Final Report

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Scarborough Retail Study Update

Final Report

April 2012

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1. INTRODUCTION

1.1 GVA was appointed by Scarborough Borough Council in September 2011 to prepare an update to the existing Borough-wide retail study (December 2007). The terms of the study brief are as follows:

- Update the existing quantitative capacity study through applying the latest population data and expenditure growth projections (Experian) to the existing household telephone survey results to take account of ongoing economic conditions (i.e. impact of the recession) and committed developments (convenience and comparison).
- Identify qualitative deficiencies in existing provision and advise on how to meet the need identified.
- Prepare an up-to-date review of the vitality and viability of the three principal town centres in the Borough (Scarborough, Whitby and Filey).

1.2 The update study is intended to provide a sound basis on which to progress with the emerging Local Plan. The conclusions of the update study do however represent a 'point-in-time' assessment of performance and opportunity. The quantitative need identified should be used to inform policy which will endure over the short to medium term as required. It will however be important that the Council continues to monitor the health of its principal centres through its forward planning function, adopting and revisiting the strategy to address changing circumstances over the coming years.

1.3 The methodological differences between the 2007 Study and this update exercise are set out along with the current planning policy context prior to concluding on forward need and policy strategy across the Borough and its three principal centres.

2. RETAIL TRENDS

2.1 The study update has been commissioned in part to assess the impact of the current economic climate on future retail needs in the Borough. In assessing quantitative and qualitative need for new provision, it is relevant to consider the wider economic and social trends likely to influence retailing in the study area moving forwards. This section therefore examines key trends and drivers for change in the retail industry and outlines those of particular relevance to the Borough. Our review draws on a range of published data sources including research by Verdict, Mintel and Experian.

ECONOMIC OUTLOOK

2.2 The latest advice published by Experian (Retail Planner 9, September 2011) presents a bleak picture for the economy as the recovery from the recession runs out of steam and new data released points to further weakness. It is anticipated that household spending will continue to be constrained by subdued disposable income growth and a weak labour market. Pressures on disposable incomes will limit the extent to which consumers are able to save and consumers will therefore be more considered with their spending decisions and seeking to achieve best value for money. In many circumstances, the cost-savings offered by the Internet will be more readily seized.

2.3 Overall, consumers will remain cautious with spending not only on discretionary items but also on needs, cutting wastage, which will impact on food & grocery volumes. There will be an increased focus on buying efficiently. Big ticket and home-related purchases will remain low, particularly as uncertainty continues to drive house prices and volumes down, as many are reluctant to move.

2.4 As the housing market recovers (expected 2013), certain sectors (e.g. home furnishing and DIY) will benefit from pent up demand. However, it is anticipated that sales through the town centre will remain weak with online and out of centre retailers continuing to take a greater share and the pent-up demand for furniture, floor coverings and electricals. Space and store numbers in town centre locations is also expected to decline as retailers drive efficiencies by closing underperforming space. These trends are discussed in more detail below.

THE INTERNET / 'E-TAILING'

2.5 Consistent with wider economic trends, growth in e-Retail declined in 2009 as a result of the recession reducing consumer demand. Austerity cuts on the spending ability of the most prolific online shoppers (35-44 year olds) also had an impact on reduced demand during this period. Overall the pace of growth in online shopping is set to slow down significantly as the channel matures and competition increases[1].

2.6 Despite overall more modest levels of growth in online shopping, there will continue to remain reasonable pressure on traditional bricks and mortar retailers. Shoppers are able to select their own retail mix online and shopping centres and high streets will need to compete with this choice, which is not only driven by price and range, but also service and expertise. Online shopping has driven expectations of convenience and service upwards and customers are expecting more from in-store ambience to tempt them to make a purchase[2]. Town centres and high streets will increasingly have to provide a shopping 'experience' that the Internet is unable to match.

2.7 Trends also show that the online and in-store shopping channels are becoming gradually more blurred as shoppers increasingly research purchases online or in stores which are increasingly becoming showrooms. According to Verdict, in 2010, 63% of shoppers researched goods online before purchasing in stores, an increase from 54% in 2007. At the same time, it is estimated that 29% of consumers researched purchases in store before buying online, representing a huge increase from 13% in 2007[3].

NEW TECHNOLOGIES

2.8 Technological advances will continue to drive changes in retailing, with greater interactions between work, entertainment, social networking and shopping using mobile devices. QR codes (Quick Response codes) have increased consumer and retailer interaction and engagement, enabling customers to scan QR barcodes on their mobiles to gain direct access to the product website, marketing, competitions and product information.

2.9 Smartphones will provide contactless payment services using Near Field Communications (NFC) technology. This will allow customers to make payments via

[1] Verdict Research, "Retail Futures H1 2011 - e-Retail", March 2011
[2] Verdict Research, "How Britain Shops: Overall 2011", March 2011
[3] Verdict Research, "UK e-Retail 2011", May 2011

instore terminals making the payment process more convenient. Starbucks is set to launch contactless and mobile payment services in the UK in 2012.

2.10 Retailers are also developing 'augmented reality' technology which will merge the physical and virtual worlds to allow retailers (such as Ikea and Tesco) to provide an interactive view of how products such as televisions or furniture, will look in consumers own homes or provide 3D projections of life size products.

2.11 Fashion retailers including Net-a-Porter and Clarks are already using augmented reality technology through pointing smartphones and tablets at an image or advertisement which triggers video content on the mobile device. This technology brings static adverts to life and allows consumers to view catwalk runways, video advertisements and product information, and to make purchases. Augmented reality will provide an interactive advertising platform for retailers, who will use this technology to break down the barriers between online and in-store shopping.

2.12 While the Internet and new technologies pose challenges to the high street, retailers are constantly looking for ways to exploit the trading opportunities available through offering a multichannel shopping experience. The advantages offered by physical stores, in terms of the experience and immediacy of products, will see a network of key stores remain a fundamental component of retailers' strategies to develop a more coherent and integrated multichannel proposition.

SALES EFFICIENCY

2.13 An efficiency growth rate represents the ability of retailers to increase their productivity and absorb higher than inflation increases in their costs (such as rents, rates and service charges) by increasing their average sales densities. The application of a turnover 'efficiency' growth rate is a standard approach used in retail planning studies and in is accordance with good practice.

2.14 Although hard quantitative evidence is limited, comparison businesses in particular have, over time, increased sales densities by achieving improvements in productivity in the use of floorspace. Analysis of past data is difficult as sales densities increases have been affected by changes in the use of retail floorspace over the last 20 years, with higher value space-efficient electrical goods replacing lower value space intensive goods, the growth in out-of-centre retailing, a number of one-off events like Sunday-trading and longer opening hours and the very strong growth of retail expenditure relative to the growth in floorspace.

2.15 Following the recession many retailers have struggled to increase or even maintain sales density levels and, together with other financial problems, have led some retailers into closure. With the expectation of weaker expenditure growth, sales density growth is also expected to be lower than previous estimates, unless retailers accelerate store closures and more existing retail stock is taken out of use.

2.16 Based on continuing trends towards more modern, higher density stores and the demolition of older inefficient space, Experian expect an efficiency growth rate of 1.7% per annum for comparison goods over in the next 16 years. This is about half the rate seen during the boom of the 1990s.

2.17 Scope for sales density increases is much more limited for convenience goods as expanding store portfolios (particularly over the next five years) will increasingly overlap with the catchment of existing stores and result in the cannibalisation of existing sales. For convenience goods, an efficiency growth rate of 0.4% per annum between 2012 and 2017, and 0.2% per annum post 2017 has therefore been incorporated into our analysis set out in later sections.

OPERATOR SPACE REQUIREMENTS

2.18 One of the major trends to emerge from the economic downturn has been the decline in the amount of retail space in town centre locations. This is, in part, a consequence of the harsh economic conditions forcing out independent retailers whose margins became too tight to survive and some multiples which have either collapsed or their store portfolios have shrunk after entering a pre-pack administration. These losses have not been offset by new developments, as many town centre schemes have been put on hold or revised downwards in scale. With online presence allowing national coverage, it is expected that retailers will remain cautious about expansion.

2.19 As retailers cut back on space to improve efficiencies and online becomes a more important channel, a new model is emerging in town centres. Retailers are moving towards opening larger flagship stores in strategic locations which are supported by smaller satellite stores and transactional websites. The larger flagships will accommodate the fuller range while smaller stores will offer a more select range supplemented by Internet kiosks allowing access to the wider range.

2.20 This model offers many advantages such as lower property costs, more efficient logistics and being able to open stores where there is a high level of demand despite there being space restrictions. Such models are already being trialled by retailers including Debenhams and House of Fraser. The first House of Fraser.com store, comprising just 140 sqm, opened at Hammerson's Union Square Shopping Centre, Aberdeen in October 2011, followed by a second in Liverpool in November 2011. It is reported that the retailer will open similar stores in locations with strong web sales, but without a store presence. Marks & Spencer is also trialling a boutique offer with sample ranges of clothing combined with online video and ordering capabilities.

OUT-OF-CENTRE PRESSURES

2.21 As retailers opt to develop stores in the most strategic and cost effective locations, there has been a notable resurgence to out-of-centre destinations which offer the benefit of lower rents, better space and in most cases, free parking. According to Verdict, out-of-town is the only channel which has seen store numbers increase consistently since 2000. BIS report that the number of out-of-centre stores has increased by up to c.1,800 (25%) since 2000; whilst the number of town centre stores fell by almost 15,000 between 2000 and 2009, the majority of which are likely to have been in 'high street' locations.

2.22 John Lewis for example, has developed a number of out-of-town stores through its At Home format. The retailer currently operates six At Home stores, although a new store is due to open in Tamworth in October 2012, and reports suggest that by end of 2012 the retailer will have increased its out-of-town portfolio to ten stores. Other retailers including H&M and Primark are also reported to be seeking to expand their portfolios in out-of-centre locations.

FOODSTORES

2.23 In the convenience sector, space expansion is high on the agenda for many grocers. Verdict estimate that between 2010 and 2015, the leading grocers will increase their space by 2 million sqm - almost double that of the new space opened between 2005 and 2010. In 2011, Tesco and the Co-operative gained a presence in every postcode in the UK[4], the latter through its acquisition of Somerfield.

2.24 The continuing fall out of independents from the market will provide further opportunities for the expansion of the leading brands. Smaller store formats are

[4]Verdict Research, "UK Food and Grocery Retailers 2011", September 2011

becoming more of a focus as top up shopping is becoming increasingly popular – a response to consumers being discouraged from travelling long distances by high fuel prices and as more are shopping online for staple goods. Following in the path of Tesco and Sainsbury's, Asda, Morrisons and Waitrose are all in the process of expanding smaller concept stores.

THE ROLE OF THE TOWN CENTRE

2.25 The town centre has been the main shopping channel for the last 30 years. However, its role is set to change dramatically. Emerging trends suggest that it will be used more for leisure and social activities with more bars, restaurants, food outlets and community spaces opening in vacant units.

2.26 These trends are of major importance to the Borough's shopping centres which will need to adapt to this broader role by broadening their non-retail offer. Data from the Local Data Company indicates that town centres with more non-retail outlets have seen an improvement in their performance. Between 2009 and 2011, 114 towns improved their town centre score and reduced their vacancy rate and of these, 60.5% had a lower proportion of retail outlets.

2.27 As retailers improve their multichannel offer, town centre stores will be used more to support e-retailing with click and collect points and safe drop boxes for customers to collect their online orders as well as satellite stores opening for customers to make online purchases. As demand for retail floorspace declines, it is anticipated that more secondary and tertiary space which suffers from lower levels of footfall, will increasingly be converted into residential uses.

2.28 In order to ensure that town centres have a viable function moving forwards, it will be important for Councils to aim to drive footfall to turn around their town centres and improve dwell time to increase awareness of offers and impulse purchases. This can be achieved by getting a better understanding of the catchment area and what local people want, improving the mix of retail and non-retail outlets in the centre to make them stay longer, and holding commercial, cultural and community events to create a 'unique selling point' for the town centre to differentiate it form the competition and encourage people to visit. Councils will also need to promote the wider area, to encourage further investment in jobs, and in the town centre, to persuade residents to spend their money in the area and support the town further.

2.29 Smaller town centres have already been greatly impacted by the pull of larger, higher order shopping destinations, leading to a higher vacancy rate and weaker performance. For these centres, it will be increasingly important to create a differentiated offer, tailored to the local catchment and to encourage residents to shop and socialise more locally.

OVERALL SUMMARY

2.30 It is evident that the traditional high street faces a number of challenges not least from the tightening of retail spend and changing consumer behaviour but also from increasing competition posed by the Internet and out-of-centre developments. Whilst the future is uncertain, in light of the challenge currently faced, strategies which support the high street are considered ever more vital.

2.31 Whilst the town centre 'first' strategy must continue to prevail, strategies in some instances will need to adopt a degree of pragmatism and at worst consider the process of managing decline of some centres, particularly secondary ones, given the ongoing process of consolidation in the retail sector.

3. PLANNING POLICY FRAMEWORK

NATIONAL PLANNING POLICY FRAMEWORK (NPPF)

3.1 National Planning Policy Framework was adopted in late March 2012 and has replaced Planning Policy Statement 4: *Planning for Sustainable Economic Growth*. The PPS4 practice guidance on need, impact and sequential assessments does however remain as an informative tool for both plan making and development management functions.

TOWN CENTRE VITALITY AND VIABILITY

3.2 The NPPF (Section 2) specifies that planning policy should promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. Local Planning Authorities (LPAs) are directed to:

- Recognise town centres as the heart of their communities and pursue policies to support their viability and vitality.
- Define a network of hierarchies and the extent of town centres and primary shopping areas.
- Promote competitive town centres that provide customer choice and a diverse retail offer which reflects the individuality of town centres.
- Retain and enhance existing markets, ensuring they remain attractive and competitive.
- Allocate appropriate in-centre sites which are not compromised by limited site availability. If it is not possible to ensure a sufficient range of suitable sites, appropriate edge of centre sites that are well connected to a town centre should be allocated.
- Where town centres are in decline, local authorities should plan positively for their futures and encourage economic activity.

3.3 The long-standing sequential test is retained in the NPPF albeit that there is increased emphasis on LPAs to ensure an available supply of sites.

EVIDENCE BASE REQUIREMENTS

3.4 LPAs are directed by NPPF to ensure that the Local Plan is based on adequate, up-to-date and relevant evidence. In relation to planning to meet business requirements, LPAs are required to have a clear understanding of business needs within the economic markets operating in and across their area. LPAs are directed to use the evidence base to assess (amongst others):

- The needs for land or floorspace for economic development, including both the quantitative and qualitative needs for all foreseeable types of economic activity over the plan period, including for retail and leisure development.
- The role and function of town centres and the relationship between them, including any trends in the performance of centres; and
- The capacity of existing centres to accommodate new town centre development.

3.5 Whilst the NPPF constitutes a material consideration which LPAs should take into account from the date of publication (late March), the policy provisions and directions of the NPPF should inform the preparation of plans either through partial review or by preparing a new plan.

REGIONAL SPATIAL STRATEGY

3.6 Whilst the Government has announced its intention to revoke Regional Spatial Strategies (RSS), the NPPF confirms that RSS remains part of the statutory development plan under Section 38(6) of the Planning & Compulsory Purchase Order 2004 for the assessment of planning applications.

3.7 The RSS for Yorkshire and the Humber was published in May 2008 and provides a long-term development strategy for the region to 2026. Policies relevant to the retail study update are as follows:

OVERARCHING SPATIAL POLICIES

- **Policy YH1 – Overall Approach**; details that plans and strategies should seek (amongst others) to support principal towns and local service centres as hubs for the rural and coastal economy and community.

- **Policy YH4 – Sub-Regional Towns**; identifies Scarborough as a sub-regional town which along with other similar centres will be the prime focus for retail and leisure development (amongst others).
- **Policy YH5 – Principal Towns**; identifies Whitby as a principal town in the regional hierarchy (amongst others). The policy details that principal towns should be the main local focus for retail and leisure development and that plans / strategies should seek to enhance the vitality and viability of such centres.
- **Policy YH6 – Local Service Centres and Rural and Coastal Areas**; details that such centres should be protected and enhanced. Plans and strategies are directed to retain and improve local services and facilities.
- **Policy YH7 – Location of Development**; reflects the wider sequential approach to development by prioritising previously developed land and buildings in advance of suitable infill opportunities.

COASTAL POLICIES

- **Policy C1 – Coast Sub Area**; the policy requires relevant plans and strategies to promote the roles and functions of places including:
  - Strengthening the role of Scarborough as a Sub-Regional Town by focusing most development in the town and achieving urban renaissance;
  - Develop the Principal Town role of Whitby; and
  - Maintain the role of Local Service Centres (Hunmanby and Filey identified as local service centres in Scarborough Borough).

ECONOMY POLICIES

- **Policy E2 – Town Centres and Major Facilities**; details that regional cities, sub-regional cities and sub-regional towns (including Scarborough) should be the focus for retail and leisure development (amongst other uses). Development, environmental enhancements, accessibility improvements and town centre management are advocated to create a distinctive identify for each centre.

3.8 The emerging Core Strategy for the Borough was based on this broad strategic policy framework, as summarised below.

SCARBOROUGH LOCAL DEVELOPMENT FRAMEWORK

3.9 Whilst significant progress was initially made in preparing the Core Strategy Development Plan Document (DPD), including the publication of preferred options in late 2009, the LDF has been largely delayed due to the state of flux with national and regional planning policy, culminating in the recent publication of NPPF (March 2012).

3.10 The Council is currently working to update the 2009 Core Strategy preferred option paper in accordance with the current statutory planning policy framework and proposes to merge its strategic policy and allocations work into a single Local Plan. The draft preferred option policies do however provide an indication of the 'direction of travel' for local planning policy. The draft preferred option policies relevant to this study are summarised as follows:

SPATIAL OBJECTIVES

- **Objective 1;** focus new development in and around the Scarborough Urban Area to enhance the town's role as the 'coastal capital', increasing the range of facilities available.
- **Objective 2;** maintain and enhance the role of Whitby, as an internationally recognised Heritage Town and a principal town in the Regional Spatial Strategy, serving a sizeable rural area.
- **Objective 3;** maintain and enhance the character and service centre roles of Filey (including its seaside resort role) and Hunmanby.

SETTLEMENT HIERARCHY

1) **Sub-Regional Town**: Scarborough Urban Area;
2) **Principal Town**; Whitby;
3) **Local Service Centres**; Filey and Hunmanby;
4) **Service Villages**; Burniston, East and West Ayton, Seamer, Sleights and Snainton; and
5) **Non-Service Villages**.

RETAIL / CENTRE (VITALITY & VIABILITY) POLICIES

- **Core Policy EC3**; details that the vitality and viability of all settlement centres will be maintained and where appropriate enhanced with a focus on safeguarding the retail character and function. On the basis of the 2007 Borough-wide retail study, the policy sets out the following thresholds for development in the respective centres up to 2016:

- **Scarborough**; c. 1,700 m^2 extra convenience goods floorspace and 13,000 m^2 comparison (non-food) retail goods floorspace by 2016.
- **Whitby**; c. 1,800 m^2 extra convenience goods floorspace (large format stores) and 6,700 m^2 comparison (non-food) retail goods floorspace by 2016.
- **Filey**; c. 1,050 m^2 extra convenience goods floorspace and 1,700 m^2 comparison (non-food) retail goods floorspace by 2016.
- **District Centres**; c. 500 m^2 extra convenience goods floorspace and 200 m^2 comparison (non-food) retail goods floorspace by 2016.
- **Local Centres**; c. 280 m^2 extra convenience goods floorspace and 100 m^2 comparison (non-food) retail goods floorspace by 2016.

3.11 Given that this retail study update is primarily to inform the emerging Local Plan, allied to recent retail commitments and development in the main centres in the Borough, the capacity figures set out in draft preferred option policy EC3 should be treated as indicative and with a significant degree of caution.

3.12 This quantitative based update to the 2007 Study will provide a current position on retail needs. However, in the meantime, it is important to establish the current vitality and viability of the principal centres in the Borough, focusing on Scarborough, Whitby and Filey in particular.

4. HEALTHCHECK UPDATE

4.1 An up-to-date floorspace survey of Scarborough, Whitby and Filey town centres has been completed in order to provide a robust baseline in which to project forward and assess future quantitative and qualitative needs.

4.2 This chapter draws comparisons with the healthcheck findings of the 2007 Study in order to identify changes in floorspace composition within the town centres. The exercise is primarily based on updated Experian Goad floorspace surveys of the respective town centres. Floorspace surveys of local centres is also undertaken and provided as a schedule at Appendix 4.

SCARBOROUGH TOWN CENTRE

4.3 The town is the principal centre in the Borough and serves a wider catchment. The retail and leisure offer is commensurate with a sub-regional centre with appropriate representation from national multiples and attractive local independents.

FLOORSPACE

4.4 The 2007 Retail Study floorspace assessment for Scarborough was based on an Experian GOAD Town Centre Survey undertaken in August 2006. The Experian GOAD survey (August 2011) has therefore been utilised to provide a like-for-like comparative assessment and to provide a robust up-to-date position.

4.5 The table below sets out the changes in floorspace between the 2007 Study and this update exercise. In addition, the current benchmark averages derived from GOAD are provided to highlight the relative performance of the town centre. Various survey categories are however excluded (public services, health and medical services, religious services, transport services, commerce and wholesale trade) to ensure consistency with the 2007 Study findings.

TABLE 1 – SCARBOROUGH TOWN CENTRE RETAIL COMPOSITION

Retail Category	2007 Study		2012 Update	
	Floorspace (sq m)	% of Total	Floorspace (sq m)	% of Total
Comparison	63,153	45.3%	61,706	43.7%
Convenience	16,360	11.7%	17,670	12.5%
Retail Service	7,804	5.6%	7,144	5.1%
Leisure Service	36,120	25.9%	37,142	26.4%
Financial Service	7,766	5.6%	8,017	5.7%
Vacant	8,203	5.9%	9,243	6.6%
Total	**139,406**	**100%**	**140,922**	**100%**

4.6 Overall, the table highlights the following changes in town centre composition between the 2007 and the study update:

- The total floorspace in the defined town centre has only marginally increased (c. 1,516 m^2) over the five year period.
- The quantum of comparison (non-food) retail floorspace in the town centre has decreased by (c. 1,447 m^2). The quantum of comparison retail floorspace as a proportion of the overall town centre floorspace (36.2%) is however above the Experian GOAD regional average (30.2%)[5].
- Convenience floorspace has increased (c. 1,310 m^2 floorspace). However, the quantum of convenience retail floorspace as a proportion of the overall town centre floorspace (10.4%) remains below the GOAD regional average (12.2%)[6].
- The amount of floorspace dedicated to leisure service uses has increased by c. 1,000 m^2 over the five year period; the proportion of leisure service floorspace from the town centre as a whole (21.8%) is significantly above the GOAD average (17.9%) reflecting the tourist attraction of the town.

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[5] The percentage figures provided by GOAD reflects the inclusion of public services, health and medical services, religious services, transport services, commerce and wholesale trade floorspace. The figure provided in Table 1 above does not include these categories to ensure comparability with the 2007 Study – hence the difference in % of floorspace.

[6] As per reference above; the % identified does not correspond with the GOAD % given the exclusions made in the 2007 Study. The GOAD % figures are used in order to show like-for-like comparison with regional average figures.

- The quantum of vacant floorspace has increased in the intervening period by c. 1,000 m^2. The proportion of town centre floorspace which is presently vacant (5.4%) is significantly below the GOAD regional average (8.4%).

4.7 Overall the changes in floorspace composition are likely to reflect natural change in a centre over time rather than the wider economic climate. Whilst there has been significant upheaval in the retail sector nationally with closures, rationalisation and re-organisation of national multiple retailers, it appears that Scarborough has retained its retail provision without significant change.

4.8 Notwithstanding wider economic trends, there is clearly a significant quantum of vacant floorspace albeit that it is apparent, having regard to the unit analysis below, that the majority of vacant units are smaller in size.

GVA FLOORSPACE SURVEY UPDATE (OCTOBER 2011)

4.9 In order to ensure a robust up-to-date assessment, GVA updated the existing GOAD survey to take account of changes in floorspace / fascia composition in the town centre. The GVA update survey is solely based on the town centre boundaries defined in the adopted Local Plan. Therefore, unlike the Experian GOAD survey, the following areas are excluded from the survey:

- Land south and west of Valley Bridge Road and Alma Parade (including Tesco and retail provision on Westborough, Victoria Road and Northway);
- The western fascias of Victoria Road and Castle Road running northwards;
- Land east of Newborough along Eastborough; and
- Land south of Falconers Road and Harcourt Place.

4.10 The GVA survey includes the upper trading floors of retail units within the town centre which are not included on the GOAD survey including:

- **Brunswick Shopping Centre**; upper trading floors of New Look, CMD, Internacionale, Top Man, Next, Toymaster, Top Shop and Debenhams;
- **Newborough**; upper trading floors of Burton/New Wear, WH Smith, Boots Chemist, Waterstones and M&S; and
- **Queen Street**; Boyes (4 trading floors).

4.11 On the basis of the above, the table below sets out the current quantum of floorspace within Scarborough town centre for the purposes of the quantitative capacity assessment.

TABLE 2 – SCARBOROUGH TOWN CENTRE – FLOORSPACE SURVEY (GVA UPDATE)

Retail Sector	Floorspace (sqm gross)
Convenience	6,610
Comparison	63,420
Service	50,410
Vacant	8,120
TOTAL	128,560

4.12 As the table shows, there is a significant difference with the Experian GOAD Category Report when just the floorspace within the defined town centre boundaries are taken into account. The significant decrease in convenience floorspace is due to the exclusion of the Tesco, Sainsbury's and Aldi stores in particular. The increase in comparison retail provision is attributable to Experian GOAD not counting upper trading floors in the town centre aside from units within Brunswick Shopping Centre.

UNIT NUMBERS

4.13 In terms of the composition of the town centre by number of units, the updated Experian GOAD survey identifies the following:

TABLE 3 – SCARBOROUGH; RETAIL COMPOSITION BY NUMBER OF UNITS

	2007 STUDY		2012 STUDY	
RETAIL CATEGORY	NO. UNITS	% of TOTAL	NO. UNITS	% of TOTAL
Comparison	289	40.4%	261	36.9%
Convenience	49	6.8%	42	5.9%
Retail Services	81	11.3%	85	12.1%
Leisure Services	165	23.1%	170	24.1%
Financial & Business Services	58	8.1%	54	7.6%
Vacant	74	10.3%	95	13.4%
TOTAL	716	100%	707	100%

4.14 The table demonstrates that whilst the overall decrease in comparison retail floorspace within the town centre has been small, the actual decrease in the number of units has been significant (28 units) suggesting that smaller units have closed.

4.15 Conversely, whilst the quantum of convenience floorspace in the town has increased over the intervening period, the number of units has decreased suggesting a consolidation of the convenience sector into larger floorplate units.

4.16 Reflecting the wider floorspace trends, the number of vacant units in the town centre has significantly increased (21 units) suggesting again that it is smaller units which have become vacant rather than larger floorplates.

WHITBY TOWN CENTRE

4.17 The town is a traditional coastal centre with retail provision located on both sides of the historic harbour. The pedestrianised Baxtergate is the primary shopping street with Flowergate and to a lesser extent Skinner Street supporting. The Market Place and Sandgate areas to the south of the harbour are predominantly tourist orientated. There are a significant number of leisure service outlets including cafes, bars and restaurants. The main convenience anchor in the town is the Co-Op supermarket adjacent to the railway station. The former Somerfield (and subsequently Nisa Local) store off Flowergate has recently re-opened as Poundland.

4.18 The non-food offer is predominantly orientated to daily top-up comparison shopping (personal goods etc.). The town has a range of daily service uses (banks, building societies etc.) commensurate with a centre of its size and catchment.

FLOORSPACE

4.19 As with Scarborough, the 2007 Study floorspace assessment for Whitby was based on an Experian GOAD Town Centre Survey undertaken in August 2006. The Experian GOAD survey (August 2011) has therefore been utilised to provide a like-for-like comparative assessment and to provide a robust up-to-date position.

TABLE 4 – WHITBY TOWN CENTRE FLOORSPACE COMPOSITION

Retail Category	2007 Study		2012 Update	
	Floorspace (sq m)	% of Total	Floorspace (sq m)	% of Total
Comparison	15,059	37.1%	14,623	35.6%
Convenience	7,237	17.8%	7,116	17.3%
Retail Service	2,220	5.5%	2,090	5.1%
Leisure Service	11,705	28.8%	12,764	31.1%
Financial Service	2,629	6.5%	2,620	6.4%
Vacant	1,793	4.4%	1,849	4.5%
Total	**40,644**	**100%**	**41,062**	**100%**

4.20 The table highlights the following changes in town centre composition between the 2007 and 2012 update study:

- The total floorspace in the town centre has increased from 40,644 m^2 to 41,062 m^2.
- The quantum of comparison floorspace has decreased by only 436 m^2 over the five year period. Comparison floorspace as a proportion of the overall town centre floorspace is slightly below the GOAD regional average (29.1% to 30.2%)[7].
- The quantum of convenience floorspace has also decreased over the five year period (121 m^2); this is likely to be attributable to the re-occupation of the former Somerfield / Nisa Local store off Flowergate by Poundland (comparison retailer). Convenience floorspace as a proportion of overall town centre floorspace remains above the GOAD regional average (14.1% to 12.2%).
- Leisure service floorspace has at the same time increased by c. 1,000 m^2. This potentially reflects the further opening of tourist-based outlets in the town centre. The proportion of leisure service floorspace is significantly above the GOAD regional average (25.4% to 17.9%).
- Vacant floorspace has only been subject to an extremely minor increase and remains significantly below the GOAD regional average (3.7% to 8.4%).

4.21 The comparative analysis above suggests that Whitby remains a viable town centre with low vacancies and no significant change in representation over the past five years. The current vacancies are smaller units but this is to be expected given the historic nature of the town centre (layout, topography, access etc.).

GVA FLOORSPACE SURVEY UPDATE (OCTOBER 2011)

4.22 As with Scarborough, GVA updated the existing GOAD survey to take account of changes in floorspace / fascia composition in Whitby town centre. The GVA update survey is based on the town centre boundaries defined in the adopted Local Plan. The GVA survey includes the upper trading floor of the Boyes store within the town centre which is not included on the GOAD survey.

4.23 On the basis of the above, the table below sets out the current quantum of floorspace within Whitby town centre for the purposes of the quantitative assessment.

TABLE 5 – WHITBY TOWN CENTRE – FLOORSPACE SURVEY (GVA UPDATE)

Retail Sector	Floorspace (sqm gross)
Convenience	5,740[8]
Comparison	15,120
Service	19,870
Vacant	1,180
TOTAL	41,910

4.24 As the table shows, there is only a minor difference between the convenience, comparison and vacant floorspace identified in the Experian GOAD Category Report and the GVA update.

[7] As per footnote 5 (Scarborough Floorspace)
[8] Town Centre Floorspace Survey includes Co-Op but excludes former Somerfield (now Poundland – included in Comparison Floorspace calculations)

UNIT NUMBERS

4.25 The Experian GOAD Category Report identifies the following unit breakdown within Whitby Town Centre.

TABLE 6 – WHITBY; RETAIL COMPOSITION BY NUMBER OF UNITS

	2007 STUDY		2012 STUDY	
RETAIL CATEGORY	**NO. UNITS**	**% of TOTAL**	**NO. UNITS**	**% of TOTAL**
Comparison	153	42.3%	147	41.3%
Convenience	44	12.2%	40	11.2%
Retail Services	31	8.6%	27	7.6%
Leisure Services	89	24.6%	101	28.4%
Financial & Business Services	20	5.5%	21	5.9%
Vacant	25	6.9%	20	5.6%
TOTAL	**362**	**100%**	**356**	**100%**

4.26 The minor decreases in comparison and convenience floorspace in the town centre since 2007 is reflected in the decrease in unit numbers. Given that the floorspace decreases are relatively minor it suggests that the vacant units are small in size.

4.27 The decrease in retail provision has clearly been off-set by the significant growth in leisure services (12 unit increase). Whilst the increase is positive in suggesting that Whitby remains a vibrant and attractive tourist location, it can also generate potential development management issues in relation to managing impacts of night-time economy, preventing 'blank' frontages during the daytime and wider amenity issues (litter and residential amenity).

4.28 The decrease in the number of vacant units but at the same time an increase in the overall quantum of vacant floorspace suggests one larger unit was vacant at the time of the Experian GOAD survey in August 2011.

4.29 Overall, the comparative analysis appears to reinforce the conclusion that Whitby is a vital and viable centre with a low level of vacancies. There is however development pressures outside of the town centre (out-of-centre Sainsbury's store under construction) and the Council will actively need to monitor the health of the town centre at regular intervals going forward through the Local Plan process.

FILEY TOWN CENTRE

4.30 Filey is a small attractive centre which predominantly meets local shopping needs. A new Tesco store has opened in the town centre since the 2007 Study. The town also attracts a significant number of tourists and has a leisure orientated offer.

FLOORSPACE

4.31 A floorspace survey of Filey town centre was not available at the time of the 2007 Study. The latest Experian GOAD town centre survey, undertaken in May 2010, is however summarised below for reference.

TABLE 7 – FILEY FLOORSPACE COMPOSITION

Retail Category	2012 Update Study	
	Floorspace (sq m)	% of Total
Comparison	4,580	29.5%
Convenience	2,136	13.8%
Retail Service	1,161	7.5%
Leisure Service	5,314	34.3%
Financial Service	1,728	11.1%
Vacant	585	3.8%
Total	**15,504**	**100%**

4.32 The convenience floorspace in particular should be treated with caution given that the GOAD survey predated the opening of Tesco in November 2010. The Somerfield store (outside of the defined town centre boundary) has also subsequently closed. The leisure orientated offer of the town centre is clearly reflected by the floorspace composition figures.

TABLE 8 – FILEY UNIT COMPOSITION

4.33 As the table below details, the unit composition figures are unsurprising with both comparison retail and leisure service uses occupying most units.

	2012 STUDY	
RETAIL CATEGORY	NO. UNITS	% of TOTAL
Comparison	43	31.4%
Convenience	17	12.4%
Retail Services	16	11.7%
Leisure Services	40	29.2%
Financial & Business Services	14	10.2%
Vacant	7	5.1%
TOTAL	137	100%

4.34 Given the lack of previous floorspace data for Filey town centre, the Council should seek to undertake regular floorspace surveys to assess the changing competition of the centre going forward.

5. RETAIL CAPACITY METHODOLOGY

5.1 The 2007 Study was underpinned by a robust household survey (June 2007) completed across the borough and adjoining areas to establish shopping patterns and to model expenditure flows to main retail destinations in and outside the Borough.

1) STUDY AREA DEFINITION / HOUSEHOLD SURVEY

5.2 The study area and individual survey zones defined in the 2007 Study remain unchanged so as to enable a comparative assessment against the latest population and expenditure data from *Experian* (based ONS 2010 mid-year estimates)[9].

5.3 The NEMS household survey (weighted and filtered version) has however been re-run as part of the study update to remove 'Internet / Home Catalogue', 'Don't Know / Varies', 'Don't Do' and 'Don't Buy' responses.

5.4 The removal of the internet / home catalogue responses ensures that there is no 'double counting'. However, the market shares identified in the updated capacity exercise is increased from the existing baseline survey position reported in the 2007 Study. The increase in market share by virtue of the differing methodological approach is counter-balanced by the significant increase in SFT deductions applied between this study update and the previous 2007 Study.

2) DATA VARIABLES

POPULATION ESTIMATES

5.5 The population estimates and forecasts for each of the survey zones are derived from the Experian Micromarketer database (2010 ONS and Price Base). The population estimates are based on trend-line projections from the 2001 Census results and are calibrated to Local Authority District targets on the most recently available Government household and population data[10]. The population estimates are updated annually to allow for changes in housing stock and residual population.

[9] Experian Retail Planner Note 9 (September 2011)
[10] Experian Retail Planner Note 9 (September 2011)

5.6 A comparison with the 2007 Study identifies the following differences in residential population in each of the defined catchment zones (Appendix 1);

Catchment	2007 Study (2011)	2012 Update (2011)[11]
Zone 1 – Scarborough PCA	32,972	33,720
Zone 2 – Scarborough SCA North	5,204	4,934
Zone 3 – Scarborough SCA West	5,107	4,681
Zone 4 – Eastfield	11,840	11,568
Zone 5 – Seamer	8,007	8,700
Zone 6 – Irton Moor	9,282	8,776
Zone 7 – Filey	10,967	`12,473
Zone 8 – Whitby PCA	21,181	20,398
Zone 9 – Whitby SCA	5,816	3,061
Zone 10 - Staithes	(Incl. in Whitby SCA)	2,625
STUDY AREA TOTAL	**110,376**	**111,331**

5.7 The table shows that there is no consistent pattern of population growth between both assessments; in some catchments the latest Experian population figures identify a very small decrease in resident population whereas the converse in others. The overall population position therefore is one of minor growth (955 residents in 2011).

EXPENDITURE PER CAPITA

5.8 The latest available (headline) expenditure per capita figures are markedly different to the figures utilised in the 2007 Study. The table below highlights the changes in spend per head (capita) figures:

[11] 2011 Study Update Figures (Convenience and Comparison) exclude SFT deductions

	CONVENIENCE		COMPARISON	
Catchment	2007 Study (2011)	2012 Update (2011)[12]	2007 Study (2011)	2012 Update (2011)[13]
Zone 1 – Scarborough PCA	£1,455	£1,658	£3,443	£2,355
Zone 2 – Scarborough SCA North	£1,528	£2,049	£3,596	£3,098
Zone 3 – Scarborough SCA West	£1,528	£1,970	£3,661	£2,846
Zone 4 – Eastfield	£1,455	£1,671	£3,443	£2,253
Zone 5 – Seamer	£1,528	£1,793	£3,661	£2,610
Zone 6 – Irton Moor	£1,528	£1,814	£3,661	£2,649
Zone 7 – Filey	£1,528	£1,834	£3,661	£2,353
Zone 8 – Whitby PCA	£1,514	£1,954	£3,587	£2,659
Zone 9 – Whitby SCA	£1,522	£1,959	£3,629	£2,978
Zone 10 - Staithes	£1,514	£2,027	£3,587	£2,577

5.9 A comparison between the two studies identifies that there has been a significant increase in convenience expenditure per capita figures in the survey zones. Conversely there is a significant decrease in available comparison expenditure per capita. This is primarily reflects the current economic climate whereby there is less spend per person available on non-essentials than convenience goods (necessity).

EXPENDITURE GROWTH

5.10 Reflecting the current economic climate, expenditure growth has significantly decreased since the publication of the 2007 Study. The following up-to-date growth rates recommended by Experian (Briefing Note 9, September 2011) are applied to the baseline expenditure (per capita) figures.

	2011	2012	2013	2021-2026
Convenience Goods Growth	-0.3%	-0.4%	-0.5%	-0.6%
	2011	**2012**	**2013**	**2021-2026**
Comparison Goods Growth	0.5%	1.6%	2.1%	3.0%

5.11 The low growth figures reflect the current economic situation and are significantly below the figures adopted in the 2007 Study:

	2005-2016
Convenience Goods Growth	1.2% p.a.
	2005-2016
Comparison Goods Growth	5.3% p.a.

5.12 Lower growth rates (particularly the negative growth in the short term) ultimately generate a reduced expenditure capacity to support new retail provision going forward. This is particularly pertinent for comparison goods when special forms of trading (i.e. expenditure spent on retail but not physically in shops) has and is projected to significantly increase.

SPECIAL FORMS OF TRADING

5.13 Experian currently advise the following deductions for special forms of trading (e.g. expenditure not available to spend in the shops[14]):

2012 Study Update	2011	2012	2014	2018	2021	2030
Convenience SFT Deduction	4.2%	4.6%	5.4%	6.0%	6.3%	7.0%
Comparison SFT Deduction	10.0%	10.9%	12.3%	12.7%	12.4%	12.0%

5.14 The 2007 Study does not apply any deductions for special forms of trading. However, as previously explained, non-store trading responses from the household survey exercise has been removed to ensure no double counting.

SALES DENSITY IMPROVEMENTS (TRADING EFFICIENCY)

5.15 In undertaking retail capacity and impact assessments, an allowance needs to be made for growth in the turnover efficiency (or productivity) of existing retail floorspace. This growth represents the ability of retailers to increase their productivity and absorb higher than inflation increases in their overhead costs (rents, rates and service charges) by increasing their average sales densities.

[12] 2012 Study Update Figures (Convenience and Comparison) exclude SFT deductions
[13] 2012 Study Update Figures (Convenience and Comparison) exclude SFT deductions
[14] Experian define SFTs as expenditure that does not take place in shops, such as that via mail order houses, door to door salesmen and stalls and markets. It also includes spending using digital TV and over the Internet.

5.16 The following efficiency improvements have been modelled in the 2012 Study Update on the basis of the latest published Experian information, as follows:

Growth	2011-2014	2014-	2019-2026
Convenience Goods Sales Density (£/m²)	0% (p.a.)	0.4% (p.a.)	0.2% (p.a.)
Comparison Goods Sales Density (£/m²)	0.7% (2011-12) 1.8% (2012-13) 1.5% (2013-14)	1.7% (p.a.; 2014-)	1.7% (p.a.)

5.17 In contrast, the 2007 Study adopts the following assumptions:

Growth	2007-2016
Convenience Goods Sales Density (£/m²)	0.4% (p.a.)
Comparison Goods Sales Density (£/m²)	2% (p.a.)

5.18 A comparison between the respective studies shows that whilst sales density growth in the longer term is broadly comparable (Experian projects that it will grow in accordance with historic longer term trends) it is reduced in the short term (i.e. no growth in convenience).

BENCHMARK TURNOVERS

5.19 In order to review the current performance of principal convenience stores in the Borough, we have firstly modelled existing performance and turnover through the household survey data, and secondly compared their existing turnover with estimates of trading at company average levels (Table 6, Appendices 2 and 3).

5.20 The company average trading levels have been calculated from average (goods-based) sales density figures obtained from the latest *Mintel Retail Rankings* and *Verdict* data.

2) AVAILABLE EXPENDITURE CAPACITY

5.21 On the basis of the revised population and expenditure figures, the overall revised expenditure capacity is detailed below:

	CONVENIENCE			COMPARISON		
Catchment	2007 Study (2011)	2012 Update (2011)	DIFF.	2007 Study (2011)	2012 Update (2011)	DIFF.
Zone 1	£48.0m	£53.4m	£5.4m	£113.5m	£70.3m	£43.2m
Zone 2	£8.0m	£9.7m	£1.7m	£19.1m	£13.5m	£5.6m
Zone 3	£7.8m	£8.8m	£1.0m	£18.7m	£11.8m	£6.9m
Zone 4	£17.2m	£18.5m	£1.3m	£40.8m	£23.1m	£17.7m
Zone 5	£12.2m	£14.9m	£2.7m	£29.3m	£20.1m	£9.2m
Zone 6	£14.2m	£15.2m	£1.0m	£34.0m	£20.6m	£13.4m
Zone 7	£16.8m	£21.9m	£5.1m	£40.2m	£26.0m	£14.2m
Zone 8	£32.1m	£38.2m	£6.1m	£76.0m	£48.0m	£28.0m
Zone 9	£8.9m	£5.7m	£3.2m	£21.1m	£8.1m	£13.0m
Zone 10	N/A	£5.1m	-	N/A	£6.0m	-

5.22 The table shows there has been a significant increase in the amount of available convenience expenditure in all zones within the Borough. The figure from the Whitby SCA catchment should be treated with caution given that the study update disaggregates the Staithes area from the SCA into a separate standalone catchment.

5.23 Given the significant deduction in comparison (per capita) expenditure allied to lower expenditure growth rates and increasing deductions for special forms of trading (unlike the 2007 Study), there is substantially less comparison expenditure available within the Borough. The deduction in the quantum of available expenditure in the Whitby SCA catchment is however partially counterbalanced by the identification of capacity for the Staithes area on an individual zone basis.

5.24 On the basis of the updated quantitative baseline (population and expenditure figures), the capacity findings for the Borough and forward strategy implications are set out below for convenience and comparison goods on an individual centre basis.

6. CONVENIENCE QUANTITATIVE ANALYSIS

6.1 Applying the results of the household telephone survey (June 2007) to population, expenditure and floorspace data inputs detailed in the previous section, it is possible to model the performance and market share of existing town centres, main foodstores and retail park destinations.

6.2 However, the retail analysis represents a *'point-in-time'* assessment and there have been a number of changes in convenience retail provision in the borough since the 2007 Study including:

- The opening of a new Tesco foodstore in Filey; and
- The change in fascia from Somerfield to Nisa Local (subsequently closed) in Whitby following the national merger between Somerfield and Co-Op (already represented in the town).

6.3 These changes need to be borne in mind when considering the market share analysis summarised below. The likely impacts of the commitments are considered later in the report. Ultimately a new household survey exercise would be required to draw definitive conclusions on market share and store performance.

6.4 The findings of the quantitative-based update is set out below along with consideration of future development strategy options for the principal town centres in light of current planning commitments and planned schemes.

1) MAIN FOOD

6.5 As detailed above, the market shares are identified from a household survey which was undertaken prior to the opening of new foodstores and fascia changes. The main headline findings (Table 5a, Appendix 2) are however set out in summary below on a zonal basis:

- **Zone 1 (Scarborough PCA)**; Tesco Westwood store is the principal destination (38.6% / £15.5m) followed by Sainsbury's Falsgrave (20.6% / £8.4m) and the out-of-centre Morrison's (18.2% / £7.3m). Overall retention within the Scarborough urban area is 98.5% (£39.5m).

- **Zone 2 (Scarborough SCA North)**; Tesco Westwood is the main destination (26.1% / £1.9m) followed by Morrison's (19.6% / £1.4m) and Sainsbury's Falsgrave (15.2% / £1.1m). The Proudfoot Scalby store performs a notable local role (10.9%/ £0.8m). Overall retention within the Scarborough urban area is 93.5% (£6.7m).

- **Zone 3 (Scarborough SCA West)**; Morrison's is the main destination (48.9% / £3.2m), followed by Sainsbury's Falsgrave (15.6% / £1.0m). Tesco Westwood only secures (4.4% / £0.3m). Overall retention within the Scarborough urban area is 93.3% (£6.1m).

- **Zone 4 (Eastfield)**; Morrison's is the main destination (65% / £9.0m) followed by Tesco Westwood (14.5% / £2.0m). Overall retention within the Scarborough urban area is 98.4% (£13.7m).

- **Zone 5 (Seamer)**; Morrison's (60.6% / £6.8m) is the main destination followed by Tesco Westwood (18.2% / £2.0m). Overall retention within the Scarborough urban area is 99.9% (£11.2m).

- **Zone 6 (Irton Moor)**; Tesco Westwood is the main destination (32.3% / £3.7m) followed by Sainsbury's Falsgrave (27.7% / £3.2m) and Morrison's (13.8% / £1.6m). Overall retention within the Scarborough urban area is 100% (£11.3m).

- **Zone 7 (Filey)**; Filey secures a 20.5% (£3.3m) market share from its immediate catchment. The Somerfield store is the main local destination (17.3% / £2.8m). Outside of Filey the main destinations are Morrison's (43.3% / £7.1m) and Tesco Bridlington (11.8% / £1.9m).

- **Zone 8 (Whitby PCA)**; Whitby retains 56.4% (£16.1m) of expenditure arising in its immediate catchment. The Co-Op is the main destination (37.9% / £10.9m) with Somerfield securing a 16.0% (£4.6m) market share. The out-of-centre Lidl secures a further 8.1% (£2.3m). The main leakage is to Scarborough with Morrison's the main destination (14.4% / £4.1m).

- **Zone 9 (Whitby SCA)**; Whitby retains 23.4% (£1.0m) of expenditure arising in its immediate catchment. The Co-Op is the main destination (17.0% / £0.7m) with Somerfield securing a 4.3% (£0.2m) market share. The main leakage is to foodstores in Guisborough (Morrison's 25.5% / £1.1m; Sainsbury's 19.1% / £0.8m).

- **Zone 10 (Staithes)**; most local residents in the catchment look towards foodstore provision in Redcar and Guisborough. Whitby does however attract a 25.6% (£1.0m) market share. Co-Op is the main destination for those who shop in Whitby (18.6% / £0.7m).

2) TOP-UP FOOD SHOPPING

6.6 Top-up food shopping is by its very nature highly localised with shoppers either visiting local shops in close walking proximity to home or provision which is conveniently located in relation to travel-to-work patterns (i.e. drive-by trade). The market shares are therefore highly dissipated.

6.7 The survey results (Table 5B, Appendix 2) identify the following headline market share performance:

- **Zone 1 (Scarborough PCA)**; provision within Scarborough town retains 47.3% (£6.3m). Local shops within the town centre secure a notable market share (10.8% (£1.4m). Local centre and out-of-centre provision in Scarborough retains a further 50.8% (£6.8m). Overall retention within Scarborough is therefore 98.1% (£13.1m).
- **Zone 2 (Scarborough SCA North)**; provision within Scarborough town retains 37.3% (£0.9m). Sainsbury's Falsgrave is the main town destination (14.3% / £0.3m). Local centre and out-of-centre provision in Scarborough retains a further 57.3% (£1.4m). Overall retention within Scarborough is 94.6% (£2.3m).
- **Zone 3 (Scarborough SCA West)**; provision within Scarborough town retains 32.4% (£0.7m). Tesco Westwood is the main town destination (10.8% / £0.2m). Local centre and out-of-centre provision in Scarborough retains a further 62.1% (£1.4m). Overall retention within Scarborough is 94.5% (£2.2m).
- **Zone 4 (Eastfield)**; provision within Scarborough town retains 35.8% (£1.7m). M&S in the town centre is the main town destination (10.1% / £0.5m). Local centre and out-of-centre provision in Scarborough retains a further 63.9% (£3.0m). Overall retention within Scarborough is 99.7% (£4.6m).
- **Zone 5 (Seamer)**; provision within Scarborough town retains 35.9% (£1.3m). Tesco Westwood is the main town destination (13.2% / £0.5m). Local centre and out-of-centre provision in Scarborough retains a further 62.2% (£2.3m). Overall retention within Scarborough is 98.1% (£3.7m).

- **Zone 6 (Irton Moor)**; provision within Scarborough town retains 56.3% (£2.1m). Sainsbury's Falsgrave is the main town destination (23.6% / £0.9m). Local centre and out-of-centre provision in Scarborough retains a further 43.7% (£1.7m). Overall retention within Scarborough is 100% (£3.8m).
- **Zone 7 (Filey)**; provision within Filey town retains 53.3% (£2.9m). Hunamby local centre retails a further 23.7% (£1.3m). Overall retention is 83.4% (£4.6m). There is minor leakage to Scarborough (13.7% / £0.7m).
- **Zone 8 (Whitby PCA)**; provision within Whitby town retains 39.7% (£3.8m). Out-of-centre provision in Whitby (principally Lidl) and other facilities in the Whitby PCA catchment retain a further 46.5% (£4.4m). Overall retention is 86.2% (£8.2m).
- **Zone 9 (Whitby SCA)**; provision within Whitby town retains 28.2% (£0.4m). Out-of-centre provision in Whitby (principally Lidl) and other facilities in the Whitby PCA catchment retain a further 12.9% (£0.2m). Overall retention is 41.1% (£0.6m). Sainsbury's Guisborough attracts a 15.4% (£0.2m) top-up share from the SCA zone.
- **Zone 10 (Staithes)**; provision within Whitby town secures an 18.5% (£0.2m) market share. The out-of-centre Lidl secures 11.1% (£0.1m). Most local residents in the catchment (63.0% / £0.8m) undertake top-up shopping outside of the borough.

3) INDIVIDUAL STORE PERFORMANCE

6.8 On the basis of the main food and top-up expenditure patterns identified through the household survey exercise, the capacity modelling exercise (Table 6, Appendix 1) identifies the following trading performance of main foodstores in the Borough.

6.9 Whilst the survey-based assessment identifies the turnover performance of existing local independent shops within respective town and local centres, it is not possible to accurately estimate the 'expected' sales performance of local independents given the lack of published sales data.

Store	Survey Turnover	Benchmark Turnover	Performance over Benchmark
Scarborough			
M&S (Scarborough TC)	£5.1m	£3.8m	**+£1.3m**
Iceland (Scarborough TC)	£3.2m	£1.9m	**+£1.3m**
Tesco (Westwood)	£30.6m	£21.7m	**+£8.8m**
Aldi (Northway)	£4.4m	£3.3m	**+£1.1m**
Sainsbury's (Falsgrave)	£19.9m	£29.7m	**-£9.8m**
Scarborough (Trading Balance)	**£63.2m**	**£60.4m**	**+£2.8m**
Scarborough			
Somerfield (Filey)	£3.8m	£1.7m	**+£2.1m**
Whitby			
Co-Op (Endeavour Wharf)	£14.9m	£10.9m	**+£4.0m**
Lidl (Stakesby Road)	£4.6m	£2.6m	**+£2.0m**

6.10 Notwithstanding the trading position identified through the original household survey, there have been a number of foodstore developments and changes in provision which have come forward over the past few years which will reduce the trading performance and alter shopping patterns.

4) CONVENIENCE COMMITMENTS

6.11 There are a number of foodstore commitments which have opened (Tesco Filey), are under construction (Sainsbury's Whitby) or have planning permission to extend (Sainsbury's Falsgrave) or construct a replacement store (Tesco Westwood). All four foodstore commitments are likely to have an impact on store performance and market share of particular existing stores in the Borough as follows:

NEW STORES

- **Tesco (Filey)[15];** new edge-of-centre foodstore (1,376 m^2 net). The store is likely to have reversed main food trade leakage to Tesco Bridlington as well as to stores in Scarborough (principally the out-of-centre Morrison's).

[15] LPA ref. 09/01301/FL

- **Sainsbury's (Whitby)[16];** new out-of-centre foodstore (2,787 m^2 net). The store is likely to draw trade away from the existing in-centre Co-Op whilst significantly enhancing retention levels through reversing main food leakage to foodstores outside of the district (primarily Morrison's and Sainsbury's in Guisborough).

STORE EXTENSIONS

- **Tesco Westwood (replacement new-build)[17]**; the approved new store at Dean Road will deliver an uplift of 1,198 m^2 net convenience floorspace increase on the existing Westwood store. The extension should generate greater competition with the existing Sainsbury's Falsgrave and out-of-centre Morrison's store.

- **Sainsbury's Falsgrave[18]**; the approved store extension will deliver an additional 1,017 m^2 net convenience floorspace increase on the existing store. A larger store with a full range offer should begin to attract additional shoppers from the out-of-centre Morrison's store as well as fully competing with the existing edge-of-centre (soon to be relocated) Tesco Westwood store.

6.12 Whilst there have also been a number of convenience store fascia changes which have taken place since the 2007 Study which may have had localised impacts on identified market shares, it would not be possible to accurately quantify the changes in local market share (particularly for top-up shopping).

6.13 In addition to the planning commitments within the borough, there are two commitments in surrounding towns which will potentially be attractive to local residents residing to the north of Whitby and south and east of Scarborough as follows:

- **Skelton (Redcar & Cleveland BC)[19];** planning permission recently granted for a 2,323 m^2 net Asda foodstore.

- **Malton (Ryedale DC)[20];** outline planning permission granted for a 3,086 m^2 net foodstore in Malton.

[16] LPA ref. 09/02118/FL
[17] LPA ref. 11/00019/FL
[18] LPA ref. 10/02538/FL
[19] LPA ref. R/2012/0154/RSM (re-submission)
[20] LPA ref. 11/00927/MOUT

6.14 Whilst the two commitments will not be taken into account in assessing quantitative capacity in the Borough they are relevant in considering potential for market share enhancement going forward.

5) QUANTITATIVE CAPACITY

BOROUGH-WIDE CAPACITY

6.15 When the total turnover of all convenience provision within the Borough (survey zones 1 to 10) is projected forward against forward population and expenditure growth, the capacity assessment (Table 8, Appendix 2) identifies that a quantitative need for new convenience provision only emerges in the latter stages (post 2021) of the emerging Local Plan period.

6.16 The capacity identified in 2030 (c. 1,100 m^2 net) would be sufficient to support a smaller format store operated by a mainstream retailer (Asda, Morrison's, Tesco or Sainsbury's) or two discount format stores (Aldi, Lidl etc.).

6.17 However, when commitments (Table 7, Appendix 2) within the Borough are taken into account, there is no need for the Council to proactively plan for new convenience provision in the Borough over the emerging Local Plan period.

SCARBOROUGH

6.18 The capacity modelling assessment identifies that existing convenience provision within Scarborough presently retains above 90% of all convenience expenditure arising within the Scarborough PCA and SCA, Eastfield and Seamer zones. There is consequently no realistic potential to achieve market share enhancement.

6.19 Whilst the identified levels of overtrading at the existing edge-of-centre Tesco Westwood and particularly out-of-centre Morrison's stores in the town would ordinarily generate both a quantitative and qualitative requirement for new provision in order to enhance local choice and competition, the following factors to be factored into the final assessment and strategy for convenience provision in the town:

- **New Tesco Store**; the recent approval of a new full-range Tesco store at Dean Road to replace the existing Tesco Westwood store will alleviate current overtrading conditions and better enable the store to compete on a like-for-like basis with the out-of-centre Morrison's. The new Tesco store will also deliver sustainability and linked trip benefits by drawing local residents back from the Morrison's store to a location in close proximity to the town centre.

- **New Sainsbury's Extension**; the recent approval of a substantial extension to the existing Sainsbury's Falsgrave store will enable the store to better compete with both the Tesco and Morrison's stores. The 2007 Survey identified that the store is presently not trading at expected levels and therefore the extension should make it more attractive to local residents.
- **Foodstore Commitments in Filey and Whitby**; the 2007 Survey identified that the three main foodstores in Scarborough (Sainsbury's, Morrison's and Tesco) all benefited from inflows from the Filey and Whitby catchments due to deficiencies in mainstream foodstore provision in those towns. The subsequent opening of a new Tesco store in Filey allied to the ongoing construction of the Sainsbury's Whitby store should reverse present outflows and thereby significantly reduce the trading performance of the existing foodstores in Scarborough.

6.20 On the basis of the above, the trading position in Scarborough should move towards trading 'equilibrium' with the new enhanced foodstore offer having re-distributed existing expenditure rather than increasing market share beyond the already significantly high retention levels (particularly main food).

6.21 As a consequence of the foodstore commitments and the limited potential for market share enhancement, the capacity assessment (Table 9, Appendix 2) identifies that there is no need for the Council to proactively plan for new convenience provision in the Borough over the Local Plan period.

6.22 This position should however be reviewed for the latter stages of the Local Plan once trading patterns settle down following the opening of the new foodstores (Tesco Scarborough relocation, Tesco Filey and Sainsbury's Whitby) and existing store extension (Sainsbury's Falsgrave) comes forward.

WHITBY

6.23 The capacity modelling assessment (Table 5a, Appendix 2) identifies that existing convenience provision in Whitby only secures 56.4% (£16.1m) of main food expenditure arising in its primary catchment (Zone 8 – Whitby PCA) and around a quarter from both the Whitby SCA and Staithes catchment zones to the north of the town. There are considerable outflows of main food expenditure to mainstream foodstore destinations in Scarborough and particularly Guisborough.

6.24 Whilst the existing Co-Op in Whitby performs a main food function (37.9% market share from the PCA), it is clear that the store cannot qualitatively compete with larger foodstore destinations outside of the town (limitations on range of goods etc.).

6.25 Ordinarily there would be a clear quantitative and qualitative justification to enhance the town's market share through provision of a new full-range mainstream foodstore in order to facilitate clawback of expenditure presently flowing to competing provision elsewhere; this would generate appropriate monetary (increased expenditure retention) and sustainability benefits (reduced need to travel).

6.26 The approval and subsequent construction of a new full range out-of-centre Sainsbury's store in the town (schedule to open in mid to late 2012) will achieve the identified quantitative and qualitative benefits for local residents.

6.27 Allied to the new Sainsbury's store, a new Asda store is to be constructed in Skelton (Redcar & Cleveland BC) which will enhance choice for local residents living to the north of the town in Whitby SCA and Staithes given proximity and road access.

6.28 Therefore, on the basis of the emerging Sainsbury's scheme and the prospective limitations on securing further market share enhancement from the Whitby SCA and Staithes catchments due to the new Asda, the capacity modelling exercise (Table 10b, Appendix 2) identifies that there is no need for the Council to proactively plan for a new foodstore in the town over the early stages of the emerging Local Plan period.

6.29 It is recommended that any assessment of need or capacity for Whitby is completed through a full update to this study, including new household survey, once trading patterns have settled down after the opening of the store.

6.30 In the meantime, it is important that the Council actively continues to monitor the health of the town centre both before and after the opening of Sainsbury's. Whilst the new store will deliver significant benefits, it is located a considerable distance to the south of the town centre in an out-of-centre location and the existing linked trips associated with the Co-Op will be reduced (notwithstanding the proposed shopper bus service to the town centre from the store).

FILEY

6.31 Similar to Whitby, the survey findings provide a clear justification for new foodstore provision to achieve market share enhancement (i.e. clawback from stores in Scarborough and Bridlington) and better meet local main food shopping needs.

6.32 However, the opening of a new Tesco store in Filey in late 2010 has addressed the existing deficiency in convenience provision. Therefore, given the existing store and the fact that Filey serves a relatively limited geographical catchment, the capacity assessment (Table 11, Appendix 2) identifies no need for the Council to proactively plan for new foodstore provision in the town over the emerging Local Plan period.

6.33 As per Whitby, an assessment of future needs for the latter stages of the Local Plan should be undertaken through commissioning a new household telephone survey. The Council in the meantime should continue to actively monitor the health of the town centre.

7. COMPARISON QUANTITATIVE ANALYSIS

7.1 The overall quantum of expenditure available to support existing and new comparison provision is reduced from the 2007 Study due to lower expenditure growth and higher deductions for non-store trading (SFTs). A summary of the survey results in relation to the updated expenditure pot are set out below prior to assessing capacity and establishing the forward strategy for the Borough as a whole and its three principle town centres.

7.2 At the outset however it is important to note that the quantitative assessment is solely based on local resident shopping patterns and does not include any inflow arising from seasonal tourist expenditure. Whilst it is possible that existing retail provision will achieve a higher turnover than that specified in the assessment due to seasonal tourist spend, the retail study seeks to robustly identify local needs given the lack of up-to-date visitor information[21] for the main town centres.

1) MARKET SHARE ANALYSIS

SCARBOROUGH

OVERALL MARKET SHARE

7.3 The assessment (Table 17, Appendix 3) identifies that the town centre achieves an overall turnover (all comparison goods combined) of c. £140.4m in 2012. This overall town centre turnover is made up from strong retention levels in the immediate (individual) catchment zones surrounding the town:

ZONE	TOWN CENTRE MARKET SHARE (% / £)	OVERALL EXPENDITURE POT (PER ZONE)
ZONE 1 – SCARBOROUGH PCA	**71.1%** / £50.6m	£71.2m
ZONE 2 – SCARBOROUGH SCA (NORTH)	**63.9%** / £8.6m	£13.5m
ZONE 3 – SCARBOROUGH SCA (WEST)	**65.1%** / £7.7m	£11.9m

[21] 2007 Borough-wide Retail Study included inflow based on 2004 Impact of Tourism Study (Scarborough) and 2007 On-Street Surveys

ZONE 4 - EASTFIELD	**64.1%** / £15.0m	£23.4m
ZONE 5 – SEAMER	**61.7%** / £12.6m	£20.4m
ZONE 6 – IRTON MOOR	**78.8%** / £16.3m	£20.7m

7.4 Whilst Scarborough town centre also secures just over half (52% / £13.6m) of all comparison goods expenditure arising in the Filey catchment zone, it is clear that the influence of the town centre as the primary shopping destination significantly decreases. Scarborough only secures just over one third (c. £15m) of comparison expenditure arising in the Whitby PCA and only 8% (£0.7m) from the Whitby SCA.

7.5 The main competition to the town centre from its core (borough-based) catchment is the existing out-of-centre Seamer Road Retail Park. The survey exercise identifies that the retail park achieves an overall comparison goods turnover of c. £10.1m from the Scarborough PCA and c. £29m from entire study area (survey zones 1 – 10).

7.6 Whilst the town centre retains a significant quantum of expenditure arising in the borough, the survey results do however identify that local residents in the Whitby PCA in particular look towards retail provision in Middlesbrough (including the out-of-centre Teesside Retail Park).

INDIVIDUAL COMPARISON GOODS

7.7 The overall market share secured by the town centre does however hide variances in retention levels for individual comparison goods (Tables 5 - 16, Appendix 3). Importantly, the survey results show that the town centre performs strongly in relation to 'high street' comparison goods such as clothing and personal (luxury) goods and weaker in relation to bulky goods.

7.8 The lower levels of market share retention for bulky goods is however to be expected given that bulky goods provision is usually located on out-of-centre retail warehouse parks and that there is a concentration of such destinations in and around the Seamer Road Retail Park.

LEAKAGE

7.9 Given the relatively high levels of retention achieved by both the town centre and out-of-centre retail provision, there is limited expenditure leakage out of the Borough. The main leakage destinations from the Scarborough PCA (zone 1), Scarborough SCA

North and West catchments (zones 2 and 3) are to York (£4.2m trade draw from the Scarborough catchments; £11.7m trade draw from Borough as a whole)[22].

7.10 The outflows in our view predominantly relate to the higher order fashion offer (national and international niche fashion chains) available in the centre rather than any significant qualitative deficiency in provision within Scarborough at present.

WHITBY

OVERALL MARKET SHARE

7.11 The 2007 Study identified that the town performed an extremely limited and highly localised comparison retail function; this reflects the nature of its existing comparison offer (predominantly orientated to day-to-day comparison needs) and the lack of national multiple representation in the town (particularly fashion).

7.12 The quantitative and qualitative deficiencies in the retail offer are reflected by the survey results (Table 17, Appendix 3) which identify that the town achieves an overall market share of 35.8% (£17.4m) from its immediate catchment (Whitby PCA – zone 8). This is slightly above the market share which Scarborough draws from the catchment (30.9% / £15.0m). Middlesbrough (9.1% / £4.4m) and Seamer Road Retail Park (4.7% / £2.3m) are other notable destinations.

7.13 The town centre market share decreases to 13.3% (£1.1m) in relation to the Whitby SCA catchment; most local residents look towards Middlesbrough (25.0% / £2.0m) whilst Teesside Retail Park secures a 7.9% (£0.6m) overall market share.

7.14 The town centre market share from the Staithes catchment, whilst further north than the Whitby SCA catchment, is above the Whitby SCA retention figure (24.2% / £1.5m market share).

INDIVIDUAL COMPARISON GOODS

7.15 There is a significant variance in the market share that the town centre secures for individual comparison goods, as highlighted in the table below[23]:

[22] Table 17 Appendix 3 (Overall Comparison Goods Market Share)
[23] Summary of individual comparison goods – not all referenced; refer to Tables 5 – 16, Appendix 3.

COMPARISON GOODS	ZONE 8 (WHITBY PCA)	ZONE 9 (WHITBY SCA)	ZONE 10 (STAITHES)
CLOTHING	11.4% (£1.3m)	2.2% (£0.04m)	10.4% (£0.1m)
CHEMIST GOODS	89.7% (£1.7m)	40.4% (£0.1m)	63.6% (£0.1m)
ELECTRICAL GOODS	36.5% (£4.4m)	2.8% (£0.05m)	29.4% (£0.4m)
FURNITURE	63.6% (£3.0m)	33.4% (£0.3m)	46.2% (£0.3m)
DIY GOODS	41.6% (£1.4m)	21.9% (£0.1m)	18.0% (£0.08m)

7.16 The relatively low clothing market share reflects the limitations of the current town centre fashion offer and the secondary position of the town in both the borough hierarchy and more widely the regional hierarchy. The town cannot compete with the range and concentration of national multiple fashion retailers which are consolidated in the larger centres (larger footfall, attraction, enhanced linked trips).

LEAKAGE

7.17 As previously detailed, a large number of local residents look towards higher order centres such as Scarborough and Middlesbrough to meet their main comparison shopping needs. Whitby performs a highly localised function commensurate with its current retail offer.

FILEY

7.18 Filey is a smallest of the three principal towns in the borough. The relatively limited retail offer is reflected in the low retention levels that the town secures from its immediate catchment (zone 7). There are negligible inflows from surrounding catchments in the borough (i.e. southern part of the Eastfield zone).

OVERALL MARKET SHARE

7.19 The town presently retains 17.3% (£4.5m) of all comparison goods expenditure arising in its immediate catchment (zone 7). Most local residents in the catchment look towards Scarborough town centre (52% / £13.6m) and the out-of-centre Seamer Road Retail Park (11% / £2.9m). There is limited leakage outside of the borough but York city centre is the main destination (3.8% / £1.0m).

INDIVIDUAL COMPARISON GOODS

7.20 The town's limited offer is reflected in the relatively low marker shares that it secures for individual comparison goods, as highlighted below:

COMPARISON GOODS	ZONE 7 (FILEY)
CLOTHING	3.9% (£0.2m)
RECREATIONAL GOODS	8.7% (£0.3m)
BOOKS & STATIONARY	33.7% (£0.4m)
CHEMIST GOODS	53.4% (£0.6m)
ELECTRICAL GOODS	27% (£1.9m)
DIY GOODS	21.2% (£0.4m)

7.21 Whilst the market share that the town secures for particular comparison goods (i.e. electrical or CDs) is likely to have increased since the household survey was completed due to the opening of a new Tesco store in the town, it is clear that most local residents look towards the larger centres (principally Scarborough) to meet their main comparison shopping needs. The town only performs a top-up comparison shopping function.

LEAKAGE

7.22 As previously detailed, the main outflow of comparison expenditure (Tables 5 – 17, Appendix 3) from the Filey catchment is to Scarborough which secures an 80.6% (£4.6m) market share for clothing and fashion goods for example.

2) BASELINE QUANTITATIVE POSITION

BOROUGH-WIDE CAPACITY

7.23 When the projected turnover of the non-food (comparison) element of the committed foodstore developments (Table 19, Appendix 3) are applied to the baseline turnover position for the borough[24] (£210.9m in 2012 – projected forward

[24] Borough Turnover includes all town centres, local centres and Seamer Road Retail Park

thereafter on constant market share basis), the capacity assessment (Table 20b, Appendix 3) identifies that there is no need for the Council to plan for new comparison retail provision until the latter stages of the emerging Local Plan when capacity is identified for c. 2,400 m^2 net in 2021, rising to c. 10,000 m^2 net by 2030.

7.24 Given the time lapse until capacity is projected to be available in the Borough, it is recommended however that the Council seek to commission a new retail study exercise once the commitments have built-out in order to ensure a robust basis on which to assess future needs across the borough.

TOWN CENTRE CAPACITY

7.25 Adopting a similar approach to Borough-wide capacity approach above, when commitments are taken into account, the capacity assessment (Tables 21-23, Appendix 3) identifies the following need through the emerging Local Plan period:

- **SCARBOROUGH**; no need for new floorspace until the latter stages of the emerging LDF (c. 4,000 m^2 net capacity by 2030).
- **WHITBY**; minor capacity for new floorspace (c. 300 m^2 net by 2030).
- **FILEY**; no capacity through the LDF period.

7.26 In all instances the capacity figures are generated on a constant market share basis which assumes no scope for further market share enhancement beyond the levels identified in the 2007 household survey. Consideration of the potential for the respective towns to achieve market share enhancement is set out below.

3) FORWARD STRATEGY

SCARBOROUGH

TOWN CENTRE

7.27 The 2007 Study identified that the town centre was performing strongly and in line with expectations for a sub-regional centre. The town centre was found to be vital and viable centre with a good balance of national multiple and local independents. In quantitative terms, the town was found to have good expenditure / trade retention with strong expenditure growth in particular generating substantive forward capacity (c. 6,300 m^2 net by 2011).

7.28 Since the 2007 Study the town has remained relatively stable; a recent floorspace survey has identified marginal changes in retail floorspace and associated limited increases in vacancies. The vacancies that have come forward are smaller units in predominantly secondary retail areas of the town centre and are likely to reflect the ongoing adverse economic climate rather than the centre declining in viability terms (i.e. no identifiable physical deficiencies in terms of its offer).

7.29 With respect to forward capacity, the updated quantitative assessment identifies that there is significantly less available expenditure to support existing and new provision due to weaker expenditure growth and increased competition from the internet. As a consequence, the capacity assessment identifies limited need for new comparison retail provision in the early phases of the emerging LDF. This capacity has in any event has already been absorbed by the recently approved extensions to existing edge-of-centre foodstores in the town (Tesco and Sainsbury's) which will provide a wide range of comparison goods (albeit predominantly geared towards impulse shopping).

7.30 Notwithstanding the approved extensions to the foodstores, we currently consider that there is no need for the Council to proactively plan for quantitative expansion of the town centre through the early stages of the emerging Local Plan period. Whilst there is potential to further enhance the town's market share, given the existing high levels of expenditure retention for 'high street' comparison goods, any market share enhancement would only be achieved if new provision comes forward which is of sufficient qualitative to improve the existing retail offer.

7.31 However, given the current commercial climate and the relative position of Scarborough in the regional hierarchy, it may be difficult in our view for the town to attract the higher order fashion retailers (international brands etc.) above and beyond the existing mid-market provision in order to deliver a true step-change in the town's performance.

7.32 However, whilst the assessment identifies a limited need in the short to medium term, it is recommended that the emerging policy framework is not unduly prescriptive and should build in sufficient flexibility in order to respond to potential developer-led schemes which could come forward. Any comprehensive regeneration scheme within the town centre is however only likely to be delivered on the basis of operator demand. The Council should therefore seek to proactively work with existing or prospective land owners and developers to explore potential regeneration options as appropriate.

7.33 In addition to the more quantitative based initiatives, the Council should continue to promote the town's independent retail and leisure offer. Investment in physical improvements to the shopping environment (public realm) allied to appropriate town centre management initiatives can assist in promoting and diversifying the town centre as a shopping and leisure destination in the wider region.

OUT-OF-CENTRE PROVISION

7.34 On the basis of the study findings, it is our view that there is no need for additional out-of-centre comparison retail provision (Seamer Road) through the emerging LDF period. The priority for the Council should be to seek, where appropriate, to effectively manage the existing mix of comparison retail uses by preventing a 'drift' towards open retail use. The diversification of traditional retail warehouse parks to accommodate 'high street' style comparison retailers could begin to undermine the vitality of the town centre going forward.

WHITBY AND FILEY

7.35 Given the existing deficiencies in comparison provision in both towns (predominantly top-up orientated with limited national multiples representation), the capacity modelling assessment identifies limited need for new provision going forward through the emerging LDF period.

7.36 Whilst there is potential to enhance current performance to better meet local residents' daily shopping needs, having regard to the realities of operator demand and current market conditions, it will be a significant challenge for Whitby and Filey to attract the appropriate quantum and quality of comparison retailers required to achieve the necessary step-change in performance.

7.37 It is our view that the overriding emphasis for emerging policy should be on measures to promote and qualitatively diversify the respective centres retail and leisure offer rather than plan for significant physical (quantitative) enhancement. We consider that there is no formal requirement to allocate any new sites for retail development in the short to medium term phase of the emerging Local Plan.

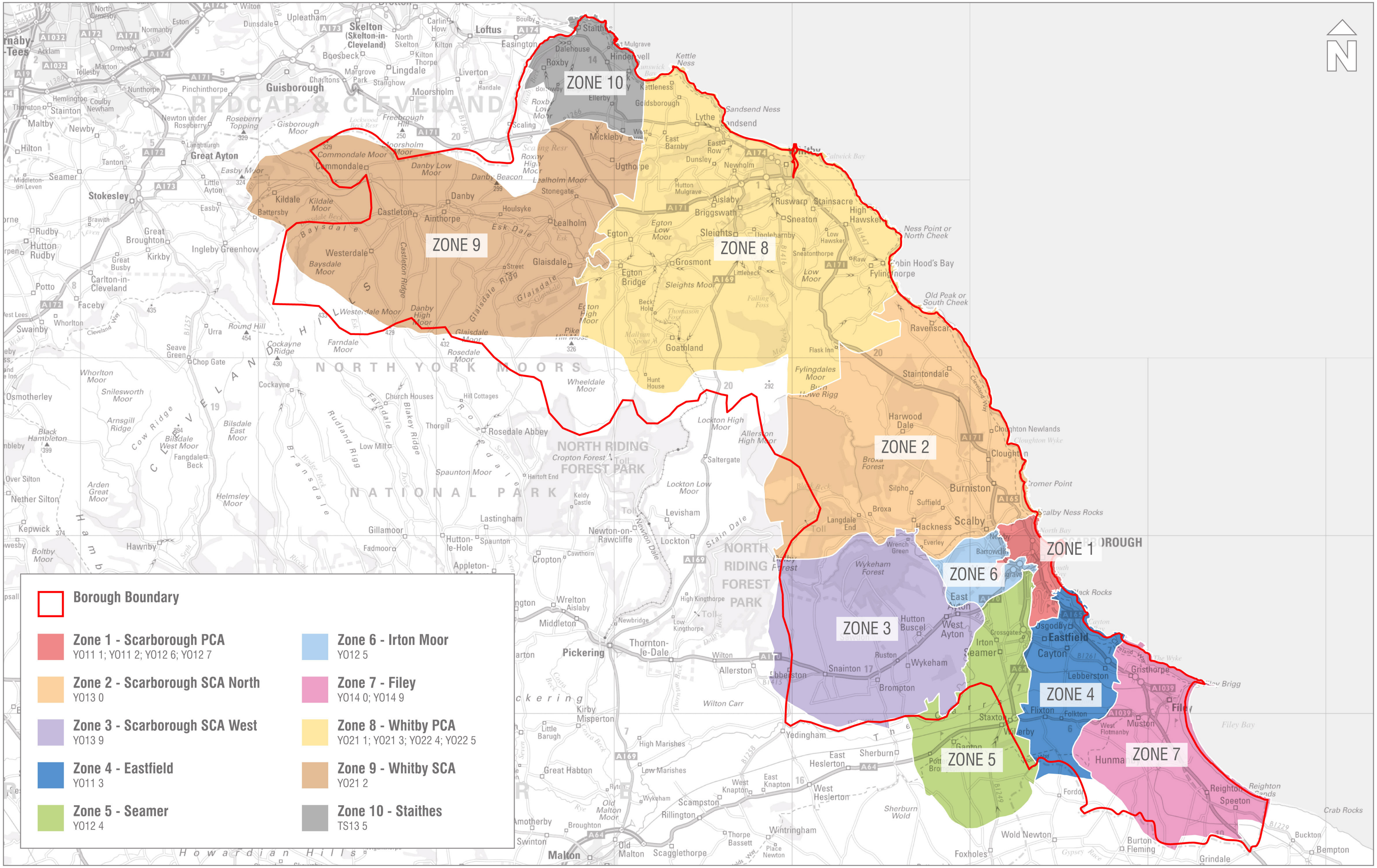
7.38 The impact of the proposed new out-of-centre Sainsbury's store in Whitby on the town centre should however be actively monitored once trading in order to understand the potential impacts arising in both convenience and comparison terms. The reality should be that the store will achieve clawback of expenditure which is presently flowing from the Whitby catchment to surrounding centres and foodstores.

7.39 If sequentially compliant proposals do however emerge outside of the Local Plan process then there is scope to support new comparison retail provision subject to the Council being genuinely satisfied that any proposals will achieve qualitative improvements in the town centre retail offer rather than simply replicating existing provision.

LOCALISED NEEDS (BOROUGH-WIDE)

7.40 There are no overriding spatial deficiencies in retail provision (particularly convenience facilities) across the Borough; the existing network of local and district centres adequately meet local resident needs.

7.41 Additional retail needs generated by potential major new developments in the Borough (i.e. emerging Potash mining proposal) should be assessed on a scheme-specific basis having regard to the likely (net) employment levels generated. Particular emphasis should be placed on new (temporary but particularly permanent) residents in the Borough; employment opportunities generated for existing local residents should not be 'double-counted' in any quantitative assessment.



Scarborough Retail Study Update

Catchment Plan

GVA

SCARBOROUGH RETAIL STUDY UPDATE - CONVENIENCE

TABLE 1 - SURVEY AREA POPULATION FORECASTS

SURVEY ZONE	POPULATION PROJECTIONS							POPULATION GROWTH (%)			
	2010	2011	2012	2014	2018	2021	2030	2010 - 2012	2012-2014	2012-2021	2012-2030
ZONE 1 - SCARBOROUGH PCA	33,535	33,720	33,922	34,290	35,321	36,122	38,767	1.2%	1.1%	6.5%	14.3%
ZONE 2 - SCARBOROUGH SCA NORTH	4,890	4,934	4,874	4,858	4,899	4,897	4,886	-0.3%	-0.3%	0.5%	0.2%
ZONE 3 - SCARBOROUGH SCA WEST	4,652	4,681	4,678	4,707	4,765	4,797	4,939	0.6%	0.6%	2.5%	5.6%
ZONE 4 - EASTFIELD	11,545	11,568	11,668	11,853	12,087	12,377	13,077	1.1%	1.6%	6.1%	12.1%
ZONE 5 - SEAMER	8,661	8,700	8,764	8,971	9,252	9,534	10,246	1.2%	2.4%	8.8%	16.9%
ZONE 6 - IRTON MOOR	8,764	8,776	8,780	8,787	8,965	9,098	9,483	0.2%	0.1%	3.6%	8.0%
ZONE 7 - FILEY	12,433	12,473	12,471	12,378	12,398	12,416	12,493	0.3%	-0.7%	-0.4%	0.2%
ZONE 8 - WHITBY PCA	20,365	20,398	20,480	20,754	21,168	21,444	22,421	0.6%	1.3%	4.7%	9.5%
ZONE 9 - WHITBY SCA	3,045	3,061	3,068	3,099	3,153	3,212	3,325	0.8%	1.0%	4.7%	8.4%
ZONE 10 - STAITHES	2,611	2,625	2,626	2,657	2,685	2,738	2,829	0.6%	1.2%	4.3%	7.7%
TOTAL	110,501	110,936	111,331	112,354	114,693	116,635	122,466				

Source: Experian Retail Planner Report (Summary Demographics - 2010 Base)

Notes

1. All Survey Zones as per 2007 Borough Retail Study

TABLE 2 - CONVENIENCE EXPENDITURE PER CAPITA FORECASTS, 2010 - 2030

SURVEY ZONE	2010 (£)	2010 Minus SfT (£)	2011 (£)	2011 Minus SfT (£)	2012 (£)	2012 Minus SfT (£)	2014 (£)	2014 Minus SfT (£)	2018 (£)	2018 Minus SfT (£)	2021 (£)	2021 Minus SfT (£)	2030 (£)	2030 Minus SfT (£)
ZONE 1 - SCARBOROUGH PCA	£1,663	£1,601	£1,658	£1,588	£1,651	£1,575	£1,668	£1,578	£1,702	£1,599	£1,732	£1,732	£1,828	£1,700
ZONE 2 - SCARBOROUGH SCA NORTH	£2,055	£1,979	£2,049	£1,963	£2,041	£1,947	£2,061	£1,950	£2,103	£1,976	£2,141	£2,141	£2,259	£2,101
ZONE 3 - SCARBOROUGH SCA WEST	£1,976	£1,903	£1,970	£1,887	£1,962	£1,872	£1,982	£1,875	£2,022	£1,900	£2,058	£2,058	£2,172	£2,020
ZONE 4 - EASTFIELD	£1,676	£1,614	£1,671	£1,601	£1,664	£1,588	£1,681	£1,590	£1,715	£1,612	£1,746	£1,746	£1,842	£1,713
ZONE 5 - SEAMER	£1,798	£1,731	£1,793	£1,717	£1,785	£1,703	£1,803	£1,706	£1,840	£1,729	£1,873	£1,873	£1,977	£1,838
ZONE 6 - IRTON MOOR	£1,819	£1,752	£1,814	£1,737	£1,806	£1,723	£1,824	£1,726	£1,861	£1,749	£1,895	£1,895	£2,000	£1,860
ZONE 7 - FILEY	£1,840	£1,772	£1,834	£1,757	£1,827	£1,743	£1,845	£1,746	£1,883	£1,770	£1,917	£1,917	£2,023	£1,881
ZONE 8 - WHITBY PCA	£1,960	£1,887	£1,954	£1,872	£1,946	£1,857	£1,966	£1,860	£2,005	£1,885	£2,042	£2,042	£2,155	£2,004
ZONE 9 - WHITBY SCA	£1,965	£1,892	£1,959	£1,877	£1,951	£1,862	£1,971	£1,864	£2,011	£1,890	£2,047	£2,047	£2,160	£2,009
ZONE 10 - STAITHES	£2,033	£1,958	£2,027	£1,942	£2,019	£1,926	£2,039	£1,929	£2,080	£1,955	£2,118	£2,118	£2,235	£2,078

Notes

1. Expenditure per Capita Forecasts derived from Experian Retail Planner (Fine Expenditure) Report; All Expenditure Figures given in 2010 Prices

2. Growth in per capita retail expenditure for Convenience Goods (Source: - Experian Retail Planner Briefing Note 9 (September 2011)

	2011	2012	2012-18	2019-30
Growth	-0.3%	-0.4%	0.5%	0.6%

3. Deductions for Special Forms of Trading (SfT) (Source: - Experian Retail Planner Briefing Note 9 (September 2011)

	2010	2011	2012	2014	2018	2021	2030
SFT	3.7%	4.2%	4.6%	5.4%	6.0%	6.3%	7.0%

TABLE 3 - Convenience Expenditure Growth, 2010 - 2030

SURVEY ZONE	2010 (£)	2011 (£)	2012 (£)	2014 (£)	2018 (£)	2021 (£)	2030 (£)	EXPENDITURE GROWTH (£) 2011-2012	2012 - 2018	2012-2021	2012-2030
ZONE 1 - SCARBOROUGH PCA	£53,705,263	£53,559,989	£53,441,245	£54,105,011	£56,494,213	£62,576,151	£65,911,930	-£118,744	£3,052,967	£9,134,906	£12,470,684
ZONE 2 - SCARBOROUGH SCA NORTH	£9,677,139	£9,684,376	£9,488,558	£9,472,118	£9,682,734	£10,483,028	£10,265,376	-£195,818	£194,176	£994,470	£776,818
ZONE 3 - SCARBOROUGH SCA WEST	£8,852,235	£8,834,587	£8,756,893	£8,824,882	£9,055,836	£9,874,190	£9,977,817	-£77,694	£298,944	£1,117,297	£1,220,925
ZONE 4 - EASTFIELD	£18,633,491	£18,517,952	£18,525,644	£18,848,642	£19,483,692	£21,608,977	£22,407,413	£7,691	£958,048	£3,083,334	£3,881,770
ZONE 5 - SEAMER	£14,996,296	£14,940,654	£14,927,770	£15,304,118	£15,999,412	£17,857,047	£18,834,480	-£12,884	£1,071,643	£2,929,277	£3,906,710
ZONE 6 - IRTON MOOR	£15,351,873	£15,247,196	£15,129,692	£15,165,303	£15,684,176	£17,239,451	£17,635,510	-£117,504	£554,484	£2,109,759	£2,505,818
ZONE 7 - FILEY	£22,030,281	£21,920,447	£21,738,120	£21,609,567	£21,940,584	£23,798,212	£23,501,422	-£182,328	£202,464	£2,060,093	£1,763,303
ZONE 8 - WHITBY PCA	£38,438,530	£38,186,014	£38,026,722	£38,595,408	£39,903,833	£43,783,117	£44,928,367	-£159,291	£1,877,111	£5,756,395	£6,901,645
ZONE 9 - WHITBY SCA	£5,762,038	£5,744,954	£5,711,113	£5,777,792	£5,958,888	£6,574,805	£6,679,805	-£33,841	£247,775	£863,692	£968,692
ZONE 10 - STAITHES	£5,111,761	£5,097,149	£5,057,489	£5,125,151	£5,250,013	£5,798,500	£5,880,035	-£39,660	£192,524	£741,010	£822,546
TOTAL	£192,558,908	£191,733,319	£190,803,246	£192,827,991	£199,453,382	£219,593,479	£226,022,156	-£930,073	£8,650,136	£28,790,233	£35,218,910

Notes

1. Expenditure Growth derived from Population Projections (Table 1) * Expenditure per Capita figures (less SfT deduction) (Table 2)

TABLE 4a - MAIN FOOD SHOPPING EXPENDITURE (75%)

SURVEY ZONE	2010 (£)	2011 (£)	2012 (£)	2014 (£)	2018 (£)	2021 (£)	2030 (£)
ZONE 1 - SCARBOROUGH PCA	£40,278,947	£40,169,992	£40,080,934	£40,578,758	£42,370,660	£46,932,113	£49,433,947
ZONE 2 - SCARBOROUGH SCA NORTH	£7,257,854	£7,263,282	£7,116,419	£7,104,088	£7,262,050	£7,862,271	£7,699,032
ZONE 3 - SCARBOROUGH SCA WEST	£6,639,176	£6,625,940	£6,567,670	£6,618,661	£6,791,877	£7,405,642	£7,483,363
ZONE 4 - EASTFIELD	£13,975,119	£13,888,464	£13,894,233	£14,136,481	£14,612,769	£16,206,733	£16,805,560
ZONE 5 - SEAMER	£11,247,222	£11,205,490	£11,195,827	£11,478,088	£11,999,559	£13,392,785	£14,125,860
ZONE 6 - IRTON MOOR	£11,513,904	£11,435,397	£11,347,269	£11,373,977	£11,763,132	£12,929,589	£13,226,633
ZONE 7 - FILEY	£16,522,711	£16,440,336	£16,303,590	£16,207,175	£16,455,438	£17,848,659	£17,626,067
ZONE 8 - WHITBY PCA	£28,828,898	£28,639,510	£28,520,042	£28,946,556	£29,927,875	£32,837,338	£33,696,275
ZONE 9 - WHITBY SCA	£4,321,529	£4,308,715	£4,283,335	£4,333,344	£4,469,166	£4,931,104	£5,009,854
ZONE 10 - STAITHES	£3,833,821	£3,822,862	£3,793,117	£3,843,863	£3,937,510	£4,348,875	£4,410,026
TOTAL	£144,419,181	£143,799,989	£143,102,435	£144,620,993	£149,590,036	£164,695,109	£169,516,617

TABLE 4B - TOP-UP FOOD SHOPPING EXPENDITURE (25%)

SURVEY ZONE	2010 (£)	2011 (£)	2012 (£)	2014 (£)	2018 (£)	2021 (£)	2030 (£)
ZONE 1 - SCARBOROUGH PCA	£13,426,316	£13,389,997	£13,360,311	£13,526,253	£14,123,553	£15,644,038	£16,477,982
ZONE 2 - SCARBOROUGH SCA NORTH	£2,419,285	£2,421,094	£2,372,140	£2,368,029	£2,420,683	£2,620,757	£2,566,344
ZONE 3 - SCARBOROUGH SCA WEST	£2,213,059	£2,208,647	£2,189,223	£2,206,220	£2,263,959	£2,468,547	£2,494,454
ZONE 4 - EASTFIELD	£4,658,373	£4,629,488	£4,631,411	£4,712,160	£4,870,923	£5,402,244	£5,601,853
ZONE 5 - SEAMER	£3,749,074	£3,735,163	£3,731,942	£3,826,029	£3,999,853	£4,464,262	£4,708,620
ZONE 6 - IRTON MOOR	£3,837,968	£3,811,799	£3,782,423	£3,791,326	£3,921,044	£4,309,863	£4,408,878
ZONE 7 - FILEY	£5,507,570	£5,480,112	£5,434,530	£5,402,392	£5,485,146	£5,949,553	£5,875,356
ZONE 8 - WHITBY PCA	£9,609,633	£9,546,503	£9,506,681	£9,648,852	£9,975,958	£10,945,779	£11,232,092
ZONE 9 - WHITBY SCA	£1,440,510	£1,436,238	£1,427,778	£1,444,448	£1,489,722	£1,643,701	£1,669,951
ZONE 10 - STAITHES	£1,277,940	£1,274,287	£1,264,372	£1,281,288	£1,312,503	£1,449,625	£1,470,009
TOTAL	£48,139,727	£47,933,330	£47,700,812	£48,206,998	£49,863,345	£54,898,370	£56,505,539

Table 5a - MAIN FOOD Market Share 2012

SEQ	Destinations		ZONE 1 - SCARBORO PCA	ZONE 2 - SCARBORO SCA NORTH	ZONE 3 - SCARBORO SCA WEST	ZONE 4 - EASTFIELD	ZONE 5 - SEAMER	ZONE 6 - IRTON MOOR	ZONE 7 - FILEY	ZONE 8 - WHITBY PCA	ZONE 9 - WHITBY SCA	ZONE 10 - STAITHES	SURVEY TURNOVER
	SCARBOROUGH - TOWN PROVISION												
IN	MARKS & SPENCER	%	2.5%	6.5%	2.2%	2.6%	0.0%	3.1%	0.8%	0.9%	0.0%	0.0%	
		£	£1,002,023	£462,567	£144,489	£361,250	£0	£351,765	£130,429	£256,680	£0	£0	£2,709,204
IN	ICELAND	%	2.9%	2.2%	0.0%	1.7%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%	
		£	£1,162,347	£156,561	£0	£236,202	£0	£170,209	£0	£0	£0	£0	£1,725,319
IN	LOCAL SHOPS (Scarborough TC)	%	0.6%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
		£	£240,486	£0	£144,489	£0	£0	£0	£0	£0	£0	£0	£384,974
EDGE	TESCO (Westwood)	%	38.6%	26.1%	4.4%	14.5%	18.2%	32.3%	5.5%	5.4%	2.1%	0.0%	
		£	£15,471,241	£1,857,385	£288,977	£2,014,664	£2,037,641	£3,665,168	£896,697	£1,540,082	£89,950	£0	£27,861,805
EDGE	ALDI (Northway / Brook Street)	%	3.0%	2.2%	6.7%	0.0%	1.5%	4.6%	0.8%	0.0%	0.0%	0.0%	
		£	£1,202,428	£156,561	£440,034	£0	£167,937	£521,974	£130,429	£0	£0	£0	£2,619,364
EDGE	SAINSBURY'S (Gallows Close)	%	20.9%	15.2%	15.6%	5.1%	7.6%	27.7%	1.6%	2.7%	0.0%	0.0%	
		£	£8,376,915	£1,081,696	£1,024,556	£708,606	£850,883	£3,143,194	£260,857	£770,041	£0	£0	£16,216,748
	SCARBOROUGH - TOWN PROVISION TOTAL	%	68.5%	52.2%	31.1%	23.9%	27.3%	69.2%	8.7%	9.0%	2.1%	0.0%	
		£	£27,455,440	£3,714,771	£2,042,545	£3,320,722	£3,056,461	£7,852,310	£1,418,412	£2,566,804	£89,950	£0	£51,517,414
	SCARBOROUGH - LOCAL / OUT PROVISION												
LC	RAMSHILL ROAD	%	1.3%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	
		£	£521,052	£0	£0	£0	£167,937	£0	£0	£0	£0	£0	£688,990
LC	FALSGRAVE ROAD	%	3.0%	4.3%	2.2%	0.0%	1.5%	10.8%	0.0%	1.0%	0.0%	0.0%	
		£	£1,202,428	£306,006	£144,489	£0	£167,937	£1,225,505	£0	£285,200	£0	£0	£3,331,566
LC	PROUDFOOT (Eastfield LC)	%	0.0%	0.0%	0.0%	6.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
		£	£0	£0	£0	£944,808	£0	£0	£0	£0	£0	£0	£944,808
LC	PROUDFOOT (Seamer LC)	%	0.6%	0.0%	2.2%	0.9%	4.5%	0.0%	0.0%	0.0%	0.0%	0.0%	
		£	£240,486	£0	£144,489	£125,048	£503,812	£0	£0	£0	£0	£0	£1,013,835
LC	PROUDFOOT (Scalby, Scarborough)	%	0.6%	10.9%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
		£	£240,486	£775,690	£0	£125,048	£0	£0	£0	£0	£0	£0	£1,141,223
LC	SPAR (East Ayton)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
		£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
OUT	CO-OP (Newlands Park, Scarborough)	%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
		£	£601,214	£0	£0	£0	£0	£0	£0	£0	£0	£0	£601,214
OUT	TESCO EXPRESS (Burniston Road, Scarborough)	%	0.6%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	
		£	£240,486	£156,561	£0	£0	£0	£0	£0	£142,600	£0	£0	£539,647
OUT	SAINSBURY'S LOCAL (Seamer Road, Scarborough)	%	1.8%	0.0%	6.7%	0.0%	4.5%	0.0%	0.0%	0.5%	0.0%	0.0%	
		£	£721,457	£0	£440,034	£0	£503,812	£0	£0	£142,600	£0	£0	£1,807,903
OUT	MORRISON'S (Dunslow Road)	%	18.2%	19.6%	48.9%	65.0%	60.6%	13.8%	43.3%	14.4%	2.1%	0.0%	
		£	£7,294,730	£1,394,818	£3,211,590	£9,031,251	£6,784,671	£1,565,923	£7,059,454	£4,106,886	£89,950	£0	£40,539,275
-	Other - Scarborough Area	%	2.4%	4.3%	2.2%	0.9%	0.0%	6.2%	7.9%	2.9%	0.0%	2.3%	
		£	£961,942	£306,006	£144,489	£125,048	£0	£703,531	£1,287,984	£827,081	£0	£87,242	£4,443,322
	SCARBOROUGH LOCAL / OUT PROVISION TOTAL	%	30.0%	41.3%	62.2%	74.5%	72.6%	30.8%	51.2%	19.3%	2.1%	2.3%	
		£	£12,024,280	£2,939,081	£4,085,090	£10,351,203	£8,128,171	£3,494,959	£8,347,438	£5,504,368	£89,950	£87,242	£55,051,782
	SCARBOROUGH CATCHMENT TOTAL	%	98.5%	93.5%	93.3%	98.4%	99.9%	100.0%	59.9%	28.3%	4.2%	2.3%	
		£	£39,479,720	£6,653,851	£6,127,636	£13,671,925	£11,184,631	£11,347,269	£9,765,850	£8,071,172	£179,900	£87,242	£106,569,196
	FILEY - TOWN PROVISION												
IN	LOCAL SHOPS [Filey TC]	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.2%	0.0%	0.0%	0.0%	
		£	£0	£0	£0	£0	£0	£0	£521,715	£0	£0	£0	£521,715
EDGE	HERON	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
		£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
EDGE	SOMERFIELD	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	17.3%	0.0%	0.0%	0.0%	
		£	£0	£0	£0	£0	£0	£0	£2,820,521	£0	£0	£0	£2,820,521
	FILEY TOWN PROVISION TOTAL	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	20.5%	0.0%	0.0%	0.0%	
		£	£0	£0	£0	£0	£0	£0	£3,342,236	£0	£0	£0	£3,342,236
	FILEY - LOCAL / OUT PROVISION												
LC	HUNAMBY	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%	0.0%	0.0%	0.0%	
		£	£0	£0	£0	£0	£0	£0	£391,286	£0	£0	£0	£391,286
-	Other - Filey Area	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	
		£	£0	£0	£0	£0	£0	£0	£130,429	£0	£0	£0	£130,429
	FILEY LOCAL / OUT PROVISION TOTAL	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.2%	0.0%	0.0%	0.0%	
		£	£0	£0	£0	£0	£0	£0	£521,715	£0	£0	£0	£521,715
	FILEY CATCHMENT TOTAL	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	23.7%	0.0%	0.0%	0.0%	
		£	£0	£0	£0	£0	£0	£0	£3,863,951	£0	£0	£0	£3,863,951
	WHITBY - TOWN PROVISION												
IN	LOCAL SHOPS [Whitby TC]	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.5%	2.1%	0.0%	
		£	£0	£0	£0	£0	£0	£0	£0	£713,001	£89,950	£0	£802,951
IN	SOMERFIELD [Flowergate]	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	16.0%	4.3%	7.0%	
		£	£0	£0	£0	£0	£0	£0	£0	£4,563,207	£184,183	£265,518	£5,012,908
EDGE	CO-OP (Endeavour Wharf)	%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%	37.9%	17.0%	18.6%	
		£	£0	£156,561	£0	£0	£0	£0	£0	£10,809,096	£728,167	£705,520	£12,399,344
	WHITBY TOWN PROVISION TOTAL	%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%	56.4%	23.4%	25.6%	
		£	£0	£156,561	£0	£0	£0	£0	£0	£16,085,304	£1,002,300	£971,038	£18,215,203
	WHITBY - LOCAL / OUT PROVISION												
OUT	LIDL [Stakesby Road]	%	0.0%	2.2%	2.2%	0.0%	0.0%	0.0%	0.0%	8.1%	0.0%	2.3%	
		£	£0	£156,561	£144,489	£0	£0	£0	£0	£2,310,123	£0	£87,242	£2,698,415
OUT	SPAR [Stakesby Road]	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
		£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
-	Other - Whitby Area	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%	0.0%	
		£	£0	£0	£0	£0	£0	£0	£0	£0	£89,950	£0	£89,950
	WHITBY LOCAL / OUT PROVISION TOTAL	%	0.0%	2.2%	2.2%	0.0%	0.0%	0.0%	0.0%	8.1%	2.1%	2.3%	
		£	£0	£156,561	£144,489	£0	£0	£0	£0	£2,310,123	£89,950	£87,242	£2,788,365
	WHITBY CATCHMENT TOTAL	%	0.0%	4.4%	2.2%	0.0%	0.0%	0.0%	0.0%	64.5%	25.5%	27.9%	
		£	£0	£313,122	£144,489	£0	£0	£0	£0	£18,395,427	£1,092,250	£1,058,280	£21,003,568
	LEAKAGE [OUTSIDE BOROUGH]												
-	MORRISON'S [Guisborough]	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.8%	25.5%	9.3%	
		£	£0	£0	£0	£0	£0	£0	£0	£798,561	£1,092,250	£352,760	£2,243,571
-	SAINSBURY'S [Guisborough]	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	19.1%	11.6%	
		£	£0	£0	£0	£0	£0	£0	£0	£0	£818,117	£440,002	£1,258,119
-	TESCO [Bridlington]	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	11.8%	0.0%	0.0%	0.0%	
		£	£0	£0	£0	£0	£0	£0	£1,923,824	£0	£0	£0	£1,923,824
-	OTHER	%	1.5%	2.1%	4.5%	1.6%	0.1%	0.0%	4.6%	4.4%	25.7%	48.9%	
		£	£601,214	£149,445	£295,545	£222,308	£11,196	£0	£749,965	£1,254,882	£1,100,817	£1,854,834	£6,240,206
	OVERALL TOTAL	%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
		£	£40,080,934	£7,116,419	£6,567,670	£13,894,233	£11,195,827	£11,347,269	£16,303,590	£28,520,042	£4,283,335	£3,793,117	£143,102,435

Table 5b - TOP-UP FOOD Market Share 2012

SEQ	Destinations		ZONE 1 - SCARBORO PCA	ZONE 2 - SCARBORO SCA NORTH	ZONE 3 - SCARBORO SCA WEST	ZONE 4 - EASTFIELD	ZONE 5 - SEAMER	ZONE 6 - IRTON MOOR	ZONE 7 - FILEY	ZONE 8 - WHITBY PCA	ZONE 9 - WHITBY SCA	ZONE 10 - STAITHES	SURVEY TURNOVER
	SCARBOROUGH - TOWN PROVISION												
IN	MARKS & SPENCER	%	4.3%	8.6%	5.4%	10.1%	9.4%	12.7%	1.8%	1.0%	0.0%	0.0%	
		£	£574,493	£204,004	£118,218	£467,773	£350,803	£480,368	£97,822	£95,067	£0	£0	£2,388,547
IN	ICELAND	%	6.0%	2.9%	2.7%	6.7%	0.0%	3.6%	0.9%	0.0%	0.0%	0.0%	
		£	£801,619	£68,792	£59,109	£310,305	£0	£136,167	£48,911	£0	£0	£0	£1,424,902
IN	LOCAL SHOPS (Scarborough TC)	%	10.8%	2.9%	2.7%	2.2%	7.6%	0.0%	0.0%	0.0%	0.0%	0.0%	
		£	£1,442,914	£68,792	£59,109	£101,891	£283,628	£0	£0	£0	£0	£0	£1,956,333
EDGE	TESCO (Westwood)	%	8.1%	0.0%	10.8%	6.7%	13.2%	9.1%	2.7%	0.0%	0.0%	0.0%	
		£	£1,082,185	£0	£236,436	£310,305	£492,616	£344,200	£146,732	£0	£0	£0	£2,612,475
EDGE	ALDI (Northway / Brook Street)	%	6.2%	8.6%	2.7%	3.4%	0.0%	7.3%	2.8%	0.0%	0.0%	3.7%	
		£	£828,339	£204,004	£59,109	£157,468	£0	£276,117	£152,167	£0	£0	£46,782	£1,723,986
EDGE	SAINSBURY'S (Gallows Close)	%	11.9%	14.3%	8.1%	6.7%	5.7%	23.6%	0.9%	0.0%	0.0%	0.0%	
		£	£1,589,877	£339,216	£177,327	£310,305	£212,721	£892,652	£48,911	£0	£0	£0	£3,571,008
	SCARBOROUGH - TOWN PROVISION TOTAL	%	47.3%	37.3%	32.4%	35.8%	35.9%	56.3%	9.1%	1.0%	0.0%	3.7%	
		£	£6,319,427	£884,808	£709,308	£1,658,045	£1,339,767	£2,129,504	£494,542	£95,067	£0	£46,782	£13,677,251
	SCARBOROUGH - LOCAL / OUT PROVISION												
LC	RAMSHILL ROAD	%	7.2%	2.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
		£	£961,942	£68,792	£0	£0	£0	£0	£0	£0	£0	£0	£1,030,734
LC	FALSGRAVE ROAD	%	1.8%	0.0%	0.0%	1.1%	3.8%	9.1%	0.0%	0.0%	0.0%	0.0%	
		£	£240,486	£0	£0	£50,946	£141,814	£344,200	£0	£0	£0	£0	£777,445
LC	PROUDFOOT (Eastfield LC)	%	0.7%	0.0%	2.7%	29.2%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	
		£	£93,522	£0	£59,109	£1,352,372	£70,907	£0	£0	£0	£0	£0	£1,575,910
LC	PROUDFOOT (Seamer LC)	%	0.7%	2.9%	2.7%	2.2%	17.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
		£	£93,522	£68,792	£59,109	£101,891	£634,430	£0	£0	£0	£0	£0	£957,745
LC	PROUDFOOT (Scalby, Scarborough)	%	2.0%	20.0%	2.7%	1.1%	0.0%	7.3%	0.0%	0.0%	0.0%	0.0%	
		£	£267,206	£474,428	£59,109	£50,946	£0	£276,117	£0	£0	£0	£0	£1,127,806
LC	SPAR (East Ayton)	%	0.0%	0.0%	0.0%	0.0%	0.0%	5.5%	0.0%	0.0%	0.0%	0.0%	
		£	£0	£0	£0	£0	£0	£208,033	£0	£0	£0	£0	£208,033
OUT	CO-OP (Newlands Park, Scarborough)	%	9.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
		£	£1,309,311	£0	£0	£0	£0	£0	£0	£0	£0	£0	£1,309,311
OUT	TESCO EXPRESS (Burniston Road, Scarborough)	%	3.8%	8.6%	2.7%	1.1%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	
		£	£507,692	£204,004	£59,109	£50,946	£0	£0	£0	£57,040	£0	£0	£878,790
OUT	SAINSBURY'S LOCAL (Seamer Road, Scarborough)	%	2.5%	0.0%	5.4%	1.1%	7.5%	5.5%	0.0%	0.6%	0.0%	0.0%	
		£	£334,008	£0	£118,218	£50,946	£279,896	£208,033	£0	£57,040	£0	£0	£1,048,140
OUT	MORRISON'S (Dunslow Road)	%	3.8%	0.0%	13.5%	16.9%	15.1%	3.6%	4.6%	0.6%	0.0%	0.0%	
		£	£507,692	£0	£295,545	£782,708	£563,523	£136,167	£249,988	£57,040	£0	£0	£2,592,664
-	Other - Scarborough Area	%	18.5%	22.9%	32.4%	11.2%	16.9%	12.7%	0.0%	0.6%	0.0%	0.0%	
		£	£2,471,658	£543,220	£709,308	£518,718	£630,698	£480,368	£0	£57,040	£0	£0	£5,411,010
	SCARBOROUGH LOCAL / OUT PROVISION TOTAL	%	50.8%	57.3%	62.1%	63.9%	62.2%	43.7%	4.6%	2.4%	0.0%	0.0%	
		£	£6,787,038	£1,359,236	£1,359,508	£2,959,472	£2,321,268	£1,652,919	£249,988	£228,160	£0	£0	£16,917,589
	SCARBOROUGH CATCHMENT TOTAL	%	98.1%	94.6%	94.5%	99.7%	98.1%	100.0%	13.7%	3.4%	0.0%	3.7%	
		£	£13,106,465	£2,244,044	£2,068,816	£4,617,517	£3,661,036	£3,782,423	£744,531	£323,227	£0	£46,782	£30,594,840
	FILEY - TOWN PROVISION												
IN	LOCAL SHOPS [Filey TC]	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	31.3%	0.0%	0.0%	0.0%	
		£	£0	£0	£0	£0	£0	£0	£1,701,008	£0	£0	£0	£1,701,008
EDGE	HERON	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.7%	0.5%	0.0%	0.0%	
		£	£0	£0	£0	£0	£0	£0	£201,078	£47,533	£0	£0	£248,611
EDGE	SOMERFIELD	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	18.3%	0.0%	0.0%	0.0%	
		£	£0	£0	£0	£0	£0	£0	£994,519	£0	£0	£0	£994,519
	FILEY TOWN PROVISION TOTAL	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	53.3%	0.5%	0.0%	0.0%	
		£	£0	£0	£0	£0	£0	£0	£2,896,604	£47,533	£0	£0	£2,944,138
	FILEY - LOCAL / OUT PROVISION												
LC	HUNAMBY	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	23.7%	0.0%	0.0%	0.0%	
		£	£0	£0	£0	£0	£0	£0	£1,287,984	£0	£0	£0	£1,287,984
-	Other - Filey Area	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.4%	0.0%	0.0%	0.0%	
		£	£0	£0	£0	£0	£0	£0	£347,810	£0	£0	£0	£347,810
	FILEY LOCAL / OUT PROVISION TOTAL	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	30.1%	0.0%	0.0%	0.0%	
		£	£0	£0	£0	£0	£0	£0	£1,635,793	£0	£0	£0	£1,635,793
	FILEY CATCHMENT TOTAL	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	83.4%	0.5%	0.0%	0.0%	
		£	£0	£0	£0	£0	£0	£0	£4,532,398	£47,533	£0	£0	£4,579,931
	WHITBY - TOWN PROVISION												
IN	LOCAL SHOPS [Whitby TC]	%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.2%	2.6%	0.0%	
		£	£93,522	£0	£0	£0	£0	£0	£0	£684,481	£37,122	£0	£815,125
IN	SOMERFIELD [Flowergate]	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	12.8%	5.1%	3.7%	
		£	£0	£0	£0	£0	£0	£0	£0	£1,216,855	£72,817	£46,782	£1,336,454
EDGE	CO-OP (Endeavour Wharf)	%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	19.7%	20.5%	14.8%	
		£	£53,441	£0	£0	£0	£0	£0	£0	£1,872,816	£292,695	£187,127	£2,406,079
	WHITBY TOWN PROVISION TOTAL	%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	39.7%	28.2%	18.5%	
		£	£146,963	£0	£0	£0	£0	£0	£0	£3,774,152	£402,633	£233,909	£4,557,658
	WHITBY - LOCAL / OUT PROVISION												
OUT	LIDL [Stakesby Road]	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	17.5%	2.6%	11.1%	
		£	£0	£0	£0	£0	£0	£0	£0	£1,663,669	£37,122	£140,345	£1,841,137
OUT	SPAR [Stakesby Road]	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	13.3%	2.6%	0.0%	
		£	£0	£0	£0	£0	£0	£0	£0	£1,264,389	£37,122	£0	£1,301,511
-	Other - Whitby Area	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	15.7%	7.7%	3.7%	
		£	£0	£0	£0	£0	£0	£0	£0	£1,492,549	£109,939	£46,782	£1,649,270
	WHITBY LOCAL / OUT PROVISION TOTAL	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	46.5%	12.9%	14.8%	
		£	£0	£0	£0	£0	£0	£0	£0	£4,420,606	£184,183	£187,127	£4,791,917
	WHITBY CATCHMENT TOTAL	%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	86.2%	41.1%	33.3%	
		£	£146,963	£0	£0	£0	£0	£0	£0	£8,194,759	£586,817	£421,036	£9,349,575
	LEAKAGE [OUTSIDE BOROUGH]												
-	MORRISON'S [Guisborough]	%	0.0%	0.0%	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%	2.6%	0.0%	
		£	£0	£0	£0	£0	£70,907	£0	£0	£0	£37,122	£0	£108,029
-	SAINSBURY'S [Guisborough]	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	15.4%	0.0%	
		£	£0	£0	£0	£0	£0	£0	£0	£57,040	£219,878	£0	£276,918
-	TESCO [Bridlington]	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%	
		£	£0	£0	£0	£0	£0	£0	£48,911	£0	£0	£0	£48,911
-	OTHER	%	0.8%	5.4%	5.5%	0.3%	0.0%	0.0%	2.0%	9.3%	40.9%	63.0%	
		£	£106,882	£128,096	£120,407	£13,894	£0	£0	£108,691	£884,121	£583,961	£796,555	£2,742,607
	OVERALL TOTAL	%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
		£	£13,360,311	£2,372,140	£2,189,223	£4,631,411	£3,731,942	£3,782,423	£5,434,530	£9,506,681	£1,427,778	£1,264,372	£47,700,812

Table 5c - OVERALL CONVENIENCE Market Share 2012

SEQ	Destinations		ZONE 1 - SCARBORO PCA	ZONE 2 - SCARBORO SCA NORTH	ZONE 3 - SCARBORO SCA WEST	ZONE 4 - EASTFIELD	ZONE 5 - SEAMER	ZONE 6 - IRTON MOOR	ZONE 7 - FILEY	ZONE 8 - WHITBY PCA	ZONE 9 - WHITBY SCA	ZONE 10 - STAITHES	SURVEY TURNOVER
	SCARBOROUGH - TOWN PROVISION												
IN	MARKS & SPENCER	%	3.0%	7.0%	3.0%	4.5%	2.4%	5.5%	1.1%	0.9%	0.0%	0.0%	
		£	£1,576,517	£666,571	£262,707	£829,023	£350,803	£832,133	£228,250	£351,747	£0	£0	£5,097,750
IN	ICELAND	%	3.7%	2.4%	0.7%	3.0%	0.0%	2.0%	0.2%	0.0%	0.0%	0.0%	
		£	£1,963,966	£225,353	£59,109	£546,506	£0	£306,376	£48,911	£0	£0	£0	£3,150,222
IN	LOCAL SHOPS (Scarborough TC)	%	3.2%	0.7%	2.3%	0.6%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	
		£	£1,683,399	£68,792	£203,598	£101,891	£283,628	£0	£0	£0	£0	£0	£2,341,308
EDGE	TESCO (Westwood)	%	31.0%	19.6%	6.0%	12.6%	17.0%	26.5%	4.8%	4.1%	1.6%	0.0%	
		£	£16,553,426	£1,857,385	£525,414	£2,324,968	£2,530,257	£4,009,368	£1,043,430	£1,540,082	£89,950	£0	£30,474,280
EDGE	ALDI (Northway / Brook Street)	%	3.8%	3.8%	5.7%	0.9%	1.1%	5.3%	1.3%	0.0%	0.0%	0.9%	
		£	£2,030,767	£360,565	£499,143	£157,468	£167,937	£798,091	£282,596	£0	£0	£46,782	£4,343,349
EDGE	SAINSBURY'S (Gallows Close)	%	18.7%	15.0%	13.7%	5.5%	7.1%	26.7%	1.4%	2.0%	0.0%	0.0%	
		£	£9,966,792	£1,420,912	£1,201,884	£1,018,910	£1,063,604	£4,035,845	£309,768	£770,041	£0	£0	£19,787,756
	SCARBOROUGH - TOWN PROVISION TOTAL	%	63.2%	48.5%	31.4%	26.9%	29.5%	66.0%	8.8%	7.0%	1.6%	0.9%	
		£	£33,774,867	£4,599,579	£2,751,854	£4,978,767	£4,396,228	£9,981,814	£1,912,955	£2,661,871	£89,950	£46,782	£65,194,665
	SCARBOROUGH - LOCAL / OUT PROVISION												
LC	RAMSHILL ROAD	%	2.8%	0.7%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	
		£	£1,482,995	£68,792	£0	£0	£167,937	£0	£0	£0	£0	£0	£1,719,724
LC	FALSGRAVE ROAD	%	2.7%	3.2%	1.7%	0.3%	2.1%	10.4%	0.0%	0.8%	0.0%	0.0%	
		£	£1,442,914	£306,006	£144,489	£50,946	£309,751	£1,569,706	£0	£285,200	£0	£0	£4,109,011
LC	PROUDFOOT (Eastfield LC)	%	0.2%	0.0%	0.7%	12.4%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	
		£	£93,522	£0	£59,109	£2,297,180	£70,907	£0	£0	£0	£0	£0	£2,520,718
LC	PROUDFOOT (Seamer LC)	%	0.6%	0.7%	2.3%	1.2%	7.6%	0.0%	0.0%	0.0%	0.0%	0.0%	
		£	£334,008	£68,792	£203,598	£226,939	£1,138,242	£0	£0	£0	£0	£0	£1,971,579
LC	PROUDFOOT (Scalby, Scarborough)	%	1.0%	13.2%	0.7%	1.0%	0.0%	1.8%	0.0%	0.0%	0.0%	0.0%	
		£	£507,692	£1,250,118	£59,109	£175,994	£0	£276,117	£0	£0	£0	£0	£2,269,029
LC	SPAR (East Ayton)	%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	
		£	£0	£0	£0	£0	£0	£208,033	£0	£0	£0	£0	£208,033
OUT	CO-OP (Newlands Park, Scarborough)	%	3.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
		£	£1,910,525	£0	£0	£0	£0	£0	£0	£0	£0	£0	£1,910,525
OUT	TESCO EXPRESS (Burniston Road, Scarborough)	%	1.4%	3.8%	0.7%	0.3%	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	
		£	£748,177	£360,565	£59,109	£50,946	£0	£0	£0	£199,640	£0	£0	£1,418,437
OUT	SAINSBURY'S LOCAL (Seamer Road, Scarborough)	%	2.0%	0.0%	6.4%	0.3%	5.3%	1.4%	0.0%	0.5%	0.0%	0.0%	
		£	£1,055,465	£0	£558,252	£50,946	£783,708	£208,033	£0	£199,640	£0	£0	£2,856,043
OUT	MORRISON'S (Dunslow Road)	%	14.6%	14.7%	40.1%	53.0%	49.2%	11.3%	33.6%	11.0%	1.6%	0.0%	
		£	£7,802,422	£1,394,818	£3,507,136	£9,813,960	£7,348,195	£1,702,090	£7,309,443	£4,163,926	£89,950	£0	£43,131,939
-	Other - Scarborough Area	%	6.4%	9.0%	9.8%	3.5%	4.2%	7.8%	5.9%	2.3%	0.0%	1.7%	
		£	£3,433,600	£849,226	£853,797	£643,766	£630,698	£1,183,898	£1,287,984	£884,121	£0	£87,242	£9,854,332
	SCARBOROUGH LOCAL / OUT PROVISION TOTAL	%	35.2%	45.3%	62.2%	71.9%	70.0%	34.0%	39.6%	15.1%	1.6%	1.7%	
		£	£18,811,318	£4,298,317	£5,444,598	£13,310,675	£10,449,439	£5,147,878	£8,597,426	£5,732,528	£89,950	£87,242	£71,969,371
	SCARBOROUGH CATCHMENT TOTAL	%	98.4%	93.8%	93.6%	98.7%	99.5%	100.0%	48.4%	22.1%	3.2%	2.7%	
		£	£52,586,185	£8,897,895	£8,196,452	£18,289,442	£14,845,667	£15,129,692	£10,510,381	£8,394,399	£179,900	£134,023	£137,164,036
	FILEY - TOWN PROVISION												
IN	LOCAL SHOPS [Filey TC]	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	10.2%	0.0%	0.0%	0.0%	
		£	£0	£0	£0	£0	£0	£0	£2,222,723	£0	£0	£0	£2,222,723
EDGE	HERON	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.1%	0.0%	0.0%	
		£	£0	£0	£0	£0	£0	£0	£201,078	£47,533	£0	£0	£248,611
EDGE	SOMERFIELD	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	17.6%	0.0%	0.0%	0.0%	
		£	£0	£0	£0	£0	£0	£0	£3,815,040	£0	£0	£0	£3,815,040
	FILEY TOWN PROVISION TOTAL	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	28.7%	0.1%	0.0%	0.0%	
		£	£0	£0	£0	£0	£0	£0	£6,238,840	£47,533	£0	£0	£6,286,374
	FILEY - LOCAL / OUT PROVISION												
LC	HUNAMBY	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.7%	0.0%	0.0%	0.0%	
		£	£0	£0	£0	£0	£0	£0	£1,679,270	£0	£0	£0	£1,679,270
-	Other - Filey Area	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	0.0%	0.0%	0.0%	
		£	£0	£0	£0	£0	£0	£0	£478,239	£0	£0	£0	£478,239
	FILEY LOCAL / OUT PROVISION TOTAL	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	9.9%	0.0%	0.0%	0.0%	
		£	£0	£0	£0	£0	£0	£0	£2,157,508	£0	£0	£0	£2,157,508
	FILEY CATCHMENT TOTAL	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	38.6%	0.1%	0.0%	0.0%	
		£	£0	£0	£0	£0	£0	£0	£8,396,349	£47,533	£0	£0	£8,443,882
	WHITBY - TOWN PROVISION												
IN	LOCAL SHOPS [Whitby TC]	%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.7%	2.2%	0.0%	
		£	£93,522	£0	£0	£0	£0	£0	£0	£1,397,482	£127,072	£0	£1,618,077
IN	SOMERFIELD [Flowergate]	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	15.2%	4.5%	6.2%	
		£	£0	£0	£0	£0	£0	£0	£0	£5,780,062	£257,000	£312,300	£6,349,362
EDGE	CO-OP (Endeavour Wharf)	%	0.1%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	33.4%	17.9%	17.7%	
		£	£53,441	£156,561	£0	£0	£0	£0	£0	£12,681,912	£1,020,862	£892,647	£14,805,423
	WHITBY TOWN PROVISION TOTAL	%	0.3%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	52.2%	24.6%	23.8%	
		£	£146,963	£156,561	£0	£0	£0	£0	£0	£19,859,456	£1,404,934	£1,204,947	£22,772,861
	WHITBY - LOCAL / OUT PROVISION												
OUT	LIDL [Stakesby Road]	%	0.0%	1.7%	1.7%	0.0%	0.0%	0.0%	0.0%	10.5%	0.7%	4.5%	
		£	£0	£156,561	£144,489	£0	£0	£0	£0	£3,973,792	£37,122	£227,587	£4,539,552
OUT	SPAR [Stakesby Road]	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.3%	0.7%	0.0%	
		£	£0	£0	£0	£0	£0	£0	£0	£1,264,389	£37,122	£0	£1,301,511
-	Other - Whitby Area	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.9%	3.5%	0.9%	
		£	£0	£0	£0	£0	£0	£0	£0	£1,492,549	£199,889	£46,782	£1,739,220
	WHITBY LOCAL / OUT PROVISION TOTAL	%	0.0%	1.7%	1.7%	0.0%	0.0%	0.0%	0.0%	17.7%	4.8%	5.4%	
		£	£0	£156,561	£144,489	£0	£0	£0	£0	£6,730,730	£274,133	£274,369	£7,580,282
	WHITBY CATCHMENT TOTAL	%	0.3%	3.3%	1.7%	0.0%	0.0%	0.0%	0.0%	69.9%	29.4%	29.3%	
		£	£146,963	£313,122	£144,489	£0	£0	£0	£0	£26,590,186	£1,679,067	£1,479,316	£30,353,143
	LEAKAGE [OUTSIDE BOROUGH]												
-	MORRISON'S [Guisborough]	%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	2.1%	19.8%	7.0%	
		£	£0	£0	£0	£0	£70,907	£0	£0	£798,561	£1,129,373	£352,760	£2,351,601
-	SAINSBURY'S [Guisborough]	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	18.2%	8.7%	
		£	£0	£0	£0	£0	£0	£0	£0	£57,040	£1,037,995	£440,002	£1,535,037
-	TESCO [Bridlington]	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	9.1%	0.0%	0.0%	0.0%	
		£	£0	£0	£0	£0	£0	£0	£1,972,734	£0	£0	£0	£1,972,734
-	OTHER	%	1.3%	2.9%	4.8%	1.3%	0.1%	0.0%	4.0%	5.6%	29.5%	52.4%	
		£	£708,097	£277,540	£415,952	£236,202	£11,196	£0	£858,656	£2,139,003	£1,684,778	£2,651,389	£8,982,813
	OVERALL TOTAL	%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
		£	£53,441,245	£9,488,558	£8,756,893	£18,525,644	£14,927,770	£15,129,692	£21,738,120	£38,026,722	£5,711,113	£5,057,489	£190,803,246

TABLE 6 - Floorspace Turnover Performance (2012)

Existing Stores	Floorspace (Net) (sq m)	Net Convenience Ratio (%)	Net Convenience Floorspace (sq. m)	Company 'Benchmark' Sales Density (£ / m^2)	'Benchmark' Store Turnover (£)	Survey-derived Turnover (£)	Trading Performance against Company 'Benchmark'
SCARBOROUGH - Main Stores							
Marks & Spencer (Scarborough TC)	-	-	350	£10,833	£3,791,550	£5,097,750	£1,306,200
Iceland (Scarborough TC)	-	-	300	£6,412	£1,923,600	£3,150,222	£1,226,622
Town Centre Shops	4,151	100.0%	4,151	-	-	£2,341,308	-
Tesco (Westwood)	1,886	90.0%	1,691	£12,842	£21,715,822	£30,474,280	£8,758,458
Aldi (Northway)	-	-	684	£4,750	£3,249,000	£4,343,349	£1,094,349
Sainsbury's (Falsgrave)	2,790	85.0%	2,372	£12,526	£29,711,672	£19,787,756	-£9,923,916
Scarborough Town Main Stores Total	8,827		9,548		£60,391,644	£65,194,665	£4,803,021
Scarborough Town - Local Centres	3,773	100.0%	3,773	-	-	£14,534,459	-
Scarborough Town Local Centres Total	3,773		3,773		-	£14,534,459	-
Morrison's (Dunslow Road)	-	-	2,640	£11,988	£31,648,320	£43,131,939	£11,483,619
SCARBOROUGH TOWN TOTAL	-	-	15,961		-	£122,861,063	-
FILEY - Main Stores							
Town Centre Shops	1,174	100.0%	1,174	-	-	£2,222,723	-
Somerfield	321	100.0%	321	£6,000	£1,926,000	£3,815,040	£1,889,040
Filey Total	1,495		1,495		£1,926,000	£6,037,763	£4,111,763
WHITBY - Main Stores							
Town Centre Shops	2,233	100.0%	2,233	-	-	£1,618,077	-
Co-Op (Endeavour Wharf)	1,700	85.0%	1,445	£7,530	£10,880,850	£14,805,423	£3,924,573
Lidl (Stakesby Road)	1,063	82.0%	875	£2,987	£2,613,625	£4,539,552	£1,925,927
Whitby Total	4,996		4,553		£13,494,475	£27,312,413	£5,850,499
Scarborough LPA AREA - Other Local Centres							
Other Local Centres	1,658	100.0%	1,658	-	-	£19,501,212	-
BOROUGH TOTAL	16,976		23,667		-	-	-

Notes

1. Foodstore Floorspace and Net Convenience Ratio based on IGD / GOAD, GVA Site Visits and Applicant's RIAs
2. Company Benchmark Sales Density (£/ sq. m) based on Verdict Data
3. Somerfield Sales Density (£/sq.m) estimated
4. Town Centre Floorspace derived from Experian GOAD Town Centre Surveys (GVA Updates (October 2011) - Foodstores deducted
5. Town Centre and Local Centre Shops all assume 70% Gross to Net
6. Local Centre Provision based on GVA On-Site Surveys (PROMAP Measurements - 5,703 sqm (gross)).
7. Local Centres comprises Newby, Eastfield, Seamer, Hunmanby, Ramshill, Falsgrave, East Ayton, Burniston and Snainton
8. Survey-derived turnover for Local Centres includes Scarborough Local / Out Provision (excl. Morrison's), Filey Local / Out Provision, Whitby Local / Out Provision (excl. Lidl)
9. Scarborough Town Local Centres includes Eastfield, Ramshill, Sainsbury's Seamer Road, Falsgrave, Newby, Co-Op Newlands Park, Tesco Express Burniston Road and Victoria Road

Table 7 - Commitments

Store	Zone	Net Floorspace (sqm)	Net Convenience (%)	Net Convenience (sqm)	Company Average Sales Density (£/sqm)	Company Average Turnover (£)
APP 09/01301/FL - Tesco Filey	**Zone 7 - Filey**	1,376	73%	1,004	£12,842	**£12,899,532**
APP 09/02118/FL - Sainsbury's Whitby	**Zone 8 - Whitby PCA**	2,787	70%	1,951	£12,526	**£24,438,226**
APP 10/02538/FL - Sainsbury's (Falsgrave) Scarborough	**Zone 1 - Scarborough PCA**	-	100%	1,017	£12,526	**£12,738,942**
APP 11/00019/FL - Tesco Westwood (Scarborough)	**Zone 1 - Scarborough PCA**	-	100%	1,198	£12,842	**£15,384,716**
TOTAL		**4,163**		**5,170**		**£65,461,416**

Notes

1. Floorspace figures derived from Planning Decision Notices / Applicant's RIA
2. Average Sales Density Figures derived from Applicant's RIA (Tesco / Sainsbury's extensions based on latest Verdict Data)

Table 8 - BOROUGH-WIDE CONVENIENCE CAPACITY (BASELINE + GROWTH)

CONVENIENCE GOODS					
	2012	**2014**	**2018**	**2021**	**2030**
Survey Derived Catchment Expenditure (£)	£175,961,062	£177,725,071	£181,306,321	£184,589,455	£196,549,581
Existing (Net) Convenience Floorspace (sq m)	23,667	23,667	23,667	23,667	23,667
Sales per sq m net (£)	£7,435	£7,494	£7,615	£7,661	£7,800
Sales from Existing Floorspace (£)	£175,961,062	£177,371,566	£180,226,584	£181,310,108	£184,599,920
RESIDUAL CAPACITY (£)	**£0**	**£353,506**	**£1,079,737**	**£3,279,347**	**£11,949,660**
Sales per sq m net in new shops (Large Retailer) (£)	£10,000	£10,080	£10,242	£10,304	£10,491
Capacity for new floorspace (sq m net)	**0**	**35**	**105**	**318**	**1,139**
Capacity for new floorspace (sq m gross)	**0**	**50**	**151**	**455**	**1,627**

Notes

1. Expenditure Growth;-0.4% (2011-2012); 0.5% per annum (2012-2018); 0.6% per annum (2019-2030)

2. Sales Efficiency Growth; 0% per annum (2011-2012); 0.4% per annum (2012-2018); 0.2% per annum (2019-2028)

3. Gross to Net ratio for new floorspace capacity is 70%

4. Sales Density for Large Retailer based on Verdict and GVA Research (Goods-Based Turnover).

Table 9a - SCARBOROUGH CONVENIENCE CAPACITY (BASELINE + GROWTH)

CONVENIENCE GOODS					
	2012	2014	2018	2021	2030
Scarborough Town Survey Derived Catchment Expenditure (£)	£122,861,063	£124,092,745	£126,593,276	£128,885,654	£137,236,558
Existing (Net) Scarborough Town Convenience Floorspace (sq m)	15,961	15,961	15,961	15,961	15,961
Sales per sq m net (£)	£7,698	£7,759	£7,884	£7,932	£8,075
Sales from Existing Floorspace (£)	£122,861,063	£123,845,917	£125,839,373	£126,595,920	£128,892,962
RESIDUAL CAPACITY (£)	£0	£246,828	£753,903	£2,289,734	£8,343,596
Sales per sq m net in new shops (Large Retailer) (£)	£10,000	£10,080	£10,242	£10,304	£10,491
Capacity for new floorspace (sq m net)	0	24	74	222	795
Capacity for new floorspace (sq m gross)	0	35	105	317	1,136

Notes

1. Expenditure Growth;-0.4% (2011-2012); 0.5% per annum (2012-2018); 0.6% per annum (2019-2030)
2. Sales Efficiency Growth; 0% per annum (2011-2012); 0.4% per annum (2012-2018); 0.2% per annum (2019-2028)
3. Gross to Net ratio for new floorspace capacity is 70%
4. Sales Density for Large Retailer from Verdict and GVA Research (Goods-Based Turnover).
5. Scarborough Town Turnover and Floorspace based on Town Provision, Local Centres and Morrison's.

Table 9b - SCARBOROUGH CONVENIENCE CAPACITY (BASELINE + GROWTH) - COMMITMENTS

CONVENIENCE GOODS					
	2012	2014	2018	2021	2030
Scarborough Town Survey Derived Catchment Expenditure (£)	£122,861,063	£124,092,745	£126,593,276	£128,885,654	£137,236,558
Existing (Net) Scarborough Town Convenience Floorspace (sq m)	15,961	15,961	15,961	15,961	15,961
Sales per sq m net (£)	£7,698	£7,759	£7,884	£7,932	£8,075
Sales from Existing Floorspace (£)	£122,861,063	£123,845,917	£125,839,373	£126,595,920	£128,892,962
CURRENT RESIDUAL	£0	£246,828	£753,903	£2,289,734	£8,343,596
COMMITMENTS	£28,123,658	£28,349,097	£28,805,412	£29,268,722	£30,887,701
RESIDUAL CAPACITY	-£28,123,658	-£28,102,269	-£28,051,508	-£26,978,988	-£22,544,105
Sales per sq m net in new shops (Large Retailer) (£)	£10,000	£10,080	£10,242	£10,304	£10,491
Capacity for new floorspace (sq m net)	-2,812	-2,788	-2,739	-2,618	-2,149
Capacity for new floorspace (sq m gross)	-4,018	-3,983	-3,913	-3,740	-3,070

Notes

1. Commitments relates to turnover generated by uplift in convenience floorspace of Sainsbury's Falsgrave and Tesco Westwood (re-location)

Table 10a - WHITBY CONVENIENCE CAPACITY (BASELINE + GROWTH)

CONVENIENCE GOODS					
	2012	**2014**	**2018**	**2021**	**2030**
WHITBY Survey Derived Catchment Expenditure (£)	£27,312,413	£27,586,220	£28,142,096	£28,651,699	£30,508,132
Existing (Net) Whitby Convenience Floorspace (sq m)	4,553	4,553	4,553	4,553	4,553
Sales per sq m net (£)	£5,999	£6,047	£6,144	£6,181	£6,293
Sales from Existing Floorspace (£)	£27,312,413	£27,531,349	£27,974,501	£28,142,684	£28,653,324
RESIDUAL CAPACITY (£)	**£0**	**£54,871**	**£167,595**	**£509,015**	**£1,854,808**
Sales per sq m net in new shops (Large Retailer) (£)	£10,000	£10,080	£10,242	£10,304	£10,491
Capacity for new floorspace (sq m net)	**0**	**5**	**16**	**49**	**177**
Capacity for new floorspace (sq m gross)	**0**	**8**	**23**	**71**	**253**

Notes

1. Expenditure Growth;-0.4% (2011-2012); 0.5% per annum (2012-2018); 0.6% per annum (2019-2030)
2. Sales Efficiency Growth; 0% per annum (2011-2012); 0.4% per annum (2012-2018); 0.2% per annum (2019-2028)
3. Gross to Net ratio for new floorspace capacity is 70%
4. Sales Density for Large Retailer from Verdict and GVA Research (Goods-Based Turnover).

Table 10b - WHITBY CONVENIENCE CAPACITY (BASELINE + GROWTH) - COMMITMENTS

CONVENIENCE GOODS					
	2012	**2014**	**2018**	**2021**	**2030**
WHITBY Survey Derived Catchment Expenditure (£)	£27,312,413	£27,586,220	£28,142,096	£28,651,699	£30,508,132
Existing (Net) Whitby Convenience Floorspace (sq m)	4,553	4,553	4,553	4,553	4,553
Sales per sq m net (£)	£5,999	£6,047	£6,144	£6,181	£6,293
Sales from Existing Floorspace (£)	£27,312,413	£27,531,349	£27,974,501	£28,142,684	£28,653,324
CURRENT RESIDUAL	**£0**	**£54,871**	**£167,595**	**£509,015**	**£1,854,808**
COMMITMENTS	**£24,438,226**	**£24,634,123**	**£25,030,640**	**£25,433,236**	**£26,840,058**
RESIDUAL CAPACITY	**-£24,438,226**	**-£24,579,252**	**-£24,863,045**	**-£24,924,221**	**-£24,985,250**
Sales per sq m net in new shops (Large Retailer) (£)	£10,000	£10,080	£10,242	£10,304	£10,491
Capacity for new floorspace (sq m net)	**-2,444**	**-2,438**	**-2,427**	**-2,419**	**-2,382**
Capacity for new floorspace (sq m gross)	**-3,491**	**-3,483**	**-3,468**	**-3,456**	**-3,402**

Notes

1. New Sainsbury's Whitby store commitment

Table 11a - FILEY CONVENIENCE CAPACITY (BASELINE + GROWTH)

CONVENIENCE GOODS					
	2012	2014	2018	2021	2030
FILEY Survey Derived Catchment Expenditure (£)	£6,037,763	£6,098,291	£6,221,175	£6,333,829	£6,744,218
Existing (Net) Filey Convenience Floorspace (sq m)	1,495	1,495	1,495	1,495	1,495
Sales per sq m net (£)	£4,039	£4,071	£4,137	£4,161	£4,237
Sales from Existing Floorspace (£)	£6,037,763	£6,086,161	£6,184,126	£6,221,305	£6,334,188
RESIDUAL CAPACITY (£)	£0	£12,130	£37,049	£112,524	£410,029
Sales per sq m net in new shops (Large Retailer) (£)	£10,000	£10,080	£10,242	£10,304	£10,491
Capacity for new floorspace (sq m net)	0	1	4	11	39
Capacity for new floorspace (sq m gross)	0	2	5	16	56

Notes

1. Expenditure Growth;-0.4% (2011-2012); 0.5% per annum (2012-2018); 0.6% per annum (2019-2030)
2. Sales Efficiency Growth; 0% per annum (2011-2012); 0.4% per annum (2012-2018); 0.2% per annum (2019-2028)
3. Gross to Net ratio for new floorspace capacity is 70%
4. Sales Density for Large Retailer from Verdict and GVA Research (Goods-Based Turnover).

Table 11b - FILEY CONVENIENCE CAPACITY (BASELINE + GROWTH) - COMMITMENTS

CONVENIENCE GOODS					
	2012	2014	2018	2021	2030
FILEY Survey Derived Catchment Expenditure (£)	£6,037,763	£6,098,291	£6,221,175	£6,333,829	£6,744,218
Existing (Net) Filey Convenience Floorspace (sq m)	1,495	1,495	1,495	1,495	1,495
Sales per sq m net (£)	£4,039	£4,071	£4,137	£4,161	£4,237
Sales from Existing Floorspace (£)	£6,037,763	£6,086,161	£6,184,126	£6,221,305	£6,334,188
CURRENT RESIDUAL	£0	£12,130	£37,049	£112,524	£410,029
COMMITMENTS	£12,899,532	£13,002,935	£13,212,233	£13,424,741	£14,167,321
RESIDUAL CAPACITY	-£12,899,532	-£12,990,805	-£13,175,184	-£13,312,216	-£13,757,292
Sales per sq m net in new shops (Large Retailer) (£)	£10,000	£10,080	£10,242	£10,304	£10,491
Capacity for new floorspace (sq m net)	-1,290	-1,289	-1,286	-1,292	-1,311
Capacity for new floorspace (sq m gross)	-1,843	-1,841	-1,838	-1,846	-1,873

Notes

1. New Tesco Filey store commitment

SCARBOROUGH RETAIL STUDY UPDATE - COMPARISON

TABLE 1 - SURVEY AREA POPULATION FORECASTS

SURVEY ZONE	POPULATION PROJECTIONS							POPULATION GROWTH (%)			
	2010	2011	2012	2014	2018	2021	2030	2010 - 2012	2012-2014	2012-2018	2012-2030
ZONE 1 - SCARBOROUGH PCA	33,535	33,720	33,922	34,290	35,321	36,122	38,767	1.2%	1.1%	4.1%	14.3%
ZONE 2 - SCARBOROUGH SCA NORTH	4,890	4,934	4,874	4,858	4,899	4,897	4,886	-0.3%	-0.3%	0.5%	0.2%
ZONE 3 - SCARBOROUGH SCA WEST	4,652	4,681	4,678	4,707	4,765	4,797	4,939	0.6%	0.6%	1.9%	5.6%
ZONE 4 - EASTFIELD	11,545	11,568	11,668	11,853	12,087	12,377	13,077	1.1%	1.6%	3.6%	12.1%
ZONE 5 - SEAMER	8,661	8,700	8,764	8,971	9,252	9,534	10,246	1.2%	2.4%	5.6%	16.9%
ZONE 6 - IRTON MOOR	8,764	8,776	8,780	8,787	8,965	9,098	9,483	0.2%	0.1%	2.1%	8.0%
ZONE 7 - FILEY	12,433	12,473	12,471	12,378	12,398	12,416	12,493	0.3%	-0.7%	-0.6%	0.2%
ZONE 8 - WHITBY PCA	20,365	20,398	20,480	20,754	21,168	21,444	22,421	0.6%	1.3%	3.4%	9.5%
ZONE 9 - WHITBY SCA	3,045	3,061	3,068	3,099	3,153	3,212	3,325	0.8%	1.0%	2.8%	8.4%
ZONE 10 - STAITHES	2,611	2,625	2,626	2,657	2,685	2,738	2,829	0.6%	1.2%	2.2%	7.7%
TOTAL	110,501	110,936	111,331	112,354	114,693	116,635	122,466				

Source: Experian Retail Planner Report (Summary Demographics - 2010 Base)

Notes

1. All Survey Zones as per 2007 Borough Retail Study

TABLE 2 - EXPENDITURE BREAKDOWN

Comparison Goods by Sector		CLOTHING / FASHION GOODS	RECREATIONAL GOODS	BOOKS & STATIONARY	CDs / DVDs / COMPUTER GAMES	MEDICINES & BEAUTY GOODS	HARDWARE & TABLEWARE	JEWELLERY & WATCHES	ELECTRICAL GOODS	FURNITURE & CARPETS	TEXTILES & SOFT FURNISHINGS	DIY GOODS	GARDEN GOODS	Total Comparison Spend (£)
ZONE 1 - SCARBORO PCA	Expenditure (£)	£584	£261	£92	£83	£88	£53	£76	£605	£209	£84	£135	£36	£2,306
	Weighting	25.3%	11.3%	4.0%	3.6%	3.8%	2.3%	3.3%	26.2%	9.1%	3.6%	5.9%	1.6%	
ZONE 2 - SCARBORO SCA NORTH	Expenditure (£)	£679	£339	£161	£83	£154	£77	£93	£701	£319	£140	£206	£82	£3,034
	Weighting	22.4%	11.2%	5.3%	2.7%	5.1%	2.5%	3.1%	23.1%	10.5%	4.6%	6.8%	2.7%	
ZONE 3 - SCARBORO SCA WEST	Expenditure (£)	£625	£315	£141	£79	£143	£72	£93	£649	£278	£114	£212	£66	£2,787
	Weighting	22.4%	11.3%	5.1%	2.8%	5.1%	2.6%	3.3%	23.3%	10.0%	4.1%	7.6%	2.4%	
ZONE 4 - EASTFIELD	Expenditure (£)	£503	£275	£84	£78	£94	£51	£65	£594	£195	£80	£148	£39	£2,206
	Weighting	22.8%	12.5%	3.8%	3.5%	4.3%	2.3%	2.9%	26.9%	8.8%	3.6%	6.7%	1.8%	
ZONE 5 - SEAMER	Expenditure (£)	£604	£301	£103	£85	£108	£57	£85	£666	£241	£95	£167	£44	£2,556
	Weighting	23.6%	11.8%	4.0%	3.3%	4.2%	2.2%	3.3%	26.1%	9.4%	3.7%	6.5%	1.7%	
ZONE 6 - IRTON MOOR	Expenditure (£)	£589	£301	£106	£85	£121	£60	£89	£671	£254	£99	£168	£51	£2,594
	Weighting	22.7%	11.6%	4.1%	3.3%	4.7%	2.3%	3.4%	25.9%	9.8%	3.8%	6.5%	2.0%	
ZONE 7 - FILEY	Expenditure (£)	£507	£269	£103	£78	£97	£57	£74	£608	£219	£83	£163	£46	£2,304
	Weighting	22.0%	11.7%	4.5%	3.4%	4.2%	2.5%	3.2%	26.4%	9.5%	3.6%	7.1%	2.0%	
ZONE 8 - WHITBY PCA	Expenditure (£)	£608	£313	£123	£85	£101	£59	£86	£644	£255	£96	£180	£54	£2,604
	Weighting	23.3%	12.0%	4.7%	3.3%	3.9%	2.3%	3.3%	24.7%	9.8%	3.7%	6.9%	2.1%	
ZONE 9 - WHITBY SCA	Expenditure (£)	£695	£324	£197	£93	£115	£68	£84	£648	£295	£126	£191	£81	£2,917
	Weighting	23.8%	11.1%	6.8%	3.2%	3.9%	2.3%	2.9%	22.2%	10.1%	4.3%	6.5%	2.8%	
ZONE 10 - STAITHES	Expenditure (£)	£564	£302	£134	£85	£98	£58	£74	£630	£238	£103	£187	£51	£2,524
	Weighting	22.3%	12.0%	5.3%	3.4%	3.9%	2.3%	2.9%	25.0%	9.4%	4.1%	7.4%	2.0%	
TOTAL	Expenditure Average	£596	£300	£124	£83	£112	£61	£82	£642	£250	£102	£176	£55	£2,578

Notes

1. Expenditure Weighting derived from Experian Retail Planner Report (Fine Expenditure)

TABLE 3 - COMPARISON EXPENDITURE FORECASTS

SURVEY AREA	2010 (£)	2010 Minus SfT (£)	2011 (£)	2011 Minus SfT (£)	2012 (£)	2012 Minus SfT (£)	2014 (£)	2014 Minus SfT (£)	2018 (£)	2018 Minus SfT (£)	2021 (£)	2021 Minus SfT (£)	2030 (£)	2030 Minus SfT (£)
ZONE 1 - SCARBOROUGH PCA	£2,306	£2,294	£2,318	£2,086	£2,355	£2,098	£2,476	£2,172	£2,787	£2,433	£3,045	£2,668	£3,974	£3,497
ZONE 2 - SCARBOROUGH SCA NORTH	£3,034	£3,019	£3,049	£2,744	£3,098	£2,760	£3,258	£2,857	£3,667	£3,201	£4,007	£3,510	£5,228	£4,601
ZONE 3 - SCARBOROUGH SCA WEST	£2,787	£2,773	£2,801	£2,521	£2,846	£2,536	£2,993	£2,625	£3,368	£2,941	£3,681	£3,224	£4,802	£4,226
ZONE 4 - EASTFIELD	£2,206	£2,195	£2,217	£1,995	£2,253	£2,007	£2,369	£2,077	£2,666	£2,328	£2,913	£2,552	£3,801	£3,345
ZONE 5 - SEAMER	£2,556	£2,543	£2,569	£2,312	£2,610	£2,325	£2,745	£2,407	£3,089	£2,697	£3,376	£2,957	£4,404	£3,876
ZONE 6 - IRTON MOOR	£2,594	£2,581	£2,607	£2,346	£2,649	£2,360	£2,785	£2,443	£3,135	£2,737	£3,426	£3,001	£4,470	£3,933
ZONE 7 - FILEY	£2,304	£2,292	£2,316	£2,084	£2,353	£2,096	£2,474	£2,170	£2,785	£2,431	£3,043	£2,665	£3,970	£3,494
ZONE 8 - WHITBY PCA	£2,604	£2,591	£2,617	£2,355	£2,659	£2,369	£2,796	£2,452	£3,147	£2,747	£3,439	£3,013	£4,487	£3,949
ZONE 9 - WHITBY SCA	£2,917	£2,902	£2,932	£2,638	£2,978	£2,654	£3,132	£2,747	£3,525	£3,078	£3,852	£3,375	£5,026	£4,423
ZONE 10 - STAITHES	£2,524	£2,511	£2,537	£2,283	£2,577	£2,296	£2,710	£2,377	£3,050	£2,663	£3,333	£2,920	£4,349	£3,827

Notes

1. Expenditure per Capita Forecasts derived from Experian Retail Planner (Fine Expenditure) Report; All Expenditure Figures given in 2010 Prices
2. Growth in per capita retail expenditure for Comparison Goods: (Source: - Experian Retail Planner Briefing Note 9 / GVA)

	2011	2012	2013	2014-2030
Expend. Growth (p.a.)	0.5%	1.6%	2.1%	3.0%

3. Deductions for Special Forms of Trading (SfT) (Source: - Experian Retail Planner Briefing Note 9 / GVA)

	2010	2011	2012	2014	2018	2021	2030
Comparison Goods	8.8%	10.0%	10.90%	12.3%	12.7%	12.4%	12.0%

TABLE 4 - OVERALL COMPARISON Expenditure Growth, 2010 - 2030

SURVEY ZONE	2010 (£)	2011 (£)	2012 (£)	2014 (£)	2018 (£)	2021 (£)	2030 (£)
ZONE 1 - SCARBOROUGH PCA	£76,945,051	£70,332,400	£71,166,929	£74,464,473	£85,936,601	£96,364,818	£135,557,172
ZONE 2 - SCARBOROUGH SCA NORTH	£14,762,079	£13,540,144	£13,453,602	£13,880,190	£15,682,269	£17,188,307	£22,478,641
ZONE 3 - SCARBOROUGH SCA WEST	£12,900,298	£11,800,059	£11,861,365	£12,353,883	£14,011,536	£15,466,573	£20,872,622
ZONE 4 - EASTFIELD	£25,340,929	£23,081,943	£23,417,439	£24,623,859	£28,132,602	£31,586,995	£43,743,611
ZONE 5 - SEAMER	£22,026,828	£20,113,547	£20,379,836	£21,593,549	£24,950,678	£28,191,839	£39,711,492
ZONE 6 - IRTON MOOR	£22,620,147	£20,590,892	£20,720,583	£21,465,101	£24,536,135	£27,302,557	£37,300,678
ZONE 7 - FILEY	£28,502,404	£25,993,333	£26,140,942	£26,856,863	£30,138,386	£33,094,178	£43,646,580
ZONE 8 - WHITBY PCA	£52,765,308	£48,043,777	£48,518,616	£50,893,829	£58,157,628	£64,600,249	£88,531,325
ZONE 9 - WHITBY SCA	£8,837,854	£8,076,224	£8,141,966	£8,512,955	£9,703,899	£10,839,254	£14,707,169
ZONE 10 - STAITHES	£6,557,213	£5,992,765	£6,030,059	£6,315,434	£7,150,222	£7,994,848	£10,827,378
TOTAL	£271,258,111	£247,565,083	£249,831,336	£260,960,137	£298,399,956	£332,629,618	£457,376,668

EXPENDITURE GROWTH (£)			
2010 - 2012	2012-2014	2012-2020	2012-2030
-£5,778,122	£3,297,543	£25,197,889	£64,390,243
-£1,308,477	£426,588	£3,734,705	£9,025,039
-£1,038,934	£492,519	£3,605,209	£9,011,257
-£1,923,489	£1,206,420	£8,169,556	£20,326,172
-£1,646,992	£1,213,713	£7,812,003	£19,331,656
-£1,899,564	£744,518	£6,581,974	£16,580,095
-£2,361,462	£715,921	£6,953,236	£17,505,638
-£4,246,691	£2,375,212	£16,081,633	£40,012,708
-£695,888	£370,989	£2,697,288	£6,565,203
-£527,154	£285,376	£1,964,789	£4,797,319
-£21,426,775	£11,128,800	£82,798,282	£207,545,332

TABLE 5a - Clothing Expenditure Growth, 2010 - 2030

SURVEY ZONE	2010	2011	2012	2014	2018	2021	2030	EXPENDITURE GROWTH (£)			
	(£)	(£)	(£)	(£)	(£)	(£)	(£)	2010 - 2012	2012-2014	2012-2021	2012-2030
ZONE 1 - SCARBOROUGH PCA	£19,486,518	£17,811,848	£18,023,195	£18,858,305	£21,763,649	£24,404,620	£34,330,177	-£1,463,323	£835,111	£6,381,426	£16,306,983
ZONE 2 - SCARBOROUGH SCA NORTH	£3,303,708	£3,030,243	£3,010,875	£3,106,344	£3,509,644	£3,846,691	£5,030,652	-£292,833	£95,469	£835,816	£2,019,776
ZONE 3 - SCARBOROUGH SCA WEST	£2,892,963	£2,646,228	£2,659,976	£2,770,426	£3,142,164	£3,468,464	£4,680,800	-£232,987	£110,450	£808,488	£2,020,824
ZONE 4 - EASTFIELD	£5,778,099	£5,263,018	£5,339,516	£5,614,597	£6,414,641	£7,202,293	£9,974,178	-£438,583	£275,081	£1,862,777	£4,634,662
ZONE 5 - SEAMER	£5,205,088	£4,752,967	£4,815,892	£5,102,701	£5,896,013	£6,661,921	£9,384,093	-£389,195	£286,809	£1,846,029	£4,568,200
ZONE 6 - IRTON MOOR	£5,136,186	£4,675,418	£4,704,866	£4,873,918	£5,571,235	£6,199,385	£8,469,583	-£431,320	£169,052	£1,494,519	£3,764,717
ZONE 7 - FILEY	£6,272,013	£5,719,887	£5,752,369	£5,909,909	£6,632,015	£7,282,443	£9,604,521	-£519,645	£157,540	£1,530,074	£3,852,152
ZONE 8 - WHITBY PCA	£12,320,010	£11,217,595	£11,328,463	£11,883,044	£13,579,047	£15,083,315	£20,670,908	-£991,547	£554,581	£3,754,851	£9,342,445
ZONE 9 - WHITBY SCA	£2,105,694	£1,924,229	£1,939,892	£2,028,284	£2,312,036	£2,582,544	£3,504,108	-£165,801	£88,391	£642,652	£1,564,215
ZONE 10 - STAITHES	£1,465,241	£1,339,112	£1,347,446	£1,411,214	£1,597,752	£1,786,487	£2,419,430	-£117,795	£63,769	£439,042	£1,071,984
TOTAL	£63,965,520	£58,380,545	£58,922,491	£61,558,743	£70,418,196	£78,518,164	£108,068,450	-£5,043,030	£2,636,253	£19,595,673	£49,145,959

Notes

1. Expenditure Growth derived from Population Projections (Table 1) * Expenditure per Capita figures (less SfT deduction) (Table 2)

Table 5b - Clothing (2012)

DESTINATIONS	M/S	ZONE 1 - SCARBORO PCA	ZONE 2 - SCARBORO SCA NORTH	ZONE 3 - SCARBORO SCA WEST	ZONE 4 - EASTFIELD	ZONE 5 - SEAMER	ZONE 6 - IRTON MOOR	ZONE 7 - FILEY	ZONE 8 - WHITBY PCA	ZONE 9 - WHITBY SCA	ZONE 10 - STAITHES	SURVEY TURNOVER
SCARBOROUGH	%	82.8%	71.4%	77.8%	81.5%	79.3%	83.3%	80.6%	53.8%	13.1%	8.3%	
	£	£14,923,205	£2,149,765	£2,069,461	£4,351,705	£3,819,003	£3,919,154	£4,636,409	£6,094,713	£254,126	£111,838	£42,329,379
SEAMER ROAD RP [SCARBOROUGH]	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
WHITBY	%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	11.4%	2.2%	10.4%	
	£	£54,070	£0	£0	£0	£0	£0	£46,019	£1,291,445	£42,678	£140,134	£1,574,345
FILEY	%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	3.9%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£48,056	£0	£0	£224,342	£0	£0	£0	£272,398
TESCO (WESTWOOD)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
SAINSBURY'S (GALLOWS CLOSE)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
MORRISON'S (DUNSLOW ROAD)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
OTHER (SCARBOROUGH LPA AREA)	%	0.6%	2.3%	2.2%	0.9%	0.0%	0.0%	0.0%	2.4%	2.2%	2.1%	
	£	£108,139	£69,250	£58,519	£48,056	£0	£0	£0	£271,883	£42,678	£28,296	£626,822
TOTAL	%	83.7%	73.7%	80.0%	83.3%	79.3%	83.3%	85.3%	67.6%	17.5%	20.8%	
	£	£15,085,414	£2,219,015	£2,127,981	£4,447,817	£3,819,003	£3,919,154	£4,906,770	£7,658,041	£339,481	£280,269	£44,802,944
YORK CITY CENTRE	c	9.9%	14.3%	15.6%	12.0%	8.6%	16.7%	6.2%	8.5%	15.2%	4.2%	
	£	£1,784,296	£430,555	£414,956	£640,742	£414,167	£785,713	£356,647	£962,919	£294,864	£56,593	£6,141,452
MONKS CROSS RP [YORK]	%	2.3%	0.0%	0.0%	0.9%	5.2%	0.0%	0.8%	0.0%	0.0%	0.0%	
	£	£414,533	£0	£0	£48,056	£250,426	£0	£46,019	£0	£0	£0	£759,034
CLIFTON MOOR RP [YORK]	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
YORK DESIGNER OUTLET	%	1.9%	4.8%	2.2%	0.9%	3.4%	0.0%	0.8%	1.0%	0.0%	0.0%	
	£	£342,441	£144,522	£58,519	£48,056	£163,740	£0	£46,019	£113,285	£0	£0	£916,582
MIDDLESBROUGH TOWN CENTRE	c	0.3%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%	20.3%	52.2%	52.1%	
	£	£54,070	£0	£58,519	£0	£0	£0	£0	£2,299,678	£1,012,624	£702,019	£4,126,910
TEESSIDE RP	c	0.0%	2.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£72,261	£0	£0	£0	£0	£0	£0	£0	£0	£72,261
LEEDS CITY CENTRE	c	0.9%	0.0%	0.0%	0.9%	1.7%	0.0%	0.8%	0.0%	0.0%	0.0%	
	£	£162,209	£0	£0	£48,056	£81,870	£0	£46,019	£0	£0	£0	£338,154
HULL CITY CENTRE	c	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	
	£	£108,139	£0	£0	£0	£0	£0	£46,019	£0	£0	£0	£154,158
BRIDLINGTON TOWN CENTRE	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.7%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£270,361	£0	£0	£0	£270,361
MALTON TOWN CENTRE	%	0.0%	4.8%	0.0%	0.9%	1.7%	0.0%	0.0%	0.5%	2.2%	0.0%	
	£	£0	£144,522	£0	£48,056	£81,870	£0	£0	£56,642	£42,678	£0	£373,768
HORNSEA OUTLET	%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£54,070	£0	£0	£0	£0	£0	£0	£0	£0	£0	£54,070
OTHER	%	0.1%	0.0%	0.0%	1.1%	0.1%	0.0%	0.6%	2.1%	12.9%	22.9%	
	£	£18,023	£0	£0	£58,735	£4,816	£0	£34,514	£237,898	£250,246	£308,565	£912,797
CATCHMENT TOTAL	%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
	£	£18,023,195	£3,010,875	£2,659,976	£5,339,516	£4,815,892	£4,704,866	£5,752,369	£11,328,463	£1,939,892	£1,347,446	£58,922,491

TABLE 6a - Recreational Expenditure Growth, 2010 - 2030

SURVEY ZONE	2010 (£)	2011 (£)	2012 (£)	2014 (£)	2018 (£)	2021 (£)	2030 (£)
ZONE 1 - SCARBOROUGH PCA	£8,708,872	£7,960,432	£8,054,887	£8,428,112	£9,726,562	£10,906,859	£15,342,768
ZONE 2 - SCARBOROUGH SCA NORTH	£1,649,421	£1,512,890	£1,503,221	£1,550,885	£1,752,238	£1,920,513	£2,511,621
ZONE 3 - SCARBOROUGH SCA WEST	£1,458,053	£1,333,699	£1,340,628	£1,396,295	£1,583,650	£1,748,106	£2,359,123
ZONE 4 - EASTFIELD	£3,159,001	£2,877,395	£2,919,218	£3,069,611	£3,507,011	£3,937,635	£5,453,079
ZONE 5 - SEAMER	£2,593,926	£2,368,614	£2,399,973	£2,542,902	£2,938,245	£3,319,931	£4,676,510
ZONE 6 - IRTON MOOR	£2,624,774	£2,389,305	£2,404,354	£2,490,746	£2,847,100	£3,168,107	£4,328,259
ZONE 7 - FILEY	£3,327,755	£3,034,812	£3,052,046	£3,135,632	£3,518,761	£3,863,860	£5,095,890
ZONE 8 - WHITBY PCA	£6,342,374	£5,774,847	£5,831,923	£6,117,423	£6,990,529	£7,764,930	£10,641,438
ZONE 9 - WHITBY SCA	£981,647	£897,051	£904,353	£945,560	£1,077,841	£1,203,949	£1,633,570
ZONE 10 - STAITHES	£784,579	£717,042	£721,505	£755,650	£855,534	£956,594	£1,295,510
TOTAL	£31,630,402	£28,866,088	£29,132,107	£30,432,816	£34,797,471	£38,790,485	£53,337,768

EXPENDITURE GROWTH (£)			
2010 - 2012	2012-2014	2012-2021	2012-2030
-£748,440	£373,226	£2,851,973	£7,287,881
-£136,531	£47,664	£417,292	£1,008,401
-£124,354	£55,667	£407,478	£1,018,495
-£281,605	£150,392	£1,018,417	£2,533,861
-£225,312	£142,929	£919,958	£2,276,537
-£235,469	£86,392	£763,753	£1,923,905
-£292,943	£83,586	£811,814	£2,043,844
-£567,527	£285,500	£1,933,007	£4,809,515
-£84,597	£41,207	£299,596	£729,217
-£67,537	£34,146	£235,090	£574,006
-£2,764,314	£1,300,709	£9,658,378	£24,205,662

Notes

1. Expenditure Growth derived from Population Projections (Table 1) * Expenditure per Capita figures (less SfT deduction) (Table 2)

Table 6b - Recreational Goods (2012)

DESTINATIONS	M/S	ZONE 1 - SCARBORO PCA	ZONE 2 - SCARBORO SCA NORTH	ZONE 3 - SCARBORO SCA WEST	ZONE 4 - EASTFIELD	ZONE 5 - SEAMER	ZONE 6 - IRTON MOOR	ZONE 7 - FILEY	ZONE 8 - WHITBY PCA	ZONE 9 - WHITBY SCA	ZONE 10 - STAITHES	SURVEY TURNOVER
SCARBOROUGH	%	82.7%	79.2%	64.7%	67.7%	77.3%	73.8%	62.3%	28.1%	8.3%	8.3%	
	£	£6,661,391	£1,190,551	£867,386	£1,976,311	£1,855,179	£1,774,414	£1,901,424	£1,638,770	£75,061	£59,885	£18,000,373
SEAMER ROAD RP [SCARBOROUGH]	%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£40,274	£0	£0	£0	£0	£0	£0	£0	£0	£0	£40,274
WHITBY	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	34.8%	12.5%	11.1%	
	£	£0	£0	£0	£0	£0	£0	£0	£2,029,509	£113,044	£80,087	£2,222,640
FILEY	%	0.0%	4.2%	0.0%	0.0%	0.0%	0.0%	8.7%	0.0%	0.0%	0.0%	
	£	£0	£63,135	£0	£0	£0	£0	£265,528	£0	£0	£0	£328,663
TESCO (WESTWOOD)	%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£40,274	£0	£0	£0	£0	£0	£0	£0	£0	£0	£40,274
SAINSBURY'S (GALLOWS CLOSE)	%	0.0%	4.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£63,135	£0	£0	£0	£0	£0	£0	£0	£0	£63,135
MORRISON'S (DUNSLOW ROAD)	%	0.0%	0.0%	2.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£38,878	£0	£0	£0	£0	£0	£0	£0	£38,878
OTHER (SCARBOROUGH LPA AREA)	%	3.2%	0.0%	2.9%	1.5%	2.3%	2.4%	4.3%	3.8%	37.5%	36.1%	
	£	£257,756	£0	£38,878	£43,788	£55,199	£57,705	£131,238	£221,613	£339,132	£260,463	£1,405,773
TOTAL	%	86.9%	87.6%	70.5%	69.2%	79.6%	76.2%	75.3%	66.7%	58.3%	55.5%	
	£	£6,999,696	£1,316,821	£945,143	£2,020,099	£1,910,378	£1,832,118	£2,298,190	£3,889,892	£527,238	£400,435	£22,140,012
YORK CITY CENTRE	c	2.5%	0.0%	23.5%	7.7%	4.5%	19.0%	8.7%	6.7%	4.2%	0.0%	
	£	£201,372	£0	£315,048	£224,780	£107,999	£456,827	£265,528	£390,739	£37,983	£0	£2,000,275
MONKS CROSS RP [YORK]	%	1.6%	4.2%	2.9%	1.5%	2.3%	2.4%	0.0%	0.0%	0.0%	0.0%	
	£	£128,878	£63,135	£38,878	£43,788	£55,199	£57,705	£0	£0	£0	£0	£387,584
CLIFTON MOOR RP [YORK]	%	1.5%	0.0%	0.0%	1.5%	0.0%	0.0%	1.5%	0.0%	0.0%	0.0%	
	£	£120,823	£0	£0	£43,788	£0	£0	£45,781	£0	£0	£0	£210,392
YORK DESIGNER OUTLET	%	0.0%	4.2%	0.0%	1.5%	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	
	£	£0	£63,135	£0	£43,788	£0	£0	£42,729	£0	£0	£0	£149,652
MIDDLESBROUGH TOWN CENTRE	c	0.5%	0.0%	0.0%	1.5%	2.3%	0.0%	0.0%	11.9%	11.9%	33.3%	
	£	£40,274	£0	£0	£43,788	£55,199	£0	£0	£693,999	£107,618	£240,261	£1,181,140
TEESSIDE RP	c	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	10.2%	20.8%	11.1%	
	£	£0	£0	£0	£0	£0	£0	£0	£594,856	£188,105	£80,087	£863,049
LEEDS CITY CENTRE	c	1.4%	0.0%	0.0%	3.1%	2.3%	2.4%	4.4%	0.0%	0.0%	0.0%	
	£	£112,768	£0	£0	£90,496	£55,199	£57,705	£134,290	£0	£0	£0	£450,458
HULL CITY CENTRE	c	0.5%	0.0%	0.0%	0.0%	2.3%	0.0%	2.9%	0.8%	0.0%	0.0%	
	£	£40,274	£0	£0	£0	£55,199	£0	£88,509	£46,655	£0	£0	£230,639
BRIDLINGTON TOWN CENTRE	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
MALTON TOWN CENTRE	%	0.0%	0.0%	2.9%	0.0%	2.3%	0.0%	1.5%	0.0%	0.0%	0.0%	
	£	£0	£0	£38,878	£0	£55,199	£0	£45,781	£0	£0	£0	£139,858
HORNSEA OUTLET	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
OTHER	%	5.1%	4.0%	0.2%	14.0%	4.4%	0.0%	4.3%	3.7%	4.8%	0.1%	
	£	£410,799	£60,129	£2,681	£408,691	£105,599	£0	£131,238	£215,781	£43,409	£722	£1,379,048
CATCHMENT TOTAL	%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
	£	£8,054,887	£1,503,221	£1,340,628	£2,919,218	£2,399,973	£2,404,354	£3,052,046	£5,831,923	£904,353	£721,505	£29,132,107

TABLE 7a - Books & Stationary Expenditure Growth, 2010 - 2030

SURVEY ZONE	2010 (£)	2011 (£)	2012 (£)	2014 (£)	2018 (£)	2021 (£)	2030 (£)	EXPENDITURE GROWTH (£) 2010 - 2012	2012-2014	2012-2021	2012-2030
ZONE 1 - SCARBOROUGH PCA	£3,069,794	£2,805,976	£2,839,270	£2,970,829	£3,428,520	£3,844,563	£5,408,179	-£230,524	£131,559	£1,005,293	£2,568,908
ZONE 2 - SCARBOROUGH SCA NORTH	£783,354	£718,511	£713,919	£736,556	£832,184	£912,102	£1,192,835	-£69,435	£22,637	£198,183	£478,916
ZONE 3 - SCARBOROUGH SCA WEST	£652,652	£596,989	£600,091	£625,008	£708,872	£782,485	£1,055,988	-£52,562	£24,918	£182,395	£455,898
ZONE 4 - EASTFIELD	£964,931	£878,914	£891,689	£937,627	£1,071,232	£1,202,769	£1,665,668	-£73,243	£45,938	£311,080	£773,979
ZONE 5 - SEAMER	£887,623	£810,522	£821,253	£870,163	£1,005,446	£1,136,056	£1,600,267	-£66,369	£48,909	£314,803	£779,014
ZONE 6 - IRTON MOOR	£924,339	£841,417	£846,716	£877,140	£1,002,633	£1,115,679	£1,524,237	-£77,623	£30,424	£268,963	£677,521
ZONE 7 - FILEY	£1,274,196	£1,162,028	£1,168,627	£1,200,632	£1,347,332	£1,479,471	£1,951,214	-£105,569	£32,005	£310,843	£782,587
ZONE 8 - WHITBY PCA	£2,492,371	£2,269,349	£2,291,778	£2,403,971	£2,747,077	£3,051,394	£4,181,779	-£200,593	£112,193	£759,616	£1,890,001
ZONE 9 - WHITBY SCA	£596,866	£545,429	£549,869	£574,924	£655,354	£732,031	£993,251	-£46,997	£25,055	£182,162	£443,382
ZONE 10 - STAITHES	£348,125	£318,158	£320,138	£335,289	£379,608	£424,449	£574,829	-£27,987	£15,151	£104,311	£254,691
TOTAL	£11,994,249	£10,947,293	£11,043,349	£11,532,137	£13,178,258	£14,680,999	£20,148,248	-£950,900	£488,788	£3,637,650	£9,104,899

Notes

1. Expenditure Growth derived from Population Projections (Table 1) * Expenditure per Capita figures (less SfT deduction) (Table 2)

Table 7b - Books & Stationary (2012)

DESTINATIONS		ZONE 1 - SCARBORO PCA	ZONE 2 - SCARBORO SCA NORTH	ZONE 3 - SCARBORO SCA WEST	ZONE 4 - EASTFIELD	ZONE 5 - SEAMER	ZONE 6 - IRTON MOOR	ZONE 7 - FILEY	ZONE 8 - WHITBY PCA	ZONE 9 - WHITBY SCA	ZONE 10 - STAITHES	SURVEY TURNOVER
SCARBOROUGH	%	91.9%	90.7%	89.7%	89.1%	86.2%	94.7%	54.5%	28.8%	2.9%	4.9%	
	£	£2,609,289	£647,524	£538,281	£794,494	£707,920	£801,840	£636,902	£660,032	£15,946	£15,687	£7,427,917
SEAMER ROAD RP [SCARBOROUGH]	%	0.0%	0.0%	0.0%	0.0%	3.4%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£27,923	£0	£0	£0	£0	£0	£27,923
WHITBY	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	51.3%	25.7%	34.1%	
	£	£0	£0	£0	£0	£0	£0	£0	£1,175,682	£141,316	£109,167	£1,426,165
FILEY	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	33.7%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£393,827	£0	£0	£0	£393,827
TESCO (WESTWOOD)	%	1.1%	4.7%	0.0%	0.0%	1.7%	1.8%	0.0%	0.0%	0.0%	0.0%	
	£	£31,232	£33,554	£0	£0	£13,961	£15,241	£0	£0	£0	£0	£93,988
SAINSBURY'S (GALLOWS CLOSE)	%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£19,875	£0	£0	£0	£0	£0	£0	£0	£0	£0	£19,875
MORRISON'S (DUNSLOW ROAD)	%	0.7%	0.0%	2.6%	5.9%	5.2%	1.8%	0.9%	0.0%	0.0%	0.0%	
	£	£19,875	£0	£15,602	£52,610	£42,705	£15,241	£10,518	£0	£0	£0	£156,551
OTHER (SCARBOROUGH LPA AREA)	%	3.3%	2.3%	2.5%	5.0%	1.7%	0.0%	4.5%	6.6%	57.1%	34.1%	
	£	£93,696	£16,420	£15,002	£44,584	£13,961	£0	£52,588	£151,257	£313,975	£109,167	£810,652
TOTAL	%	97.7%	97.7%	94.8%	100.0%	98.2%	98.3%	93.6%	86.7%	85.7%	73.1%	
	£	£2,773,967	£697,499	£568,886	£891,689	£806,471	£832,322	£1,093,835	£1,986,971	£471,238	£234,021	£10,356,898
YORK CITY CENTRE	c	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.3%	0.0%	2.4%	
	£	£28,393	£0	£0	£0	£0	£0	£0	£98,546	£0	£7,683	£134,622
MONKS CROSS RP [YORK]	%	0.7%	0.0%	0.0%	0.0%	1.7%	0.0%	0.0%	0.4%	0.0%	0.0%	
	£	£19,875	£0	£0	£0	£13,961	£0	£0	£9,167	£0	£0	£43,003
CLIFTON MOOR RP [YORK]	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
YORK DESIGNER OUTLET	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
MIDDLESBROUGH TOWN CENTRE	c	0.0%	0.0%	2.6%	0.0%	0.0%	0.0%	0.0%	5.8%	2.6%	24.4%	
	£	£0	£0	£15,602	£0	£0	£0	£0	£132,923	£14,297	£78,114	£240,936
TEESSIDE RP	c	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.9%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£15,946	£0	£15,946
LEEDS CITY CENTRE	c	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£8,518	£0	£0	£0	£0	£0	£0	£0	£0	£0	£8,518
HULL CITY CENTRE	c	0.3%	0.0%	0.0%	0.0%	0.0%	1.7%	0.0%	0.9%	0.0%	0.0%	
	£	£8,518	£0	£0	£0	£0	£14,394	£0	£20,626	£0	£0	£43,538
BRIDLINGTON TOWN CENTRE	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£31,553	£0	£0	£0	£31,553
MALTON TOWN CENTRE	%	0.0%	0.0%	2.6%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	
	£	£0	£0	£15,602	£0	£0	£0	£0	£9,167	£0	£0	£24,769
HORNSEA OUTLET	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
OTHER	%	0.0%	2.3%	0.0%	0.0%	0.1%	0.0%	3.7%	1.5%	8.8%	0.1%	
	£	£0	£16,420	£0	£0	£821	£0	£43,239	£34,377	£48,388	£320	£143,566
CATCHMENT TOTAL	%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
	£	£2,839,270	£713,919	£600,091	£891,689	£821,253	£846,716	£1,168,627	£2,291,778	£549,869	£320,138	£11,043,349

TABLE 8a - CDs / DVDs Expenditure Growth, 2010 - 2030

SURVEY ZONE	2010	2011	2012	2014	2018	2021	2030	EXPENDITURE GROWTH (£)			
	(£)	(£)	(£)	(£)	(£)	(£)	(£)	2010 - 2012	2012-2014	2012-2021	2012-2030
ZONE 1 - SCARBOROUGH PCA	£2,769,488	£2,531,478	£2,561,516	£2,680,204	£3,093,121	£3,468,465	£4,879,118	-£207,972	£118,689	£906,949	£2,317,602
ZONE 2 - SCARBOROUGH SCA NORTH	£403,841	£370,413	£368,045	£379,715	£429,014	£470,214	£614,940	-£35,796	£11,670	£102,169	£246,895
ZONE 3 - SCARBOROUGH SCA WEST	£365,670	£334,483	£336,221	£350,182	£397,169	£438,414	£591,653	-£29,450	£13,961	£102,193	£255,432
ZONE 4 - EASTFIELD	£896,007	£816,134	£827,996	£870,653	£994,716	£1,116,857	£1,546,692	-£68,011	£42,657	£288,860	£718,695
ZONE 5 - SEAMER	£732,504	£668,878	£677,733	£718,095	£829,737	£937,522	£1,320,609	-£54,771	£40,362	£259,789	£642,876
ZONE 6 - IRTON MOOR	£741,215	£674,721	£678,971	£703,367	£803,998	£894,648	£1,222,266	-£62,245	£24,396	£215,678	£543,295
ZONE 7 - FILEY	£964,925	£879,983	£884,980	£909,217	£1,020,310	£1,120,376	£1,477,619	-£79,945	£24,237	£235,396	£592,639
ZONE 8 - WHITBY PCA	£1,722,370	£1,568,249	£1,583,749	£1,661,281	£1,898,386	£2,108,687	£2,889,847	-£138,621	£77,532	£524,938	£1,306,098
ZONE 9 - WHITBY SCA	£281,769	£257,487	£259,583	£271,411	£309,380	£345,578	£468,895	-£22,186	£11,828	£85,995	£209,312
ZONE 10 - STAITHES	£220,825	£201,817	£203,073	£212,683	£240,796	£269,240	£364,630	-£17,753	£9,611	£66,168	£161,558
TOTAL	£9,098,615	£8,303,642	£8,381,866	£8,756,808	£10,016,628	£11,170,000	£15,376,268	-£716,749	£374,942	£2,788,134	£6,994,402

Notes

1. Expenditure Growth derived from Population Projections (Table 1) * Expenditure per Capita figures (less SfT deduction) (Table 2)

Table 8b - CDs / DVDs (2012)

DESTINATIONS		ZONE 1 - SCARBORO PCA	ZONE 2 - SCARBORO SCA NORTH	ZONE 3 - SCARBORO SCA WEST	ZONE 4 - EASTFIELD	ZONE 5 - SEAMER	ZONE 6 - IRTON MOOR	ZONE 7 - FILEY	ZONE 8 - WHITBY PCA	ZONE 9 - WHITBY SCA	ZONE 10 - STAITHES	SURVEY TURNOVER
SCARBOROUGH	%	88.0%	79.9%	100.0%	90.6%	76.6%	92.5%	78.7%	32.1%	21.7%	8.3%	
	£	£2,254,134	£294,068	£336,221	£750,165	£519,144	£628,048	£696,479	£508,383	£56,329	£16,855	£6,059,826
SEAMER ROAD RP [SCARBOROUGH]	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
WHITBY	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	47.0%	13.0%	13.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£744,362	£33,746	£26,399	£804,507
FILEY	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£23,894	£0	£0	£0	£23,894
TESCO (WESTWOOD)	%	4.3%	10.0%	0.0%	1.4%	8.5%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£110,145	£36,805	£0	£11,592	£57,607	£0	£0	£0	£0	£0	£216,149
SAINSBURY'S (GALLOWS CLOSE)	%	2.0%	3.3%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£51,230	£12,145	£0	£11,592	£0	£0	£0	£0	£0	£0	£74,968
MORRISON'S (DUNSLOW ROAD)	%	1.2%	6.7%	0.0%	4.1%	6.4%	0.0%	8.0%	0.8%	0.0%	0.0%	
	£	£30,738	£24,659	£0	£33,948	£43,375	£0	£70,798	£12,670	£0	£0	£216,188
OTHER (SCARBOROUGH LPA AREA)	%	2.0%	0.0%	0.0%	1.1%	4.2%	7.5%	4.0%	3.2%	34.8%	38.9%	
	£	£51,230	£0	£0	£9,108	£28,465	£50,923	£35,399	£50,680	£90,335	£78,995	£395,135
TOTAL	%	97.5%	99.9%	100.0%	98.6%	95.7%	100.0%	93.4%	83.1%	69.5%	60.2%	
	£	£2,497,478	£367,677	£336,221	£816,405	£648,591	£678,971	£826,571	£1,316,095	£180,410	£122,250	£7,790,668
YORK CITY CENTRE	c	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.3%	8.7%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£83,939	£22,584	£0	£106,522
MONKS CROSS RP [YORK]	%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£23,054	£0	£0	£0	£0	£0	£0	£0	£0	£0	£23,054
CLIFTON MOOR RP [YORK]	%	0.0%	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£11,592	£0	£0	£0	£0	£0	£0	£11,592
YORK DESIGNER OUTLET	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
MIDDLESBROUGH TOWN CENTRE	c	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	17.4%	22.2%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£45,167	£45,082	£90,249
TEESSIDE RP	c	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
LEEDS CITY CENTRE	c	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.3%	0.0%	
	£	£10,246	£0	£0	£0	£0	£0	£0	£0	£11,162	£0	£21,408
HULL CITY CENTRE	c	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%	0.0%	0.0%	
	£	£10,246	£0	£0	£0	£0	£0	£0	£25,340	£0	£0	£35,586
BRIDLINGTON TOWN CENTRE	%	0.4%	0.0%	0.0%	0.0%	2.1%	0.0%	2.7%	0.0%	0.0%	0.0%	
	£	£10,246	£0	£0	£0	£14,232	£0	£23,894	£0	£0	£0	£48,373
MALTON TOWN CENTRE	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
HORNSEA OUTLET	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
OTHER	%	0.4%	0.1%	0.0%	0.0%	2.2%	0.0%	3.9%	10.0%	0.1%	17.6%	
	£	£10,246	£368	£0	£0	£14,910	£0	£34,514	£158,375	£260	£35,741	£254,414
CATCHMENT TOTAL	%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
	£	£2,561,516	£368,045	£336,221	£827,996	£677,733	£678,971	£884,980	£1,583,749	£259,583	£203,073	£8,381,866

TABLE 9a - Chemist Goods Expenditure Growth, 2010 - 2030

SURVEY ZONE	2010 (£)	2011 (£)	2012 (£)	2014 (£)	2018 (£)	2021 (£)	2030 (£)	EXPENDITURE GROWTH (£) 2010 - 2012	2012-2014	2012-2021	2012-2030
ZONE 1 - SCARBOROUGH PCA	£2,936,325	£2,683,977	£2,715,824	£2,841,662	£3,279,454	£3,677,409	£5,173,040	-£220,501	£125,839	£961,585	£2,457,217
ZONE 2 - SCARBOROUGH SCA NORTH	£749,295	£687,272	£682,879	£704,532	£796,002	£872,445	£1,140,973	-£66,416	£21,653	£189,566	£458,094
ZONE 3 - SCARBOROUGH SCA WEST	£661,910	£605,457	£608,602	£633,873	£718,927	£793,584	£1,070,967	-£53,307	£25,271	£184,982	£462,364
ZONE 4 - EASTFIELD	£1,079,804	£983,546	£997,842	£1,049,249	£1,198,760	£1,345,955	£1,863,962	-£81,962	£51,407	£348,113	£866,120
ZONE 5 - SEAMER	£930,711	£849,868	£861,120	£912,403	£1,054,254	£1,191,204	£1,677,950	-£69,591	£51,284	£330,085	£816,831
ZONE 6 - IRTON MOOR	£1,055,142	£960,485	£966,534	£1,001,263	£1,144,515	£1,273,558	£1,739,931	-£88,607	£34,729	£307,023	£773,397
ZONE 7 - FILEY	£1,199,971	£1,094,337	£1,100,552	£1,130,693	£1,268,847	£1,393,288	£1,837,551	-£99,419	£30,141	£292,736	£737,000
ZONE 8 - WHITBY PCA	£2,046,581	£1,863,449	£1,881,866	£1,973,993	£2,255,730	£2,505,616	£3,433,819	-£164,714	£92,126	£623,750	£1,551,952
ZONE 9 - WHITBY SCA	£348,424	£318,398	£320,989	£335,615	£382,567	£427,327	£579,816	-£27,435	£14,626	£106,338	£258,827
ZONE 10 - STAITHES	£254,599	£232,683	£234,131	£245,211	£277,624	£310,418	£420,397	-£20,468	£11,080	£76,287	£186,267
TOTAL	£11,262,760	£10,279,472	£10,370,340	£10,828,495	£12,376,679	£13,790,806	£18,938,407	-£892,420	£458,155	£3,420,466	£8,568,067

Notes

1. Expenditure Growth derived from Population Projections (Table 1) * Expenditure per Capita figures (less SfT deduction) (Table 2)

Table 9b - Chemist Goods (2012)

DESTINATIONS		ZONE 1 - SCARBORO PCA	ZONE 2 - SCARBORO SCA NORTH	ZONE 3 - SCARBORO SCA WEST	ZONE 4 - EASTFIELD	ZONE 5 - SEAMER	ZONE 6 - IRTON MOOR	ZONE 7 - FILEY	ZONE 8 - WHITBY PCA	ZONE 9 - WHITBY SCA	ZONE 10 - STAITHES	SURVEY TURNOVER
SCARBOROUGH	%	80.2%	62.6%	73.5%	60.0%	72.1%	91.2%	27.1%	4.9%	2.1%	0.0%	
	£	£2,178,091	£427,482	£447,323	£598,705	£620,867	£881,479	£298,250	£92,211	£6,741	£0	£5,551,150
SEAMER ROAD RP [SCARBOROUGH]	%	0.3%	0.0%	0.0%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£8,147	£0	£0	£17,961	£0	£0	£0	£0	£0	£0	£26,109
WHITBY	%	0.0%	4.2%	2.0%	0.0%	0.0%	0.0%	0.0%	89.7%	40.4%	63.6%	
	£	£0	£28,681	£12,172	£0	£0	£0	£0	£1,688,034	£129,680	£148,907	£2,007,474
FILEY	%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	53.4%	0.0%	0.0%	0.0%	
	£	£8,147	£0	£0	£0	£0	£0	£587,695	£0	£0	£0	£595,842
TESCO (WESTWOOD)	%	1.8%	2.1%	0.0%	0.0%	2.9%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£48,885	£14,340	£0	£0	£24,972	£0	£0	£0	£0	£0	£88,198
SAINSBURY'S (GALLOWS CLOSE)	%	3.4%	8.3%	0.0%	0.0%	1.5%	2.9%	0.0%	0.4%	0.0%	0.0%	
	£	£92,338	£56,679	£0	£0	£12,917	£28,030	£0	£7,527	£0	£0	£197,491
MORRISON'S (DUNSLOW ROAD)	%	1.6%	0.0%	14.3%	22.7%	13.2%	0.0%	6.0%	0.4%	0.0%	0.0%	
	£	£43,453	£0	£87,030	£226,510	£113,668	£0	£66,033	£7,527	£0	£0	£544,222
OTHER (SCARBOROUGH LPA AREA)	%	11.8%	20.7%	8.1%	11.8%	5.8%	5.9%	8.9%	2.1%	52.2%	27.3%	
	£	£320,467	£141,356	£49,297	£117,745	£49,945	£57,026	£97,949	£39,519	£167,556	£63,918	£1,104,778
TOTAL	%	99.4%	97.9%	97.9%	96.3%	95.5%	100.0%	95.4%	97.5%	94.7%	90.9%	
	£	£2,699,529	£668,538	£595,822	£960,922	£822,369	£966,534	£1,049,926	£1,834,820	£303,977	£212,825	£10,115,263
YORK CITY CENTRE	c	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.3%	0.0%	0.0%	
	£	£5,432	£0	£0	£0	£0	£0	£16,508	£5,646	£0	£0	£27,586
MONKS CROSS RP [YORK]	%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£12,917	£0	£0	£0	£0	£0	£12,917
CLIFTON MOOR RP [YORK]	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£7,527	£0	£0	£7,527
YORK DESIGNER OUTLET	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
MIDDLESBROUGH TOWN CENTRE	c	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	1.2%	4.3%	9.1%	
	£	£0	£0	£0	£0	£12,917	£0	£0	£22,582	£13,803	£21,306	£70,608
TEESSIDE RP	c	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
LEEDS CITY CENTRE	c	0.0%	0.0%	0.0%	3.6%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£35,922	£0	£0	£7,704	£0	£0	£0	£43,626
HULL CITY CENTRE	c	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£7,527	£0	£0	£7,527
BRIDLINGTON TOWN CENTRE	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£16,508	£0	£0	£0	£16,508
MALTON TOWN CENTRE	%	0.0%	2.1%	2.0%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£14,340	£12,172	£0	£12,917	£0	£0	£0	£0	£0	£39,429
HORNSEA OUTLET	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
OTHER	%	0.4%	0.0%	0.1%	0.1%	0.0%	0.0%	0.9%	0.2%	1.0%	0.0%	
	£	£10,863	£0	£609	£998	£0	£0	£9,905	£3,764	£3,210	£0	£29,348
CATCHMENT TOTAL	%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
	£	£2,715,824	£682,879	£608,602	£997,842	£861,120	£966,534	£1,100,552	£1,881,866	£320,989	£234,131	£10,370,340

TABLE 10a - Hardware Expenditure Growth, 2010 - 2030

SURVEY ZONE	2010 (£)	2011 (£)	2012 (£)	2014 (£)	2018 (£)	2021 (£)	2030 (£)
ZONE 1 - SCARBOROUGH PCA	£1,768,468	£1,616,486	£1,635,667	£1,711,456	£1,975,126	£2,214,803	£3,115,581
ZONE 2 - SCARBOROUGH SCA NORTH	£374,647	£343,636	£341,439	£352,266	£398,001	£436,223	£570,486
ZONE 3 - SCARBOROUGH SCA WEST	£333,269	£304,845	£306,429	£319,153	£361,977	£399,567	£539,228
ZONE 4 - EASTFIELD	£585,851	£533,626	£541,382	£569,273	£650,391	£730,252	£1,011,298
ZONE 5 - SEAMER	£491,209	£448,542	£454,480	£481,546	£556,412	£628,691	£885,585
ZONE 6 - IRTON MOOR	£523,211	£476,274	£479,273	£496,494	£567,528	£631,516	£862,776
ZONE 7 - FILEY	£705,138	£643,064	£646,716	£664,428	£745,611	£818,736	£1,079,798
ZONE 8 - WHITBY PCA	£1,195,527	£1,088,549	£1,099,308	£1,153,124	£1,317,704	£1,463,677	£2,005,894
ZONE 9 - WHITBY SCA	£206,025	£188,270	£189,802	£198,451	£226,214	£252,681	£342,848
ZONE 10 - STAITHES	£150,681	£137,710	£138,567	£145,125	£164,308	£183,717	£248,807
TOTAL	£6,334,026	£5,781,002	£5,833,065	£6,091,316	£6,963,271	£7,759,863	£10,662,302

EXPENDITURE GROWTH (£)			
2010 - 2012	2012-2014	2012-2021	2012-2030
-£132,802	£75,789	£579,136	£1,479,915
-£33,208	£10,826	£94,783	£229,047
-£26,840	£12,724	£93,138	£232,799
-£44,469	£27,891	£188,870	£469,916
-£36,729	£27,066	£174,211	£431,105
-£43,937	£17,221	£152,243	£383,503
-£58,422	£17,712	£172,020	£433,082
-£96,219	£53,816	£364,369	£906,586
-£16,222	£8,648	£62,878	£153,046
-£12,114	£6,558	£45,150	£110,240
-£500,961	£258,252	£1,926,798	£4,829,237

Notes

1. Expenditure Growth derived from Population Projections (Table 1) * Expenditure per Capita figures (less SfT deduction) (Table 2)

Table 10b - Hardware (2012)

DESTINATIONS		ZONE 1 - SCARBORO PCA	ZONE 2 - SCARBORO SCA NORTH	ZONE 3 - SCARBORO SCA WEST	ZONE 4 - EASTFIELD	ZONE 5 - SEAMER	ZONE 6 - IRTON MOOR	ZONE 7 - FILEY	ZONE 8 - WHITBY PCA	ZONE 9 - WHITBY SCA	ZONE 10 - STAITHES	SURVEY TURNOVER
SCARBOROUGH	%	77.7%	72.3%	75.8%	63.8%	76.9%	79.3%	50.5%	35.2%	12.5%	5.6%	
	£	£1,270,913	£246,861	£232,273	£345,402	£349,495	£380,064	£326,592	£386,956	£23,725	£7,760	£3,570,041
SEAMER ROAD RP [SCARBOROUGH]	%	1.8%	6.9%	0.0%	10.0%	5.1%	3.4%	4.1%	1.2%	0.0%	2.8%	
	£	£29,442	£23,559	£0	£54,138	£23,178	£16,295	£26,515	£13,192	£0	£3,880	£190,200
WHITBY	%	0.0%	3.4%	0.0%	0.0%	0.0%	0.0%	0.0%	31.1%	15.6%	22.2%	
	£	£0	£11,609	£0	£0	£0	£0	£0	£341,885	£29,609	£30,762	£413,865
FILEY	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	22.7%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£146,805	£0	£0	£0	£146,805
TESCO (WESTWOOD)	%	0.4%	0.0%	0.0%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£6,543	£0	£0	£13,535	£0	£0	£0	£0	£0	£0	£20,077
SAINSBURY'S (GALLOWS CLOSE)	%	1.7%	3.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£27,806	£11,609	£0	£0	£0	£0	£0	£0	£0	£0	£39,415
MORRISON'S (DUNSLOW ROAD)	%	3.4%	0.0%	0.0%	6.3%	5.1%	0.0%	5.2%	0.6%	3.1%	0.0%	
	£	£55,613	£0	£0	£34,107	£23,178	£0	£33,629	£6,596	£5,884	£0	£159,007
OTHER (SCARBOROUGH LPA AREA)	%	7.0%	0.0%	6.1%	3.6%	0.0%	3.4%	4.1%	6.1%	40.6%	44.4%	
	£	£114,497	£0	£18,692	£19,490	£0	£16,295	£26,515	£67,058	£77,060	£61,524	£401,131
TOTAL	%	92.0%	86.0%	81.9%	86.2%	87.1%	86.1%	86.6%	74.2%	71.8%	75.0%	
	£	£1,504,813	£293,638	£250,966	£466,672	£395,852	£412,654	£560,056	£815,687	£136,278	£103,925	£4,940,541
YORK CITY CENTRE	c	3.8%	6.9%	12.1%	5.0%	2.6%	8.6%	3.1%	9.4%	0.0%	0.0%	
	£	£62,155	£23,559	£37,078	£27,069	£11,816	£41,218	£20,048	£103,335	£0	£0	£326,279
MONKS CROSS RP [YORK]	%	2.1%	3.4%	0.0%	2.5%	0.0%	1.7%	0.0%	1.2%	0.0%	0.0%	
	£	£34,349	£11,609	£0	£13,535	£0	£8,148	£0	£13,192	£0	£0	£80,832
CLIFTON MOOR RP [YORK]	%	0.4%	0.0%	0.0%	1.3%	2.6%	1.7%	5.1%	0.0%	0.0%	0.0%	
	£	£6,543	£0	£0	£7,038	£11,816	£8,148	£32,983	£0	£0	£0	£66,527
YORK DESIGNER OUTLET	%	1.3%	0.0%	0.0%	5.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£21,264	£0	£0	£27,069	£0	£0	£0	£0	£0	£0	£48,333
MIDDLESBROUGH TOWN CENTRE	c	0.4%	0.0%	3.0%	0.0%	5.1%	0.0%	0.0%	11.0%	18.8%	25.0%	
	£	£6,543	£0	£9,193	£0	£23,178	£0	£0	£120,924	£35,683	£34,642	£230,163
TEESSIDE RP	c	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%	3.1%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£19,788	£5,884	£0	£25,671
LEEDS CITY CENTRE	c	0.0%	0.0%	0.0%	0.0%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£11,816	£0	£0	£0	£0	£0	£11,816
HULL CITY CENTRE	c	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
BRIDLINGTON TOWN CENTRE	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£13,581	£0	£0	£0	£13,581
MALTON TOWN CENTRE	%	0.0%	3.4%	3.0%	0.0%	0.0%	1.7%	0.0%	1.2%	6.2%	0.0%	
	£	£0	£11,609	£9,193	£0	£0	£8,148	£0	£13,192	£11,768	£0	£53,909
HORNSEA OUTLET	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
OTHER	%	0.0%	0.3%	0.0%	0.0%	0.0%	0.2%	3.1%	1.2%	0.1%	0.0%	
	£	£0	£1,024	£0	£0	£0	£959	£20,048	£13,192	£190	£0	£35,413
CATCHMENT TOTAL	%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
	£	£1,635,667	£341,439	£306,429	£541,382	£454,480	£479,273	£646,716	£1,099,308	£189,802	£138,567	£5,833,065

TABLE 11a - Jewellery Expenditure Growth, 2010 - 2030

SURVEY ZONE	2010 (£)	2011 (£)	2012 (£)	2014 (£)	2018 (£)	2021 (£)	2030 (£)
ZONE 1 - SCARBOROUGH PCA	£2,535,917	£2,317,980	£2,345,484	£2,454,163	£2,832,256	£3,175,944	£4,467,626
ZONE 2 - SCARBOROUGH SCA NORTH	£452,496	£415,041	£412,388	£425,464	£480,702	£526,866	£689,029
ZONE 3 - SCARBOROUGH SCA WEST	£430,473	£393,759	£395,804	£412,239	£467,554	£516,107	£696,503
ZONE 4 - EASTFIELD	£746,673	£680,112	£689,997	£725,544	£828,930	£930,714	£1,288,910
ZONE 5 - SEAMER	£732,504	£668,878	£677,733	£718,095	£829,737	£937,522	£1,320,609
ZONE 6 - IRTON MOOR	£776,096	£706,472	£710,922	£736,466	£841,833	£936,749	£1,279,784
ZONE 7 - FILEY	£915,442	£834,855	£839,596	£862,590	£967,986	£1,062,921	£1,401,843
ZONE 8 - WHITBY PCA	£1,742,633	£1,586,699	£1,602,381	£1,680,825	£1,920,720	£2,133,495	£2,923,846
ZONE 9 - WHITBY SCA	£254,501	£232,569	£234,462	£245,145	£279,440	£312,135	£423,518
ZONE 10 - STAITHES	£192,248	£175,699	£176,793	£185,159	£209,634	£234,397	£317,443
TOTAL	£8,778,983	£8,012,064	£8,085,561	£8,445,693	£9,658,793	£10,766,851	£14,809,111

EXPENDITURE GROWTH (£)			
2010 - 2012	2012-2014	2012-2021	2012-2030
-£190,432	£108,679	£830,459	£2,122,142
-£40,108	£13,076	£114,478	£276,641
-£34,668	£16,435	£120,303	£300,699
-£56,676	£35,547	£240,717	£598,913
-£54,771	£40,362	£259,789	£642,876
-£65,174	£25,544	£225,827	£568,862
-£75,846	£22,994	£223,324	£562,247
-£140,252	£78,444	£531,114	£1,321,464
-£20,039	£10,683	£77,673	£189,056
-£15,455	£8,367	£57,605	£140,650
-£693,422	£360,132	£2,681,290	£6,723,550

Notes

1. Expenditure Growth derived from Population Projections (Table 1) * Expenditure per Capita figures (less SfT deduction) (Table 2)

Table 11b - Jewellery (2012)

DESTINATIONS		ZONE 1 - SCARBORO PCA	ZONE 2 - SCARBORO SCA NORTH	ZONE 3 - SCARBORO SCA WEST	ZONE 4 - EASTFIELD	ZONE 5 - SEAMER	ZONE 6 - IRTON MOOR	ZONE 7 - FILEY	ZONE 8 - WHITBY PCA	ZONE 9 - WHITBY SCA	ZONE 10 - STAITHES	SURVEY TURNOVER
SCARBOROUGH	%	88.2%	89.7%	71.5%	87.1%	88.3%	97.5%	68.9%	39.6%	6.1%	2.9%	
	£	£2,068,717	£369,912	£283,000	£600,987	£598,438	£693,149	£578,482	£634,543	£14,302	£5,127	£5,846,658
SEAMER ROAD RP [SCARBOROUGH]	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
WHITBY	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	30.6%	27.3%	23.5%	
	£	£0	£0	£0	£0	£0	£0	£0	£490,329	£64,008	£41,546	£595,883
FILEY	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
TESCO (WESTWOOD)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
SAINSBURY'S (GALLOWS CLOSE)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
MORRISON'S (DUNSLOW ROAD)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
OTHER (SCARBOROUGH LPA AREA)	%	6.6%	6.8%	5.6%	8.6%	4.6%	0.0%	26.8%	9.9%	27.2%	35.3%	
	£	£154,802	£28,042	£22,165	£59,340	£31,176	£0	£225,012	£158,636	£63,774	£62,408	£805,354
TOTAL	%	94.8%	96.5%	77.1%	95.7%	92.9%	97.5%	95.7%	80.1%	60.6%	61.7%	
	£	£2,223,519	£397,954	£305,165	£660,327	£629,614	£693,149	£803,494	£1,283,507	£142,084	£109,081	£7,247,895
YORK CITY CENTRE	c	4.4%	0.0%	20.0%	2.9%	0.0%	2.5%	2.8%	4.5%	9.1%	2.9%	
	£	£103,201	£0	£79,161	£20,010	£0	£17,773	£23,509	£72,107	£21,336	£5,127	£342,224
MONKS CROSS RP [YORK]	%	0.4%	3.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£9,382	£14,021	£0	£0	£0	£0	£0	£0	£0	£0	£23,403
CLIFTON MOOR RP [YORK]	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
YORK DESIGNER OUTLET	%	0.0%	0.0%	0.0%	0.0%	4.7%	0.0%	1.4%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£31,853	£0	£11,754	£0	£0	£0	£43,608
MIDDLESBROUGH TOWN CENTRE	c	0.0%	0.0%	2.9%	1.4%	0.0%	0.0%	0.0%	14.5%	30.3%	35.3%	
	£	£0	£0	£11,478	£9,660	£0	£0	£0	£232,345	£71,042	£62,408	£386,933
TEESSIDE RP	c	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
LEEDS CITY CENTRE	c	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
HULL CITY CENTRE	c	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
BRIDLINGTON TOWN CENTRE	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
MALTON TOWN CENTRE	%	0.0%	0.0%	0.0%	0.0%	2.3%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£15,588	£0	£0	£0	£0	£0	£15,588
HORNSEA OUTLET	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
OTHER	%	0.4%	0.1%	0.0%	0.0%	0.1%	0.0%	0.1%	0.9%	0.0%	0.1%	
	£	£9,382	£412	£0	£0	£678	£0	£840	£14,421	£0	£177	£25,910
CATCHMENT TOTAL	%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
	£	£2,345,484	£412,388	£395,804	£689,997	£677,733	£710,922	£839,596	£1,602,381	£234,462	£176,793	£8,085,561

TABLE 12a - Electrical Goods Expenditure Growth, 2010 - 2030

SURVEY ZONE	2010 (£)	2011 (£)	2012 (£)	2014 (£)	2018 (£)	2021 (£)	2030 (£)	EXPENDITURE GROWTH (£) 2010 - 2012	2012-2014	2012-2021	2012-2030
ZONE 1 - SCARBOROUGH PCA	£20,187,232	£18,452,343	£18,671,289	£19,536,429	£22,546,246	£25,282,183	£35,564,653	-£1,515,943	£865,140	£6,610,895	£16,893,364
ZONE 2 - SCARBOROUGH SCA NORTH	£3,410,751	£3,128,425	£3,108,429	£3,206,992	£3,623,359	£3,971,326	£5,193,648	-£302,321	£98,562	£862,897	£2,085,218
ZONE 3 - SCARBOROUGH SCA WEST	£3,004,052	£2,747,843	£2,762,119	£2,876,810	£3,262,823	£3,601,653	£4,860,542	-£241,933	£114,691	£839,534	£2,098,423
ZONE 4 - EASTFIELD	£6,823,441	£6,215,174	£6,305,512	£6,630,359	£7,575,143	£8,505,292	£11,778,652	-£517,930	£324,847	£2,199,781	£5,473,140
ZONE 5 - SEAMER	£5,739,385	£5,240,854	£5,310,239	£5,626,488	£6,501,233	£7,345,761	£10,347,361	-£429,146	£316,249	£2,035,522	£5,037,122
ZONE 6 - IRTON MOOR	£5,851,241	£5,326,326	£5,359,873	£5,552,460	£6,346,857	£7,062,458	£9,648,710	-£491,368	£192,587	£1,702,585	£4,288,837
ZONE 7 - FILEY	£7,521,468	£6,859,352	£6,898,304	£7,087,228	£7,953,185	£8,733,186	£11,517,847	-£623,164	£188,924	£1,834,882	£4,619,543
ZONE 8 - WHITBY PCA	£13,049,485	£11,881,794	£11,999,228	£12,586,646	£14,383,069	£15,976,406	£21,894,844	-£1,050,257	£587,418	£3,977,178	£9,895,616
ZONE 9 - WHITBY SCA	£1,963,294	£1,794,101	£1,808,705	£1,891,119	£2,155,683	£2,407,897	£3,267,139	-£154,589	£82,414	£599,192	£1,458,434
ZONE 10 - STAITHES	£1,636,705	£1,495,817	£1,505,126	£1,576,356	£1,784,723	£1,995,544	£2,702,555	-£131,580	£71,231	£490,419	£1,197,429
TOTAL	£69,187,053	£63,142,028	£63,728,824	£66,570,889	£76,132,320	£84,881,707	£116,775,951	-£5,458,229	£2,842,065	£21,152,883	£53,047,127

Notes

1. Expenditure Growth derived from Population Projections (Table 1) * Expenditure per Capita figures (less SfT deduction) (Table 2)

Table 12b - Electrical Goods (2012)

DESTINATIONS		ZONE 1 - SCARBORO PCA	ZONE 2 - SCARBORO SCA NORTH	ZONE 3 - SCARBORO SCA WEST	ZONE 4 - EASTFIELD	ZONE 5 - SEAMER	ZONE 6 - IRTON MOOR	ZONE 7 - FILEY	ZONE 8 - WHITBY PCA	ZONE 9 - WHITBY SCA	ZONE 10 - STAITHES	SURVEY TURNOVER
SCARBOROUGH	%	56.4%	53.5%	50.0%	47.6%	40.0%	76.4%	35.7%	29.3%	5.6%	2.9%	
	£	£10,530,607	£1,663,010	£1,381,060	£3,001,424	£2,124,096	£4,094,943	£2,462,695	£3,515,774	£101,288	£43,649	£28,918,543
SEAMER ROAD RP [SCARBOROUGH]	%	33.0%	27.9%	37.5%	36.2%	46.7%	16.4%	20.9%	8.9%	5.6%	2.9%	
	£	£6,161,525	£867,252	£1,035,795	£2,282,595	£2,479,882	£879,019	£1,441,746	£1,067,931	£101,288	£43,649	£16,360,681
WHITBY	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	36.5%	2.8%	29.4%	
	£	£0	£0	£0	£0	£0	£0	£0	£4,379,718	£50,644	£442,507	£4,872,869
FILEY	%	0.0%	2.3%	0.0%	3.8%	0.0%	0.0%	27.0%	0.0%	0.0%	0.0%	
	£	£0	£71,494	£0	£239,609	£0	£0	£1,862,542	£0	£0	£0	£2,173,645
TESCO (WESTWOOD)	%	0.4%	2.3%	0.0%	1.0%	1.7%	0.0%	0.0%	0.0%	2.8%	0.0%	
	£	£74,685	£71,494	£0	£63,055	£90,274	£0	£0	£0	£50,644	£0	£350,152
SAINSBURY'S (GALLOWS CLOSE)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
MORRISON'S (DUNSLOW ROAD)	%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	1.7%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£63,055	£0	£0	£117,271	£0	£0	£0	£180,326
OTHER (SCARBOROUGH LPA AREA)	%	1.9%	0.0%	5.0%	1.0%	0.0%	0.0%	4.3%	4.5%	36.0%	14.7%	
	£	£354,754	£0	£138,106	£63,055	£0	£0	£296,627	£539,965	£651,134	£221,253	£2,264,895
TOTAL	%	91.7%	86.0%	92.5%	90.6%	88.4%	92.8%	89.6%	79.2%	52.8%	49.9%	
	£	£17,121,572	£2,673,249	£2,554,960	£5,712,794	£4,694,251	£4,973,962	£6,180,880	£9,503,388	£954,996	£751,058	£55,121,111
YORK CITY CENTRE	c	0.6%	0.0%	2.5%	2.9%	6.7%	1.8%	1.7%	2.7%	2.8%	0.0%	
	£	£112,028	£0	£69,053	£182,860	£355,786	£96,478	£117,271	£323,979	£50,644	£0	£1,308,098
MONKS CROSS RP [YORK]	%	0.9%	2.3%	2.5%	1.0%	0.0%	0.0%	1.7%	0.6%	0.0%	0.0%	
	£	£168,042	£71,494	£69,053	£63,055	£0	£0	£117,271	£71,995	£0	£0	£560,910
CLIFTON MOOR RP [YORK]	%	0.7%	2.3%	0.0%	1.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	
	£	£130,699	£71,494	£0	£63,055	£0	£0	£0	£47,997	£0	£0	£313,245
YORK DESIGNER OUTLET	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
MIDDLESBROUGH TOWN CENTRE	c	0.0%	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%	0.9%	25.0%	32.4%	
	£	£0	£0	£0	£119,805	£0	£0	£0	£107,993	£452,176	£487,661	£1,167,635
TEESIDE RETAIL PARK	0	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	8.1%	19.4%	14.7%	
	£	£0	£0	£0	£0	£0	£0	£0	£971,937	£350,889	£221,253	£1,544,080
LEEDS CITY CENTRE	c	0.7%	0.0%	0.0%	0.0%	0.0%	3.6%	0.0%	0.0%	0.0%	0.0%	
	£	£130,699	£0	£0	£0	£0	£192,955	£0	£0	£0	£0	£323,654
HULL CITY CENTRE	c	0.0%	2.5%		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£77,711	£0	£0	£0	£0	£0	£0	£0	£0	£77,711
BRIDLINGTON TOWN CENTRE	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£117,271	£0	£0	£0	£117,271
MALTON TOWN CENTRE	%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£63,055	£0	£0	£0	£0	£0	£0	£63,055
HORNSEA OUTLET	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
OTHER	%	5.4%	6.9%	2.5%	1.6%	4.9%	1.8%	5.3%	8.1%	0.0%	3.0%	
	£	£1,008,250	£214,482	£69,053	£100,888	£260,202	£96,478	£365,610	£971,937	£0	£45,154	£3,132,053
CATCHMENT TOTAL	%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
	£	£18,671,289	£3,108,429	£2,762,119	£6,305,512	£5,310,239	£5,359,873	£6,898,304	£11,999,228	£1,808,705	£1,505,126	£63,728,824

TABLE 13a - Furniture Goods Expenditure Growth, 2010 - 2030

SURVEY ZONE	2010 (£)	2011 (£)	2012 (£)	2014 (£)	2018 (£)	2021 (£)	2030 (£)
ZONE 1 - SCARBOROUGH PCA	£6,973,771	£6,374,446	£6,450,082	£6,748,948	£7,788,703	£8,733,845	£12,285,971
ZONE 2 - SCARBOROUGH SCA NORTH	£1,552,110	£1,423,634	£1,414,535	£1,459,387	£1,648,861	£1,807,208	£2,363,443
ZONE 3 - SCARBOROUGH SCA WEST	£1,286,790	£1,177,042	£1,183,157	£1,232,285	£1,397,634	£1,542,773	£2,082,020
ZONE 4 - EASTFIELD	£2,240,019	£2,040,335	£2,069,991	£2,176,633	£2,486,789	£2,792,141	£3,866,729
ZONE 5 - SEAMER	£2,076,864	£1,896,465	£1,921,573	£2,036,012	£2,352,548	£2,658,151	£3,744,315
ZONE 6 - IRTON MOOR	£2,214,926	£2,016,225	£2,028,924	£2,101,826	£2,402,536	£2,673,419	£3,652,418
ZONE 7 - FILEY	£2,709,213	£2,470,720	£2,484,751	£2,552,801	£2,864,716	£3,145,671	£4,148,698
ZONE 8 - WHITBY PCA	£5,167,110	£4,704,748	£4,751,247	£4,983,843	£5,695,159	£6,326,061	£8,669,542
ZONE 9 - WHITBY SCA	£893,784	£816,759	£823,408	£860,926	£981,368	£1,096,188	£1,487,355
ZONE 10 - STAITHES	£618,311	£565,086	£568,603	£595,512	£674,229	£753,872	£1,020,965
TOTAL	£25,732,897	£23,485,460	£23,696,270	£24,748,173	£28,292,544	£31,529,329	£43,321,457

EXPENDITURE GROWTH (£)			
2010 - 2012	2012-2014	2012-2021	2012-2030
-£523,689	£298,867	£2,283,764	£5,835,889
-£137,576	£44,852	£392,673	£948,908
-£103,632	£49,128	£359,615	£898,862
-£170,027	£106,642	£722,150	£1,796,738
-£155,292	£114,439	£736,578	£1,822,742
-£186,002	£72,902	£644,496	£1,623,494
-£224,462	£68,050	£660,920	£1,663,947
-£415,863	£232,596	£1,574,814	£3,918,295
-£70,376	£37,519	£272,780	£663,948
-£49,708	£26,909	£185,269	£452,362
-£2,036,627	£1,051,903	£7,833,059	£19,625,186

Notes

1. Expenditure Growth derived from Population Projections (Table 1) * Expenditure per Capita figures (less SfT deduction) (Table 2)

Table 13b - Furniture (2012)

DESTINATIONS		ZONE 1 - SCARBORO PCA	ZONE 2 - SCARBORO SCA NORTH	ZONE 3 - SCARBORO SCA WEST	ZONE 4 - EASTFIELD	ZONE 5 - SEAMER	ZONE 6 - IRTON MOOR	ZONE 7 - FILEY	ZONE 8 - WHITBY PCA	ZONE 9 - WHITBY SCA	ZONE 10 - STAITHES	SURVEY TURNOVER
SCARBOROUGH	%	69.0%	64.7%	70.3%	75.8%	59.3%	80.4%	46.4%	6.3%	7.7%	0.0%	
	£	£4,450,556	£915,204	£831,760	£1,569,053	£1,139,493	£1,631,255	£1,152,924	£299,329	£63,402	£0	£12,052,976
SEAMER ROAD RP [SCARBOROUGH]	%	8.9%	11.7%	2.7%	5.5%	24.1%	5.4%	12.4%	0.9%	0.0%	0.0%	
	£	£574,057	£165,501	£31,945	£113,850	£463,099	£109,562	£308,109	£42,761	£0	£0	£1,808,884
WHITBY	%	2.2%	2.9%	2.7%	0.0%	0.0%	0.0%	0.0%	63.6%	33.4%	46.2%	
	£	£141,902	£41,022	£31,945	£0	£0	£0	£0	£3,021,793	£275,018	£262,695	£3,774,374
FILEY	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	11.4%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£283,262	£0	£0	£0	£283,262
TESCO (WESTWOOD)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
SAINSBURY'S (GALLOWS CLOSE)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
MORRISON'S (DUNSLOW ROAD)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
OTHER (SCARBOROUGH LPA AREA)	%	11.2%	2.9%	2.7%	9.9%	3.5%	7.0%	14.3%	15.0%	38.4%	30.7%	
	£	£722,409	£41,022	£31,945	£204,929	£67,255	£142,025	£355,319	£712,687	£316,188	£174,561	£2,768,341
TOTAL	%	91.3%	82.2%	78.4%	91.2%	86.9%	92.8%	84.5%	85.8%	79.5%	76.9%	
	£	£5,888,925	£1,162,748	£927,595	£1,887,832	£1,669,847	£1,882,841	£2,099,615	£4,076,570	£654,609	£437,256	£20,687,837
YORK CITY CENTRE	%	2.0%	5.9%	10.8%	0.0%	5.6%	1.8%	5.2%	2.8%	2.6%	2.6%	
	£	£129,002	£83,458	£127,781	£0	£107,608	£36,521	£129,207	£133,035	£21,409	£14,784	£782,803
MONKS CROSS RP [YORK]	%	0.4%	0.0%	2.7%	0.0%	0.0%	0.0%	1.0%	0.5%	0.0%	0.0%	
	£	£25,800	£0	£31,945	£0	£0	£0	£24,848	£23,756	£0	£0	£106,349
CLIFTON MOOR RP [YORK]	%	2.4%	0.0%	0.0%	3.3%	0.0%	0.0%	3.1%	0.4%	0.0%	0.0%	
	£	£154,802	£0	£0	£68,310	£0	£0	£77,027	£19,005	£0	£0	£319,144
YORK DESIGNER OUTLET	%	0.4%	0.0%	0.0%	1.1%	1.9%	0.0%	1.0%	0.0%	0.0%	0.0%	
	£	£25,800	£0	£0	£22,770	£36,510	£0	£24,848	£0	£0	£0	£109,928
MIDDLESBROUGH TOWN CENTRE	c	0.4%	2.9%	0.0%	0.0%	0.0%	0.0%	0.0%	9.1%	12.8%	17.9%	
	£	£25,800	£41,022	£0	£0	£0	£0	£0	£432,363	£105,396	£101,780	£706,361
TEESSIDE RP	c	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	5.1%	2.6%	
	£	£0	£0	£0	£0	£0	£0	£0	£47,512	£41,994	£14,784	£104,290
LEEDS CITY CENTRE	c	0.4%	2.9%	2.7%	2.2%	3.7%	3.6%	2.1%	0.0%	0.0%	0.0%	
	£	£25,800	£41,022	£31,945	£45,540	£71,098	£73,041	£52,180	£0	£0	£0	£340,626
HULL CITY CENTRE	c	2.7%	5.9%	2.7%	0.0%	1.9%	1.8%	0.0%	0.0%	0.0%	0.0%	
	£	£174,152	£83,458	£31,945	£0	£36,510	£36,521	£0	£0	£0	£0	£362,586
BRIDLINGTON TOWN CENTRE	%	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	3.1%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£22,770	£0	£0	£77,027	£0	£0	£0	£99,797
MALTON TOWN CENTRE	%	0.0%	0.0%	2.7%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£31,945	£22,770	£0	£0	£0	£0	£0	£0	£54,715
HORNSEA OUTLET	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
OTHER	%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	
	£	£0	£2,829	£0	£0	£0	£0	£0	£19,005	£0	£0	£21,834
CATCHMENT TOTAL	%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
	£	£6,450,082	£1,414,535	£1,183,157	£2,069,991	£1,921,573	£2,028,924	£2,484,751	£4,751,247	£823,408	£568,603	£23,696,270

TABLE 14a - Textile Goods Expenditure Growth, 2010 - 2030

SURVEY ZONE	2010 (£)	2011 (£)	2012 (£)	2014 (£)	2018 (£)	2021 (£)	2030 (£)
ZONE 1 - SCARBOROUGH PCA	£2,802,855	£2,561,978	£2,592,377	£2,712,496	£3,130,388	£3,510,254	£4,937,902
ZONE 2 - SCARBOROUGH SCA NORTH	£681,177	£624,792	£620,799	£640,483	£723,638	£793,132	£1,037,248
ZONE 3 - SCARBOROUGH SCA WEST	£527,676	£482,672	£485,180	£505,326	£573,131	£632,648	£853,778
ZONE 4 - EASTFIELD	£918,982	£837,060	£849,227	£892,978	£1,020,221	£1,145,494	£1,586,350
ZONE 5 - SEAMER	£818,681	£747,569	£757,467	£802,577	£927,353	£1,047,819	£1,475,975
ZONE 6 - IRTON MOOR	£863,298	£785,851	£790,801	£819,215	£936,421	£1,042,002	£1,423,580
ZONE 7 - FILEY	£1,026,779	£936,392	£941,709	£967,500	£1,085,714	£1,192,195	£1,572,338
ZONE 8 - WHITBY PCA	£1,945,265	£1,771,199	£1,788,705	£1,876,270	£2,144,060	£2,381,576	£3,263,828
ZONE 9 - WHITBY SCA	£381,752	£348,853	£351,693	£367,718	£419,161	£468,202	£635,277
ZONE 10 - STAITHES	£267,588	£244,554	£246,076	£257,722	£291,788	£326,256	£441,846
TOTAL	£10,234,054	£9,340,922	£9,424,033	£9,842,285	£11,251,875	£12,539,577	£17,228,122

EXPENDITURE GROWTH (£)			
2010 - 2012	2012-2014	2012-2021	2012-2030
-£210,478	£120,119	£917,876	£2,345,525
-£60,378	£19,684	£172,333	£416,449
-£42,497	£20,146	£147,468	£368,598
-£69,755	£43,751	£296,267	£737,123
-£61,214	£45,111	£290,352	£718,508
-£72,497	£28,415	£251,201	£632,779
-£85,070	£25,791	£250,485	£630,628
-£156,560	£87,565	£592,871	£1,475,123
-£30,059	£16,025	£116,510	£283,584
-£21,512	£11,646	£80,180	£195,770
-£810,020	£418,251	£3,115,543	£7,804,089

Notes

1. Expenditure Growth derived from Population Projections (Table 1) * Expenditure per Capita figures (less SfT deduction) (Table 2)

Table 14b - Textiles (2012)

DESTINATIONS		ZONE 1 - SCARBORO PCA	ZONE 2 - SCARBORO SCA NORTH	ZONE 3 - SCARBORO SCA WEST	ZONE 4 - EASTFIELD	ZONE 5 - SEAMER	ZONE 6 - IRTON MOOR	ZONE 7 - FILEY	ZONE 8 - WHITBY PCA	ZONE 9 - WHITBY SCA	ZONE 10 - STAITHES	SURVEY TURNOVER
SCARBOROUGH	%	84.6%	76.9%	73.8%	75.5%	71.4%	90.5%	50.0%	32.8%	5.0%	2.5%	
	£	£2,193,151	£477,394	£358,063	£641,167	£540,831	£715,675	£470,855	£586,695	£17,585	£6,152	£6,007,567
SEAMER ROAD RP [SCARBOROUGH]	%	0.4%	2.6%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£10,370	£16,141	£0	£9,341	£0	£0	£0	£0	£0	£0	£35,852
WHITBY	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	30.8%	15.0%	25.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£550,921	£52,754	£61,519	£665,194
FILEY	%	0.7%	0.0%	0.0%	0.0%	2.0%	0.0%	30.2%	0.0%	0.0%	0.0%	
	£	£18,147	£0	£0	£0	£15,149	£0	£284,396	£0	£0	£0	£317,692
TESCO (WESTWOOD)	%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£20,739	£0	£0	£0	£0	£0	£0	£0	£0	£0	£20,739
SAINSBURY'S (GALLOWS CLOSE)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
MORRISON'S (DUNSLOW ROAD)	%	0.4%	0.0%	2.4%	0.0%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£10,370	£0	£11,644	£0	£15,149	£0	£0	£0	£0	£0	£37,163
OTHER (SCARBOROUGH LPA AREA)	%	3.8%	5.2%	2.3%	3.3%	2.0%	0.0%	2.6%	10.2%	45.0%	42.5%	
	£	£98,510	£32,282	£11,159	£28,024	£15,149	£0	£24,484	£182,448	£158,262	£104,582	£654,901
TOTAL	%	90.7%	84.7%	78.5%	79.9%	77.4%	90.5%	82.8%	73.8%	65.0%	70.0%	
	£	£2,351,286	£525,817	£380,866	£678,533	£586,279	£715,675	£779,735	£1,320,064	£228,600	£172,253	£7,739,108
YORK CITY CENTRE	c	4.0%	7.5%	11.9%	5.6%	8.2%	3.2%	4.3%	5.3%	7.5%	0.0%	
	£	£103,695	£46,560	£57,736	£47,557	£62,112	£25,306	£40,493	£94,801	£26,377	£0	£504,638
MONKS CROSS RP [YORK]	%	0.4%	0.0%	0.0%	3.3%	4.1%	0.0%	0.9%	1.1%	0.0%	0.0%	
	£	£10,370	£0	£0	£28,024	£31,056	£0	£8,475	£19,676	£0	£0	£97,601
CLIFTON MOOR RP [YORK]	%	2.5%	2.6%	4.8%	4.4%	4.1%	1.6%	0.9%	1.7%	0.0%	0.0%	
	£	£64,809	£16,141	£23,289	£37,366	£31,056	£12,653	£8,475	£30,408	£0	£0	£224,197
YORK DESIGNER OUTLET	%	0.0%	2.6%	4.8%	0.0%	0.0%	1.6%	0.0%	3.0%	0.0%	0.0%	
	£	£0	£16,141	£23,289	£0	£0	£12,653	£0	£53,661	£0	£0	£105,743
MIDDLESBROUGH TOWN CENTRE	c	0.7%	2.6%	0.0%	1.1%	0.0%	1.6%	0.9%	11.5%	22.5%	27.5%	
	£	£18,147	£16,141	£0	£9,341	£0	£12,653	£8,475	£205,701	£79,131	£67,671	£417,260
TEESSIDE RP	c	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	3.1%	5.0%	2.5%	
	£	£0	£0	£0	£0	£0	£11,862	£0	£55,450	£17,585	£6,152	£91,048
LEEDS CITY CENTRE	c	0.7%	0.0%	0.0%	0.0%	2.0%	0.0%	0.9%	0.0%	0.0%	0.0%	
	£	£18,147	£0	£0	£0	£15,149	£0	£8,475	£0	£0	£0	£41,771
HULL CITY CENTRE	c	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%	0.5%	0.0%	0.0%	
	£	£25,924	£0	£0	£0	£0	£0	£16,009	£8,944	£0	£0	£50,876
BRIDLINGTON TOWN CENTRE	%	0.0%	0.0%	0.0%	4.4%	0.0%	0.0%	6.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£37,366	£0	£0	£56,503	£0	£0	£0	£93,869
MALTON TOWN CENTRE	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
HORNSEA OUTLET	%	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£9,341	£0	£0	£0	£0	£0	£0	£9,341
OTHER	%	0.0%	0.0%	0.0%	0.2%	4.2%	0.0%	1.6%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£1,698	£31,814	£0	£15,067	£0	£0	£0	£48,579
CATCHMENT TOTAL	%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
	£	£2,592,377	£620,799	£485,180	£849,227	£757,467	£790,801	£941,709	£1,788,705	£351,693	£246,076	£9,424,033

TABLE 15a - DIY Goods Expenditure Growth, 2010 - 2030

SURVEY ZONE	2010 (£)	2011 (£)	2012 (£)	2014 (£)	2018 (£)	2021 (£)	2030 (£)
ZONE 1 - SCARBOROUGH PCA	£4,504,589	£4,117,465	£4,166,321	£4,359,369	£5,030,981	£5,641,479	£7,935,914
ZONE 2 - SCARBOROUGH SCA NORTH	£1,002,303	£919,337	£913,461	£942,426	£1,064,782	£1,167,037	£1,526,236
ZONE 3 - SCARBOROUGH SCA WEST	£981,293	£897,600	£902,264	£939,728	£1,065,822	£1,176,503	£1,587,727
ZONE 4 - EASTFIELD	£1,700,117	£1,548,562	£1,571,070	£1,652,009	£1,887,409	£2,119,164	£2,934,748
ZONE 5 - SEAMER	£1,439,155	£1,314,148	£1,331,546	£1,410,846	£1,630,189	£1,841,955	£2,594,608
ZONE 6 - IRTON MOOR	£1,464,990	£1,333,566	£1,341,965	£1,390,184	£1,589,079	£1,768,246	£2,415,773
ZONE 7 - FILEY	£2,016,446	£1,838,938	£1,849,381	£1,900,030	£2,132,186	£2,341,298	£3,087,844
ZONE 8 - WHITBY PCA	£3,647,372	£3,320,998	£3,353,821	£3,518,007	£4,020,113	£4,465,455	£6,119,677
ZONE 9 - WHITBY SCA	£578,687	£528,817	£533,121	£557,413	£635,394	£709,735	£962,999
ZONE 10 - STAITHES	£485,816	£443,996	£446,760	£467,903	£529,751	£592,328	£802,187
TOTAL	£17,820,767	£16,263,428	£16,409,711	£17,137,914	£19,585,705	£21,823,200	£29,967,714

EXPENDITURE GROWTH (£)			
2010 - 2012	2012-2014	2012-2021	2012-2030
-£338,268	£193,048	£1,475,158	£3,769,594
-£88,842	£28,964	£253,576	£612,775
-£79,029	£37,465	£274,239	£685,463
-£129,046	£80,938	£548,094	£1,363,678
-£107,609	£79,300	£510,409	£1,263,062
-£123,025	£48,219	£426,281	£1,073,807
-£167,065	£50,649	£491,917	£1,238,463
-£293,550	£164,185	£1,111,634	£2,765,855
-£45,566	£24,292	£176,614	£429,878
-£39,056	£21,143	£145,569	£355,427
-£1,411,056	£728,202	£5,413,489	£13,558,003

Notes

1. Expenditure Growth derived from Population Projections (Table 1) * Expenditure per Capita figures (less SfT deduction) (Table 2)

Table 15b - DIY Goods (2012)

DESTINATIONS		ZONE 1 - SCARBORO PCA	ZONE 2 - SCARBORO SCA NORTH	ZONE 3 - SCARBORO SCA WEST	ZONE 4 - EASTFIELD	ZONE 5 - SEAMER	ZONE 6 - IRTON MOOR	ZONE 7 - FILEY	ZONE 8 - WHITBY PCA	ZONE 9 - WHITBY SCA	ZONE 10 - STAITHES	SURVEY TURNOVER
SCARBOROUGH	%	30.1%	16.3%	31.6%	18.6%	17.2%	47.5%	21.1%	14.3%	2.4%	5.1%	
	£	£1,254,063	£148,894	£285,115	£292,219	£229,026	£637,433	£390,219	£479,596	£12,795	£22,785	£3,752,146
SEAMER ROAD RP [SCARBOROUGH]	%	68.1%	81.4%	55.3%	79.3%	81.0%	49.2%	52.3%	29.1%	0.0%	2.6%	
	£	£2,837,264	£743,558	£498,952	£1,245,859	£1,078,553	£660,247	£967,226	£975,962	£0	£11,616	£9,019,236
WHITBY	%	0.0%	0.0%	2.6%	0.0%	0.0%	0.0%	0.0%	41.6%	21.9%	18.0%	
	£	£0	£0	£23,459	£0	£0	£0	£0	£1,395,190	£116,754	£80,417	£1,615,819
FILEY	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	21.2%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£392,069	£0	£0	£0	£392,069
TESCO (WESTWOOD)	%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£16,665	£0	£0	£0	£0	£0	£0	£0	£0	£0	£16,665
SAINSBURY'S (GALLOWS CLOSE)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
MORRISON'S (DUNSLOW ROAD)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
OTHER (SCARBOROUGH LPA AREA)	%	1.4%	2.3%	5.2%	2.0%	1.7%	1.6%	2.7%	7.2%	0.0%	30.8%	
	£	£58,328	£21,010	£46,918	£31,421	£22,636	£21,471	£49,933	£241,475	£0	£137,602	£630,795
TOTAL	%	100.0%	100.0%	94.7%	99.9%	99.9%	98.3%	97.3%	92.2%	24.3%	56.5%	
	£	£4,166,321	£913,461	£854,444	£1,569,499	£1,330,215	£1,319,152	£1,799,448	£3,092,223	£129,549	£252,419	£15,426,730
YORK CITY CENTRE	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£16,644	£0	£0	£0	£16,644
MONKS CROSS RP [YORK]	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£12,795	£0	£12,795
CLIFTON MOOR RP [YORK]	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
YORK DESIGNER OUTLET	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
MIDDLESBROUGH TOWN CENTRE	c	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.9%	17.1%	15.4%	
	£	£0	£0	£0	£0	£0	£0	£0	£130,799	£91,164	£68,801	£290,764
TEESSIDE RP	c	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	2.4%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£33,538	£12,795	£0	£46,333
LEEDS CITY CENTRE	c	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
HULL CITY CENTRE	c	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
BRIDLINGTON TOWN CENTRE	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£33,289	£0	£0	£0	£33,289
MALTON TOWN CENTRE	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£12,795	£0	£12,795
HORNSEA OUTLET	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
OTHER	%	0.0%	0.0%	5.3%	0.1%	0.1%	1.7%	0.0%	2.9%	51.4%	28.1%	
	£	£0	£0	£47,820	£1,571	£1,332	£22,813	£0	£97,261	£274,024	£125,539	£570,361
CATCHMENT TOTAL	%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
	£	£4,166,321	£913,461	£902,264	£1,571,070	£1,331,546	£1,341,965	£1,849,381	£3,353,821	£533,121	£446,760	£16,409,711

TABLE 16a - Garden Goods Expenditure Growth, 2010 - 2030

SURVEY ZONE	2010 (£)	2011 (£)	2012 (£)	2014 (£)	2018 (£)	2021 (£)	2030 (£)
ZONE 1 - SCARBOROUGH PCA	£1,201,224	£1,097,991	£1,111,019	£1,162,498	£1,341,595	£1,504,394	£2,116,244
ZONE 2 - SCARBOROUGH SCA NORTH	£398,975	£365,950	£363,611	£375,140	£423,845	£464,549	£607,531
ZONE 3 - SCARBOROUGH SCA WEST	£305,497	£279,442	£280,893	£292,557	£331,812	£366,270	£494,292
ZONE 4 - EASTFIELD	£448,004	£408,067	£413,998	£435,327	£497,358	£558,428	£773,346
ZONE 5 - SEAMER	£379,179	£346,243	£350,827	£371,720	£429,511	£485,306	£683,609
ZONE 6 - IRTON MOOR	£444,729	£404,832	£407,382	£422,020	£482,399	£536,789	£733,360
ZONE 7 - FILEY	£569,058	£518,964	£521,911	£536,205	£601,721	£660,734	£871,416
ZONE 8 - WHITBY PCA	£1,094,211	£996,300	£1,006,146	£1,055,402	£1,206,034	£1,339,637	£1,835,903
ZONE 9 - WHITBY SCA	£245,412	£224,263	£226,088	£236,390	£269,460	£300,987	£408,392
ZONE 10 - STAITHES	£132,495	£121,090	£121,844	£127,610	£144,478	£161,544	£218,778
TOTAL	£5,218,784	£4,763,140	£4,803,720	£5,014,869	£5,728,213	£6,378,638	£8,742,872

EXPENDITURE GROWTH (£)			
2010 - 2012	2012-2014	2012-2021	2012-2030
-£90,205	£51,479	£393,376	£1,005,225
-£35,364	£11,529	£100,938	£243,920
-£24,603	£11,664	£85,376	£213,399
-£34,005	£21,328	£144,430	£359,348
-£28,352	£20,893	£134,479	£332,783
-£37,347	£14,638	£129,407	£325,977
-£47,147	£14,294	£138,823	£349,505
-£88,065	£49,256	£333,490	£829,757
-£19,324	£10,302	£74,899	£182,304
-£10,652	£5,766	£39,701	£96,935
-£415,064	£211,149	£1,574,918	£3,939,152

Notes

1. Expenditure Growth derived from Population Projections (Table 1) * Expenditure per Capita figures (less SfT deduction) (Table 2)

Table 16b - Garden Goods (2012)

DESTINATIONS		ZONE 1 - SCARBORO PCA	ZONE 2 - SCARBORO SCA NORTH	ZONE 3 - SCARBORO SCA WEST	ZONE 4 - EASTFIELD	ZONE 5 - SEAMER	ZONE 6 - IRTON MOOR	ZONE 7 - FILEY	ZONE 8 - WHITBY PCA	ZONE 9 - WHITBY SCA	ZONE 10 - STAITHES	SURVEY TURNOVER
SCARBOROUGH	%	21.2%	18.2%	31.9%	19.0%	17.9%	43.3%	9.8%	7.6%	5.1%	0.0%	
	£	£235,536	£66,177	£89,605	£78,660	£62,798	£176,397	£51,147	£76,467	£11,530	£0	£848,317
SEAMER ROAD RP [SCARBOROUGH]	%	43.2%	31.8%	29.8%	42.0%	41.1%	35.0%	25.0%	19.7%	0.0%	0.0%	
	£	£479,960	£115,628	£83,706	£173,879	£144,190	£142,584	£130,478	£198,211	£0	£0	£1,468,636
WHITBY	%	0.0%	2.3%	0.0%	0.0%	0.0%	0.0%	0.0%	27.4%	15.4%	28.6%	
	£	£0	£8,363	£0	£0	£0	£0	£0	£275,684	£34,818	£34,847	£353,712
FILEY	%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	13.4%	0.0%	0.0%	0.0%	
	£	£4,444	£0	£0	£0	£0	£0	£69,936	£0	£0	£0	£74,380
TESCO (WESTWOOD)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
SAINSBURY'S (GALLOWS CLOSE)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
MORRISON'S (DUNSLOW ROAD)	%	0.4%	0.0%	0.0%	0.0%	0.0%	1.7%	1.8%	0.5%	0.0%	0.0%	
	£	£4,444	£0	£0	£0	£0	£6,925	£9,394	£5,031	£0	£0	£25,795
OTHER (SCARBOROUGH LPA AREA)	%	33.2%	45.5%	36.2%	37.0%	41.0%	20.0%	41.1%	37.8%	43.6%	28.6%	
	£	£368,858	£165,443	£101,683	£153,179	£143,839	£81,476	£214,505	£380,323	£98,574	£34,847	£1,742,730
TOTAL	%	98.4%	97.8%	97.9%	98.0%	100.0%	100.0%	91.1%	93.0%	64.1%	57.2%	
	£	£1,093,243	£355,611	£274,995	£405,718	£350,827	£407,382	£475,461	£935,716	£144,923	£69,694	£4,513,570
YORK CITY CENTRE	c	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£15,092	£0	£0	£15,092
MONKS CROSS RP [YORK]	%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£4,444	£0	£0	£0	£0	£0	£0	£0	£0	£0	£4,444
CLIFTON MOOR RP [YORK]	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
YORK DESIGNER OUTLET	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
MIDDLESBROUGH TOWN CENTRE	c	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	2.6%	14.3%	
	£	£0	£0	£0	£0	£0	£0	£0	£15,092	£5,878	£17,424	£38,394
TEESSIDE RP	c	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	5.1%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£10,061	£11,530	£0	£21,592
LEEDS CITY CENTRE	c	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£4,140	£0	£0	£0	£0	£0	£0	£4,140
HULL CITY CENTRE	c	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£4,140	£0	£0	£0	£0	£0	£0	£4,140
BRIDLINGTON TOWN CENTRE	%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	8.0%	0.0%	0.0%	0.0%	
	£	£8,888	£0	£0	£0	£0	£0	£41,753	£0	£0	£0	£50,641
MALTON TOWN CENTRE	%	0.4%	0.0%	2.1%	0.0%	0.0%	0.0%	0.0%	0.6%	2.6%	0.0%	
	£	£4,444	£0	£5,899	£0	£0	£0	£0	£6,037	£5,878	£0	£22,258
HORNSEA OUTLET	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
OTHER	%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%	0.9%	2.4%	25.6%	28.5%	
	£	£0	£7,999	£0	£0	£0	£0	£4,697	£24,148	£57,879	£34,725	£129,448
CATCHMENT TOTAL	%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
	£	£1,111,019	£363,611	£280,893	£413,998	£350,827	£407,382	£521,911	£1,006,146	£226,088	£121,844	£4,803,720

TABLE 17 - OVERALL COMPARISON MARKET SHARE

DESTINATIONS		ZONE 1 - SCARBORO PCA	ZONE 2 - SCARBORO SCA NORTH	ZONE 3 - SCARBORO SCA WEST	ZONE 4 - EASTFIELD	ZONE 5 - SEAMER	ZONE 6 - IRTON MOOR	ZONE 7 - FILEY	ZONE 8 - WHITBY PCA	ZONE 9 - WHITBY SCA	ZONE 10 - STAITHES	SURVEY TURNOVER
SCARBOROUGH	%	71.1%	63.9%	65.1%	64.1%	61.7%	78.8%	52.0%	30.9%	8.0%	4.8%	
	£	£50,629,653	£8,596,843	£7,719,548	£15,000,292	£12,566,290	£16,333,850	£13,602,378	£14,973,471	£652,831	£289,737	£140,364,893
SEAMER ROAD RP [SCARBOROUGH]	%	14.2%	14.4%	13.9%	16.6%	20.7%	8.7%	11.0%	4.7%	1.2%	1.0%	
	£	£10,141,041	£1,931,638	£1,650,398	£3,897,624	£4,216,824	£1,807,707	£2,874,074	£2,298,057	£101,288	£59,144	£28,977,795
WHITBY	%	0.3%	0.7%	0.6%	0.0%	0.0%	0.0%	0.2%	35.8%	13.3%	24.2%	
	£	£195,971	£89,674	£67,576	£0	£0	£0	£46,019	£17,384,552	£1,084,068	£1,458,988	£20,326,848
FILEY	%	0.0%	1.0%	0.0%	1.2%	0.1%	0.0%	17.3%	0.0%	0.0%	0.0%	
	£	£30,738	£134,629	£0	£287,665	£15,149	£0	£4,534,296	£0	£0	£0	£5,002,478
TESCO (WESTWOOD)	%	0.5%	1.2%	0.0%	0.4%	0.9%	0.1%	0.0%	0.0%	0.6%	0.0%	
	£	£349,169	£156,193	£0	£88,182	£186,815	£15,241	£0	£0	£50,644	£0	£846,243
SAINSBURY'S (GALLOWS CLOSE)	%	0.3%	1.1%	0.0%	0.0%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	
	£	£191,250	£143,569	£0	£11,592	£12,917	£28,030	£0	£7,527	£0	£0	£394,884
MORRISON'S (DUNSLOW ROAD)	%	0.2%	0.2%	1.3%	1.8%	1.2%	0.1%	1.2%	0.1%	0.1%	0.0%	
	£	£164,493	£24,659	£153,155	£410,230	£238,076	£22,166	£307,644	£31,824	£5,884	£0	£1,358,130
OTHER (SCARBOROUGH LPA AREA)	%	3.8%	3.8%	4.5%	3.5%	2.1%	2.1%	5.8%	6.2%	28.5%	22.2%	
	£	£2,703,448	£514,824	£532,365	£822,721	£427,626	£426,921	£1,509,571	£3,017,545	£2,318,668	£1,337,617	£13,611,307
TOTAL	%	90.5%	86.2%	85.3%	87.6%	86.7%	89.9%	87.5%	77.7%	51.7%	52.2%	84.4%
	£	£64,405,762	£11,592,030	£10,123,043	£20,518,305	£17,663,697	£18,633,914	£22,873,982	£37,712,976	£4,213,382	£3,145,486	£210,882,577
YORK CITY CENTRE	c	3.6%	4.3%	9.3%	4.9%	5.2%	7.0%	3.8%	4.7%	5.8%	1.4%	
	£	£2,529,574	£584,132	£1,100,813	£1,143,017	£1,059,488	£1,459,835	£985,856	£2,284,139	£475,195	£84,187	£11,706,236
MONKS CROSS RP [YORK]	%	1.2%	1.2%	1.2%	0.8%	1.8%	0.3%	0.8%	0.3%	0.2%	0.0%	
	£	£838,727	£160,259	£139,876	£196,458	£363,560	£65,852	£196,613	£137,786	£12,795	£0	£2,111,927
CLIFTON MOOR RP [YORK]	%	0.7%	0.7%	0.2%	1.0%	0.2%	0.1%	0.6%	0.2%	0.0%	0.0%	
	£	£477,676	£87,635	£23,289	£231,149	£42,873	£20,800	£164,266	£104,937	£0	£0	£1,152,625
YORK DESIGNER OUTLET	%	0.5%	1.7%	0.7%	0.6%	1.1%	0.1%	0.5%	0.3%	0.0%	0.0%	
	£	£389,505	£223,798	£81,808	£141,683	£232,104	£12,653	£125,349	£166,946	£0	£0	£1,373,846
MIDDLESBROUGH TOWN CENTRE	c	0.2%	0.4%	0.8%	0.8%	0.4%	0.1%	0.0%	9.1%	25.0%	32.0%	
	£	£144,834	£57,162	£94,793	£182,594	£91,295	£12,653	£8,475	£4,394,400	£2,033,979	£1,927,168	£8,947,353
TEESSIDE RP	c	0.0%	0.5%	0.0%	0.0%	0.0%	0.1%	0.0%	3.6%	7.9%	5.3%	
	£	£0	£72,261	£0	£0	£0	£11,862	£0	£1,733,143	£644,728	£322,276	£2,784,270
LEEDS CITY CENTRE	c	0.7%	0.3%	0.3%	1.0%	1.2%	1.6%	1.0%	0.0%	0.1%	0.0%	
	£	£468,387	£41,022	£31,945	£224,154	£235,134	£323,701	£248,668	£0	£11,162	£0	£1,584,172
HULL CITY CENTRE	c	0.5%	1.2%	0.3%	0.0%	0.5%	0.2%	0.6%	0.2%	0.0%	0.0%	
	£	£367,253	£161,168	£31,945	£4,140	£91,709	£50,915	£150,537	£109,092	£0	£0	£966,761
BRIDLINGTON TOWN CENTRE	%	0.0%	0.0%	0.0%	0.3%	0.1%	0.0%	2.6%	0.0%	0.0%	0.0%	
	£	£19,134	£0	£0	£60,136	£14,232	£0	£681,741	£0	£0	£0	£775,243
MALTON TOWN CENTRE	%	0.0%	1.3%	1.0%	0.6%	0.8%	0.0%	0.2%	0.2%	0.9%	0.0%	
	£	£4,444	£170,471	£113,689	£133,881	£165,574	£8,148	£45,781	£85,038	£73,119	£0	£800,145
HORNSEA OUTLET	%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	£	£54,070	£0	£0	£9,341	£0	£0	£0	£0	£0	£0	£63,411
OTHER	%	2.1%	2.3%	1.0%	2.4%	2.1%	0.6%	2.5%	3.7%	8.3%	9.1%	
	£	£1,467,563	£303,664	£120,163	£572,581	£420,171	£120,250	£659,673	£1,790,158	£677,606	£550,943	£6,682,771
CATCHMENT TOTAL	%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
	£	£71,166,929	£13,453,602	£11,861,365	£23,417,439	£20,379,836	£20,720,583	£26,140,942	£48,518,616	£8,141,966	£6,030,059	£249,831,336

Table 18A - Scarborough Town Centre Comparison Floorspace

	Gross Floorspace	Net Floorspace
Scarborough Town Centre	63,420	44,394
SUB TOTAL		44,394

Notes
1. Floorspace derived from Experian Goad Centre Report (August 2011) - updated by GVA on-site fieldwork (Octob
2. Gross to Net (70%)

Table 18B - Scarborough 'Other' Comparison Floorspace

	Gross Floorspace	Net Floorspace	Net Comparison
Sainsbury's (Falsgrave)	-	2,790	418
Tesco (Westwood)	-	1,886	195
Morrison's (Dunslow Road)	-	3,461	821
Seamer Road Retail Park	13,314	9,320	9,320
SUB TOTAL		17,457	10,754

Notes
1. Foodstore Floorspace derived from Applicant's RIA
2. Seamer Road RP Floorspace derived from on-site GVA Survey / Trevor Wood Database

Table 18C - Whitby Town Centre Comparison Floorspace

	Gross Floorspace	Net Floorspace	Net Comparison
Whitby Town Centre	15,120	10,584	10,584
Co-Op (Endeavour Wharf)	-	1,700	255
SUB TOTAL		12,284	10,839

Notes
1. Floorspace derived from Experian Goad Centre Report (August 2011) - updated by GVA on-site fieldwork (Octob
2. Gross to Net (70%)
3. Co-Op Net Floorspace Split 85/15 Convenience

Table 18D - Filey Town Centre Comparison Floorspace

	Gross Floorspace	Net Floorspace	Net Comparison
Filey Town Centre	4,580	3,206	3,206
SUB TOTAL		3,206	3,206

Notes
1. Floorspace derived from Experian Goad Centre Report (May 2010) - updated by GVA on-site fieldwork (October
2. Gross to Net (70%)

Table 18E - Scarborough Local Centres

	Gross Floorspace	Net Floorspace	Net Comparison
Local Centres	10,842	7,589	7,589
SUB TOTAL		7,589	7,589

Notes

1. Floorspace based on GVA On-Site Surveys (PROMAP Measurements)

2. Local Centres comprises Newby, Eastfield, Seamer, Hunmanby, Ramshill, Falsgrave, East Ayton, Burniston, Snainton and Victoria R

3. Gross to Net 70% for Local Shops

Table 19 - Comparison Commitments

Store	Zone	Net Floorspace (sqm)	Net Comparison (%)	Net Comparison (sqm)	Company Average Sales Density (£/sqm)	Company Average Turnover (£)
APP 09/01301/FL - Tesco Filey	**Zone 7 - Filey**	1,376	27%	372	£7,152	**£2,657,111**
APP 09/02118/FL - Sainsbury's Whitby	**Zone 8 - Whitby PCA**	2,787	30%	836	£5,249	**£4,388,689**
APP 10/02538/FL - Sainsbury's (Falsgrave) Scarborough	**Zone 1 - Scarborough PCA**	-	-	1,841	£5,249	**£9,663,409**
APP 11/00019/FL - Tesco (Westwood) Scarborough	**Zone 1 - Scarborough PCA**	-	-	2,388	£7,152	**£17,078,976**
TOTAL		**4,163**		**5,437**		**£33,788,185**

Notes

1. Floorspace figures derived from Planning Decision Notices / Applicant's RIA
2. Average Sales Density Figures derived from Applicant's RIA (Tesco / Sainsbury's extensions based on latest Verdict Data)

Table 20a - **BOROUGH-WIDE COMPARISON CAPACITY (BASELINE + GROWTH)**

COMPARISON GOODS					
	2012	2014	2018	2021	2030
Survey Derived Catchment Expenditure (£)	£210,882,577	£221,770,444	£249,604,589	£272,749,674	£355,876,460
Existing (NET) Comparison Floorspace (m^2)	76,782	76,782	76,782	76,782	76,782
Sales per m^2 net (£)	£2,747	£2,830	£3,027	£3,184	£3,706
Sales from Existing Floorspace (£)	£210,882,577	£217,256,503	£232,410,956	£244,466,556	£284,516,876
RESIDUAL CAPACITY (£)	£0	£4,513,942	£17,193,633	£28,283,117	£71,359,584
Sales per m^2 net in new shops (£)	£4,000	£4,133	£4,421	£4,651	£5,413
Capacity for new floorspace (m^2 net)	0	1,092	3,889	6,081	13,184
Capacity for new floorspace (m^2 gross)	0	1,560	5,555	8,688	18,834

Notes

1. Comparison Goods Expend. Growth; 0.5% p.a. (2011-2012); 1.6% p.a. (2012-2013); 2.1% p.a. (2013-2014); and 3% p.a. (2014-); Source Experian Retail Planner Note 9
2. Sales Efficiency Growth; 0.7% p.a. (2011-2012); 1.8% p.a. (2012-2013); 1.5% p.a. (2013-2014); and 1.7% p.a. (2014-); Source Experian Retail Planner Note 9 (September
3. Gross to Net ratio for new floorspace is 70%
4. New Shop Sales Density based on GVA judgement having regard to existing centre
5. Retention Level based on Overall Market Share Table
6. Retained Expenditure includes 'Other - Scarborough LPA Area' turnover

Table 20b - BOROUGH WIDE **COMPARISON CAPACITY (BASELINE + GROWTH) - COMMITMENTS**

COMPARISON GOODS					
	2012	2014	2018	2021	2030
Survey Derived Catchment Expenditure (£)	£210,882,577	£221,770,444	£249,604,589	£272,749,674	£355,876,460
Existing (NET) Comparison Floorspace (m^2)	76,782	76,782	76,782	76,782	76,782
Sales per m^2 net (£)	£2,747	£2,830	£3,027	£3,184	£3,706
Sales from Existing Floorspace (£)	£210,882,577	£217,256,503	£232,410,956	£244,466,556	£284,516,876
CURRENT RESIDUAL	£0	£4,513,942	£17,193,633	£28,283,117	£71,359,584
COMMITMENTS	£33,788,185	£34,912,318	£34,912,318	£17,193,633	£17,193,633
RESIDUAL CAPACITY	-£33,788,185	-£30,398,376	-£17,718,684	£11,089,484	£54,165,951
Sales per m^2 net in new shops (£)	£4,000	£4,133	£4,421	£4,651	£5,413
Capacity for new floorspace (m^2 net)	-8,447	-7,355	-4,008	2,384	10,007
Capacity for new floorspace (m^2 gross)	-12,067	-10,507	-5,725	3,406	14,296

Notes

1. Borough Commitments projected forward in accordance with Experian sales density projections

Table 21A - **SCARBOROUGH (BASELINE + GROWTH) COMPARISON CAPACITY**

COMPARISON GOODS					
	2012	**2014**	**2018**	**2021**	**2030**
Survey Derived Catchment Expenditure (£)	£171,941,945	£180,819,307	£203,513,723	£222,384,940	£290,161,907
Existing (NET) Comparison Floorspace (m^2)	55,148	55,148	55,148	55,148	55,148
Sales per m^2 net (£)	£3,118	£3,212	£3,436	£3,614	£4,207
Sales from Existing Floorspace (£)	£171,941,945	£177,138,890	£189,494,989	£199,324,457	£231,979,264
RESIDUAL CAPACITY (£)	**£0**	**£3,680,417**	**£14,018,734**	**£23,060,484**	**£58,182,643**
Sales per m^2 net in new shops (£)	£4,000	£4,133	£4,421	£4,651	£5,413
Capacity for new floorspace (m^2 net)	**0**	**890**	**3,171**	**4,958**	**10,749**
Capacity for new floorspace (m^2 gross)	**0**	**1,272**	**4,530**	**7,084**	**15,356**

Notes

1. Comparison Goods Expend. Growth; 0.5% p.a. (2011-2012); 1.6% p.a. (2012-2013); 2.1% p.a. (2013-2014); and 3% p.a. (2014-); Source Experian Retail Planner Note 9
2. Sales Efficiency Growth; 0.7% p.a. (2011-2012); 1.8% p.a. (2012-2013); 1.5% p.a. (2013-2014); and 1.7% p.a. (2014-); Source Experian Retail Planner Note 9 (September 2011)
3. Gross to Net ratio for new floorspace is 70%
4. New Shop Sales Density based on GVA judgement having regard to existing centre
5. Survey Turnover based on Scarborough TC, Seamer Road RP and Scarborough Foodstores (Sainsbury's, Tesco and Morrison's).

Table 21B - **SCARBOROUGH COMPARISON CAPACITY - COMMITMENTS**

COMPARISON GOODS					
	2012	**2014**	**2018**	**2021**	**2030**
Survey Derived Catchment Expenditure (£)	£171,941,945	£180,819,307	£203,513,723	£222,384,940	£290,161,907
Existing (NET) Comparison Floorspace (m^2)	55,148	55,148	55,148	55,148	55,148
Sales per m^2 net (£)	£3,118	£3,212	£3,436	£3,614	£4,207
Sales from Existing Floorspace (£)	£171,941,945	£177,138,890	£189,494,989	£199,324,457	£231,979,264
CURRENT RESIDUAL	**£0**	**£3,680,417**	**£14,018,734**	**£23,060,484**	**£58,182,643**
COMMITMENTS	**£26,742,385**	**£27,632,104**	**£29,559,547**	**£31,092,857**	**£36,186,719**
RESIDUAL CAPACITY	**-£26,742,385**	**-£23,951,687**	**-£15,540,813**	**-£8,032,373**	**£21,995,924**
Sales per m^2 net in new shops (£)	£4,000	£4,133	£4,421	£4,651	£5,413
Capacity for new floorspace (m^2 net)	**-6,686**	**-5,795**	**-3,515**	**-1,727**	**4,064**
Capacity for new floorspace (m^2 gross)	**-9,551**	**-8,279**	**-5,021**	**-2,467**	**5,805**

Notes

1. Commitments Turnover relates to Sainsbury's Falsgrave and Tesco Westwood (replacement store); projected forward in accordance with recommended Experian Sales

Table 22a - **WHITBY (BASELINE + GROWTH) COMPARISON CAPACITY**

COMPARISON GOODS					
	2012	2014	2018	2021	2030
Survey Derived Catchment Expenditure (£)	£20,326,848	£21,376,323	£24,059,240	£26,290,181	£34,302,723
Existing (NET) Comparison Floorspace (m^2)	10,839	10,839	10,839	10,839	10,839
Sales per m^2 net (£)	£1,875	£1,932	£2,067	£2,174	£2,530
Sales from Existing Floorspace (£)	£20,326,848	£20,941,227	£22,401,956	£23,563,988	£27,424,415
RESIDUAL CAPACITY (£)	£0	£435,096	£1,657,284	£2,726,193	£6,878,308
Sales per m^2 net in new shops (£)	£2,500	£2,583	£2,763	£2,907	£3,383
Capacity for new floorspace (m^2 net)	0	168	600	938	2,033
Capacity for new floorspace (m^2 gross)	0	241	857	1,340	2,905

Notes

1. Comparison Goods Expend. Growth; 0.5% p.a. (2011-2012); 1.6% p.a. (2012-2013); 2.1% p.a. (2013-2014); and 3% p.a. (2014-); Source Experian Retail Planner Note 9
2. Sales Efficiency Growth; 0.7% p.a. (2011-2012); 1.8% p.a. (2012-2013); 1.5% p.a. (2013-2014); and 1.7% p.a. (2014-); Source Experian Retail Planner Note 9 (September 2011
3. Gross to Net ratio for new floorspace is 70%
4. New Shop Sales Density based on GVA judgement having regard to existing centre / catchment

Table 22b - **WHITBY COMPARISON CAPACITY - COMMITMENTS**

COMPARISON GOODS					
	2012	2014	2018	2021	2030
Survey Derived Catchment Expenditure (£)	£20,326,848	£21,376,323	£24,059,240	£26,290,181	£34,302,723
Existing (NET) Comparison Floorspace (m^2)	10,839	10,839	10,839	10,839	10,839
Sales per m^2 net (£)	£1,875	£1,932	£2,067	£2,174	£2,530
Sales from Existing Floorspace (£)	£20,326,848	£20,941,227	£22,401,956	£23,563,988	£27,424,415
CURRENT RESIDUAL	£0	£435,096	£1,657,284	£2,726,193	£6,878,308
COMMITMENTS	£4,388,689	£4,534,701	£4,851,013	£5,102,644	£5,938,597
RESIDUAL CAPACITY	-£4,388,689	-£4,099,604	-£3,193,729	-£2,376,451	£939,711
Sales per m^2 net in new shops (£)	£2,500	£2,583	£2,763	£2,907	£3,383
Capacity for new floorspace (m^2 net)	-1,755	-1,587	-1,156	-818	278
Capacity for new floorspace (m^2 gross)	-2,508	-2,267	-1,651	-1,168	397

Notes

1. Commitments Turnover relates to Sainsbury's Whitby store; projected forward in accordance with recommended Experian Sales Efficiency Growth

Table 23a - **FILEY (BASELINE + GROWTH) COMPARISON CAPACITY**

COMPARISON GOODS					
	2012	**2014**	**2018**	**2021**	**2030**
Survey Derived Catchment Expenditure (£)	£5,002,478	£5,260,756	£5,921,027	£6,470,066	£8,441,969
Existing (NET) Comparison Floorspace (m^2)	3,206	3,206	3,206	3,206	3,206
Sales per m^2 net (£)	£1,560	£1,608	£1,720	£1,809	£2,105
Sales from Existing Floorspace (£)	£5,002,478	£5,153,678	£5,513,166	£5,799,144	£6,749,203
RESIDUAL CAPACITY (£)	**£0**	**£107,078**	**£407,861**	**£670,922**	**£1,692,765**
Sales per m^2 net in new shops (£)	£2,000	£2,067	£2,211	£2,325	£2,706
Capacity for new floorspace (m^2 net)	**0**	**52**	**184**	**289**	**625**
Capacity for new floorspace (m^2 gross)	**0**	**74**	**264**	**412**	**894**

Notes

1. Comparison Goods Expend. Growth; 0.5% p.a. (2011-2012); 1.6% p.a. (2012-2013); 2.1% p.a. (2013-2014); and 3% p.a. (2014-); Source Experian Retail Planner Note 9
2. Sales Efficiency Growth; 0.7% p.a. (2011-2012); 1.8% p.a. (2012-2013); 1.5% p.a. (2013-2014); and 1.7% p.a. (2014-); Source Experian Retail Planner Note 9 (September 2011
3. Gross to Net ratio for new floorspace is 70%
4. New Shop Sales Density based on GVA judgement having regard to existing centre

Table 23b - **FILEY COMPARISON CAPACITY - COMMITMENTS**

COMPARISON GOODS					
	2012	**2014**	**2018**	**2021**	**2030**
Survey Derived Catchment Expenditure (£)	£5,002,478	£5,260,756	£5,921,027	£6,470,066	£8,441,969
Existing (NET) Comparison Floorspace (m^2)	3,206	3,206	3,206	3,206	3,206
Sales per m^2 net (£)	£1,560	£1,608	£1,720	£1,809	£2,105
Sales from Existing Floorspace (£)	£5,002,478	£5,153,678	£5,513,166	£5,799,144	£6,749,203
CURRENT RESIDUAL	**£0**	**£107,078**	**£407,861**	**£670,922**	**£1,692,765**
COMMITMENTS	**£2,657,111**	**£2,745,513**	**£2,937,023**	**£3,089,372**	**£3,595,496**
RESIDUAL CAPACITY	**-£2,657,111**	**-£2,638,435**	**-£2,529,162**	**-£2,418,450**	**-£1,902,730**
Sales per m^2 net in new shops (£)	£2,000	£2,067	£2,211	£2,325	£2,706
Capacity for new floorspace (m^2 net)	**-1,329**	**-1,277**	**-1,144**	**-1,040**	**-703**
Capacity for new floorspace (m^2 gross)	**-1,898**	**-1,824**	**-1,634**	**-1,486**	**-1,004**

Notes

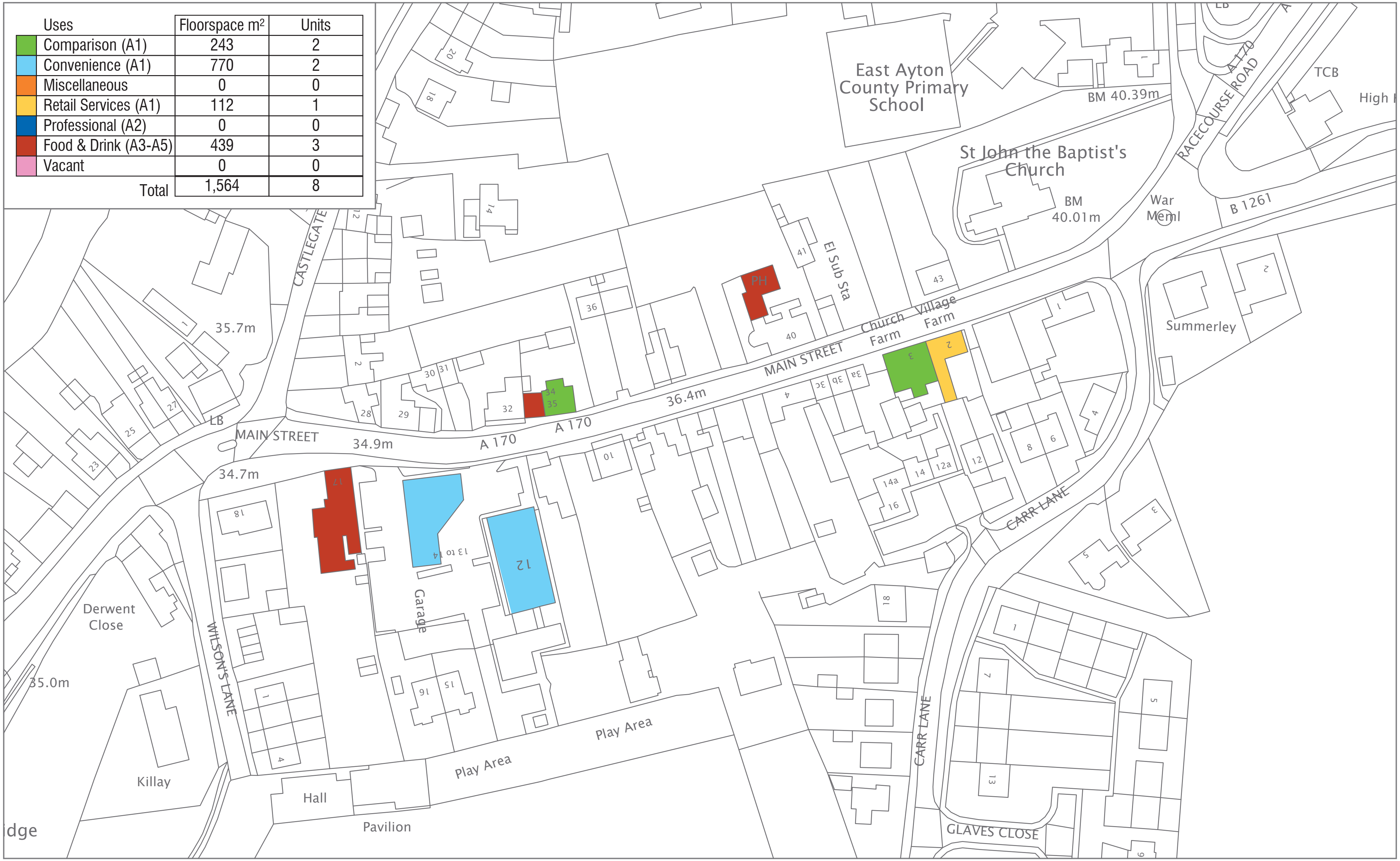
1. Commitments Turnover relates to Tesco Filey store; projected forward in accordance with recommended Experian Sales Efficiency Growth

Uses	Floorspace m²	Units
Comparison (A1)	2,490	24
Convenience (A1)	570	9
Miscellaneous	120	1
Retail Services (A1)	216	3
Professional (A2)	1,398	12
Food & Drink (A3-A5)	1,684	11
Vacant	471	6
Total	6,949	66

Scarborough Retail Study Update
Falsgrave Local Centre

GVA

Uses	Floorspace m²	Units
Comparison (A1)	243	2
Convenience (A1)	770	2
Miscellaneous	0	0
Retail Services (A1)	112	1
Professional (A2)	0	0
Food & Drink (A3-A5)	439	3
Vacant	0	0
Total	1,564	8



Scarborough Retail Study Update
East Ayton Local Centre

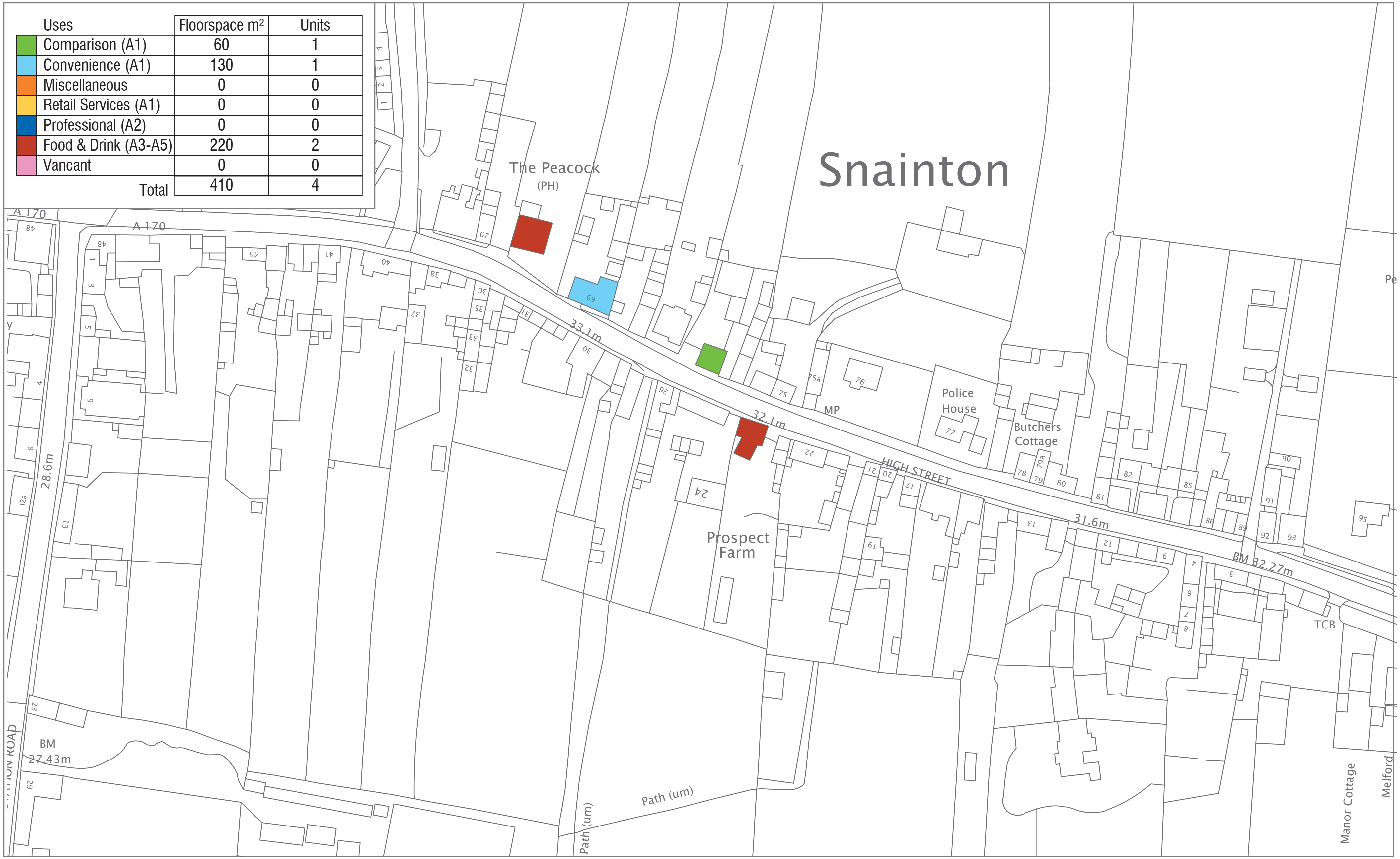
Uses	Floorspace m²	Units
Comparison (A1)	0	0
Convenience (A1)	170	1
Miscellaneous	0	0
Retail Services (A1)	0	0
Professional (A2)	0	0
Food & Drink (A3-A5)	387	1
Vacant	0	0
Total	557	2

Scarborough Retail Study Update

Burniston Local Centre

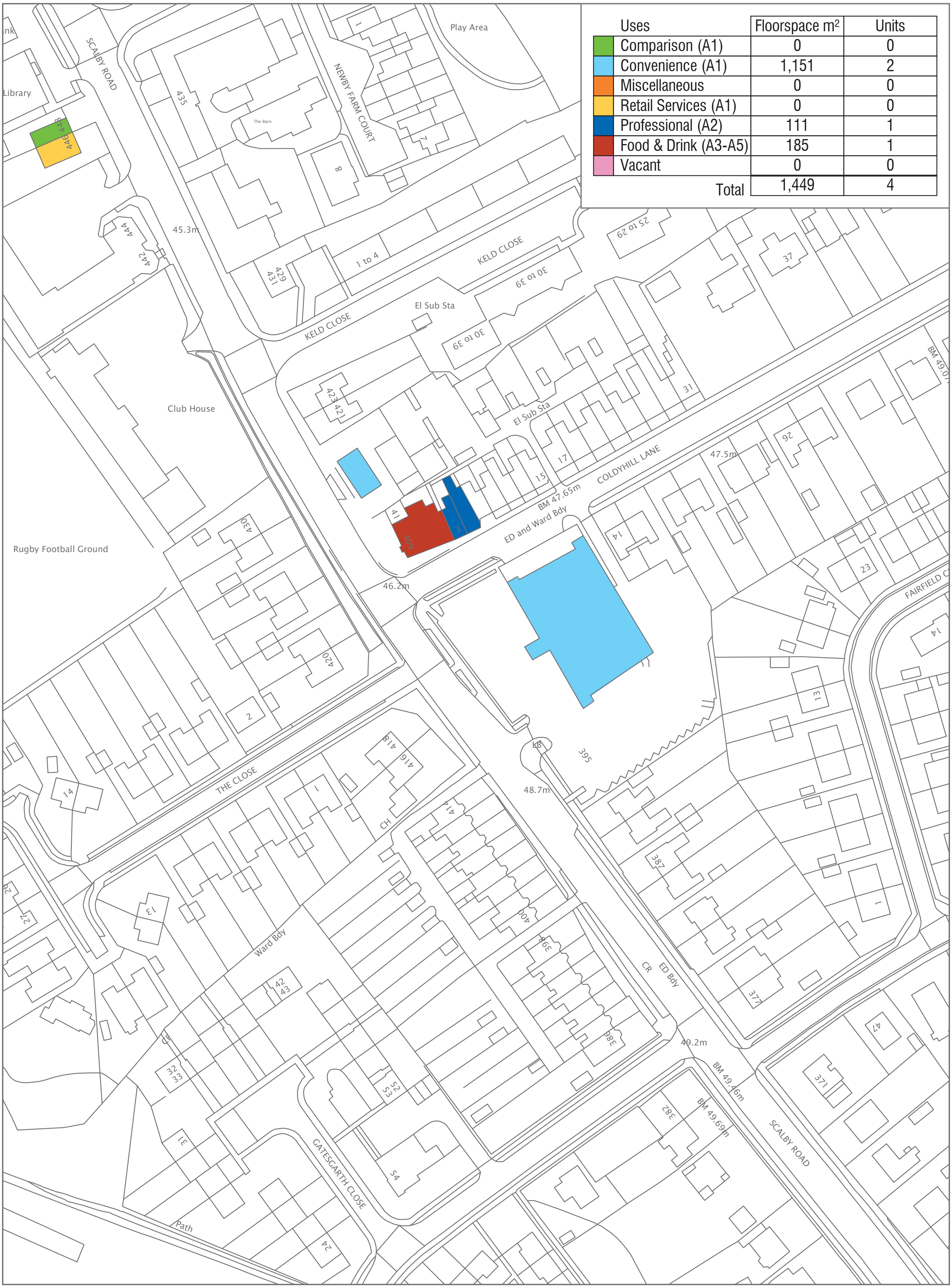
GVA

Uses	Floorspace m²	Units
Comparison (A1)	60	1
Convenience (A1)	130	1
Miscellaneous	0	0
Retail Services (A1)	0	0
Professional (A2)	0	0
Food & Drink (A3-A5)	220	2
Vancant	0	0
Total	410	4



Scarborough Retail Study Update

Snainton Local Centre



Uses	Floorspace m²	Units
Comparison (A1)	0	0
Convenience (A1)	1,151	2
Miscellaneous	0	0
Retail Services (A1)	0	0
Professional (A2)	111	1
Food & Drink (A3-A5)	185	1
Vacant	0	0
Total	1,449	4

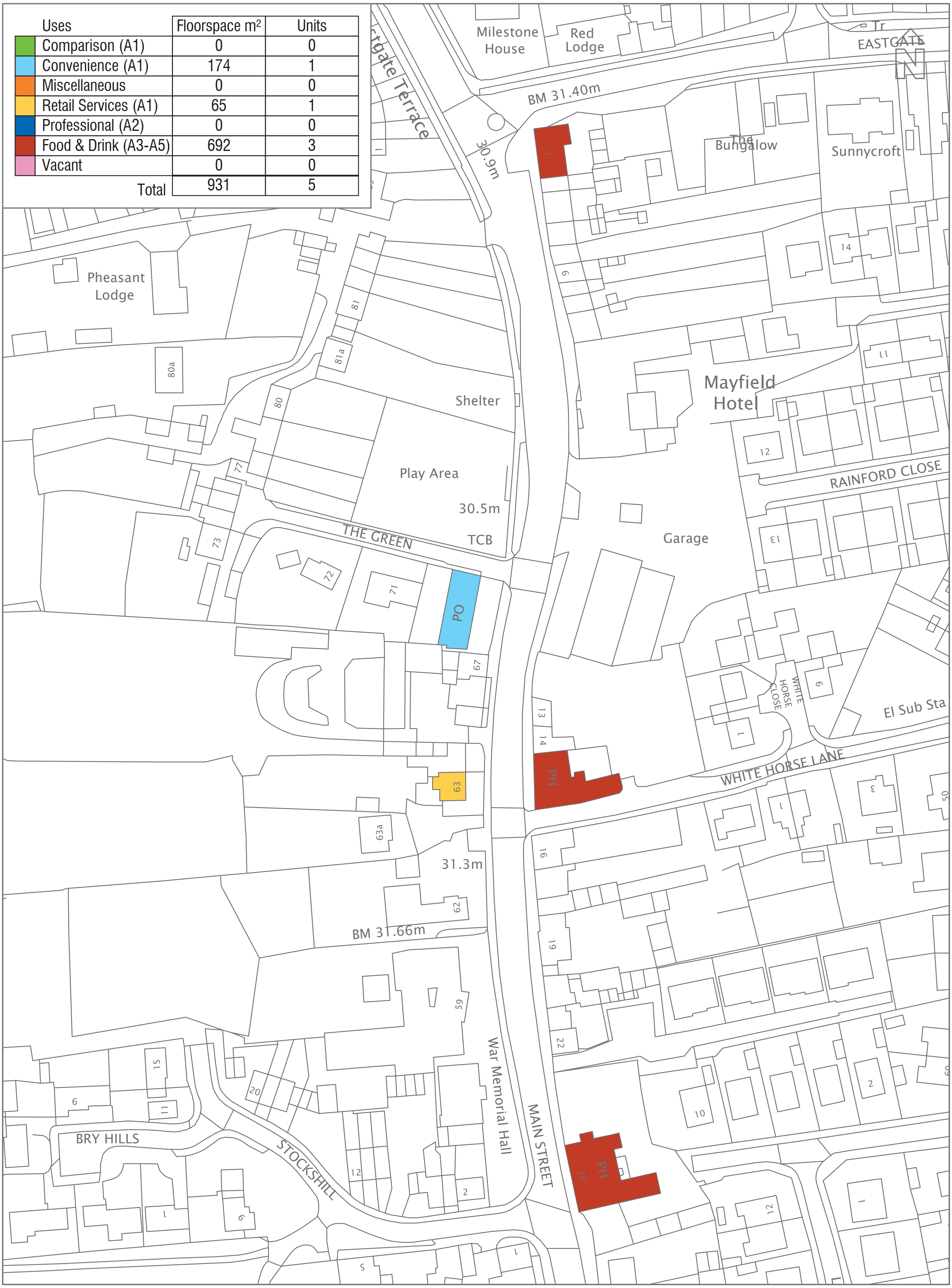
Scarborough Retail Study Update
Newby Local Centre

	Uses	Floorspace m²	Units
	Comparison (A1)	167	1
	Convenience (A1)	1,438	2
	Miscellaneous	0	0
	Retail Services (A1)	289	3
	Professional (A2)	283	1
	Food & Drink (A3-A5)	312	2
	Vacant	197	2
	Total	2,686	11

Scarborough Retail Study Update

Eastfield Local Centre

Uses	Floorspace m²	Units
Comparison (A1)	0	0
Convenience (A1)	174	1
Miscellaneous	0	0
Retail Services (A1)	65	1
Professional (A2)	0	0
Food & Drink (A3-A5)	692	3
Vacant	0	0
Total	931	5

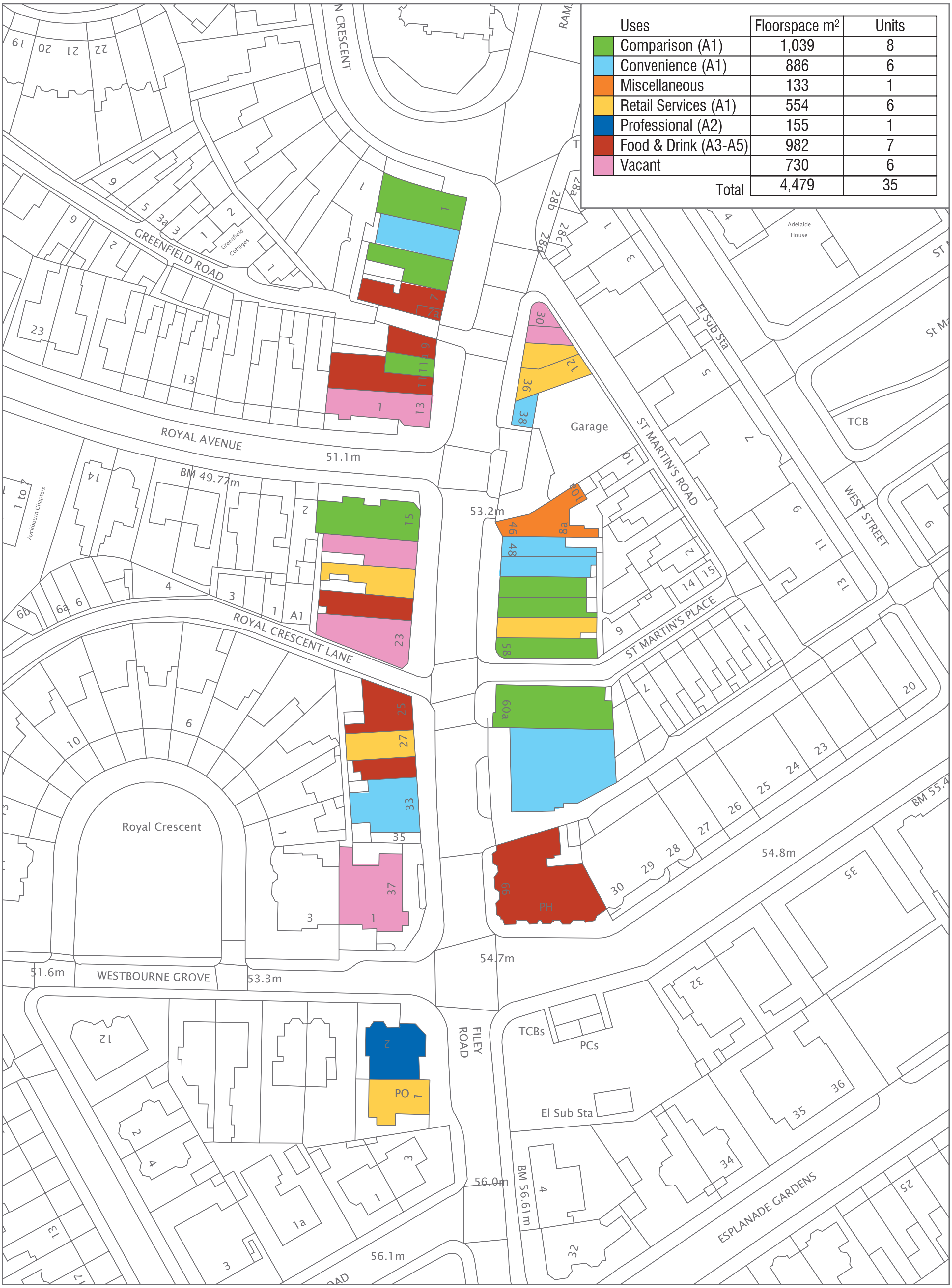


Scarborough Retail Study Update
Seamer Local Centre

GVA

Uses	Floorspace m²	Units
Comparison (A1)	313	4
Convenience (A1)	414	4
Miscellaneous	329	2
Retail Services (A1)	283	3
Professional (A2)	0	0
Food & Drink (A3-A5)	658	5
Vacant	0	0
Total	1,794	15

Scarborough Retail Study Update
Hunmanby Local Centre



Uses	Floorspace m²	Units
Comparison (A1)	1,039	8
Convenience (A1)	886	6
Miscellaneous	133	1
Retail Services (A1)	554	6
Professional (A2)	155	1
Food & Drink (A3-A5)	982	7
Vacant	730	6
Total	4,479	35

Scarborough Retail Study Update

Ramshill Local Centre

Uses	Floorspace m²	Units
Comparison (A1)	13,314	9
Convenience (A1)	252	1
Miscellaneous	0	0
Retail Services (A1)	0	0
Professional (A2)	0	0
Food & Drink (A3-A5)	0	0
Vacant	107	1
Total	13,673	11

Scarborough Retail Study Update

Seamer Road Retail Park

GVA