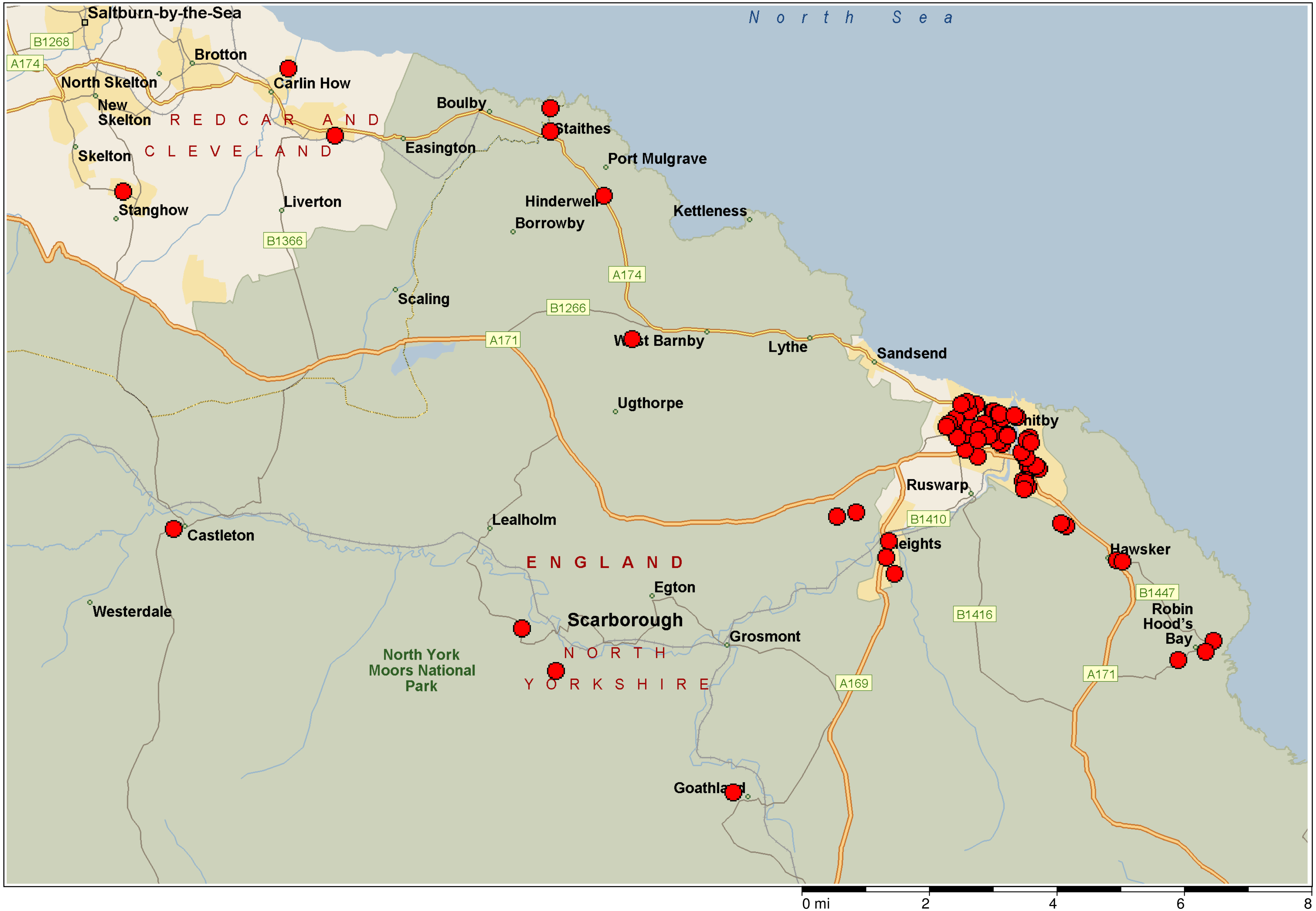
1. Floorspace from 2004 Scarborough Retail Floorspace Survey updated
2. Sales Densities based on Mintel's 2007 Retail Rankings and 2007 Verdict's Grocery Report
3. Turnover (£m) calculated by multiplying net convenience floorspace (1) by sales density (2)
4. Inflows based on 2007 Street Surveys, expenditure from Scarborough and Filey in 2007 NEMS household survey and Scarborough BC 2004 Impacts of Tourism Report
5. Turnover (£m) from Study Area caclulated by deducting inflow expenditure (4) from expected benchmark turnovers (3)
6. Turnover (£m) from Survey based on market shares extracted from 2007 NEMS household survey
7. Potential Over / undertrading calculated by expressing difference between survey based turnover (6) and expected turnover from study area (5) as a percentage
8. Other Local Stores within Filey Area include Station Road (excluding Somerfield) and Hunmanby
9. Comparison Floorspace in supermarkets based on national company averages recorded in 2007 Verdict's Grocery Report and MT 2007 surveys
10. Internet deliveries for comparison goods assumed to be from outside study area
11. Market share for leakage from 2007 NEMS household survey
12. 2004 Price Base

Map 2 Scarborough Visitor Postcode Origins

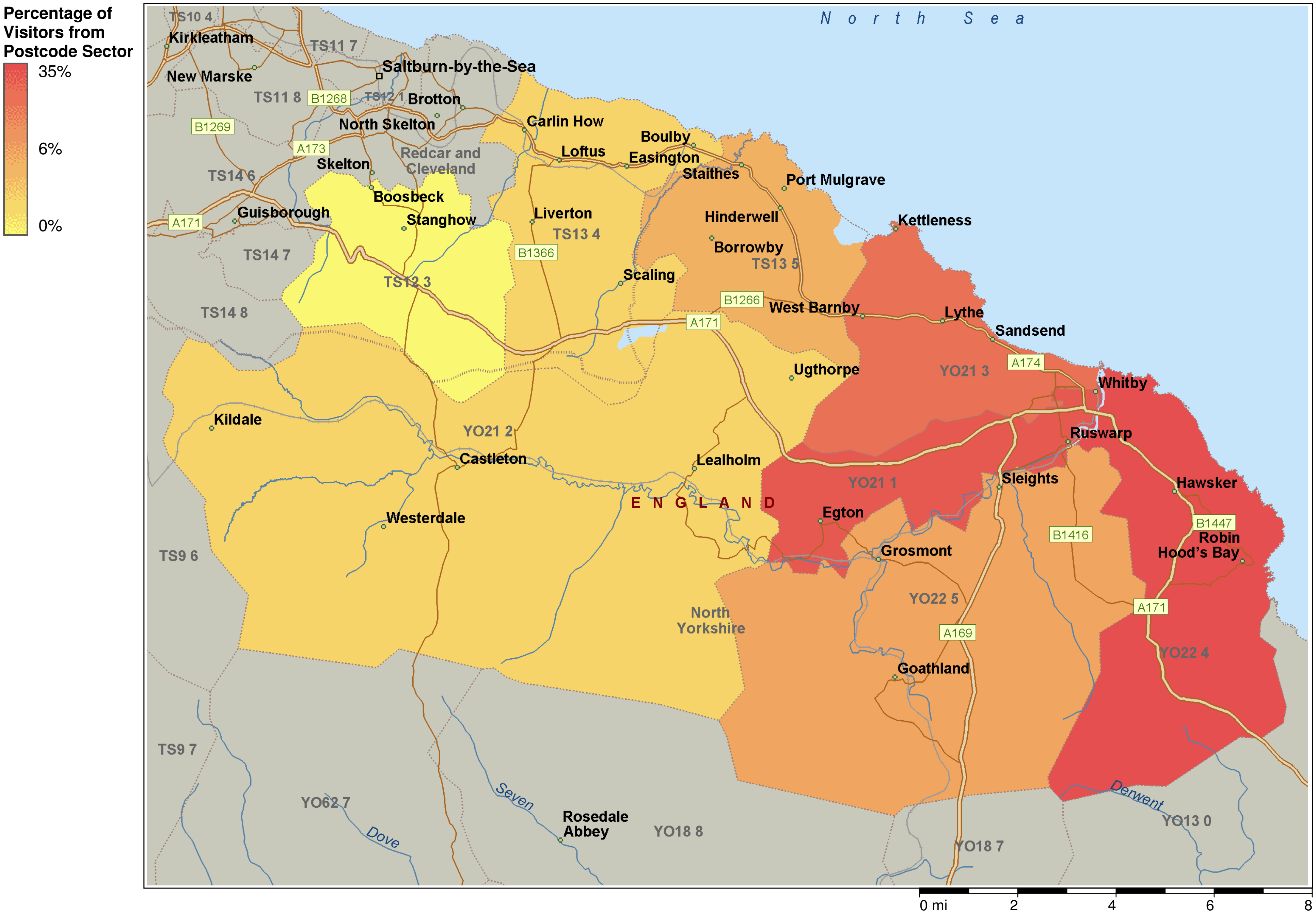
Map 3 Scarborough Visitor Postcode Sector Origins



Map 4 Whitby Visitor Postcode Origins

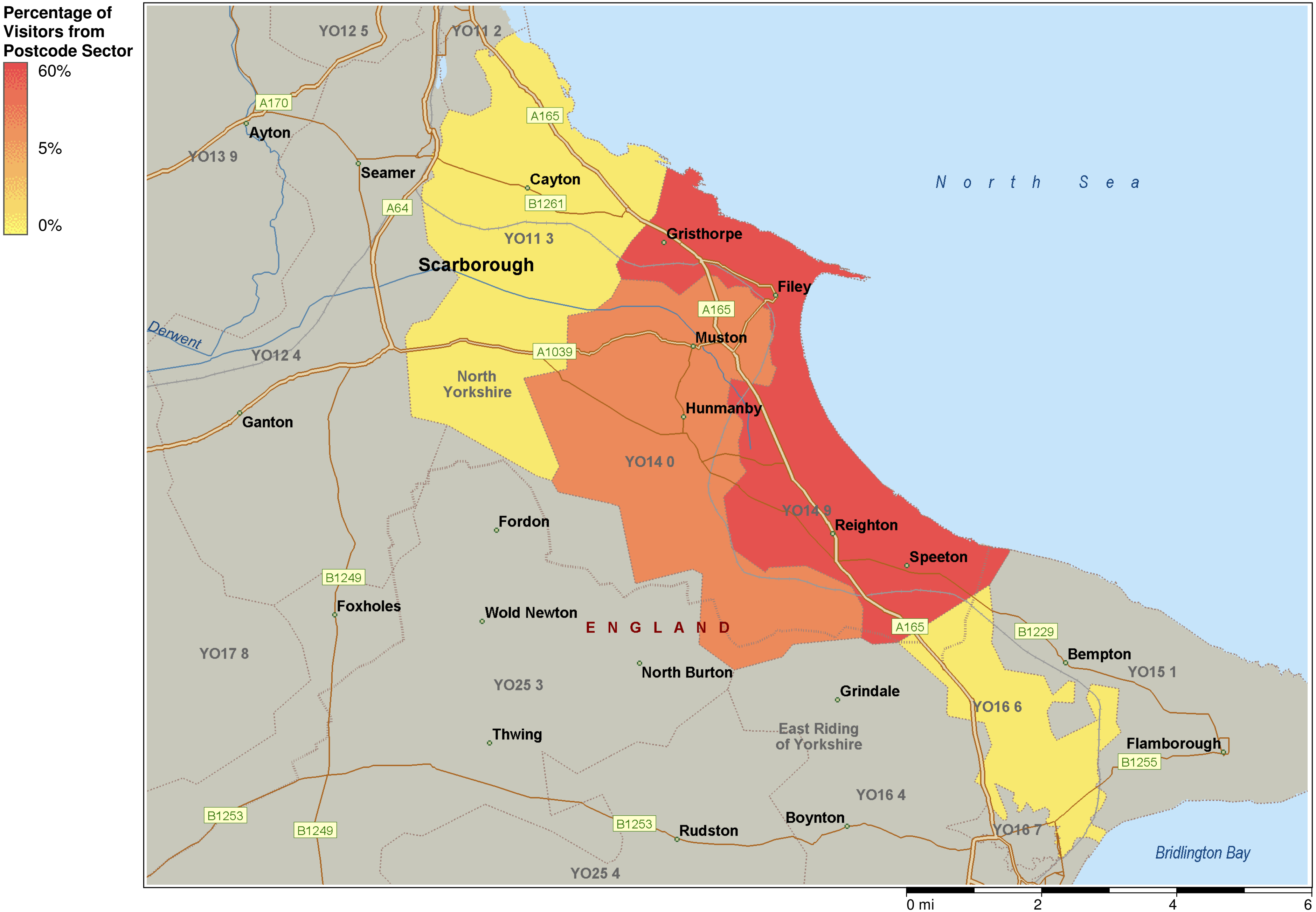


Map 5 Whitby Visitor Postcode Sector Origins



Map 6 Filey Visitor Postcode Origins

Map 7 Filey Visitor Postcode Sector Origins



CONVENIENCE GOODS MARKET SHARE TABLES

Table 27: Market Share of Conveninece Goods Expenditure in Scarborough PCA

Store / Shopping Centre	%	£m
Tesco, Westwood, Scarborough	31.1%	£14.0
Sainsbury's, Gallows Close, Scarborough	18.7%	£8.4
Other shops in Scarborough area	18.1%	£8.2
Morrisons, Seamer	14.6%	£6.6
Scarborough Town Centre	9.3%	£4.2
Ramshill Road, Scarborough	2.9%	£1.3
Falsgrave Road, Scarborough	2.7%	£1.2
Leakage beyond Scarborough area	1.5%	£0.7
Seamer Village	0.6%	£0.3
Internet / goods delivered	0.2%	£0.1
Eastfield	0.2%	£0.1
	100.0%	£45.0

Table 28: Market Share of Conveninece Goods Expenditure in Scarborough SCA

Store / Shopping Centre	%	£m
Morrisons, Seamer	36.5%	£20.4
Tesco, Westwood, Scarborough	16.9%	£9.4
Other shops in Scarborough area	14.3%	£8.0
Sainsbury's, Gallows Close, Scarborough	13.2%	£7.3
Scarborough Town Centre	6.8%	£3.8
Eastfield	4.1%	£2.3
Falsgrave Road, Scarborough	3.5%	£2.0
Seamer Village	2.3%	£1.3
Leakage beyond Scarborough area	1.9%	£1.1
Ramshill Road, Scarborough	0.3%	£0.1
Internet / goods delivered	0.3%	£0.1
	100.0%	£55.8

Table 29: Market Share of Conveninece Goods Expenditure in Filey

Store / Shopping Centre	%	£m
Morrisons, Seamer	33.1%	£5.2
Somerfield, Filey	17.5%	£2.7
Leakage beyond Scarborough area	13.1%	£2.0
Hunmanby	7.9%	£1.2
Other shops in Scarborough area	7.6%	£1.2
Mills, Filey	5.0%	£0.8
Tesco, Westwood, Scarborough	4.9%	£0.8
Filey Town Centre	4.8%	£0.7
Other shops in Filey area	3.1%	£0.5
Sainsbury's, Gallows Close, Scarborough	1.6%	£0.3
Scarborough Town Centre	1.5%	£0.2
Internet / goods delivered	0.0%	£0.0
	100.0%	£15.6

Table 30: Market Share of Conveninece Goods Expenditure in Whitby PCA

Store / Shopping Centre	%	£m
Co-Op, Endeavour Warf, Whitby	32.7%	£9.8
Somerfield, Flowergate, Whitby	15.0%	£4.5
Morrisons, Seamer	10.8%	£3.2
Lidl, Stakesby Road, Whitby	10.5%	£3.2
Other shops in Whitby area	10.4%	£3.1
Leakage beyond Whitby area	7.7%	£2.3
Tesco, Westwood, Scarborough	3.9%	£1.2
Other shops in Scarborough area	3.3%	£1.0
Sainsbury's, Gallows Close, Scarborough	1.8%	£0.5
Internet / goods delivered	1.8%	£0.5
Scarborough Town Centre	1.0%	£0.3
Falsgrave Road, Scarborough	0.7%	£0.2
Other Whitby Town Centre	0.6%	£0.2
	100.0%	£30.1

Table 31: Market Share of Conveninece Goods Expenditure in Whitby SCA

Store / Shopping Centre	%	£m
Leakage beyond Whitby area	63.1%	£5.3
Co-Op, Endeavour Warf, Whitby	16.9%	£1.4
Somerfield, Flowergate, Whitby	4.9%	£0.4
Other shops in Whitby area	3.6%	£0.3
Lidl, Stakesby Road, Whitby	3.0%	£0.2
Internet / goods delivered	2.5%	£0.2
Whitby Town Centre	1.8%	£0.2
Other shops in Scarborough area	1.8%	£0.2
Tesco, Westwood, Scarborough	1.2%	£0.1
Morrisons, Seamer	1.2%	£0.1
Scarborough Town Centre	0.0%	£0.0
Sainsbury's, Gallows Close, Scarborough	0.0%	£0.0
	100.0%	£8.3

Notes & Source.

1. Market shares from 2007 NEMS Survey
2. Leakage beyond Scarborough area in Filey mainly to Bridlington (9%)
3. Leakage beyond Whitby area in SCA mainly to Guisborough (26%) and Teesside
4. 2004 Price Base

TABLE 32: COMPARISON GOODS MARKET SHARES BY CLASS OF GOODS IN SCARBOROUGH PCA

ALL COMPARISON GOODS	Mkt Share
Scarborough Town Centre	63.4%
Seamer Road Retail Park	12.0%
Elsewhere in Scarborough area	5.0%
TOTAL SCARBOROUGH AREA	80.4%
Whitby Area	0.4%
Filey Area	0.1%
TOTAL SCARBOROUGH DISTRICT	80.9%
York	7.0%
Leeds	1.0%
Hull & East Riding	1.1%
Teesside	0.3%
Leakage Elsewhere	2.7%
TOTAL LEAKAGE	12.0%
Internet / Mail Order	7.1%
TOTAL	100.0%

CLOTHES FIRST CHOICE	Mkt Share
Scarborough Town Centre	76.9%
Seamer Road Retail Park	0.0%
Elsewhere in Scarborough area	0.0%
TOTAL SCARBOROUGH AREA	76.9%
Whitby Area	0.3%
Filey Area	0.0%
TOTAL SCARBOROUGH DISTRICT	77.1%
York	12.9%
Leeds	0.9%
Hull & East Riding	0.9%
Teesside	0.3%
Leakage Elsewhere	1.1%
TOTAL LEAKAGE	16.0%
Internet / Mail Order	6.9%
TOTAL	100.0%

CLOTHES SECOND CHOICE	Mkt Share
Scarborough Town Centre	19.4%
Seamer Road Retail Park	0.3%
Elsewhere in Scarborough area	1.0%
TOTAL SCARBOROUGH AREA	20.7%
Whitby Area	0.5%
Filey Area	0.3%
TOTAL SCARBOROUGH DISTRICT	21.5%
York	46.6%
Leeds	9.6%
Hull & East Riding	8.3%
Teesside	1.6%
Leakage Elsewhere	8.8%
TOTAL LEAKAGE	74.9%
Internet / Mail Order	3.6%
TOTAL	100.0%

TOYS & HOBBYS	Mkt Share
Scarborough Town Centre	74.2%
Seamer Road Retail Park	0.5%
Elsewhere in Scarborough area	0.9%
TOTAL SCARBOROUGH AREA	75.6%
Whitby Area	0.0%
Filey Area	0.0%
TOTAL SCARBOROUGH DISTRICT	75.6%
York	5.1%
Leeds	1.4%
Hull & East Riding	0.5%
Teesside	0.5%
Leakage Elsewhere	6.9%
TOTAL LEAKAGE	14.3%
Internet / Mail Order	10.1%
TOTAL	100.0%

BOOKS & STATIONARY	Mkt Share
Scarborough Town Centre	83.7%
Seamer Road Retail Park	0.0%
Elsewhere in Scarborough area	3.5%
TOTAL SCARBOROUGH AREA	87.2%
Whitby Area	0.0%
Filey Area	0.0%
TOTAL SCARBOROUGH DISTRICT	87.2%
York	1.6%
Leeds	0.3%
Hull & East Riding	0.3%
Teesside	0.0%
Leakage Elsewhere	2.2%
TOTAL LEAKAGE	4.5%
Internet / Mail Order	8.3%
TOTAL	100.0%

CDs, DVDs & COMPUTER GAMES	Mkt Share
Scarborough Town Centre	74.7%
Seamer Road Retail Park	0.0%
Elsewhere in Scarborough area	7.6%
TOTAL SCARBOROUGH AREA	82.3%
Whitby Area	0.0%
Filey Area	0.0%
TOTAL SCARBOROUGH DISTRICT	82.3%
York	0.7%
Leeds	0.3%
Hull & East Riding	0.7%
Teesside	0.0%
Leakage Elsewhere	1.0%
TOTAL LEAKAGE	2.8%
Internet / Mail Order	14.9%
TOTAL	100.0%

CHEMIST & BEAUTY PRODUCTS	Mkt Share
Scarborough Town Centre	78.1%
Seamer Road Retail Park	0.3%
Elsewhere in Scarborough area	18.3%
TOTAL SCARBOROUGH AREA	96.6%
Whitby Area	0.0%
Filey Area	0.3%
TOTAL SCARBOROUGH DISTRICT	96.9%
York	0.3%
Leeds	0.0%
Hull & East Riding	0.0%
Teesside	0.0%
Leakage Elsewhere	0.3%
TOTAL LEAKAGE	0.6%
Internet / Mail Order	2.5%
TOTAL	100.0%

HARDWARE & TABLEWARE	Mkt Share
Scarborough Town Centre	72.7%
Seamer Road Retail Park	1.6%
Elsewhere in Scarborough area	8.2%
TOTAL SCARBOROUGH AREA	82.4%
Whitby Area	0.0%
Filey Area	0.0%
TOTAL SCARBOROUGH DISTRICT	82.4%
York	7.0%
Leeds	0.0%
Hull & East Riding	0.0%
Teesside	0.4%
Leakage Elsewhere	4.3%
TOTAL LEAKAGE	11.7%
Internet / Mail Order	5.9%
TOTAL	100.0%

JEWELLERY & WATCHES	Mkt Share
Scarborough Town Centre	76.2%
Seamer Road Retail Park	0.0%
Elsewhere in Scarborough area	0.9%
TOTAL SCARBOROUGH AREA	77.1%
Whitby Area	0.4%
Filey Area	0.0%
TOTAL SCARBOROUGH DISTRICT	77.5%
York	4.3%
Leeds	0.0%
Hull & East Riding	0.0%
Teesside	0.0%
Leakage Elsewhere	11.7%
TOTAL LEAKAGE	16.0%
Internet / Mail Order	6.5%
TOTAL	100.0%

ELECTRICAL GOODS	Mkt Share
Scarborough Town Centre	50.4%
Seamer Road Retail Park	34.7%
Elsewhere in Scarborough area	1.5%
TOTAL SCARBOROUGH AREA	86.6%
Whitby Area	0.0%
Filey Area	0.0%
TOTAL SCARBOROUGH DISTRICT	86.6%
York	2.1%
Leeds	0.6%
Hull & East Riding	0.0%
Teesside	0.0%
Leakage Elsewhere	0.6%
TOTAL LEAKAGE	3.3%
Internet / Mail Order	10.1%
TOTAL	100.0%

FURNITURE & CARPETS	Mkt Share
Scarborough Town Centre	65.2%
Seamer Road Retail Park	8.4%
Elsewhere in Scarborough area	5.9%
TOTAL SCARBOROUGH AREA	79.5%
Whitby Area	2.2%
Filey Area	0.0%
TOTAL SCARBOROUGH DISTRICT	81.7%
York	4.8%
Leeds	0.4%
Hull & East Riding	2.6%
Teesside	0.4%
Leakage Elsewhere	4.8%
TOTAL LEAKAGE	12.8%
Internet / Mail Order	5.5%
TOTAL	100.0%

SOFT FURNISHINGS	Mkt Share
Scarborough Town Centre	77.0%
Seamer Road Retail Park	0.3%
Elsewhere in Scarborough area	2.3%
TOTAL SCARBOROUGH AREA	79.6%
Whitby Area	1.9%
Filey Area	0.6%
TOTAL SCARBOROUGH DISTRICT	82.2%
York	6.1%
Leeds	0.6%
Hull & East Riding	1.0%
Teesside	0.6%
Leakage Elsewhere	1.3%
TOTAL LEAKAGE	9.7%
Internet / Mail Order	8.1%
TOTAL	100.0%

DIY GOODS	Mkt Share
Scarborough Town Centre	29.4%
Seamer Road Retail Park	66.9%
Elsewhere in Scarborough area	1.5%
TOTAL SCARBOROUGH AREA	97.8%
Whitby Area	0.0%
Filey Area	0.0%
TOTAL SCARBOROUGH DISTRICT	97.8%
York	0.0%
Leeds	0.0%
Hull & East Riding	0.0%
Teesside	0.0%
Leakage Elsewhere	0.4%
TOTAL LEAKAGE	0.4%
Internet / Mail Order	1.8%
TOTAL	100.0%

GARDEN CENTRE GOODS	Mkt Share
Scarborough Town Centre	20.7%
Seamer Road Retail Park	42.6%
Elsewhere in Scarborough area	27.9%
TOTAL SCARBOROUGH AREA	91.2%
Whitby Area	0.4%
Filey Area	2.8%
TOTAL SCARBOROUGH DISTRICT	94.4%
York	0.4%
Leeds	0.0%
Hull & East Riding	0.8%
Teesside	0.0%
Leakage Elsewhere	3.2%
TOTAL LEAKAGE	4.4%
Internet / Mail Order	1.2%
TOTAL	100.0%

Notes & Source.

1. Market shares from 2007 NEMS Survey

TABLE 33: COMPARISON GOODS MARKET SHARES BY CLASS OF GOODS IN SCARBOROUGH SCA

ALL COMPARISON GOODS	Mkt Share	
Scarborough Town Centre	60.8%	£69.5
Seamer Road Retail Park	11.8%	£13.5
Elsewhere in Scarborough area	4.9%	
TOTAL SCARBOROUGH AREA	77.6%	
Whitby Area	0.3%	£0.3
Filey Area	0.3%	£0.4
TOTAL SCARBOROUGH DISTRICT	78.2%	
York	9.3%	
Leeds	1.3%	
Hull & East Riding	0.8%	
Teesside	0.5%	
Leakage Elsewhere	2.7%	
TOTAL LEAKAGE	14.6%	£16.7
Internet / Mail Order	7.1%	£8.2
TOTAL	100.0%	

CLOTHES FIRST CHOICE	Mkt Share
Scarborough Town Centre	73.0%
Seamer Road Retail Park	0.0%
Elsewhere in Scarborough area	0.2%
TOTAL SCARBOROUGH AREA	73.2%
Whitby Area	0.0%
Filey Area	0.2%
TOTAL SCARBOROUGH DISTRICT	73.5%
York	15.0%
Leeds	0.5%
Hull & East Riding	0.0%
Teesside	0.5%
Leakage Elsewhere	2.9%
TOTAL LEAKAGE	18.9%
Internet / Mail Order	7.6%
TOTAL	100.0%

CLOTHES SECOND CHOICE	Mkt Share
Scarborough Town Centre	20.7%
Seamer Road Retail Park	0.0%
Elsewhere in Scarborough area	0.2%
TOTAL SCARBOROUGH AREA	20.9%
Whitby Area	0.6%
Filey Area	0.0%
TOTAL SCARBOROUGH DISTRICT	21.5%
York	49.6%
Leeds	8.2%
Hull & East Riding	6.7%
Teesside	2.3%
Leakage Elsewhere	7.7%
TOTAL LEAKAGE	74.5%
Internet / Mail Order	4.0%
TOTAL	100.0%

TOYS & HOBBYS	Mkt Share
Scarborough Town Centre	68.2%
Seamer Road Retail Park	0.0%
Elsewhere in Scarborough area	0.7%
TOTAL SCARBOROUGH AREA	68.9%
Whitby Area	0.0%
Filey Area	0.4%
TOTAL SCARBOROUGH DISTRICT	69.3%
York	18.7%
Leeds	1.5%
Hull & East Riding	0.7%
Teesside	0.7%
Leakage Elsewhere	2.2%
TOTAL LEAKAGE	24.0%
Internet / Mail Order	6.7%
TOTAL	100.0%

BOOKS & STATIONARY	Mkt Share
Scarborough Town Centre	82.1%
Seamer Road Retail Park	0.8%
Elsewhere in Scarborough area	4.9%
TOTAL SCARBOROUGH AREA	87.7%
Whitby Area	0.0%
Filey Area	0.0%
TOTAL SCARBOROUGH DISTRICT	87.7%
York	0.3%
Leeds	0.0%
Hull & East Riding	0.3%
Teesside	0.3%
Leakage Elsewhere	2.1%
TOTAL LEAKAGE	2.8%
Internet / Mail Order	9.5%
TOTAL	100.0%

CDs, DVDs & COMPUTER GAMES	Mkt Share
Scarborough Town Centre	72.6%
Seamer Road Retail Park	0.0%
Elsewhere in Scarborough area	8.1%
TOTAL SCARBOROUGH AREA	80.6%
Whitby Area	0.0%
Filey Area	0.0%
TOTAL SCARBOROUGH DISTRICT	80.6%
York	0.6%
Leeds	0.0%
Hull & East Riding	0.0%
Teesside	0.0%
Leakage Elsewhere	1.0%
TOTAL LEAKAGE	1.6%
Internet / Mail Order	17.7%
TOTAL	100.0%

CHEMIST & BEAUTY PRODUCTS	Mkt Share
Scarborough Town Centre	71.5%
Seamer Road Retail Park	0.5%
Elsewhere in Scarborough area	22.9%
TOTAL SCARBOROUGH AREA	94.9%
Whitby Area	0.7%
Filey Area	0.0%
TOTAL SCARBOROUGH DISTRICT	95.7%
York	0.2%
Leeds	1.0%
Hull & East Riding	0.0%
Teesside	0.2%
Leakage Elsewhere	1.4%
TOTAL LEAKAGE	2.9%
Internet / Mail Order	1.4%
TOTAL	100.0%

HARDWARE & TABLEWARE	Mkt Share
Scarborough Town Centre	68.5%
Seamer Road Retail Park	5.5%
Elsewhere in Scarborough area	3.9%
TOTAL SCARBOROUGH AREA	77.9%
Whitby Area	0.3%
Filey Area	0.0%
TOTAL SCARBOROUGH DISTRICT	78.2%
York	9.4%
Leeds	0.3%
Hull & East Riding	0.0%
Teesside	1.3%
Leakage Elsewhere	3.2%
TOTAL LEAKAGE	14.3%
Internet / Mail Order	7.5%
TOTAL	100.0%

JEWELLERY & WATCHES	Mkt Share
Scarborough Town Centre	75.7%
Seamer Road Retail Park	0.0%
Elsewhere in Scarborough area	0.7%
TOTAL SCARBOROUGH AREA	76.3%
Whitby Area	0.0%
Filey Area	0.0%
TOTAL SCARBOROUGH DISTRICT	76.3%
York	5.0%
Leeds	0.0%
Hull & East Riding	0.0%
Teesside	0.7%
Leakage Elsewhere	10.7%
TOTAL LEAKAGE	16.3%
Internet / Mail Order	7.3%
TOTAL	100.0%

ELECTRICAL GOODS	Mkt Share
Scarborough Town Centre	47.5%
Seamer Road Retail Park	32.3%
Elsewhere in Scarborough area	1.2%
TOTAL SCARBOROUGH AREA	81.0%
Whitby Area	0.0%
Filey Area	1.2%
TOTAL SCARBOROUGH DISTRICT	82.3%
York	3.7%
Leeds	0.7%
Hull & East Riding	0.2%
Teesside	0.5%
Leakage Elsewhere	1.0%
TOTAL LEAKAGE	6.2%
Internet / Mail Order	11.6%
TOTAL	100.0%

FURNITURE & CARPETS	Mkt Share
Scarborough Town Centre	70.3%
Seamer Road Retail Park	9.3%
Elsewhere in Scarborough area	2.4%
TOTAL SCARBOROUGH AREA	82.0%
Whitby Area	0.6%
Filey Area	0.0%
TOTAL SCARBOROUGH DISTRICT	82.6%
York	5.1%
Leeds	3.0%
Hull & East Riding	1.8%
Teesside	0.3%
Leakage Elsewhere	4.5%
TOTAL LEAKAGE	14.7%
Internet / Mail Order	2.7%
TOTAL	100.0%

SOFT FURNISHINGS	Mkt Share
Scarborough Town Centre	71.4%
Seamer Road Retail Park	0.5%
Elsewhere in Scarborough area	0.8%
TOTAL SCARBOROUGH AREA	72.7%
Whitby Area	0.8%
Filey Area	0.3%
TOTAL SCARBOROUGH DISTRICT	73.7%
York	11.1%
Leeds	0.5%
Hull & East Riding	2.1%
Teesside	1.1%
Leakage Elsewhere	1.1%
TOTAL LEAKAGE	15.9%
Internet / Mail Order	10.3%
TOTAL	100.0%

DIY GOODS	Mkt Share
Scarborough Town Centre	26.5%
Seamer Road Retail Park	69.0%
Elsewhere in Scarborough area	0.8%
TOTAL SCARBOROUGH AREA	96.4%
Whitby Area	0.8%
Filey Area	0.0%
TOTAL SCARBOROUGH DISTRICT	97.2%
York	0.8%
Leeds	0.0%
Hull & East Riding	0.0%
Teesside	0.0%
Leakage Elsewhere	0.6%
TOTAL LEAKAGE	1.4%
Internet / Mail Order	1.4%
TOTAL	100.0%

GARDEN CENTRE GOODS	Mkt Share
Scarborough Town Centre	26.7%
Seamer Road Retail Park	36.5%
Elsewhere in Scarborough area	25.1%
TOTAL SCARBOROUGH AREA	88.3%
Whitby Area	0.3%
Filey Area	3.0%
TOTAL SCARBOROUGH DISTRICT	91.6%
York	0.0%
Leeds	0.3%
Hull & East Riding	0.5%
Teesside	0.0%
Leakage Elsewhere	7.1%
TOTAL LEAKAGE	7.9%
Internet / Mail Order	0.5%
TOTAL	100.0%

Notes & Source.

1. Market shares from 2007 NEMS Survey

TABLE 34: COMPARISON GOODS MARKET SHARES BY CLASS OF GOODS IN FILEY

ALL COMPARISON GOODS	Mkt Share
Filey Town Centre	16.7%
Elsewhere in Filey Area	0.3%
Total Filey Area	17.0%
Scarborough Town Centre	45.4%
Seamer Road Retail Park	8.8%
Elsewhere in Scarborough area	3.0%
TOTAL SCARBOROUGH AREA	57.2%
Whitby Area	0.3%
TOTAL SCARBOROUGH DISTRICT	74.5%
York	7.2%
Leeds	1.2%
Bridlington	4.0%
Elsewhere in East Riding & Hull	1.1%
Teesside	0.1%
Leakage Elsewhere	5.2%
TOTAL LEAKAGE	18.7%
Internet / Mail Order	6.8%
TOTAL	100.0%

CLOTHES FIRST CHOICE	Mkt Share
Filey Town Centre	3.4%
Elsewhere in Filey Area	0.0%
Total Filey Area	3.4%
Scarborough Town Centre	76.7%
Seamer Road Retail Park	0.0%
Elsewhere in Scarborough area	0.0%
TOTAL SCARBOROUGH AREA	76.7%
Whitby Area	0.9%
TOTAL SCARBOROUGH DISTRICT	81.0%
York	7.8%
Leeds	0.9%
Bridlington	5.2%
Elsewhere in East Riding & Hull	0.9%
Teesside	0.0%
Leakage Elsewhere	0.0%
TOTAL LEAKAGE	14.7%
Internet / Mail Order	4.3%
TOTAL	100.0%

CLOTHES SECOND CHOICE	Mkt Share
Filey Town Centre	2.0%
Elsewhere in Filey Area	0.0%
Total Filey Area	2.0%
Scarborough Town Centre	25.8%
Seamer Road Retail Park	0.0%
Elsewhere in Scarborough area	0.0%
TOTAL SCARBOROUGH AREA	25.8%
Whitby Area	0.7%
TOTAL SCARBOROUGH DISTRICT	28.5%
York	35.8%
Leeds	2.6%
Bridlington	13.2%
Elsewhere in East Riding & Hull	9.3%
Teesside	0.7%
Leakage Elsewhere	5.3%
TOTAL LEAKAGE	66.9%
Internet / Mail Order	4.6%
TOTAL	100.0%

TOYS & HOBBYS	Mkt Share
Filey Town Centre	7.5%
Elsewhere in Filey Area	0.0%
Total Filey Area	7.5%
Scarborough Town Centre	55.2%
Seamer Road Retail Park	0.0%
Elsewhere in Scarborough area	1.5%
TOTAL SCARBOROUGH AREA	56.7%
Whitby Area	0.0%
TOTAL SCARBOROUGH DISTRICT	64.2%
York	13.4%
Leeds	4.5%
Bridlington	1.5%
Elsewhere in East Riding & Hull	3.0%
Teesside	0.0%
Leakage Elsewhere	4.5%
TOTAL LEAKAGE	26.9%
Internet / Mail Order	9.0%
TOTAL	100.0%

BOOKS & STATIONARY	Mkt Share
Filey Town Centre	29.5%
Elsewhere in Filey Area	0.0%
Total Filey Area	29.5%
Scarborough Town Centre	48.6%
Seamer Road Retail Park	0.0%
Elsewhere in Scarborough area	1.9%
TOTAL SCARBOROUGH AREA	50.5%
Whitby Area	0.0%
TOTAL SCARBOROUGH DISTRICT	80.0%
York	0.0%
Leeds	1.0%
Bridlington	5.7%
Elsewhere in East Riding & Hull	0.0%
Teesside	0.0%
Leakage Elsewhere	2.9%
TOTAL LEAKAGE	9.5%
Internet / Mail Order	10.5%
TOTAL	100.0%

CDs, DVDs & COMPUTER GAMES	Mkt Share
Filey Town Centre	2.6%
Elsewhere in Filey Area	0.0%
Total Filey Area	2.6%
Scarborough Town Centre	66.2%
Seamer Road Retail Park	0.0%
Elsewhere in Scarborough area	6.5%
TOTAL SCARBOROUGH AREA	72.7%
Whitby Area	0.0%
TOTAL SCARBOROUGH DISTRICT	75.3%
York	1.3%
Leeds	0.0%
Bridlington	5.2%
Elsewhere in East Riding & Hull	0.0%
Teesside	0.0%
Leakage Elsewhere	3.9%
TOTAL LEAKAGE	10.4%
Internet / Mail Order	14.3%
TOTAL	100.0%

CHEMIST & BEAUTY PRODUCTS	Mkt Share
Filey Town Centre	51.3%
Elsewhere in Filey Area	0.0%
Total Filey Area	51.3%
Scarborough Town Centre	26.5%
Seamer Road Retail Park	0.0%
Elsewhere in Scarborough area	6.8%
TOTAL SCARBOROUGH AREA	33.3%
Whitby Area	0.0%
TOTAL SCARBOROUGH DISTRICT	84.6%
York	1.7%
Leeds	0.9%
Bridlington	2.6%
Elsewhere in East Riding & Hull	0.0%
Teesside	0.0%
Leakage Elsewhere	7.7%
TOTAL LEAKAGE	12.8%
Internet / Mail Order	2.6%
TOTAL	100.0%

HARDWARE & TABLEWARE	Mkt Share
Filey Town Centre	21.2%
Elsewhere in Filey Area	0.0%
Total Filey Area	21.2%
Scarborough Town Centre	49.4%
Seamer Road Retail Park	3.5%
Elsewhere in Scarborough area	4.7%
TOTAL SCARBOROUGH AREA	57.6%
Whitby Area	0.0%
TOTAL SCARBOROUGH DISTRICT	78.8%
York	8.2%
Leeds	2.4%
Bridlington	2.4%
Elsewhere in East Riding & Hull	1.2%
Teesside	0.0%
Leakage Elsewhere	3.5%
TOTAL LEAKAGE	17.6%
Internet / Mail Order	3.5%
TOTAL	100.0%

JEWELLERY & WATCHES	Mkt Share
Filey Town Centre	0.0%
Elsewhere in Filey Area	0.0%
Total Filey Area	0.0%
Scarborough Town Centre	51.9%
Seamer Road Retail Park	0.0%
Elsewhere in Scarborough area	1.2%
TOTAL SCARBOROUGH AREA	53.1%
Whitby Area	0.0%
TOTAL SCARBOROUGH DISTRICT	53.1%
York	3.7%
Leeds	0.0%
Bridlington	0.0%
Elsewhere in East Riding & Hull	0.0%
Teesside	0.0%
Leakage Elsewhere	32.1%
TOTAL LEAKAGE	35.8%
Internet / Mail Order	11.1%
TOTAL	100.0%

ELECTRICAL GOODS	Mkt Share
Filey Town Centre	23.4%
Elsewhere in Filey Area	0.0%
Total Filey Area	23.4%
Scarborough Town Centre	30.6%
Seamer Road Retail Park	22.5%
Elsewhere in Scarborough area	3.6%
TOTAL SCARBOROUGH AREA	56.8%
Whitby Area	0.0%
TOTAL SCARBOROUGH DISTRICT	80.2%
York	3.6%
Leeds	0.0%
Bridlington	1.8%
Elsewhere in East Riding & Hull	0.0%
Teesside	0.0%
Leakage Elsewhere	3.6%
TOTAL LEAKAGE	9.0%
Internet / Mail Order	10.8%
TOTAL	100.0%

FURNITURE & CARPETS	Mkt Share
Filey Town Centre	10.2%
Elsewhere in Filey Area	0.0%
Total Filey Area	10.2%
Scarborough Town Centre	43.2%
Seamer Road Retail Park	11.4%
Elsewhere in Scarborough area	3.4%
TOTAL SCARBOROUGH AREA	58.0%
Whitby Area	0.0%
TOTAL SCARBOROUGH DISTRICT	68.2%
York	10.2%
Leeds	2.3%
Bridlington	3.4%
Elsewhere in East Riding & Hull	0.0%
Teesside	0.0%
Leakage Elsewhere	10.2%
TOTAL LEAKAGE	26.1%
Internet / Mail Order	5.7%
TOTAL	100.0%

SOFT FURNISHINGS	Mkt Share
Filey Town Centre	27.8%
Elsewhere in Filey Area	0.9%
Total Filey Area	28.7%
Scarborough Town Centre	45.4%
Seamer Road Retail Park	0.0%
Elsewhere in Scarborough area	0.0%
TOTAL SCARBOROUGH AREA	45.4%
Whitby Area	2.8%
TOTAL SCARBOROUGH DISTRICT	76.9%
York	5.6%
Leeds	0.9%
Bridlington	6.5%
Elsewhere in East Riding & Hull	1.9%
Teesside	0.9%
Leakage Elsewhere	0.0%
TOTAL LEAKAGE	15.7%
Internet / Mail Order	7.4%
TOTAL	100.0%

DIY GOODS	Mkt Share
Filey Town Centre	20.6%
Elsewhere in Filey Area	0.0%
Total Filey Area	20.6%
Scarborough Town Centre	20.6%
Seamer Road Retail Park	50.5%
Elsewhere in Scarborough area	0.0%
TOTAL SCARBOROUGH AREA	71.1%
Whitby Area	0.0%
TOTAL SCARBOROUGH DISTRICT	91.8%
York	1.0%
Leeds	0.0%
Bridlington	2.1%
Elsewhere in East Riding & Hull	0.0%
Teesside	0.0%
Leakage Elsewhere	3.1%
TOTAL LEAKAGE	6.2%
Internet / Mail Order	2.1%
TOTAL	100.0%

GARDEN CENTRE GOODS	Mkt Share
Filey Town Centre	13.5%
Elsewhere in Filey Area	14.6%
Total Filey Area	28.1%
Scarborough Town Centre	9.4%
Seamer Road Retail Park	25.0%
Elsewhere in Scarborough area	13.5%
TOTAL SCARBOROUGH AREA	47.9%
Whitby Area	0.0%
TOTAL SCARBOROUGH DISTRICT	76.0%
York	0.0%
Leeds	1.0%
Bridlington	8.3%
Elsewhere in East Riding & Hull	0.0%
Teesside	0.0%
Leakage Elsewhere	14.6%
TOTAL LEAKAGE	24.0%
Internet / Mail Order	0.0%
TOTAL	100.0%

Notes & Source.

1. Market shares from 2007 NEMS Survey

TABLE 35: COMPARISON GOODS MARKET SHARES BY CLASS OF GOODS IN WHITBY PCA

ALL COMPARISON GOODS	Mkt Share
Whitby Town Centre	35.10%
Elsewhere in Whitby area	3.29%
Total Whitby Area	38.38%
Scarborough Town Centre	23.9%
Seamer Road Retail Park	3.6%
Elsewhere in Scarborough area	0.4%
Total Scarborough Area	27.9%
TOTAL SCARBOROUGH DISTRICT	66.3%
Teesside	12.7%
York	6.2%
Leeds	0.1%
Hull & East Riding	0.3%
Leakage Elsewhere	4.7%
TOTAL LEAKAGE	24.0%
Internet / Mail Order	9.7%
TOTAL	100.0%

CLOTHES FIRST CHOICE	Mkt Share
Whitby Town Centre	10.31%
Elsewhere in Whitby area	0.00%
Total Whitby Area	10.31%
Scarborough Town Centre	48.4%
Seamer Road Retail Park	0.0%
Elsewhere in Scarborough area	0.0%
Total Scarborough Area	48.4%
TOTAL SCARBOROUGH DISTRICT	58.7%
Teesside	19.7%
York	8.5%
Leeds	0.0%
Hull & East Riding	0.0%
Leakage Elsewhere	3.1%
TOTAL LEAKAGE	31.4%
Internet / Mail Order	9.9%
TOTAL	100.0%

CLOTHES SECOND CHOICE	Mkt Share
Whitby Town Centre	7.30%
Elsewhere in Whitby area	0.00%
Total Whitby Area	7.30%
Scarborough Town Centre	24.8%
Seamer Road Retail Park	0.0%
Elsewhere in Scarborough area	0.0%
Total Scarborough Area	24.8%
TOTAL SCARBOROUGH DISTRICT	32.1%
Teesside	26.6%
York	26.6%
Leeds	1.8%
Hull & East Riding	0.7%
Leakage Elsewhere	7.7%
TOTAL LEAKAGE	63.5%
Internet / Mail Order	4.4%
TOTAL	100.0%

TOYS & HOBBYS	Mkt Share
Whitby Town Centre	31.39%
Elsewhere in Whitby area	0.00%
Total Whitby Area	31.39%
Scarborough Town Centre	25.5%
Seamer Road Retail Park	0.0%
Elsewhere in Scarborough area	0.0%
Total Scarborough Area	25.5%
TOTAL SCARBOROUGH DISTRICT	56.9%
Teesside	20.4%
York	9.5%
Leeds	0.0%
Hull & East Riding	0.7%
Leakage Elsewhere	4.4%
TOTAL LEAKAGE	35.0%
Internet / Mail Order	8.0%
TOTAL	100.0%

BOOKS & STATIONARY	Mkt Share
Whitby Town Centre	45.79%
Elsewhere in Whitby area	0.93%
Total Whitby Area	46.73%
Scarborough Town Centre	25.7%
Seamer Road Retail Park	0.0%
Elsewhere in Scarborough area	0.0%
Total Scarborough Area	25.7%
TOTAL SCARBOROUGH DISTRICT	72.4%
Teesside	5.6%
York	4.2%
Leeds	0.0%
Hull & East Riding	0.9%
Leakage Elsewhere	6.5%
TOTAL LEAKAGE	17.3%
Internet / Mail Order	10.3%
TOTAL	100.0%

CDs, DVDs & COMPUTER GAMES	Mkt Share
Whitby Town Centre	35.37%
Elsewhere in Whitby area	0.00%
Total Whitby Area	35.37%
Scarborough Town Centre	24.4%
Seamer Road Retail Park	0.0%
Elsewhere in Scarborough area	1.2%
Total Scarborough Area	25.6%
TOTAL SCARBOROUGH DISTRICT	61.0%
Teesside	7.3%
York	4.3%
Leeds	0.0%
Hull & East Riding	1.2%
Leakage Elsewhere	1.8%
TOTAL LEAKAGE	14.6%
Internet / Mail Order	24.4%
TOTAL	100.0%

CHEMIST & BEAUTY PRODUCTS	Mkt Share
Whitby Town Centre	87.77%
Elsewhere in Whitby area	0.87%
Total Whitby Area	88.65%
Scarborough Town Centre	4.8%
Seamer Road Retail Park	0.0%
Elsewhere in Scarborough area	0.9%
Total Scarborough Area	5.7%
TOTAL SCARBOROUGH DISTRICT	94.3%
Teesside	1.3%
York	0.9%
Leeds	0.0%
Hull & East Riding	0.4%
Leakage Elsewhere	1.3%
TOTAL LEAKAGE	3.9%
Internet / Mail Order	1.7%
TOTAL	100.0%

HARDWARE & TABLEWARE	Mkt Share
Whitby Town Centre	28.24%
Elsewhere in Whitby area	1.18%
Total Whitby Area	29.41%
Scarborough Town Centre	31.2%
Seamer Road Retail Park	1.2%
Elsewhere in Scarborough area	0.6%
Total Scarborough Area	32.9%
TOTAL SCARBOROUGH DISTRICT	62.4%
Teesside	11.8%
York	9.4%
Leeds	0.0%
Hull & East Riding	0.0%
Leakage Elsewhere	7.1%
TOTAL LEAKAGE	28.2%
Internet / Mail Order	9.4%
TOTAL	100.0%

JEWELLERY & WATCHES	Mkt Share
Whitby Town Centre	25.00%
Elsewhere in Whitby area	1.35%
Total Whitby Area	26.35%
Scarborough Town Centre	32.4%
Seamer Road Retail Park	0.0%
Elsewhere in Scarborough area	0.0%
Total Scarborough Area	32.4%
TOTAL SCARBOROUGH DISTRICT	58.8%
Teesside	12.2%
York	4.1%
Leeds	0.0%
Hull & East Riding	0.0%
Leakage Elsewhere	13.5%
TOTAL LEAKAGE	29.7%
Internet / Mail Order	11.5%
TOTAL	100.0%

ELECTRICAL GOODS	Mkt Share
Whitby Town Centre	30.77%
Elsewhere in Whitby area	0.00%
Total Whitby Area	30.77%
Scarborough Town Centre	24.5%
Seamer Road Retail Park	7.2%
Elsewhere in Scarborough area	0.5%
Total Scarborough Area	32.2%
TOTAL SCARBOROUGH DISTRICT	63.0%
Teesside	13.9%
York	3.4%
Leeds	0.0%
Hull & East Riding	0.0%
Leakage Elsewhere	3.4%
TOTAL LEAKAGE	20.7%
Internet / Mail Order	16.3%
TOTAL	100.0%

FURNITURE & CARPETS	Mkt Share
Whitby Town Centre	48.50%
Elsewhere in Whitby area	15.50%
Total Whitby Area	64.00%
Scarborough Town Centre	6.0%
Seamer Road Retail Park	1.0%
Elsewhere in Scarborough area	0.0%
Total Scarborough Area	7.0%
TOTAL SCARBOROUGH DISTRICT	71.0%
Teesside	9.5%
York	3.5%
Leeds	0.0%
Hull & East Riding	0.0%
Leakage Elsewhere	12.0%
TOTAL LEAKAGE	25.0%
Internet / Mail Order	4.0%
TOTAL	100.0%

SOFT FURNISHINGS	Mkt Share
Whitby Town Centre	21.57%
Elsewhere in Whitby area	5.88%
Total Whitby Area	27.45%
Scarborough Town Centre	26.5%
Seamer Road Retail Park	0.0%
Elsewhere in Scarborough area	0.0%
Total Scarborough Area	26.5%
TOTAL SCARBOROUGH DISTRICT	53.9%
Teesside	11.8%
York	9.3%
Leeds	0.0%
Hull & East Riding	0.5%
Leakage Elsewhere	5.4%
TOTAL LEAKAGE	27.0%
Internet / Mail Order	19.1%
TOTAL	100.0%

DIY GOODS	Mkt Share
Whitby Town Centre	34.30%
Elsewhere in Whitby area	10.47%
Total Whitby Area	44.77%
Scarborough Town Centre	14.0%
Seamer Road Retail Park	28.5%
Elsewhere in Scarborough area	0.0%
Total Scarborough Area	42.4%
TOTAL SCARBOROUGH DISTRICT	87.2%
Teesside	7.6%
York	0.6%
Leeds	0.0%
Hull & East Riding	0.0%
Leakage Elsewhere	3.5%
TOTAL LEAKAGE	11.6%
Internet / Mail Order	1.2%
TOTAL	100.0%

GARDEN CENTRE GOODS	Mkt Share
Whitby Town Centre	26.88%
Elsewhere in Whitby area	29.57%
Total Whitby Area	56.45%
Scarborough Town Centre	7.5%
Seamer Road Retail Park	19.4%
Elsewhere in Scarborough area	4.3%
Total Scarborough Area	31.2%
TOTAL SCARBOROUGH DISTRICT	87.6%
Teesside	4.8%
York	1.6%
Leeds	0.0%
Hull & East Riding	0.0%
Leakage Elsewhere	4.3%
TOTAL LEAKAGE	10.8%
Internet / Mail Order	1.6%
TOTAL	100.0%

Notes & Source.

1. Market shares from 2007 NEMS Survey

TABLE 36: COMPARISON GOODS MARKET SHARES BY CLASS OF GOODS IN WHITBY SCA

ALL COMPARISON GOODS	Mkt Share
Whitby Town Centre	18.45%
Elsewhere in Whitby area	2.41%
Total Whitby Area	20.85%
Scarborough Town Centre	6.4%
Seamer Road Retail Park	0.8%
Elsewhere in Scarborough area	0.7%
Total Scarborough Area	7.8%
TOTAL SCARBOROUGH DISTRICT	28.7%
Teesside	32.0%
York	4.4%
Leeds	0.3%
Hull & East Riding	0.0%
Leakage Elsewhere	26.2%
TOTAL LEAKAGE	62.8%
Internet / Mail Order	8.5%
TOTAL	100.0%

CLOTHES FIRST CHOICE	Mkt Share
Whitby Town Centre	6.25%
Elsewhere in Whitby area	0.00%
Total Whitby Area	6.25%
Scarborough Town Centre	9.4%
Seamer Road Retail Park	0.0%
Elsewhere in Scarborough area	0.0%
Total Scarborough Area	9.4%
TOTAL SCARBOROUGH DISTRICT	15.6%
Teesside	64.1%
York	9.4%
Leeds	0.0%
Hull & East Riding	0.0%
Leakage Elsewhere	6.3%
TOTAL LEAKAGE	79.7%
Internet / Mail Order	4.7%
TOTAL	100.0%

CLOTHES SECOND CHOICE	Mkt Share
Whitby Town Centre	10.29%
Elsewhere in Whitby area	0.00%
Total Whitby Area	10.29%
Scarborough Town Centre	16.2%
Seamer Road Retail Park	0.0%
Elsewhere in Scarborough area	0.0%
Total Scarborough Area	16.2%
TOTAL SCARBOROUGH DISTRICT	26.5%
Teesside	17.6%
York	19.1%
Leeds	1.5%
Hull & East Riding	0.0%
Leakage Elsewhere	27.9%
TOTAL LEAKAGE	66.2%
Internet / Mail Order	7.4%
TOTAL	100.0%

TOYS & HOBBYS	Mkt Share
Whitby Town Centre	10.00%
Elsewhere in Whitby area	0.00%
Total Whitby Area	10.00%
Scarborough Town Centre	7.5%
Seamer Road Retail Park	0.0%
Elsewhere in Scarborough area	0.0%
Total Scarborough Area	7.5%
TOTAL SCARBOROUGH DISTRICT	17.5%
Teesside	40.0%
York	2.5%
Leeds	0.0%
Hull & East Riding	0.0%
Leakage Elsewhere	32.5%
TOTAL LEAKAGE	75.0%
Internet / Mail Order	7.5%
TOTAL	100.0%

BOOKS & STATIONARY	Mkt Share
Whitby Town Centre	23.73%
Elsewhere in Whitby area	1.69%
Total Whitby Area	25.42%
Scarborough Town Centre	3.4%
Seamer Road Retail Park	0.0%
Elsewhere in Scarborough area	0.0%
Total Scarborough Area	3.4%
TOTAL SCARBOROUGH DISTRICT	28.8%
Teesside	15.3%
York	1.7%
Leeds	0.0%
Hull & East Riding	0.0%
Leakage Elsewhere	37.3%
TOTAL LEAKAGE	54.2%
Internet / Mail Order	16.9%
TOTAL	100.0%

CDs, DVDs & COMPUTER GAMES	Mkt Share
Whitby Town Centre	17.02%
Elsewhere in Whitby area	0.00%
Total Whitby Area	17.02%
Scarborough Town Centre	12.8%
Seamer Road Retail Park	0.0%
Elsewhere in Scarborough area	0.0%
Total Scarborough Area	12.8%
TOTAL SCARBOROUGH DISTRICT	29.8%
Teesside	17.0%
York	2.1%
Leeds	2.1%
Hull & East Riding	0.0%
Leakage Elsewhere	29.8%
TOTAL LEAKAGE	51.1%
Internet / Mail Order	19.1%
TOTAL	100.0%

CHEMIST & BEAUTY PRODUCTS	Mkt Share
Whitby Town Centre	47.54%
Elsewhere in Whitby area	1.64%
Total Whitby Area	49.18%
Scarborough Town Centre	1.6%
Seamer Road Retail Park	0.0%
Elsewhere in Scarborough area	0.0%
Total Scarborough Area	1.6%
TOTAL SCARBOROUGH DISTRICT	50.8%
Teesside	4.9%
York	0.0%
Leeds	0.0%
Hull & East Riding	0.0%
Leakage Elsewhere	41.0%
TOTAL LEAKAGE	45.9%
Internet / Mail Order	3.3%
TOTAL	100.0%

HARDWARE & TABLEWARE	Mkt Share
Whitby Town Centre	19.57%
Elsewhere in Whitby area	0.00%
Total Whitby Area	19.57%
Scarborough Town Centre	8.7%
Seamer Road Retail Park	2.2%
Elsewhere in Scarborough area	2.2%
Total Scarborough Area	13.0%
TOTAL SCARBOROUGH DISTRICT	32.6%
Teesside	21.7%
York	0.0%
Leeds	0.0%
Hull & East Riding	0.0%
Leakage Elsewhere	41.3%
TOTAL LEAKAGE	63.0%
Internet / Mail Order	4.3%
TOTAL	100.0%

JEWELLERY & WATCHES	Mkt Share
Whitby Town Centre	21.74%
Elsewhere in Whitby area	0.00%
Total Whitby Area	21.74%
Scarborough Town Centre	4.3%
Seamer Road Retail Park	0.0%
Elsewhere in Scarborough area	0.0%
Total Scarborough Area	4.3%
TOTAL SCARBOROUGH DISTRICT	26.1%
Teesside	30.4%
York	6.5%
Leeds	0.0%
Hull & East Riding	0.0%
Leakage Elsewhere	30.4%
TOTAL LEAKAGE	67.4%
Internet / Mail Order	6.5%
TOTAL	100.0%

ELECTRICAL GOODS	Mkt Share
Whitby Town Centre	10.91%
Elsewhere in Whitby area	1.82%
Total Whitby Area	12.73%
Scarborough Town Centre	3.6%
Seamer Road Retail Park	3.6%
Elsewhere in Scarborough area	3.6%
Total Scarborough Area	10.9%
TOTAL SCARBOROUGH DISTRICT	23.6%
Teesside	36.4%
York	1.8%
Leeds	0.0%
Hull & East Riding	0.0%
Leakage Elsewhere	20.0%
TOTAL LEAKAGE	58.2%
Internet / Mail Order	18.2%
TOTAL	100.0%

FURNITURE & CARPETS	Mkt Share
Whitby Town Centre	28.85%
Elsewhere in Whitby area	9.62%
Total Whitby Area	38.46%
Scarborough Town Centre	3.8%
Seamer Road Retail Park	0.0%
Elsewhere in Scarborough area	0.0%
Total Scarborough Area	3.8%
TOTAL SCARBOROUGH DISTRICT	42.3%
Teesside	19.2%
York	3.8%
Leeds	0.0%
Hull & East Riding	0.0%
Leakage Elsewhere	32.7%
TOTAL LEAKAGE	55.8%
Internet / Mail Order	1.9%
TOTAL	100.0%

SOFT FURNISHINGS	Mkt Share
Whitby Town Centre	12.28%
Elsewhere in Whitby area	15.79%
Total Whitby Area	28.07%
Scarborough Town Centre	3.5%
Seamer Road Retail Park	0.0%
Elsewhere in Scarborough area	0.0%
Total Scarborough Area	3.5%
TOTAL SCARBOROUGH DISTRICT	31.6%
Teesside	24.6%
York	3.5%
Leeds	0.0%
Hull & East Riding	0.0%
Leakage Elsewhere	29.8%
TOTAL LEAKAGE	57.9%
Internet / Mail Order	10.5%
TOTAL	100.0%

DIY GOODS	Mkt Share
Whitby Town Centre	18.18%
Elsewhere in Whitby area	1.82%
Total Whitby Area	20.00%
Scarborough Town Centre	3.6%
Seamer Road Retail Park	1.8%
Elsewhere in Scarborough area	0.0%
Total Scarborough Area	5.5%
TOTAL SCARBOROUGH DISTRICT	25.5%
Teesside	40.0%
York	1.8%
Leeds	0.0%
Hull & East Riding	0.0%
Leakage Elsewhere	29.1%
TOTAL LEAKAGE	70.9%
Internet / Mail Order	3.6%
TOTAL	100.0%

GARDEN CENTRE GOODS	Mkt Share
Whitby Town Centre	20.41%
Elsewhere in Whitby area	8.16%
Total Whitby Area	28.57%
Scarborough Town Centre	2.0%
Seamer Road Retail Park	0.0%
Elsewhere in Scarborough area	2.0%
Total Scarborough Area	4.1%
TOTAL SCARBOROUGH DISTRICT	32.7%
Teesside	36.7%
York	0.0%
Leeds	0.0%
Hull & East Riding	0.0%
Leakage Elsewhere	28.6%
TOTAL LEAKAGE	65.3%
Internet / Mail Order	2.0%
TOTAL	100.0%

Notes & Source.

1. Market shares from 2007 NEMS Survey