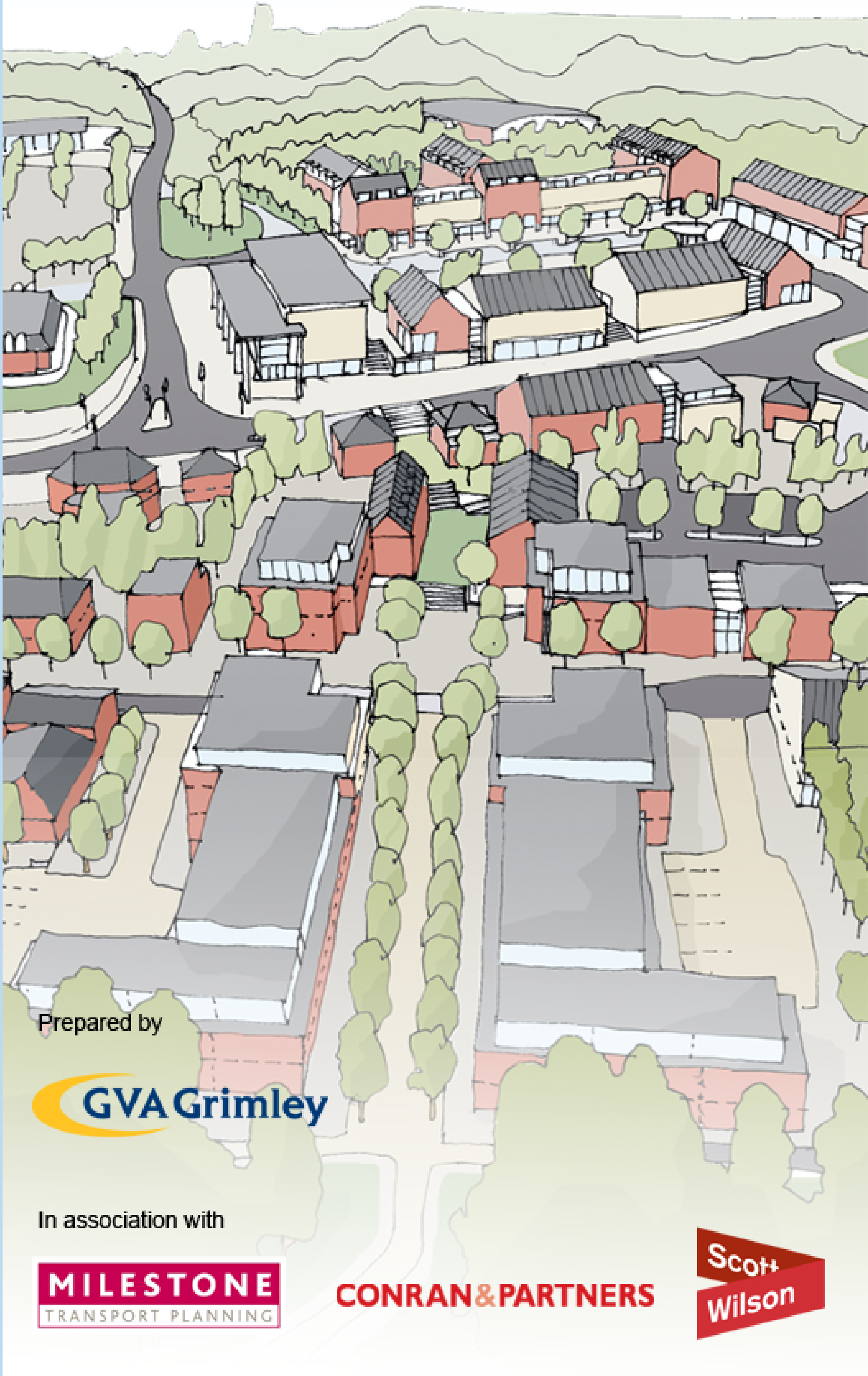
CGTC/OPA/Document 6

Retail Impact Assessment

November 2006



DEFENCE ESTATES
Delivering Estate Solutions to Defence Needs

Catterick Garrison Town Centre
Outline Planning Application

Prepared by

GVA Grimley

In association with

MILESTONE TRANSPORT PLANNING

CONRAN & PARTNERS

Scott Wilson

Catterick Garrison

Retail Capacity and Impact Assessment

Prepared for and on behalf of

Defence Estates

November 2006

Contact: Stuart Morley
Tel. 020 7911 2427

GVA Grimley
10 Stratton Street
London
W1J 8JR

Contents

APPENDICES

1 INTRODUCTION AND PROPOSED DEVELOPMENT

1.1 GVA Grimley LLP were appointed by Defence Estates to undertake a retail capacity and impact assessment in support of the proposed development of a new town centre at Catterick Garrison, which is located within Richmondshire District Council (RDC).

1.2 The objective of this study is firstly to identify the level of retail development needed in Catterick Garrison, both in quantitative and qualitative terms, and thus to demonstrate that capacity exists to support the proposals for a new town centre. The second part of the retail assessment considers the effect that the proposals may have on other nearby town centres such as Richmond, Bedale and Leyburn, and in more general terms on Darlington and Northallerton.

1.3 The principal focus of the study will be on Richmond, which is Richmondshire's key retail centre, and therefore most likely to be affected by the proposals. The existing and future function of the centres is considered and the inter-relationships between them as they are located so close together.

Proposed Development

1.4 The proposals are aimed at creating a new town centre for Catterick Garrison, building on the existing town centre but addressing its weaknesses. A new focal point for the town centre will be created on the corner of Richmond Road and Gough Road and the proposals also aim to utilise the space between existing uses and create improved vehicle and pedestrian linkages/access.

1.5 The proposals are for a mixed-use scheme, totalling approximately 33,574 sqm (gross) and comprising of retail, offices, residential and a hotel. The commercial and residential aspects will be complemented by a number of community facilities, including a multi-use cultural and leisure centre, open spaces and landscaping. The new facilities will be integrated with existing uses.

1.6 The composition of the proposed scheme is set out below:-

Table 1.1: Gross External Area (m²) Schedule

Use	Sq.m (gross)	No. of Units
A1 retail (non-food)	6,304	
A3 food and drink	1,787	
D2 leisure	1,690	
D1 Public/Clinic	3,000	
B1 Business	1,947	
C1 Hotel	3,270	84 rooms
A2 Finance	1,460	
C3 Residential	14,116	177 units
TOTAL	**33,574**	

1.7 This study provides an assessment of the capacity to support the A1 retail development (which is assumed to be 100% non-food uses) and the likely impact it would have on other town centres. The methodology used is set out in the following section of the report.

1.8 The proposed town centre scheme has a number of aims – to improve the facilities for local people in Catterick Garrison and Colburn particularly, to cater for substantial growth in the Garrison's population and to reduce expenditure leakage to more distant larger towns such as Darlington. This mixed-use town centre scheme, therefore, provides a sustainable solution to the needs of the local population.

2 METHODOLOGY

2.1 Our approach to the retail assessment has been tailored to meet the objectives of the study and to reflect both current and forthcoming good practice. It combines an objective quantitative analysis of local shopping patterns, with qualitative assessments of each centre, drawing on a range of data sources.

2.2 The methodology used to assess the quantitative capacity for the A1 retail element of the scheme (assuming 100% comparison retail) compares the retained expenditure in each town centre (i.e. the actual turnover being achieved by stores) with benchmark or 'equilibrium' turnover levels. The actual turnover of town centres, local centres and an out-of-centre retail facility is assessed using survey evidence on actual shopping habits.

2.3 This approach allows independent and robust conclusions to be reached about trading levels in existing stores, and the overall performance of key centres. The use of survey data also allows any leakage of expenditure from the study area to nearby centres to be identified, in terms of its size, type of spending and direction. This facilitates the assessment of the potential to reclaim any leakage of expenditure through new retail development within the study area, such as the development of a new town centre as being proposed.

2.4 The analysis allows the level of need for new development in existing centres, in particular the need in Catterick Garrison, to be identified. Future capacity is determined by considering the growth of expenditure within the study area, relative to increases in efficiency in existing stores, and increases in floorspace through committed retail developments, and the potential clawback of expenditure leakage which may result from new development.

2.5 The quantitative capacity assessment is based on up-to-date, empirical data obtained from a bespoke household telephone survey of residents in the study area. This survey determines existing shopping patterns i.e. the size and direction of retail expenditure flows between the areas where people live and the locations where they shop. The results are combined with the latest population and expenditure data to determine actual retail turnover, catchment areas and market shares of the main retail centres within and beyond the study area.

2.6 The key stages of the quantitative retail assessment are briefly described below.

- The definition of an appropriate study area which includes all relevant centres and is wide enough for the household survey to capture all the flows of expenditure to these centres. The study area is sub-divided into population zones for the purpose of surveying and modelling the area.

- Estimation of the study area population at the base date and in the future based on natural population growth and residential development. Particular attention is paid to the special population characteristics of certain parts of the study area, and consideration is made as to how these may affect the analysis.

- Assessment of the expenditure per capita of the study area population zones for comparison (non-food) shopping, at the base date and in the future. Again the special population characteristics are considered in terms of how these may effect spending levels.

- Estimation of the total comparison expenditure generated by the study area population (multiplying population figures by the expenditure per capita estimates), for each zone and the study area in total.

- Analysis of the existing comparison retail provision within the study area and an assessment of the benchmark turnover of stores/centres taking account of their size and composition.

- Evaluation and analysis of the household survey data to show shopping patterns in terms of the expenditure flows to centres within and outside the study area. Data has been analysed for the different types of comparison goods, which is then combined to show overall flows of comparison expenditure.

- Comparison of the actual turnover of centres (survey derived) with their benchmark turnover, making allowance for tourist spending as identified in **Appendix 1**.

- Assessment of capacity levels drawing together the above information and taking account of proposed/committed developments and future changes in market shares and the retention of expenditure, which may result from new development.

2.7 Following the assessment of capacity, the Catterick Garrison Town Centre development is assessed in terms of the likely impact that it may have on existing centres. The data from the household survey is used to show where local residents are currently shopping, where the proposed town centre scheme will draw trade from and how these expenditure flows will be affected by the new development.

2.8 In addition to the quantitative analysis, a healthcheck assessment has been undertaken to help examine the possible effect of the proposed development on the existing retail centres located nearby.

2.9 To inform our healthcheck assessment, qualitative comments and findings have also been drawn from a number of previous studies. These have provided information on tourism spending and the views of residents and visitors on Richmond town centre.

2.10 This remainder of the study is presented in two parts, the main report and the appendices covering the quantitative assessment and all the relevant survey data.

2.11 The sections of this report are as follows:

- **Section 3** provides an overview of national and local planning policy and retail trends which are relevant for the study area.

- **Section 4** provides a healthcheck assessment of the town centres within the study area, focusing on Richmond, examining retail provision and how it has changed, along with other qualitative factors e.g. surveys, and draws on the findings to inform the assessment of benchmark turnover levels.

- **Section 5** examines the study area and the population of each of the eight study area zones.

- **Section 6** examines expenditure per capita, expenditure growth rates and total expenditure generated within the study area.

- **Section 7** examines the results of the household survey data and analyses shopping patterns (in terms of expenditure flows) for comparison shopping, and the market shares of each centre.

- **Section 8** provides the comparison capacity assessment and defines the level of need for additional facilities in Catterick Garrison at the present time and at future dates, to demonstrate that the proposals can be supported

- **Section 9** considers all the planned/committed comparison retail development schemes within the study area, and examines their likely turnover, trade diversion from and resultant impact on other centres within the study area and in neighbouring districts.

- **Section 10** summarises the findings of the report and draws conclusions on the need for the proposed Catterick Garrison town centre developments and the impact that is might have on the retail facilities within nearby centres.

3 OVERVIEW OF PLANNING POLICY AND RETAIL TRENDS

Planning Policy

3.1 National and local planning policy is, and has been for many years, strongly pro town centres. In the study area almost all retail floorspace is in town centres and the proposals/commitments considered in this study are all in a town centre location – Catterick Garrison town centre. Policies relating to sequential site assessment and transport accessibility are not, therefore, relevant in this study for the proposal being considered.

3.2 The draft Regional Spatial Strategy reinforces the national pro-town centre emphasis and the need for sustainable development. Although most new development should be concentrated in the larger towns and cities, it acknowledges that a polycentric model of managing change and development is desirable. It recognises that not everywhere can offer every service or meet every need, so it is important that places are well connected and recognise inter-dependencies so that complimentary, rather than competing roles are developed. This approach is taken up in the Local Plan relating to the relationship between Richmond and Catterick Garrison (see below).

3.3 The draft RSS also states that market towns have a key role to play as hubs for the rural economy and as service centres. Town centres have a key role to play, but it is important that the character and distinctiveness of such towns is protected and enhanced. The links between Richmond and Catterick Garrison (see below) are important in this regard, due to the problems of accommodating retail expenditure growth in the historic town centre of Richmond, but the need to reduce expenditure loss to more distant, larger centres and reduce longer distance car travel.

3.4 Although the Catterick Garrison scheme is in a town centre location, a need and impact assessment is still required. National planning policy does not specifically require it, but the Local Plan does. Following guidance in the Structure Plan, new developments or extensions which produce an overall floorspace greater than 1,500 sqm must show that they will not undermine the vitality and viability of any town centre. A capacity and impact assessment is, therefore, required.

3.5 One other policy at the national level is relevant to the proposed scheme at Catterick Garrison and that is the scale of development. PPS6 states that "the scale of development should relate to the role and function of the centre within the wider hierarchy and the catchment served". Development should fit into the centre and complement its role and function.

3.6 The Richmondshire Local Plan (RLP) was adopted in September 2001. The core strategy maps out the broad pattern of development and it has a commitment to steer housing and employment development to the Catterick Garrison Administrative Area which will become the main long term growth point in Richmondshire.

3.7 **Policy 78** welcomes additional retail floorspace in Richmond and Leyburn town centres, providing it is of an appropriate scale. However, the justification of the policy recognises that there is limited scope for town centre development in Richmond, given its historic status and exceptional quality of its townscape. Following guidance in the Structure Plan, new development or extensions which produce an overall floorspace greater than 1,500 sq.m must show that they will not undermine the vitality and viability of the town centre or other town centres.

3.8 **Policy 79** states that priority will be given to the expansion of town centre uses within Catterick Garrison town centre, to provide improved shopping facilities for Garrison residents so that they have less need to travel outside Richmondshire. Nevertheless, the same criteria regarding shopping proposals greater than 1,500 sq.m will apply to development or extensions in Catterick Garrison town centre. Emphasis is also given of the need to "foster a mutually beneficial relationship with Richmond town centre, reflecting the long established links between that area and Catterick Garrison residents".

3.9 **Policy 80** provides the details of the requirement for town centre developments over 1,500 sq.m and all proposals outside Richmond, Leyburn, Colburn and Catterick Garrison town centres not to undermine the vitality and viability of existing centres. The need to consider town centre and edge-of-centre sites is emphasised. In the justification for the policy reference is made to Richmond and Catterick Garrison town centres going through a period of transition, as a result of the recent supermarket development (Co-op and Tesco). "The establishment of a new role for both is an important priority for the District Council and it is essential that competition is maintained without the ill effects of excessive development in either town centre".

Retail Trends

3.10 Key retail trends of relevance to this study are summarised below:

- Comparison goods expenditure growth has been very strong (nearly 5% pa) over the last 25-30 years and particularly over recent years until 2005. Compound growth over 20 years has been over 200%. Such strong growth is unlikely over the next 10 years, but reasonably healthy growth close to 4% pa is still likely.

- Car ownership and mobility have increased significantly over the last 25 years. Nationally 75% of households own one or more cars and 30% own 2 or more cars. In the study area car ownership is even higher.

- The growth in car ownership and mobility has led to shoppers travelling greater distances to shop in larger centres. A polarisation of centres has occurred.

- The growth of larger town centres at the expense of smaller town centres has been further encouraged by the growth of multiple retailers and their desire for larger shop unit size, which is difficult to accommodate in small town centres.

- The growth of shop size has stimulated the movement out of town centres and the development of multi-product stores. This is particularly noticeable in the foodstore and DIY sector. Larger foodstores increasingly sell an ever increasing amount of non-food goods.

- Sunday trading, increased affluence, increased tourism and the growth of the internet mean that shoppers no longer merely shop to satisfy needs, they increasingly shop to satisfy wants as well. The integration of leisure uses (in particular quality restaurants, coffee shops, cafes and bars) with shopping uses and set in an attractive environment are important to attract shoppers and encourage longer stays. Accessibility and the cost and location of car parking are also important.

- The policy focus on urban renewal has increased demand for town centre sites for a wide range of land uses. Sustainable mixed use developments are now encouraged which means that office, leisure and residential developments compete with retail uses for space and necessitate a coherent and integrated approach to land use mix to optimise the use of space to the mutual benefit of all uses.

Conclusion

3.12 The proposed Catterick Garrison development is a mixed-use town centre scheme. The retail element is modest in scale and will complement the existing retail uses in the town centre which are dominated by the large Tesco foodstore at Richmond Walk. It is, therefore, in accordance with national and local planning policies. It will also complement Richmond town centre as much as possible where the scope for new development is limited and will help to reduce expenditure leakage to higher order centres such as Darlington, lessening the polarisation of centres that has occurred in North Yorkshire.

4 RETAIL PROVISION AND HEALTH CHECK ASSESSMENTS

4.1 Richmond is the main focus of this section, due to its close proximity to Catterick Garrison, because it is one of Yorkshire Forward's Renaissance Market Towns, because it is the largest town in the study area and because the Local plan requires it. Due to its size there are a number of reports/surveys covering the town and some data on retail floorspace and retailer demand. None of this material exists for Leyburn, Colburn or Hawes, but the recent Nathaniel Lichfield report for Hambleton District Council provides some useful information on Bedale.

4.2 In floorspace terms Richmond is about twice the size of Leyburn and Bedale, which in turn are nearly four times the size of Hawes. Colburn is even smaller than Hawes.

Leyburn, Bedale and Hawes

4.3 Leyburn is marginally larger than Bedale and there are also some converted warehouses just outside the town selling furniture and floor coverings, and a recently completed business park where trade counters and ancilliary retail uses have been permitted, which increase the size of Leyburn and its environs in shopping floorspace terms. Leyburn and Bedale are about 10 miles apart and about 8 miles to the south of Catterick, which itself is two miles south of Richmond. They are both very attractive towns and appear to be trading reasonably well, which is broadly confirmed by the results of the household survey. Parking is reasonably plentiful, except on market day and is conveniently located.

4.4 Neither towns have any edge or out-of-centre foodstores, unlike Richmond, but each has a relatively large town centre foodstore, recently taken over by the Co-op. The Co-op foodstore in Leyburn has a sales area of about 1,200 sqm and in Bedale it is slightly smaller at about 800 sqm sales area. Neither store is modern or purpose built, but each performs a vital function for the town centres. Leyburn has nearly twice as much convenience floorspace as Bedale, but has slightly less comparison floorspace (excluding the out-of-town retail warehousing). This is due to two large furniture stores in converted buildings (a chapel and a warehouse) on the periphery of Bedale town centre, which swell the overall comparison floorspace. Leyburn town centre has slightly more convenience floorspace than comparison floorspace (which is unusual), whereas Bedale has nearly twice as much comparison floorspace as convenience floorspace (due to the edge-of-centre furniture stores). In terms of floorspace composition it is noticeable that there are few clothing/footwear shops, but a reasonable range of shops selling furniture/carpets/textiles.

4.5 One marked characteristic of both town centres is their low level of vacancies. Under 5% of town centre floorspace in both towns is vacant and in Leyburn there was only one small shop unit that was vacant at the time of our surveys in 2004 and 2006. In Bedale there were four vacancies in 2004, which has increased to five in 2006, but these units are small and represent a low proportion of floorspace. This suggests both centres are reasonably healthy. In Bedale there are more service trade uses (banks, building societies, estate agents, travel agents, restaurant and cafes and hairdressing) than there are in Leyburn, representing about 40% of units compared to about 20% in Leyburn. However, in floorspace terms the percentages are smaller and more similar.

4.6 The Nathaniel Lichfield study for Hambleton District Council (December 2004) contains a health check study of Bedale and the analysis is similar to our own analysis above. Their conclusions for Bedale are also applicable to Leyburn and Hawes and are common for many small, historic, market towns. The strengths are listed as providing for the day-to-day shopping and service needs of local residents who visit the centre regularly and performing an important convenience retail function with a weekly market. There are a good variety of food and drink uses, which attract significant numbers of visitors/ tourists and the town has an historic and attractive environment which also attracts visitors/tourists.

4.7 In terms of weaknesses, shop units are small with limited accommodation for large modern retailers or multiples. There is expenditure leakage to nearby larger centres (Northallerton in Bedale's case) and the period buildings and conservation area designation restrict opportunities for new development or the expansion/improvement of existing facilities. The need to accommodate expenditure growth in comparison goods and accommodate larger shop units and multiple retailers occur realistically in larger centres such as Northallerton (also difficult due to its conservation designation and attractive old buildings) and Darlington, which involve longer car journeys, or in town centres such as Catterick Garrison, where constraints are far fewer and which are nearby.

4.8 Hawes is much smaller than Leyburn or Bedale, but it too has virtually no vacant shop units (one unit, or less than 2% of floorspace, at the time of our survey). It has a very similar floorspace composition to Bedale, with nearly twice as much comparison floorspace as convenience floorspace, and with a strong tourist emphasis. Hawes has a large car park running parallel to the main street, which was virtually full at the time of our visit (mid week) in 2004. The town centre appears to be trading reasonably well.

Catterick Garrison

4.9 The town centre contains a number of small older buildings located along Richmond Road and Shute Road and the modern Richmond Walk development located off Gough Road and adjacent to Richmond Road, opposite its junction with Shute Road. There is also a recently completed Aldi foodstore on Richmond Road just south of its junction with Shute Road. Further east there is a terrace of shops at Hildyard Road.

4.10 The town centre is dominated by the Tesco foodstore which has a retail sales are of about 3,600 sqm, with about 40% of the sales area (about 1,500 sqm) currently used for the sale of comparison goods (including toiletries). Other comparison goods shops at Richmond Walk total about 1,400 sqm sales area, with a further 700 sqm of comparison floorspace located in the shops on Richmond and Shute Road and about 200 sqm of comparison floorspace at Hildyard Row. In total the amount of comparison floorspace has increased slightly (by about 300 sqm) since our 2004 survey.

4.11 At the time of our August 2006 survey there appeared to be three shop units closed at Hildyard Row, but none of these were comparison goods units. In 2004 these shops were all trading. In Richmond Walk and Richmond Road/Shute Road, the core of the town centre, there was one vacancy (of only 16 sqm) in 2004 and no vacancies in August 2006. Richmond Walk is the heart of the town centre (it comprises the majority of the town centre floorspace and is an attractive modern development with plentiful car parking) and appears to be trading well with no vacancies. Tesco obtained planning permission to extend its store in 2004, but this has yet to be implemented.

4.12 The remainder of this section relies heavily on the Richmond Health Check and Action Plan prepared by England & Lyle in October 2002. Where relevant, the figures on floorspace composition, historical change, retailer demand and qualitative survey results have been added to or updated.

Richmond – Current Retail Composition

4.13 In 2002 England & Lyle's analysis of the retail composition of the town centre showed that 9.7% of shops were convenience shops (excluding the Co-op), close to the national average of 9.5%, whereas 40.3% of shops were comparison shops compared to the national average of 49.5%. Service trades, at 39.3%, were well above the national average of 28.6% and vacancies at 11.7% were only slightly above the national average of 11%.

4.14 These figures differ from the Experian Goad figures of 2002 (survey date 18 July 2002). This survey shows 12.4% of shops were convenience shops, if the Co-op is excluded (compared to the national average of 9.3%), 42.3% were comparison shops (national average of 48%), 27% were service trades (national average of 31.1%) and 16.1% were vacant (national average of 10.3%). On this analysis, there was an above average number of convenience shops and vacancies, but a below average number of comparison shops and service trades.

4.15 Since this survey in 2002, our own updated figures (as at September 2004) suggest a very marginal net change in the number of convenience and comparison shops (+1 and –1 respectively), a large net increase in service trades (+6) and a large net decrease in vacancies (-10). In 2004 service trades equated to the national average, vacancies were slightly below the national average, comparison shops were still well below the national average and convenience shops were still well above the national average. By August 2006, further slight changes had occurred with an overall net increase since 2004 of one comparison shop, two convenience shops, four service trades and a reduction of four vacant units

4.16 However, a more meaningful measure is in floorspace terms rather than shop numbers and this shows a rather different picture. Our updated Experian Goad survey shows that in 2006 in Richmond town centre 16.3% of floorspace is in convenience businesses (excluding the Co-op) compared to a national average of 16.8%, 47.6% is in comparison businesses (national average of 52.5%), 25.6% is in service trades (national average of 21.2%) and 6.9% is vacant (national average of 8.5%). On this, more meaningful basis, there are relatively minor differences between Richmond town centre and the national average. Convenience provision is slightly below the national average (but this is offset by the proximity of the Co-op store), comparison provision is well below the national average, service trades are above the national average and vacancies are below the national average. These figures are not unexpected for a small town, which benefits from tourism, and give no clear message about its vitality and viability, but the low level of vacancies suggests that the town is trading reasonably well.

4.17 Although the headline sector figures are largely as expected for a town the size of Richmond, the composition of these figures highlights some differences. The most noteworthy difference is the number of charity shops. Experian Goad have a category covering charity, pets and other comparison shops. In Richmond this category comprises 6.8% of total town centre floorspace, compared to a national average of 2.4%, i.e. nearly three times the national average. Other retail categories with well above average representation are florists (about double the national average), off licences (about four times the national average) and bakers and butchers (two to three times the national average).

4.18 There are also a number of retail categories with well below national average representation. The following have just over half the national average representation: clothing/footwear; electrical, home entertainment, phones and video; and also DIY, hardware and household goods. Interestingly, in the service trades category, restaurants, cafès and fast food have a very similar representation in Richmond town centre as the national average, as do hairdressers. These three service trades account for the majority of service trades floorspace in Richmond town centre.

4.19 The England & Lyle report monitored change since 1994. To be consistent with how Experian Goad monitor retail composition, the 2006 GVA Grimley survey has been compared with earlier Goad survey reports of 1998 and 1993.

Change in Composition since 1993

4.20 Convenience floorspace reduced significantly between 1993 and 1998 (from 20.8% to 17.3% of total floorspace). By 2004 this figure had reduced further to 15.6%, no doubt reflecting the opening of the edge-of-centre Co-op store and the Tesco store in Catterick Garrison, but then increased slightly to 16.3% by 2006. The rate of change since 1998 appears to have been less strong than between 1993 and 1998. Total convenience floorspace in the town centre has reduced by 30% over the last 13 years. This compares with an overall decrease in total floorspace of 9.5% in the town centre.

4.21 Comparison floorspace reduced marginally between 1993 and 2006 from 48.8% to 47.6% of total floorspace, whereas nationally it increased marginally from 52.6% to 53.1% of total floorspace. Interestingly, in Richmond there was an increase to 50.8% of total floorspace in 1998, before decreasing to 47.6% in 2006. Nationally there was no effective percentage change between 1998 and 2004. There was thus a marked change in Richmond over the last eight years, coinciding with the opening of the Catterick Garrison development. Total comparison floorspace in Richmond town centre increased 10% between 1993 and 1998 and then contracted by about 20% between 1998 and 2004. Over this 13 year period per capita comparison business expenditure nationally increased by 75% in constant price terms.

4.22 There have been a number of significant changes in the components of the comparison sector over the last six years, but generally few changes over the previous five years. One exception to this is the clothing sector, although analysis is not clear cut due to changes in variety stores, department stores and catalogue showrooms, which also sell clothes. In 1993 clothing and footwear shops represented 7.8% of total floorspace in Richmond town centre compared to 9.3% nationally. By 1998 these figures had altered to 3.2% and 10.9% respectively, representing a major decline in Richmond. By 2006 the decline had been reversed, and the proportions were 8% in Richmond and 12.7% nationally. Nevertheless, in floorspace terms there has been an overall decline over the last 13 years from 1,570 sqm in 1993 to 687 sqm in 1998 and back up to 1,430 sqm in 2006, at a time when expenditure on clothing in the study area and nationally increased significantly in constant price terms.

4.23 Other major changes over the last six years are declines in the electrical and DIY sectors and a huge decline in the cars, motor cycles and motor accessories sector, from being well above to well below national representation. In contrast, service sector floorspace has increased slightly, following a slight decrease over the previous five years, whereas vacant floorspace (including space under construction) has done the reverse. In 1993 only 3.7% of total floorspace in Richmond town centre was vacant (or under construction) compared to a national average figure of 11%. 5 years later, this had increased to 8.5% in Richmond town centre (and reduced slightly to 10.6% nationally). In 2002 it had increased again significantly to 13.6% of total floorspace, well above the national average, but by 2004 it had reduced to 7.9% in Richmond town centre and 7.9% nationally and further reduced to 6.9% in Richmond in 2006 (8.5% nationally). Currently it is below the national average, but much higher than in 1993, although lower than in 1998 and much lower than in 2002.

Summary of Floorspace Change

4.24 Summarising these changes, it is clear that convenience floorspace has decreased significantly and consistently over the last 13 years in Richmond town centre, both in absolute terms and as a percentage of total floorspace. This decline does not mirror the national picture, where convenience floorspace has actually increased slightly as a percentage of total floorspace. Nevertheless, in Richmond the proximity to the town centre of the Co-op foodstore offsets the decline in convenience floorspace in the town centre.

4.25 Comparison floorspace increased slightly between 1993 and 1998 in Richmond town centre, but has decreased since 1998, showing an overall decline over the last 13 years. Comparison floorspace as a percentage of total floorspace in Richmond town centre is well below the national average, even more so than it was 13 years ago. The key changes within the comparison sector are the decline in clothing floorspace (excluding charity clothing shops), the decline in electrical floorspace, and the huge decline in DIY floorspace and also car, motorcycle and motor accessories floorspace.

4.26 Service sector floorspace, unlike convenience and comparison floorspace, has increased over the last 13 years, both in absolute and percentage terms. Vacant floorspace has also increased, but from a very low level 13 years ago. It has decreased noticeably over the last four years, so that it now represents 6.9% of total floorspace, below the national average.

Retailer Confidence

4.27 The England & Lyle report mentions that the number of multiple retailers increased from 9 to 10 between 2000 and 2002, and no changes appear to have occurred since then. England & Lyle note that significant improvements had occurred in the town centre between the Market Place and the Co-op (along Victoria Road and King Street), but not in the Market Place itself. It seems likely that this change results from the Co-op store's edge-of-centre location and the relatively short and easy walk between the foodstore and the town centre. Although the Co-op foodstore is not in the town centre, it appears to have benefited the town centre, retaining shoppers In Richmond and creating linked trips with the town centre. The importance of large foodstores in, or adjacent to, small town centres has been noted in other market towns nationally.

4.28 England and Lyle state that there is no significant retailer demand in Richmond, which they attribute to lack of suitable accommodation for retailers (small shop units) and limited market potential, not being as prosperous as some other market towns that they are familiar with. They also mention that rent levels are low and not generally increasing and that "there is a feeling that landlords will accept low rents rather than have vacant properties. Most properties are taken on short leases with a get-out clause after a year".

4.29 The Town Focus report (published by Property Intelligence Ltd) for Richmond largely confirms these impressions. No rental data is provided as Richmond is too small and unimportant to be monitored. Retailer demand shows that currently there are requirements from eight retailers. This level of retailer requirement has doubled since the 2004 study and has generally fluctuated between 3 and 8 over the last 16 years. In terms of the Focus national ranking, Richmond's ranking has slipped over the last 11 years, (although it has improved over the last two years). For most of the 1990's Richmond's national ranking fluctuated between 400 and 500 (1^{st} is highest). Since 2000 its ranking has fluctuated between 600 and just over 800. It is currently (April 2006) ranked 669.

Health Check Score

4.30 England & Lyle undertook a very comprehensive health check analysis of Richmond in 2002. 42 criteria were used to give an overall assessment covering the following areas:- diversity of uses, retailer representation, vacant properties, commercial performance, pedestrian flows, accessibility, customer views and behaviour, safety and security, and environmental quality. On a scale of 1-5, Richmond scored 3.2 which was slightly above average.

4.31 England & Lyle considered Richmond's main strengths were "a reasonable diversity of uses, the variety of independent shops, the lack of low quality discount shops, the relatively low amount of vacant floorspace, the general pedestrian environment, the feeling of safety and security and the overall environmental quality. The main weaknesses are the lack of multiple retailers, difficulty of movement for the less mobile within the Market Place, leakage of trade to other centres and the lack of CCTV".

4.32 England & Lyle considered that a score of 2.5 represents a poor performing centre, with a low level of vitality and viability, and a score of 4 represents a centre which is performing well, with a high level of vitality and viability. Other centres surveyed by England & Lyle included Northallerton with a score of 3.8, Whitby with a score of 3.3, and Selby, Pickering, Bishop Auckland and Market Weighton with scores of 3.1, 3.0, 2.9 and 2.8 respectively. Due to the improvements that have occurred in Richmond since 2002 (reduction in vacancies for example), Richmond's score in 2006 would probably be slightly higher than it was in 2002, suggesting neither a weak nor a strong centre.

5 STUDY AREA AND CATCHMENT POPULATION

Study Area

5.1 The study area covers a very wide area, extending far beyond the district boundary, with the aim of capturing all the expenditure possibly flowing to the town centres in Richmondshire.

5.2 To the west, the study area stretches well into the Dales along the A684 as far as Garsdale Head and along the B6270 to Coldbergh Side. The area extends this far because in this largely rural area, where retail facilities are very limited, it is plausible that residents will look further to the larger centres such as Richmond for their shopping needs. Another reason is to ensure that all the expenditure flowing to Hawes can be monitored.

5.3 To the north and north east the study area extends close to Barnard Castle and Darlington which are the next largest centres of any significance in these directions. Similarly to the east the catchment extends close to Northallerton which will limit the draw to study area centres from this direction.

5.4 The study area has been subdivided into eight population zones for the purposes of the household survey and modelling. This has been done to ensure that spending patterns can be accurately modelled, and the zones have been drawn so that they are largely centred on the main town within them. The zones have been drawn using Census Output Areas, as an examination of the postal geography showed that the use of Postal Sector Boundaries to define the zones would not have been appropriate in this area.

5.5 The core zones are Zones 1 and 2 which cover Richmond (Zone 1) and Catterick (Zone 2). As these two centres are located so close to each other these two zones will largely be considered as one core area. The remaining six zones, Zones 3-8 cover the rest of the study area, wrapping around the two core zones, and include the catchment areas for the other main towns – Bedale, Leyburn and Hawes.

5.6 The study area boundary and sub-division into survey zones can be seen on Map 1 in **Appendix 2**.

5.7 In a rural area such as this Study area, car ownership is high (well above national average levels according to the 2001 Census). According to the household survey conducted in 2004 of Study Area residents, 90% of households used a car for shopping and only 5% used buses. In all zones the figures were similar.

Catchment Population

5.8 The population figures for the study area zones (see Table 1 in **Appendix 2**), have been obtained from Experian Business Strategies (EBS) through their Retail Planner Service. The Retail Planner demographic reports use 2001 Census based population counts combined with local area data to provide estimates of the population as at 2004 when the household survey was undertaken, and the future population in 5-10 years time. For compliance with the household survey data, a base date of 2004 is assumed for this assessment.

5.9 The demographic reports also provide an insight into the socio-economic characteristics of the catchment population, based on Census information, and Experian's own MOSAIC classification. These factors feed into the zonal expenditure estimates, so that the per capita spend figures reflect the socio-economic conditions at the local level.

5.10 Zone 2, which is shown to be the largest of the zones, has some complications with regards to the population due to the presence of some Army bases; Catterick Garrison Town Barracks and Marne Barracks (Catterick village) within the zone. Table 5.1 below sets out the total military population (inc. dependants) it is assumed were resident at the base in 2004:-

Table 5.1: Total Military Population (inc. dependants)

Type of Accommodation	No. of Units/Spaces	Population
Single Living Accommodation (average stay 6 months per annum).	4,500 bed spaces [1]	4,500
Infantry Training Centre (fully occupied throughout the year on a revolving basis).	2,100 bed spaces	2,100
Family Quarters (85% of head of households' average stay 6 months per annum, 15% head of households average stay 12 months per annum).	1,538 houses [1]	c. 5,500
Total Population (Military Personnel and Families) in 2004		**c. 12,100**

[1] Including SLA and SFA at Catterick Garrison Town Barracks and Marne Barracks, Catterick Village

5.11 Following discussions with the Ministry of Defence and RDC regarding the Army barracks, an adjustment has been made to the population figures for Zone 2 (the Catterick Garrison Zone), to reflect that the Census is unlikely to have accurately recorded the number of military personnel resident there. This is because some personnel are only temporarily located at the barracks for training purposes (i.e. it is not their permanent residence) and some of the 'permanent residents' are likely to have been away on service duties at the time of the Census. An assessment has therefore been undertaken to estimate the number of personnel excluded from the Census figures.

5.12 As mentioned above, a number of personnel are at Catterick Garrison Town barracks on a temporary basis in the Infantry Training Centre (ITC). The ITC is where army personnel (normally located at barracks outside the area) come for training, typically lasting up to three months (as at the time of the Census), and the training centre is in effect fully occupied throughout the year on a 'revolving basis'. This means there are 2,100 additional personnel in the Catterick Garrison Town barracks throughout the year, over and above the 'usually resident' population as recorded by the Census.

5.13 It is also thought that the military personnel in the Single Living Accommodation (SLA) on the barracks will have been under-recorded by the Census, as some personnel will have been away on duty. Analysis of Census statistics for the parishes in which the barracks are located show a total of 2,545 residents living in 'communal establishments' in Hipswell & Scotton (covering Catterick Garrison Town barracks) and a further 351 in 'communal establishments' in Catterick Village (the parish for Marne barracks). These figures are lower than the total number of personnel in the SLA (i.e. communal establishments at the two barracks) estimated as 3,900 at Catterick Garrison Town, with a further 600 at Marne. In summary, the Census recorded 2,896 residents in 'communal establishments' which when compared with the total military personnel in the SLA (4,500), suggests an under-recording by around 1,604 personnel.

5.14 Combining the ITC residents (2,100) and those SLA resident (1,604), whom it is believed were not recorded by the Census, suggests that in total c.3,704 additional people should be added to the Zone 2 baseline estimates. Making this adjustment to the Experian figures gives a revised total Zone 2 population of 22,041 in 2004.

5.15 It is recognised that due to the nature of their work, some of the military personnel based at Catterick Garrison on a permanent basis will in fact spend some of the year away from the base on active service duties. All personnel in the SLA (4,500) and around 85% of the military personnel in the SFA are estimated to spend roughly half the year away on active service. With 5,269 personnel away for 6 months of the year, this is effectively equivalent to c. 2,904 personnel being away on an annual basis.

5.16 When military personnel are away they will not be spending any money in the local area, therefore, Table 1 also shows a 'net population' figure for Zone 2, of 19,137 which is used for the spending calculations. This is the population who are estimated to be present in Zone 2 throughout the year. The spending patterns of this 'net population' are considered in the following section and appropriate adjustments made to reflect their special characteristics.

Summary of Baseline Population

5.17 Zone 2 has by far the largest population, followed by Zone 1 (Richmond Zone) and Zone 3 (Bedale Zone), which are quite similar in size, having populations in 2004 of 11,963 and 12,776 respectively.

5.18 Combining Zones 1 and 2, suggests a core population of 34,000 people in 2004.

5.19 The remaining zones are much smaller in size, reflecting their more rural location. Zone 4, the Leyburn Zone, has a population of around 7,600 people, and Zone 7, which covers the area immediately north of Richmond, has a population of 4,949. The remaining zones have smaller populations ranging from just 1,348 to 2,852 people.

5.20 The estimated 2004 population for the study area as a whole is 65,941.

Population Projections

5.21 Population projections have also been sourced from EBS Retail Planner data, and the Experian figures are used for all zones except Zone 2. The study assessment dates are 2010 and 2015, therefore linear interpolation has been used between the 2009 and 2014 EBS figures, and an additional years growth post 2014 has been allowed for using the average rate for the period 2004-2014. The population forecasts are shown in Table 1 of the Appendices, and show the overall population in the study area increasing to 70,887 by 2010, and 74,436 by 2015.

5.22 Zone 2, has again been assessed separately because of the Army Garrison and the planned expansion of facilities there, which would not be reflected in the EBS forecasts. The population forecasts for Zone 2 have therefore been estimated by firstly considering any known 'non-military' housing developments which are currently taking place and secondly to account for the future expansion of Catterick Garrison.

Non-military housing developments

5.23 There are already some non-military housing developments in Zone 2, which include approx. 175 new houses being built on Garrison land (Arras Lines, of which it is assumed that two-thirds have been built/completed post 2004). There are also residential developments currently under construction/proposed on Byng Road (40 houses), in Colburn (50 houses) and in Catterick Village (150 houses). Much of this development comprises 3-4 bed houses, and the additional population is estimated to total c.1,070 people (with assumed completion by around 2008).

Catterick Garrison Expansion

5.24 The expansion of Catterick Garrison Town is being planned over a 20 year period with the aim of increasing the current Garrison population from around 13,000 (military and civilian) to around 25,000 (military and civilian). The development plans include c. 2,500 new houses (to be a mix of military and non-military housing) and an expansion of the SLA accommodation at the barracks by c. 3,500 bed-spaces.

5.25 The expansion of Catterick Garrison will take place in phases; the short term (up to 2010), the medium term (2010-2015) and the longer term (post 2015). This assessment considers the short-medium term phases and the plans in terms of the number of additional units and associated population figures are set out below: -

Table 5.2: Short Term and Medium Term Expansion at Catterick Garrison

	Short Term (2004-10)		Medium Term (2010-15)	
	Units/Spaces	**Population**	**Units/Spaces**	**Population**
Civilian Housing	150	450	200	600
SFA (military houses)	450	1,350	300	900
SLA	500	500	1,000	1,000
Total Increase		**2,300**		**2,500**

Zone 2 Forecasts

5.26 Combining the population in the non-military housing developments (1,070), and the population arising from the Garrison expansion, suggests that by 2010, the population in Zone 2 will increase by c. 3,370 people, taking the population to 25,411.

5.27 The continued expansion of Catterick Garrison over the medium term will see a further 2,500 new people present by 2015, taking the total Zone 2 population to 27,911.

5.28 Forecasts of the 'net population' figures are also shown to reflect those personnel likely to be away from the base on active service in the future. This is assessed in the same way as for the baseline population, assuming that all SLA personnel will spend 6 months away from the base, along with 85% of the SFA personnel. The annual equivalent number of personnel away from the base has been estimated and the total population adjusted accordingly to give the net populations (22,066 in 2010 and 23,939 in 2015), which are used in the spending calculations.

6 EXPENDITURE

6.1 This section examines the comparison expenditure which is generated by the catchment population. Per capita spend figures are applied to population figures to provide an estimate of the comparison expenditure generated in each study zone, for the study area as a whole.

6.2 As mentioned in **Section 5** the special characteristics of the population in Zone 2 means that it has been necessary to modify the expenditure estimates, and the adjustments are explained in detail in paragraphs 6.7-6.11.

Expenditure per Capita, 2004

6.3 The expenditure data used has all been obtained from Experian Business Strategies, Retail Planner Coarse Expenditure Reports. Retail Planner uses the most up to date information available on spending (from Consumer Trends), which is combined with a number of other key sources including the Family Expenditure Survey, the MOSAIC customer segmentation and Census socio-economic information to produce local level expenditure estimates. These estimates are therefore comprehensive, and reflect, as accurately as possible, local spending habits.

6.4 This study examines comparison retailing, and the overall comparison goods expenditure estimates have been broken down into the broad product categories relating to the categories used within the household survey:-

- Clothing, Footwear and Fashion Goods;
- Furniture, Floor coverings and Household Textiles;
- DIY and Decorating Goods;
- Domestic Appliances; and
- Personal/luxury goods.

6.5 The baseline figures have been adjusted to reflect expenditure through Special Forms of Trading (SFT, i.e. through non-store outlets such as mail order and the internet). Analysis by EBS suggests that currently around 5.7% of comparison expenditure is spent through SFT and this is expected to increase to c.11% by 2010 and to c.12.5% by 2015. The per capita spend figures have been adjusted accordingly in each year.

6.6 The per capita expenditure estimates, in 2004 (in 2004 prices) are shown in Tables 2a and 2b of the Appendices.

Zone 2 (Catterick Garrison) Comparison Goods Expenditure per Capita

6.7 The estimates for Zone 2 have been modified to reflect the individual characteristics of the population within that zone. This has been done drawing on knowledge obtained from GVA Grimley's consultancy work for the MOD at Catterick Garrison regarding the type of accommodation at the barracks and how spending habits will vary to reflect the different population groups.

6.8 The expenditure of the Zone 2 population has been assessed dividing the population into sub-groups who are likely to have different spending habits:-

a. the civilian population;
b. the 'single' military population; and
c. the population in family accommodation.

6.9 The spending of these different sub-groups has been analysed to make an assessment as to how their spending might vary from the 'norm' to reflect their particular circumstances. As discussed in **Section 5**, it is noted that some of the military personnel will be away from the barracks on active service duties and thus all expenditure figures relate to the 'net population' whom it is assumed are resident at the barracks throughout the year (from Table 1).

6.10 The adjustments made to the expenditure for each of the sub-groups are summarised below:-

a. The civilian population will have normal spending habits and thus 100% of the average spend on each type of comparison goods has been allowed for.

b. The single military personnel in the SLA and the ITC are living within barracks (i.e. provided accommodation), which is fully furnished. It is therefore assumed that these residents will not spend anything on furniture and floor coverings or DIY goods.

c. These residents are also likely to have significantly lower than average spending on electrical goods, reflecting that as they are largely catered for in the Mess, they will not be purchasing major electrical items (white goods such as cookers/fridges/microwaves etc) and are only likely to be buying smaller electrical goods for personal use. Spending on clothing will also be below average reflecting that uniforms are provided.

d. The serviced family accommodation is provided on a part-furnished basis therefore spending by the families living in the army houses will reflect this. Their spending on furniture, floor coverings and DIY goods etc will be lower than average, although they will still purchase some of these items.

e. Spending on electrical goods will also be lower, as main white goods items are likely to be provided in the accommodation. Families will still purchase some additional 'white goods', along with other electrical items for personal use such as televisions, stereos, DVD players, computers etc.

f. Spending on clothing and other comparison goods will be 'normal' for the majority of residents who are the dependants, and it is only the military personnel who will spend less on clothing as their uniforms are provided.

6.11 Relevant adjustments have been made to the average spend per capita figure for the study area (based on spending in the other 7 zones). This gives the per capita estimates for each sub-group, which are multiplied by the sub-group populations to give the total spending by each sub-group. Combining the figures gives the total Zone 2 spending which has been converted back into overall per capita estimate as shown in Tables 2a/2b for reference. Compared with the average spend in the other zones (£2,448-£2,964) the revised per capita spend for the 'net Zone 2 population is c.15% lower than average at £2,296 (although for particular categories it is as much as 35% lower than the average spend).

Total Expenditure, 2004

6.12 The per capita expenditure estimates have been multiplied by the corresponding population figures to give the total expenditure per zone in 2004 for each type of product. At the base date, the amount of comparison expenditure generated was estimated to total £152.7m, (see Table 3 of the Appendices).

Expenditure per capita Forecasts 2004-2015

6.13 Experian Business Strategies also provide detailed information on expenditure patterns to enable future spending levels within the study area to be predicted. This can be done using either:-

a. Projections of growth, based on the extrapolation of past trends over different time periods, or
b. Forecasts of growth based on an econometric model of disaggregated consumer spending, which uses a number of factors (chiefly consumer spending, incomes and inflation).

6.14 The 2004 per capita expenditure estimates have been projected forward in accordance with the latest growth forecasts from the Retail Planner Briefing Note 3.0 (March 2006), to give the estimated expenditure levels at the assessment dates of 2010 and 2015.

6.15 The Experian Business Strategies (EBS) forecast rates of growth in comparison goods expenditure, when compared to trend rates (ultra-long, long and medium terms – see below) are shown to be fairly conservative and therefore robust. The figures, particularly over the longer term to 2014, are much lower than the trend rates reflecting that expenditure levels are currently well above trend and that a correction is expected over the longer term (as is currently occurring) to bring growth back in line with trend rates.

Annual Comparison Goods Expenditure Growth rates

Table 6.1: Annual Comparison Expenditure Growth Rates

	EBS	Trend Rates of Growth		
	Forecast Rate	Ultra Long–Term (1965-2004)	Long-Term (1975-2004)	Medium-Term 1985-2004)
2004-2009	3.9%	4.7%	5.2%	6.5%
2004-2014	3.6%			

6.16 Therefore over the period 2004-2010, expenditure growth of 3.9% pa for comparison goods has been assumed (projections are based on total comparison goods rather than the component product categories). For the longer term period 2004-2015, growth of 3.6% pa has been used. These are arguably conservative growth rates. The forecast estimates of per capita expenditure are shown in Tables 4a and 4b.

Expenditure Forecasts – Zone 2 (Catterick Garrison)

6.17 The special population characteristics of Zone 2 mean that spending forecasts need to be considered in the same way as the baseline spending. The composition of the future population will change reflecting non-military housing developments and the expansion at Catterick Garrison. The 2010 and 2015 population forecasts have therefore been assessed by splitting them into the relevant sub-groups as before:-

a. the civilian population;
b. the ‘single’ military population; and
c. the population in family accommodation.

6.18 The expenditure assumptions for each population sub-group, in terms of spending on different types of comparison goods relative to the norm will be unchanged so the same % adjustments are made, but to the forecast average spending per capita in the respective years. These are then multiplied by the respective population figures for each sub-group as at 2010/2015 to give total spending. The average per capita figures are again estimated for reference and shown in Tables 4a/4b.

6.19 As with the baseline assessment, the forecast spending estimates are based on the net population assumed to be resident in Zone 2 throughout the year (as discussed in paragraph 5.27)

Total Expenditure, 2010-2015

6.20 The forecast per capita expenditure estimates have been multiplied by the forecast population figures per zone to give future total expenditure figures per zone. These can be seen in Tables 5a and 5b in the Appendices.

6.21 The future projections show that with increases in the population and spending levels, comparison expenditure is expected to rise to £193.9m by 2010 (an increase of £41.2m), and to £232.4m by 2015 (a total increase of almost £80m over the period 2004-15).

7 HOUSEHOLD SURVEY RESULTS AND EXPENDITURE FLOWS

7.1 This section provides a review of the results of the telephone household survey, undertaken in 2004. The flows derived from the survey results are combined with the spending estimates to determine the current turnover of each of the study area centres. The actual turnovers are used within the capacity assessment to compare against expected benchmark turnover levels.

7.2 Where possible the survey results were verified by drawing on the household survey results for the Darlington Retail Study 2004. The study area zones are not quite the same as those used in this assessment, so the results are not directly comparable, however, Zone 7 which is the North Yorkshire/SW Durham zone covers much of the same area. The main differences in areas are that the Darlington study Zone 7 extends slightly further to the north than our study area and is tighter to the south east, excluding the area around Bedale, which is included within our study area. Allowing for these differences, the results for this zone can be broadly used to support the findings of our household survey.

Comparison Shopping Flows

7.3 The survey asked questions on each of the broad comparison product categories separately as people visit different locations for different types of shopping and the shopping patterns are analysed in the following paragraphs.

Clothing, Footwear and Fashion Goods Shopping Flows

7.4 The clothing, footwear and fashion goods flows (Tables 7/7b) typically reflect the level and quality of provision of stores selling these goods. Centres where provision is relatively poor are visited less frequently than those with much better provision, which are shown to have a much higher share of expenditure.

7.5 Overall the results show the level of retention within the study area for expenditure on clothing and footwear is very low, just 6.4%. This finding is verified by the findings of the Darlington study, which showed a broadly similar retention level for fashion goods in the North Yorkshire zone.

7.6 Richmond, being the main centre within the study area, accounts for the largest proportion of this retained expenditure, with a 3% share, and the remainder is split between the smaller centres. The provision of clothing stores within Richmond town centre is very limited, hence the low level of expenditure which equates to just £1m. In Zone 1, the Richmond zone, the town centre retains just 5.5% of expenditure on clothing and footwear, and in the neighbouring zone, Zone 2 Richmond's share of expenditure is just 3%.

7.7 The majority of expenditure on clothing and footwear within the study area is currently leaking out of the area to the more dominant centres such as Darlington, Northallerton and

Middlesborough/Stockton-on-Tees. In total 94% (£30.8m) of clothing and footwear expenditure leaks out of the study area, with more than half of this leaking to Darlington alone. Darlington is significantly larger than any of the centres within the study area, and is easily accessible from much of the study area which is why it attracts 50% (£16.7m) of the study area expenditure on clothing and footwear. The market shares per zone highlight the draw of Darlington from across the study area, ranging from around 22% at the lowest to 63% at the highest. The core zones, Zones 1 and 2, both see around 62% of clothing and footwear expenditure go to Darlington.

7.8 Northallerton attracts around 15% of the total study area expenditure on clothing and footwear which equates to around £4.8m, i.e. considerably more expenditure from the study area goes to Northallerton than is retained within the study area. The two zones with the highest shares of clothing and footwear flowing to Northallerton are Zones 3 and 8, which are the zones located closest to Northallerton.

7.9 Middlesborough/Stockton-on-Tees attracts almost 6% (£2m) of the study area expenditure on clothing and footwear, with other places such as Harrogate, Newcastle and York, each attracting around 4%.

Furniture, Floor Covering and Household Textiles Shopping Flows

7.10 The flows for these product items reflect the better provision of furniture/floor covering stores within the study area. 13.3% (£2.9m) of expenditure on furniture and floor coverings is retained within the study area, with the retention levels per zone being as high as 28% for some zones. The overall level of retention for furniture and floor covering expenditure is similar to that shown for this area by the Darlington study, at around 12%. The furniture, floor covering and household textiles flows are shown in Tables 8a/8b of the Appendices.

7.11 Overall Richmond has a market share of almost 7% (equating to £1.4m) of study area expenditure on furniture and floor coverings, although in the Richmond zone, Zone 1, Richmond’s share of expenditure is as high as 18%. The figure for Zone 6, which is just to the north east of Richmond, is similar. This illustrates the potential to retain a higher level of expenditure if the right facilities are provided. It contrasts with Catterick Garrison, where the lack of facilities mean very low expenditure retention, less than half a percent of the total study area expenditure, and just 0.2% of the Zone 2 expenditure on furniture and floor coverings.

7.12 Leyburn, which has a few furniture stores, also manages to retain a higher proportion of expenditure from its own zone, attracting 14.4% of the zone’s expenditure on furniture items. Bedale, which has a limited provision of stores, attracts 6% and 4% of the expenditure from its own zone and its neighbouring zone. These shares are significantly higher than the clothing and footwear shares of expenditure.

7.13 The outflow of expenditure on furniture and floor coverings, accounting for about 87% (£18.7m) of the study area expenditure on these items, again flows primarily to the Darlington and Northallerton areas. Darlington town centre attracts 32% of the study area expenditure, whilst out-of-centre retail warehouses in Darlington attract a further 15% (which is more than is retained within the study area!). The core zones, Zones 1 and 2, lose almost 55% and 63%

respectively to the Darlington town centre and out-of-centre retail warehouses. Zone 7, which is located closet to Darlington, similarly loses almost 65% of expenditure to Darlington. These levels of expenditure leakage to Darlington are again broadly similar to those shown in the Darlington Retail Study.

7.14 Northallerton has a furniture and floor covering market share of 16% from the study area as a whole, with a further 5% to out of centre retail warehouses in the Northallerton area. Much smaller shares of expenditure on such items come from Zones 1 and 2, compared with the shares going to Darlington from these zones. The highest shares of zonal expenditure flowing to Northallerton town centre and retail warehouses again come from the closest located zones, i.e. Zone 3 (45%) and Zone 8 (33%).

DIY and Decorating Goods Shopping Flows

7.15 The household survey results show that when shopping for DIY and decorating goods, residents within the study area do use local facilities where they are available, although the majority chose to shop outside the area where provision is better. The results show that 12.5% of the overall expenditure on these items is retained within the study area centres. The expenditure flows can be seen in Tables 9a/9b of the Appendices.

7.16 Richmond town centre has an overall market share of almost 5% of DIY expenditure. As with furniture, the largest ‘zonal' shares of expenditure come from Zone 1 (the Richmond Zone) and Zone 6. In these zones 15% and 11% respectively of expenditure on DIY goods goes to Richmond.

7.17 In the Leyburn zone, the highest share of expenditure flowing to any location, at 25%, flows to Leyburn town centre itself. In Zones 3 and 5, the Bedale and Hawes zone, again the highest proportions of retained expenditure, 9-10%, goes to the respective town centres. The survey findings for Catterick Garrison, show that virtually no DIY expenditure is retained by the town centre.

7.18 The strength of the retail warehousing provision for DIY goods in both Darlington and Northallerton is highlighted by the survey results with the highest overall share of DIY expenditure, 28%, going to retail warehouse facilities in the Darlington area. Darlington town centre also attracts a significant share at almost 25%. The outflow of more than half of DIY expenditure to the Darlington area is verified by the findings of the Darlington Retail Study. Northallerton town centre draws 19% of DIY expenditure, with the retail warehouses in this area drawing 12%. Overall the leakage of DIY expenditure totals almost 88% which is equivalent to around £10m. It is interesting to note that for these products, residents appear less likely to travel much further than Darlington or Northallerton, with the flows to other centres beyond the study area being much lower than for other product categories.

Electrical Goods (Domestic Appliances) Shopping Flows.

7.19 The results of the household survey, (see Tables 10a/10b), show that the retention of expenditure within the study area is highest for electrical items, at 18%. This must reflect the provision of electrical stores (typically independent retailers) in the study area centres, and again highlights potential for retaining expenditure with appropriate retail provision.

7.20 It is interesting to note that for electrical goods, Richmond is not as dominant as for other comparison items. Richmond, Bedale and Leyburn all have a market share of electrical expenditure of 4-4.5%. Hawes has a slightly lower market share of 3.5% of total study area electrical expenditure. Catterick Garrison has a very small market share of around 0.6%.

7.21 The survey results show that the expenditure flowing to these centres largely comes from the residents in the zones in which they are located. For example, Richmond attracts 13.5% of Zone 1 electrical expenditure, Bedale attracts 20% of Zone 3 electrical expenditure, Leyburn attracts 27% of Zone 4 electrical expenditure and Hawes attracts 47% of Zone 5 electrical expenditure. Catterick Garrison, as with other comparison items, has a low market share of electrical expenditure, at just 0.5% overall, and the town centre retains just 0.7% of Zone 2 expenditure.

7.22 Darlington again attracts the major share of the expenditure leakage from the study area, with almost equivalent amounts going to the town centre and retail warehouse facilities, equating to 50% of the study area electrical expenditure. Northallerton town centre attracts around 14% of electrical expenditure, again primarily from its closest zones, Zones 3 and 8. One interesting flow is that to retail warehouse facilities in the Middlesborough/Stockton-on-Tees area, which draw 8% of the study area expenditure on electrical items.

Personal and Luxury Goods Shopping Flows

7.23 The household survey results show that shopping patterns for personal and luxury items (e.g. jewellery, books, china, glass, music, sports equipment etc) are again better in terms of the use of study area facilities and the retention of expenditure, (see Tables 11a/11b of the Appendices). Overall the retention of personal and luxury goods expenditure is around 17% for the study area as a whole, with Richmond town centre achieving its highest retention level of all product categories at 9.3% of expenditure. This is likely to reflect the nature of Richmond town centre, being a tourist centre, and the reasonable representation of shops selling these types of items.

7.24 From its own zone, Richmond retains almost 29% of expenditure on personal/luxury items, with a further 8% of the expenditure from Zone 6, and 6% form Zones 2 and 7. The draw of expenditure from the other zones is lower, although relatively speaking is generally better than the draw of Richmond for other comparison goods.

7.25 Leyburn is the other centre which achieves a good level of expenditure retention from its own zone, at 24% of zonal expenditure, and a further 10% of the expenditure from Zone 6, which is the zone directly to the north of the Leyburn zone. Catterick Garrison has a better market share of personal/luxury items than for other comparison goods, at 1% of overall expenditure on these items, and the town centre retains 4.1% of the zone expenditure.

7.26 As with all other shopping patterns the outflow of expenditure on personal/luxury items is high at 83% (equating to an outflow of around £58m from the study area). The results again highlight the attraction of Darlington as the largest centre within easy access of much of the study area, with the town centre drawing 43% of the study area expenditure on personal/luxury items. Retail warehouses do not have the same attraction for this type of shopping as for other comparison items such as DIY and furniture. Looking at the core zones shows that from Zone 1, Darlington has almost twice the share of expenditure which flows to Richmond. From Zone 2 the difference is almost as much as ten times the amount going to Richmond. This is also true for most of the other survey zones highlighting the sheer dominance of Darlington

7.27 Northallerton has a market share of around 20% of study area expenditure for personal/luxury items, and as with all other product categories the highest zonal shares of expenditure come from the two closest zones, Zone 3 and Zone 8.

7.28 Some of the other named centres which tend to draw noticeable amounts of expenditure from certain zones include Kendal (attracting 11% of Zone 5 expenditure), the Metrocentre (attracting 10% of Zone 6 expenditure) Harrogate (attracting 4-6% of expenditure from Zones 3-6), Middlesborough out of centre (attracting 6% of Zone 2 expenditure) and York (attracting around 6% of expenditure from Zone 3 and Zone 6).

Total Comparison Goods Shopping Flows

7.29 Drawing together all the information on the component parts of comparison goods shopping, shows the overall comparison goods shopping patterns, (see **Table 12a/12b** of the Appendices). The overall retention figures are summarised in the table below.

Table 7.1: Overall Retention Figures

	Zone (%)								Total
	1	2	3	4	5	6	7	8	
Expenditure retained within study area	19.6	10.2	7.2	27.1	19.7	20.9	5.1	3.9	**13.8**
Expenditure leaking from study area	80.4	89.8	92.8	72.9	80.3	79.1	94.9	96.1	**86.2**

7.30 The most dominant feature of comparison shopping patterns within the study area is the considerable outflow of expenditure. The household survey has shown that the majority of the comparison expenditure spent by study area residents is spent within centres outside the study area. In total 86% of comparison expenditure leaks out of the area and just 14% is retained. These findings are verified by the Darlington Retail Study where survey evidence estimated that 16% of comparison expenditure from the zone which broadly corresponds with our study area is retained in that zone.

7.31 The 14% retention of expenditure within the study area is low, equating to £20.8m, which largely reflects the fairly limited retail provision for comparison shopping, particularly when compared to the competing centres which are easily accessible and are much larger.

7.32 Roughly half of the comparison expenditure retained within the study area goes to the main town of Richmond (with an overall share of 6.2%). The other two main towns Leyburn and Bedale attract 3% and 2% respectively of overall comparison expenditure. Catterick Garrison is shown to attract just 1.2% of the study area comparison expenditure, although this may have been slightly under-recorded as flows to the comparison element of the large Tesco store were not picked up by the survey.

7.33 Looking at the results for the core zones, shows that for Zone 1, the Richmond zone, a slightly higher than average proportion of expenditure is retained at 19.6% (almost all of which goes to Richmond), with 80% flowing out of the area to Darlington (45%), Darlington retail warehouses (13%), and Northallerton (7%).

7.34 For Zone 2 (Catterick Garrison) expenditure retention is lower than the study area average, at just 10%. Of the 90% outflow, most goes to Darlington (50%), Darlington retail warehouses (11%), Northallerton (9%) and Middlesborough retail warehouses (7%).

7.35 In the Leyburn zone (Zone 4) expenditure retention is highest at 27%, with almost 20% being retained within Leyburn town centre. Zone 5 (Hawes), sees a similar overall retention level to Zone 1, at 21%, with just over half of this 12.5% going to Hawes town centre.

7.36 In the Bedale zone, Zone 3, retention is much lower at just 7%, virtually all of which is retained by Bedale town centre. This reflects the location of this zone on the eastern edge of the study area, along with Zones 7 and 8 which also have very low retention levels (4-5%), as these zones are closer to larger competing centres outside the area.

7.37 The centre exerting the greatest influence over the study area is Darlington town centre, drawing 38.5% of comparison expenditure (considerably more than double the total amount retained by all the study area centres), with a further 8% drawn to Darlington's out-of-centre facilities. Northallerton draws the next largest proportion, 17.5% of expenditure, which again is more than the amount retained in the study area. Middlesborough/Stockton-on-Tees, Harrogate, and York all draw 2-4% of expenditure, with the Metrocentre, Gateshead also attracting a small proportion (1.4%).

Market Shares

7.38 The analysis of the household survey results has so far concentrated on examining the expenditure flows on a zonal or total study area basis. In the following paragraphs the comparison goods market shares of the main study area towns are examined.

7.39 Overall the survey results highlight that, with the exception of Richmond, the smaller town centres all have very localised draws/market shares.

Richmond Town Centre

7.40 Richmond town centre draws the majority, (82%) of its turnover from just two zones, with almost more than half from the zone in which is it located. In total, 60% of Richmond's turnover comes from Zone 1, with a further 22% from the neighbouring Zone 2. The draw from other zones is much smaller, 4-6% from Zones 4, 6 and 1, with just 1-2% from Zones 3,5 and 8. The smaller draws from these other zones in part reflect the smaller population within these zones, and the proximity of competing centres.

Bedale Town Centre

7.41 Bedale has a localised catchment area, drawing virtually all its turnover from just three zones. Two thirds of its turnover comes from the zone in which the town is located, Zone 3, and 19% and 10% respectively come from its two neighbouring zones, Zone 2 and Zone 4.

Leyburn Town Centre

7.42 The survey results show that Leyburn has an even tighter catchment area, drawing 84% from its own zone, Zone 4, and at most 6% from any of the other zones.

Catterick Garrison

7.43 Catterick Garrison (excluding Tesco) has a similar trade draw pattern to Bedale, drawing around two-thirds of turnover from the Catterick Zone and 8-16% from its three neighbouring zones, Zone 1, 3 and 4. Very little is drawn from the other study area zones.

Hawes Town Centre

7.44 Hawes has the tightest catchment area of all the main centres, which is perhaps not surprising, as it is the remotest of the study area town centres. It achieves 96% of its turnover from Zone 5, in which the centre is located, and the remainder from its two neighbouring zones.

Summary of Findings

7.45 The following bullet points draw out some of the key findings from the household survey:-

- For comparison shopping the leakage is very large, accounting for 86% of total study area comparison expenditure. This highlights the enormous disparity between the study area centres and the centres beyond, such as Darlington, which is more than ten times larger than Richmond in terms of comparison shopping, and Northallerton which is around three times the size of Richmond in floorspace terms.

- The huge outflow also reflects that a significant proportion of the study area population (around a third) lives in the three zones which are on the eastern edge of the catchment area and are closer to the larger centres such as Darlington and Northallerton.

- The retention for clothing and footwear goods is much weaker than for other comparison goods, reflecting the limited retail provision within the area and the attraction of the larger centres outside the area.

- Where better facilities are present within the study area, the survey results show that retention levels are slightly better.

- Overall the findings show the town centres within the study area tend to have very tight catchment areas drawing most of their turnover from the zones in which they are located and their neighbouring zones.

- Excluding the zones on the eastern edge of the study area, most of the other zones retain 20-30% of comparison expenditure, the only exception being the Catterick zone, Zone 2 which retains just half this amount at 10%. This suggests there is some potential for increasing the market share in this zone.

8 TRADING ANALYSIS AND CAPACITY ASSESSMENT

8.1 In the previous section, the shopping patterns in terms of market shares of zonal expenditure and town centre trade draws were examined. This section examines the performance of town centres in terms of their actual turnovers (as derived from the household survey data, multiplying zonal percentage flows by zonal expenditure).

8.2 An allowance has been made at this stage for tourist spending, which previous studies, along with the findings of our own retailers' survey, suggest boosts the turnover of centres by 15-25% for comparison shopping.

8.3 Table 13 in the Appendices shows the estimated turnover of each of the study area stores/centres for comparison shopping.

Comparison Goods Trading Analysis

8.4 The household survey results suggest that in 2004 comparison goods stores in Richmond town centre achieved a turnover in the region of £9.8m, which after allowing for tourist spending (shown by our analysis of previous survey findings to equate to around £2.5m in Richmond) gives a total turnover of £12.3m. This level of turnover reflects the limited provision of 'quality' comparison retailers within Richmond town centre, and suggests that the town is achieving a slightly lower benchmark sales density than might be expected for a town of this size. The edge of centre comparison retail facilities, namely the comparison element of the Co-op store and the Dorothy Perkins concession were not very well recorded by the household survey which tends to under-record comparison shopping within foodstores as it tends to be ancillary to food shopping.

8.5 Leyburn town centre is shown by the survey to be trading reasonably well for comparison retailing, achieving a turnover of around £5.2m (including tourist spending). The couple of retail warehouse type furniture stores just outside Leyburn are not shown to be trading as well, although this may reflect that the household survey has not fully recorded expenditure flows to these stores.

8.6 The results from the household survey for all of the other centres within the study area show that the level of turnover being achieved equate to sales densities which are slightly lower than might be expected. The low turnover in these centres is, however, likely to be partly due to the tendency of household surveys to 'under-record' flows of expenditure to smaller locations within a study area, even though questions on main and secondary flows were included in the questionnaire. The tendency to favour the larger centres has perhaps also been exacerbated by the very high level of car ownership within the study area.

8.7 It should also be noted that for Catterick Garrison, whilst the comparison floorspace within Tesco has been included in the overall estimate of comparison floorspace within the town centre, the household survey failed to pick up any comparison expenditure flowing to Tesco. This is likely to be because much comparison shopping is likely to be ancillary to food shopping at the store and purchases of comparison items tend to be impulse buys. Therefore, respondents would not have thought to mention Tesco in their answers and the survey findings for Catterick Garrison will underestimate the actual turnover of the centre.

8.8 Table 13 highlights the sheer size of some of the expenditure flows leaking out of the study area - £60.4m to Darlington, £26.4m to Northallerton, £11.6m to Darlington retail warehouses, £4m to Northallerton retail warehouses, and a total of £29.6m to 'other' centres, principally large centres such as Middlesborough/Stockton-on-Tees, Harrogate, York, Metro-Centre and many others.

Comparison Goods Capacity

8.9 When examining the capacity for further comparison goods retail development, there are a number of key points which should be considered.

8.10 Firstly, the household survey data is not likely to be 100% accurate for the smaller centres. It is a common tendency of household surveys to under-record flows to smaller centres, which appears to be true for this assessment despite questions being asked about main and secondary location used. A high level of car ownership within the study area may also have contributed to the over emphasis on the larger centres that are largely car-borne destinations. Household surveys also tend not to capture flows of comparison expenditure to food stores, as appears to be the case for the Richmond edge-of-Centre Co-op (with Dorothy Perkins concession) and even more so for Catterick Garrison, where Tesco forms around one third of the town centre comparison floorspace. As comparison purchases in foodstores tend to be ancillary to food shopping the household survey has not recorded any expenditure flows for this element of the Tesco floorspace, and similarly very little has been recorded as going to the Co-op/Dorothy Perkins in Richmond. Within this assessment no explicit adjustments have been made to the survey flows to try and compensate for these potential inaccuracies, but this is taken into account in the capacity assessment.

8.11 On the whole the findings of the household survey for comparison goods show that the centres within the survey area are trading at roughly the levels expected (bearing in mind the inaccuracies of flow data for smaller centres). The results show that the study area centres are neither trading very well or very badly.

8.12 For comparison goods the dominant feature of the study area shopping patterns is the massive outflow of expenditure to centres located beyond the study area. The retention of expenditure within the study area, at 14%, is very small and reflects the huge disparity in size and quality of provision between the study area centres and centres outside the area such as Darlington and Northallerton.

8.13 The retention of expenditure from the three zones on the eastern periphery of the study area, (Zones 3, 7 and 8) is lower than in other zones, at just 4-7%. This reflects the location of these zones in closest proximity to Darlington and Northallerton. In Zones 1, 4, 5 and 6, which are either located further from Darlington/Northallerton, or contain reasonable sized centres, the retention rate is much higher at 20-27%. The Catterick zone, Zone 2, however, has a much lower average retention rate despite being located in the centre of the study area. If Richmond, Hawes and Leyburn can all achieve retention rates in the region of 20%-27%, there is no reason why Catterick Garrison should not have the potential to retain a similar level (i.e. double the amount it does now according to the household survey).

8.14 There is clearly a need for new development within the study area to help redress the apparent deficiencies in retail provision, reclaim some of the current leakage of expenditure and to prevent the outflow to places such as Darlington and Northallerton which will increase in the future, as these centres increase in size (a large new retail development is currently planned in Darlington town centre).

8.15 The first preference for any new development must be a town centre location in accordance with planning policy. When considering the town centres within the study area, there appears to be a clear need in Catterick Garrison. With such a low level of expenditure retention the town centre is clearly in need of improvement. Zone 2 is also the largest zone in terms of population, and this is forecast to increase significantly with the expansion of the Garrison. Therefore, there is a clear need to provide for the retail demands of this population.

8.16 Catterick Garrison also has the advantage of being able to accommodate the amount of retail floorspace needed to address some of the issues raised. Any significant increase in floorspace would be difficult to accommodate in any of the other town centres within the study area. Richmond town centre, as the principal town, would be the only other real option for new development if sites were available. The historic town is however constrained by existing buildings and conservation areas, which severely limit expansion of the town centre.

8.17 Any significant new development would have to be located within Catterick Garrison town centre, helping to increase the retention of expenditure within Zone 2, to a minimum of 20% (in line with other core zones). It is also assumed that new retail development within the study area, of the right type/size could help to reclaim some of the expenditure flowing out of the study area by providing facilities which are closer to residents and hence more convenient.

8.18 However, there is a limit to the amount of expenditure that could be reclaimed due to the sheer dominance of Darlington and Northallerton over the study area. As they are significantly larger, particularly in the case of Darlington (where proposed development will expand the town centre even further), these centres will continue to attract large shares of the study area expenditure. A development of about 7,000 sqm gross additional comparison floorspace in Catterick Garrison would still mean that Catterick Garrison would be a fraction of the size of Darlington and much smaller than Northallerton. The maximum retention level for the study area, with new retail development, is therefore unlikely to be greater than about 25% overall, compared to the 14% retention currently indicated by the household survey.

8.19 The assessment of capacity, drawing on all of the above points is shown in Table 14 of the Appendices.

8.20 Within the assessment of capacity, the comparison floorspace in the recently permitted Tesco expansion has also been considered. Our analysis of the expanded store, compared with the existing store (paragraph 9.12) showed that the overall increase in comparison floorspace will be relatively small, 365 sqm net, which assuming a sales density of about half the company average level will achieve a turnover of £1.9m. This amount is deducted from any surplus expenditure within the study area.

8.21 The capacity assessment is summarised in the table below, which shows that, after making allowances for the Tesco expansion and for the retention of expenditure within Zone 2 to be brought in line with other zones, (which would increase the overall retention level in the study area as a whole from 14% to about 16.4%) and for new development to also help to reclaim some of the expenditure currently leaking out of the area (pushing the overall retention rate up to 25%), by 2010 there will be surplus comparison expenditure of £14.5m, which with expenditure and population growth increases to £22.1m by 2015.

Table 8.1: Comparison Capacity Summary

	2004	**2010**	**2015**
Total turnover of existing stores	£24.8	£32.4	£37.7
Benchmark turnover of stores	£33.9	£37.1	£40.0
Turnover of Commitments	-	-£1.9	-£2.0
Additional expenditure from improved retention rate	-	£22.0	£26.4
Overall capacity £m	**-**	**£14.5**	**£22.1**
Floorspace Equivalent (£3,500 psm)			
Comparison sales area, sqm net	-	3,785	5,363
Comparison floorspace, sqm gross	**-**	**5,406**	**7,662**

8.22 Assuming a sales density in the region of £3,500 psm for new floorspace as at 2004 (and allowing for sales efficiency growth 2004-2010/2015) this capacity equates to a comparison sales floor area of 3,785 sqm net in 2010, increasing to 5,363 sqm net by 2015. The gross floorspace equivalents are 5,406 sqm in 2010 and 7,662 sqm in 2015 (assuming a gross to net ratio of 70%). Further population growth (particularly in Catterick Garrison) and expenditure per head growth will increase the capacity further by 2020. The scheme proposed in Catterick Garrison is 6,304 sq m gross (of A1 non-food retail). The capacity assessment demonstrates that there will be sufficient capacity to support this town centre proposal by the time it has been completed and a settled level of trading has occurred.

9 TRADE DIVERSION AND IMPACT ASSESSMENT

Methodology for Impact Assessment

9.1 This section of the report examines how the proposed retail development at Catterick Garrison may effect/impact upon existing town centres and retail facilities. This is done through the assessment of the likely turnover and trade draw of the proposal and with the use of a shopping model to determine the likely trade diversion from individual centres/stores.

9.2 This section provides two separate impact assessments to consider the various convenience and comparison developments proposed within the study area:-

a. A solus comparison impact for the proposed Catterick Garrison scheme; and

b. A cumulative comparison impact assessment for the proposed Catterick Garrison scheme, in conjunction with the comparison floorspace element of the proposed Tesco extension.

9.3 The main stages in each of the impact assessments are as follows:-

- A review of the proposed scheme, in terms of its size and likely/potential composition;
- Estimation of the likely sales density and thus the total turnover for the proposed development, once completed and open for trading at some future date;
- An assessment of the likely trade draw of the proposed development from each of the study area zones, based on an analysis of existing shopping patterns, and the scheme details;
- Use of a shopping model to calculate trade diversion from each centre/store reflecting existing zonal expenditure flows to each centre/store;
- Weighting of the centres/stores to reflect size and comparability with the proposed scheme; and
- Comparison of the trade diversion from each centre/store with the estimated total turnover of the centre/store at some future date to calculate the overall impact.

Proposed Development and Turnover, 2010

Assessment (1) – proposed Catterick Garrison scheme

9.4 The scheme, which is the principal subject of this assessment, is the potential expansion of the shopping facilities at Catterick Garrison town centre (in Zone 2), which would be part of the proposed expansion of the Garrison as a whole.

9.5 The plan is for additional A1 retail facilities totalling 6,304 sqm gross, which would be designed to complement the existing retail provision close to the Tesco store and adjacent shops and to provide for the needs of the growing Army Garrison.

9.6 The precise composition of such a development is unknown and thus assumptions have been made regarding the best type of scheme to provide for local needs, but at the same time minimising the potential conflict with other town centres, principally Richmond, due to its close proximity.

9.7 The most appropriate type of scheme would be one which complements the retail facilities within Richmond town centre and does not aim to cater for the same market. This would enable Richmond to develop and continue its function as more of a higher order centre and tourist location with more upmarket/niche retail facilities.

9.8 The Garrison has been shown to have a high number of families and young children and with its expansion this is the market that the new development would aim to target. This would suggest that the retail provision should be mid/lower middle market or even discount retailers, with an element of clothing to help ‘plug’ the existing gap in the clothing and footwear market.

9.9 On this basis it is assumed that the new development would be a mix of middle/lower order retailers some of which would be bulky goods retailers with an average or benchmark sales density of around £3,827 psm in 2010. Applying this to the total sales floor area of 4,413 sqm (assuming a gross to net ratio of 70%) suggests the proposed scheme would have a turnover in the region of £16.9m, (see Table 15a).

Assessment (2) – proposed Catterick Garrison Scheme and Tesco extension (comparison element)

9.10 In this assessment the cumulative impact of the proposed Catterick Garrison scheme, with an estimated turnover of £16.9m, and the comparison element of the Tesco store extension is considered.

9.11 The comparison floorspace area of the Tesco extension has been estimated by comparing the overall size of the comparison floorspace within the extended store at a maximum of 1,528 sqm net (DPP report) with that of the existing store, 1,163 sqm net (on-site store survey in 2004). This shows an overall increase in comparison sales floorspace of just 365 sqm net. Assuming that this floorspace will trade at around half the company average level, gives an estimated turnover for the comparison element of the extension of about £2m.

9.12 Taking both schemes together gives an overall comparison turnover for the proposed developments of £18.8m, (see Table 18a in the Appendices).

Trade Draw of the Proposed Developments

9.13 The trade draw of the proposals i.e. the zones from where it is most likely that the schemes will derive their turnover, has been assessed by considering the size and composition of each proposed scheme and its location relative to existing stores/centres. The level of trade draw from each zone also reflects the relative strength of retail provision within the zone, the distance of the zone from the proposed development (considering ease of access, road networks etc), and the population and expenditure generated within the zone.

Assessment (1) – proposed Catterick Garrison scheme

9.14 Trade is primarily going to be drawn from those zones which are located close to the proposed development site, and to assist in assessing the likely trade draw pattern of the proposal, the current trade draws of Catterick Garrison town centre, and that of Richmond (which is the other closest town centre) have been analysed. These two centres draw most of their turnover from Zones 1 and 2, which suggests that this is where the proposed scheme will also draw most of its turnover from.

9.15 The proposed development will significantly increase and improve the retail attraction of Catterick town centre, therefore it is reasonable to assume that the proposed scheme will have a wider draw than the existing town centre. This has been reflected in the trade draw assumptions, by reducing the emphasis on Zone 2 (although keeping this zone as having the highest share), and spreading the draw across the remaining zones.

9.16 Zone 1, which is the other core area zone, is expected to see the second highest trade draw, with the total for the core area (Zones 1 and 2) as a whole, being just over half, at 55%.

9.17 The remaining zones are all expected to see a higher level of trade draw to the proposed development, than is currently drawn from these zones by the existing Catterick Garrison town centre. This reflects the greater attraction the proposed development would have and the fact that it would provide within the study area, the retail facilities that some residents are currently travelling out of the area for.

9.18 The trade draw is shown on a zone by zone basis, in percentage terms in Table 15b of the Appendices. These percentages are then multiplied by the estimated turnover of the scheme to give the amount of the scheme’s turnover in monetary terms being drawn from each zone.

Assessment (2) – proposed Catterick Garrison Scheme and Tesco extension (comparison element)

9.19 The trade draw for the two developments considered within this cumulative assessment have been analysed separately. The trade draw for the Catterick Garrison proposal is the same as in Assessment 1.

9.20 The trade draw for the comparison element of the Tesco store has been analysed on the basis that goods bought will primarily be ancillary purchases made whilst carrying out food shopping. Thus the trade draw for the comparison element of the store will be the same as that for the convenience floorspace, with most trade being drawn from Zone 2 where the store is located, along with Zones 1, 3 and 4. The trade draw pattern is shown in Table 18b of the Appendices, and the percentage figures are multiplied by the estimated turnover of the comparison part of the store to give the trade draw in monetary terms.

9.21 The trade draw of both schemes is added together to give the cumulative (total) trade draw in monetary terms from each of the study area zones, which feeds into the model to give the cumulative impact of both developments combined on each centre within the study area.

Shopping Model

9.22 The trade diversion of the proposed development from each of the study area centres, and those located outside the study area, is calculated using our shopping model. The assumed trade diversion (as discussed above) is fed into the model which then uses an iterative process to calculate the trade diversion from each centre.

9.23 The model produces a series of tables, starting with a summary table (Table 16a/19a of the Appendices) which shows the comparison goods expenditure flows from each zone to each centre, and the total turnover of each centre based on the survey results. The table also shows the estimated trade draw of the scheme from each zone. All figures are shown at the future date of 2010 when it is assumed that the proposed development would have been completed and open for trading.

9.24 The model uses an iterative process to apportion the trade draw between the centres, proportionately to the expenditure flows from each zone to each centre. The centres are weighted in the latter stages of the model to reflect comparability with the proposed development. The final table generated by the model (Table 16b/19b in the appendices) shows the trade diversion from each centre on a zone by zone basis and then gives the total trade diversion from each centre.

9.25 The trade diversion figures from the model are then expressed as a percentage of each centre's total comparison goods turnover to give the overall impact on the centre's comparison retail.

Weightings

9.26 Within the shopping model, to make sure that trade is apportioned correctly, centres are weighted to reflect how comparable they are with the proposed development, taking account of the size and quality of provision and the turnover being achieved. This weighting is needed because although the model automatically takes account of the location of each centre, it cannot distinguish between the size/type of centres, so the application of weights ensures that trade is diverted from those centres which will most directly compete with the proposal.

9.27 The highest weightings are given to those centres/stores which are most likely to compete on a like–for-like basis with any new development. They are then scaled down, decreasing as a store/centre's comparability with a proposal decreases, to the lowest weighting of 1 or even 0 where a centre will not compete at all with a new development.

Assessments (1) and (2) – Proposed Catterick Garrison Scheme and Tesco Extension

9.28 The basic scaling of weights used for both the solus comparison assessment of the Catterick Garrison scheme, and the cumulative assessment with the Tesco extensions is the same, using weights ranging from 0 to 5. A weight of 0 reflects no level of comparable attraction i.e. because the centre in question is so small and has virtually no retail provision of the type proposed in the new development. A weighting of 5 represents a large, thriving centre which has a strong representation of the type of stores which will be directly comparable with those proposed.

9.29 Darlington, being the most dominant and largest of the centres has been given a weighting of 5. 'Other centres' (which comprises mainly of large regional centres such as Middlesborough, York, Harrogate, the Metrocentre, Leeds etc) have also been given the same weight. These weightings reflect that these are large centres, which have very good retail facilities, and the provision of comparable facilities within the study area, may prevent the need to visit these centres on such a regular basis.

9.30 Centres such as Northallerton, Bishops Auckland and Ripon have been weighted 4, with Richmond and Catterick Garrison weighted 3 along with Barnard Castle and Thirsk. These weightings reflect the smaller size of these centres relative to places such as Darlington, and thus the more limited and different type of retail offer within them. Similarly the smaller centres within the study area have been weighted 1.5 down to 0 for the small 'unnamed' other local shops scattered in small parades around the study area.

Trade Diversion and Impact

Assessment (2) – Proposed Catterick Garrison Scheme

9.31 The trade diversion and resultant impact figures are shown in Table 17 of **Appendix 2**, and summarised below for the main centres.

Table 9.1: Summary of Trade Diversion and Resultant Impact

	Comparison Turnover (£m)	Trade Diversion (£m)	Impact (%)
Richmond Town Centre	£15.3	£0.78	5.1
Bedale Town Centre	£4.4	£0.09	2.0
Catterick Garrison Town Centre	£2.5	£0.17	6.6
Colburn	£0.2	£0.00	2.2
Hawes Town Centre	£1.0	£0.02	2.1
Leyburn Town Centre	£6.6	£0.2	3.4
Darlington Town Centre	£216.5	£7.9	3.7
Northallerton Town Centre	£53.3	£2.3	4.4

9.32 Assuming that the proposed scheme is developed in the way outlined, catering for a different retail function to Richmond town centre, i.e. with the minimal possible amount of retailing which is directly comparable to that in Richmond, the level of trade diversion (£0.78m) and resultant impact on the town centre is fairly small, at 5.1%. This trade diversion may, in part, be offset by the development, which if it serves to complement Richmond, may help to draw more visitors into the area who may also visit Richmond town centre as part of a linked trip.

9.33 The highest impact of 6.6% is expected on the existing shops in Catterick Garrison, which is to be expected given that they will be located very close to the proposed development. However, this impact is likely to be offset by the increased attraction of the Catterick Garrison shopping facilities as a whole, and through linked trips to other parts of the town centre.

9.34 The impacts on the other centres within the study area, are small, ranging from 2% to at most 3.4%, which is on Leyburn town centre.

9.35 The largest trade diversion will come from centres outside the study area, through the clawback of expenditure that is currently leaking out of the area. The trade diversion from Darlington is estimated to be in the region of £7.9m, which is just under half of the proposed Catterick Garrison scheme’s turnover. This reflects that around half of the study area expenditure currently leaks out to Darlington, so the clawback of leakage would be in line with that. The model shows this equates to an impact of 3.7%, on the estimated comparison goods turnover of Darlington town centre in 2010 (using data from the Darlington Retail Study, 2004 and allowing for sales growth to 2010 resulting from expenditure growth). This impact should be offset by just one year’s expenditure growth.

9.36 The next highest trade diversions would be £3.3m from other large centres (mainly regional centres), £1.6m from out-of-centre stores/retail warehouses in Darlington, followed by £2.3m from Northallerton. These amounts, when compared with the total retail turnover of these towns, will be small equating to approximately 4.4% on Northallerton and 1.9% on Darlington retail warehouses.

Assessment (2) – proposed Catterick Garrison Scheme and Tesco extension (comparison element)

9.37 The cumulative trade diversion from both developments is shown in Table 20 of **Appendix 2** and summarised in the table below.

Table 9.2: Summary of Cumulative Trade Diversion from Both Developments

	Comparison Turnover (£m)	Cumulative Trade Diversion (£m)	Cumulative Impact (%)
Richmond Town Centre	£15.3	£0.86	5.6
Bedale Town Centre	£4.4	£0.10	2.2
Catterick Garrison Town Centre	£2.5	£0.19	7.4
Colburn	£0.2	£0.01	2.5
Hawes Town Centre	£1.0	£0.02	2.4
Leyburn Town Centre	£6.6	£0.25	3.8
Darlington Town Centre	£216.5	£8.80	4.1
Northallerton Town Centre	£53.3	£2.6	4.8

9.38 The figures show that the total diversion from Richmond town centre, based on the same assumption about the type of development at Catterick Garrison, and that comparison purchases within the extended Tesco will largely be ancillary to food shopping, will be around £0.86m. This equates to an overall impact on the town centre of 5.6% (an increase by just over half a percentage point on the solus impact from the Catterick Garrison proposal).

9.39 Similarly the trade diversion from, and resultant impacts on, the other town centres within the study area are also increased slightly, to between 2.2% and 7.4%. The highest impact on the smaller centres is on existing shops within Catterick Garrison, which is to be expected as both developments are also in the town centre. This impact, however, should be offset by the spin off benefits of the increased attraction to the town centre as a whole resulting from the new developments.

9.40 Leyburn town centre is expected to experience an impact of around 3.8%, and Colburn and Bedale expected to have slightly lower impacts of 2.5% and 2.2% respectively. These impacts reflect that these centres are all located fairly close to the proposed developments.

9.41 As with the solus impact assessment, the largest trade diversions are expected to come from centres located outside the study area through the clawback of expenditure which is currently leaking out to these centres. The cumulative effect of both developments is an increase in the impact on the main centres of Darlington and Northallerton to 4.1% and 4.8% respectively. These levels of impacts again would be offset by new developments combined with 1-2 year's worth of expenditure growth.

10 CONCLUSIONS

10.1 All the town centres in the study area are small, particularly relative to Darlington and Northallerton, as the towns themselves are small. Due to their attractiveness and location, they benefit from tourism, but the leakage of residents' expenditure from the study area is very large. Less than 15% of study area comparison expenditure is retained in the study area. This figure is distorted by the size of the study area and the proximity of the eastern part of the study area to Darlington and Northallerton and the A1, giving good access to large centres to the north and south. Nevertheless, the leakage out of the study area from more central zones with their own town centres, such as Richmond and Leyburn, is still 75-80%, and even higher in the Catterick Garrison zone.

10.2 This leakage is not just to Darlington and Northallerton, but also to more distant centres such as Middlesborough, Newcastle/Metrocentre and York, and also to out-of-centre retail parks in Darlington, Stockton etc. This is mainly due to the size of these centres, but also due to high car ownership and mobility and the size and range of individual shops/stores available in these town centres and retail parks. Proposed new developments in these higher order centres, particularly the 25,000 sqm extension of Darlington town centre (three times the size of the whole of Richmond town centre for comparison floorspace) will only reinforce these trends and will potentially increase leakage over time. From a sustainability point of view (important in the Regional Spatial Strategy), this is not desirable.

10.3 The retailer and household surveys undertaken for this study reinforce the results of other recently undertaken surveys in Richmond. They clearly shown that the reasons that many residents are not shopping in Richmond (and the same would no doubt be true for Leyburn, Bedale and Hawes) is due to the relatively limited range and quality of shops. The amount of shops, the size of shops and the quality of shops cannot compete with larger centres which are reasonably accessible to highly mobile shoppers. Residents stated that if facilities were improved they would shop more locally. The problem is the historic nature of these towns, their conservation areas, and the lack of sites for expansion.

10.4 Whilst the main town centres appear to be reasonably healthy, they are not particularly strong. A study of Richmond shows that there has been a contraction of comparison floorspace over the last 10 years, despite the large growth in expenditure in the study area (and nationally) and the composition of floorspace has changed. The development of the Co-op edge-of-centre foodstore has helped to retain expenditure and the shopping between this store and the heart of the town centre has improved. There is also an opportunity site close to the Co-op, within the town centre and in this improving area, which could provide much needed new large unit floorspace, but there are a number of constraints to achieving development.

10.5 Clearly the opportunities for expanding Richmond, Leyburn, Bedale and Hawes will be limited and whilst desirable if it could be achieved, would make little difference to clawing back the leakage of expenditure to higher order centres. Limited expansion would help to stem the leakage, preventing it from increasing further, and also improve vitality and viability, but not to claw back leakage. The only possible location where substantial new development could, physically, be accommodated is at Catterick Garrison. This is also the area where most population (and expenditure) growth is likely to occur and currently the zone which has the highest expenditure leakage out of the study area. It is located in the heart of the study area and would provide a sustainable solution to accommodating new development in a sustainable location.

10.6 The household survey shows that whereas most of the other study area zones which have town centres retain 20%+ of expenditure in the study area, Catterick Garrison retains about half as much, which is less than the study area average retention. Partly this may be due to an under-recording by the household survey of comparison expenditure in Catterick Garrison and Colburn town centres, due to their small size, the nature of their shops and the ancillary nature of comparison shopping (largely impulse buying) in the Tesco store. However, the capacity analysis suggests considerable scope for expansion in Catterick Garrison town centre. The Catterick zone is the largest of the eight study area zones (in terms of population), substantial population and expenditure growth is likely to occur in this zone, and retention of comparison expenditure is very low.

10.7 The capacity assessment suggests that the proposed expansion of the town centre (the new retail/leisure centre) is justified and could reduce the high levels of leakage, although a large reduction in leakage is unlikely due to the size, proximity and accessibility of Darlington, in particular.

10.8 The capacity assessment shows that expansion of comparison retail facilities in Catterick Garrison of up to about 7,000 sqm gross over the next nine years is justified in general terms, but care will be needed to ensure impact on nearby centres, particularly Richmond, is kept to a minimum. The size of units and type of retailers and the goods that they sell are important when considering an expansion of Catterick Garrison town centre.To help stem leakage to Darlington, the type of shops that shoppers are travelling to Darlington for are needed in Catterick Garrison. They need to compliment the types of goods sold in Richmond, Leyburn and Bedale, not replicate them, and our impact assessment assumes this. Larger sized shop units, which are difficult to provide in small historic market towns, selling value for money basic goods appealing to young families and single person households, could limit the impact on nearby towns and be a major attraction to Study Area residents lessening the need to make longer journeys to more distant larger centres. Our impact assessment suggests impact levels are likely to be about 5% of comparison turnover in Richmond and lower than this in Leyburn and Bedale, which are acceptable levels of impact for the benefits which new development in Catterick Garrison town centre would achieve for the surrounding area.

APPENDIX 1

TOURISM SPENDING ANALYSIS

1 TOURISM SPENDING ANALYSIS

Introduction

1.1 STEAM reports have been produced for the Dales, Richmondshire, Hambleton and the N. Yorkshire Moors. They provide information on the number of tourists and how much they spend and on what. The amount they spend reflects a number of factors including the length of stay and the type of accommodation they stay in.

Number of Visitors

1.2 For Richmondshire there were 4.015m tourists visiting in 2003, a 72% increase over the previous seven years (an annual equivalent increase of 8%). In terms of tourist days the figure for 2003 was equivalent to 5.382m. This represents a 50% increase over the previous seven years (an annual equivalent increase of 5.9%).

1.3 For neighbouring Hambleton the number of tourists in 2003 was 1.685m, less than half the number in Richmondshire. The number of tourist days in 2003 was 2.83m, just over half the number in Richmondshire, even though the two districts are the same size geographically and Hambleton is nearly double the size of Richmondshire in terms of population.

1.4 Interestingly, the North Yorkshire Moors recorded 8.58m tourist days in 2002, approximately twice the number in Richmondshire and 3.4 times the number in Hambleton, and the Yorkshire Dales recorded 11.26m tourist days, 30% more than the North Yorkshire Moors. This means that Richmondshire accounts for nearly 50% of total tourist days in the whole of the Yorkshire Dales.

Types of Visitors

1.5 An analysis of the tourist days figures shows that throughout Yorkshire, Day Visitors comprise the largest group of visitors. In Richmondshire they comprise 64% of the total, whereas in Hambleton they comprise 44%, in the North Yorkshire Moors they comprise 69% and in the Yorkshire Dales they comprise 61%.

1.6 The next largest group is Non-Serviced Accommodation with 24% of the total in Richmondshire, 29% in Hambleton, 24% in the North Yorkshire Moors and 24% in the Yorkshire Dales. Serviced Accommodation generally represents no more than 11% of the total in all areas. Finally, Staying With Friends varies noticeably in the different areas with only about 5% or less of the total in Richmondshire, the North Yorkshire Moors and the Yorkshire Dales, but 16.5% in Hambleton.

1.7 The figures for Richmondshire show a very similar composition as those for the Yorkshire Dales as a whole and the North Yorkshire Moors, with close to two thirds of tourist days made up of day visitors. Hambleton deviates from this pattern, with far fewer day visitors (as a proportion of total tourist days) and far more visitors staying with friends. This has an impact on total spending by visitors.

How Much Visitors Spend

1.8 In Richmondshire total (direct) spending by tourists (i.e. excluding indirect spending from the employment created by tourist spending) amounted to £68.5m in 2003, a 6% increase from 2002. This is equivalent to £12.73 per tourist day. In Hambleton, the North Yorkshire Moors and the Yorkshire Dales the daily spend figures are £14.86, £12.21 (in 2002) and £13.32 respectively.

1.9 Statistics for Richmondshire show that total spending by tourists has increased by 57% over the last seven years, an annual equivalent increase of 6.6%. In real terms (i.e. excluding inflation) the annual increase has been about 4% pa. As the number of tourist days has increased at approximately the same rate as total tourist spending over the last seven years, it is clear that the amount spent per tourist day has stayed the same in nominal terms and actually reduced in real terms. Total spending has increased due to an increase in the number of tourists, not the amount that each tourist spends.

1.10 In Richmond town itself the Richmond Town Centre Marketing Initiative Prime Evaluation report (February 2004) refers to anecdotal evidence that tourist spending (direct and indirect) was about £12m in 2002, equivalent to about 12% of the Richmondshire total. However the report considers that this is an underestimate and comes to the conclusion, based on analysis of car parking data, tourist information numbers, data from businesses in the town etc, that about 25% of tourist trips to Richmondshire are made to Richmond town. This would give a spending figure (direct tourist spending) of about £17m, assuming that tourist spending in the town represented 25% of total tourist spending.

1.11 This may be an over-estimate. Tourist spending comprises spending on accommodation, food and drink, recreation, shopping and transport. Whilst the bulk of tourist shopping and food and drink spending will occur in the three main tourist towns (Richmond, Leyburn and Hawes), a smaller proportion of the spending on accommodation, recreation and transport will occur in these towns. Somewhere between £12m (anecdotal evidence) and £17m would, therefore, seem to be a realistic figure for direct tourism spending in Richmond town itself. However, if the smaller figure is applicable it is likely that a larger proportion would be spent on shopping and a smaller proportion on accommodation, recreation and transport.

Composition of Tourism Spending

1.12 The STEAM reports give a breakdown of tourist spending on the categories of expenditure mentioned above. In Richmondshire, the model estimates that 21% of direct tourist spending was on non-food shopping and 32% was on food and drink (eating, drinking and food shopping).

1.13 The equivalent figures for Hambleton, the North Yorkshire Moors and the Yorkshire Dales for non-food shopping are broadly similar at 19.6%, 21.5% and 24.5%. For food and drink the equivalent figures are 24%, 33% and 32%. The national (England) domestic tourism spending figures from the UK Toursim Survey, 2003, are 17% for shopping and 21% for eating and drinking, but it is not clear whether food shopping (i.e. mainly self-catering) is included in the shopping figure or the eating and drinking figure, but it is likely to be a small figure nationally in any case.

1.14 If the Richmondshire figures, which are similar to the Yorkshire Dales and Moors figures, are assumed to be robust and applicable to Richmond town, this would give non-food shopping in Richmond of £2.5m-£3.6m in 2003. Spending on eating, drinking and food shopping would be £3.8m-£5.4m, of which a small part is likely to be on food shopping. We have assumed that much of the food spending would be by visitors staying in non-serviced accommodation. As non-serviced accommodation tourist days spending amounts to 33% of total tourist days spending, but only 24% of total tourist days (ie visits), it suggests that the difference between these two figures is largely due to food spending, which other groups of tourists don't undertake to anything like the same extent. This assessment suggests that food shopping in Richmond probably amounts to £0.34m-£0.48m and is probably closer to the latter figure.

1.15 The above analysis, combined with the results of the household survey covering residents' expenditure in each town centre, suggests that 20-25% of Richmond's comparison turnover and about 5% of convenience turnover is accounted for by tourist spending. Based on this analysis we have assumed that the equivalent figures for Leyburn, Bedale and Hawes are about 15% and 5% respectively. We have also assumed that 5% of the turnover of the Tesco store at Catterick Garrison comes from tourist spending (self catering holidaymakers).

1.16 Future spending, based on past evidence, is likely to increase at about 4% pa in real terms (as explained in the previous section), although this increase is due to a continuing increase in tourist numbers not on the amount that each tourist spends. However, improved facilities may encourage a higher spend per visit. This growth rate is very similar to the national growth in consumer retail expenditure on non-food items. However, this growth rate is due to increased spending per head, rather than an increase in population. So consumer retail expenditure and tourist shopping expenditure may grow at similar rates, but for different reasons.

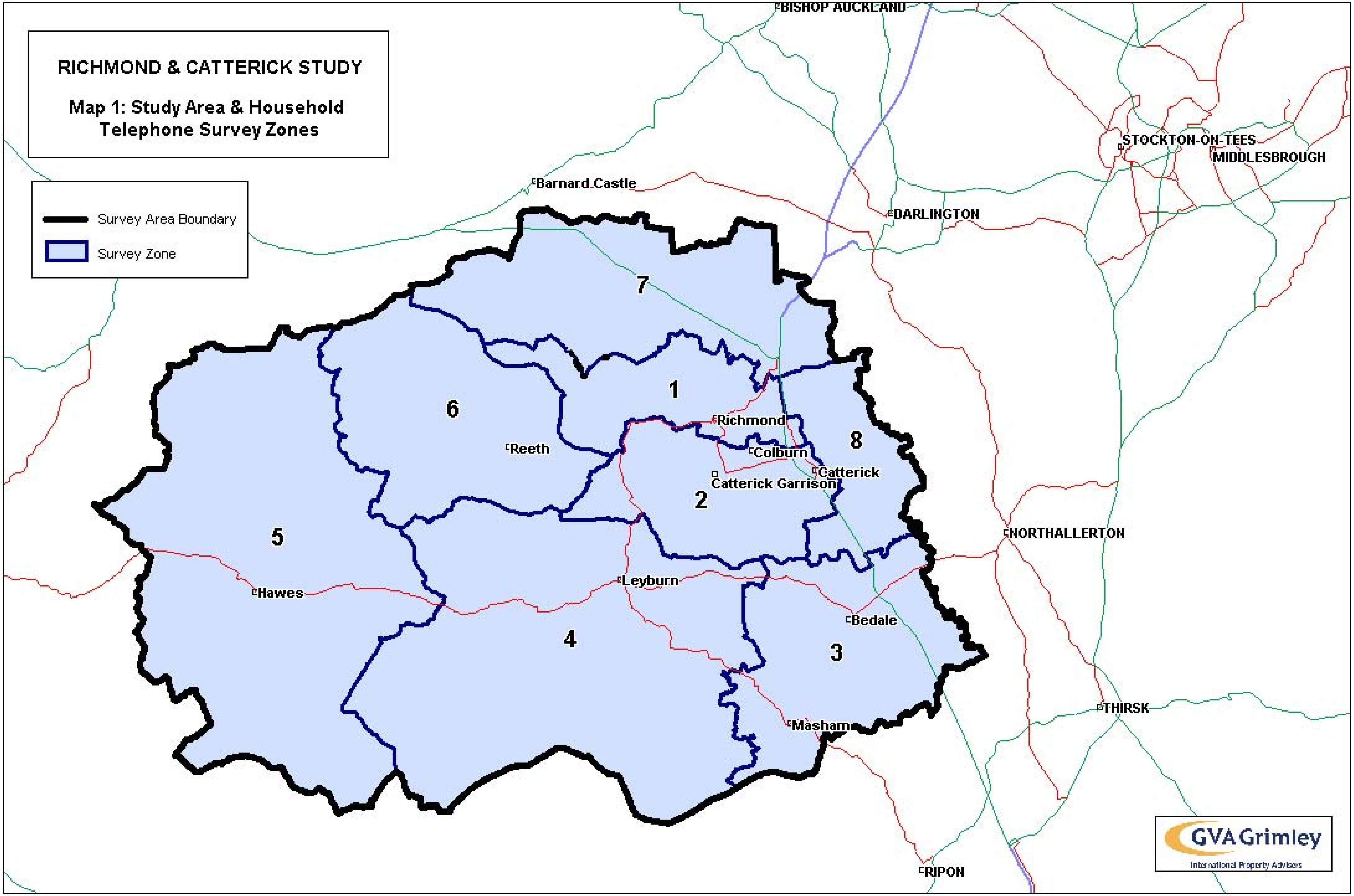
Sources:

- Yorkshire Dales Joint Promotions Initiative, STEAM Report 2003,Global Tourism Solutions (UK) Ltd;
- Hambleton STEAM Report 2003, Global Tourism Solutions (UK) Ltd;
- Richmondshire District Council Tourism Statistics, 1992-2002;
- Richmond town centre Marketing Initiative PRIME evaluation report, YTB Research Services, February 2004-08-20;
- North York Moors Tourism Trends 2002, Bill Breakell, Tourism & Transport Officer, North York Moors National Park Authority, June 2003; and
- Northallerton Tourism Analysis, Vision Works, 2004.

APPENDIX 2

QUANTITATIVE RETAIL ASSSESSMENT MAP AND TABLES

QUANTIATIVE ASSESSMENT MAPS/TABLES



Source:MapInfo - OS 250 BaseMap

Table 1: Population

	Zone 1	Zone 2 Total[1,2]	Zone 2 *Net* [3]	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Total
2004	11,963	22,041	*19,137*	12,776	7,619	2,852	1,348	4,949	2,393	65,941
2010	12,103	25,411	*22,066*	13,112	8,071	2,972	1,346	5,307	2,565	70,887
2,014	12,389	-		13,294	8,070	2,995	1,366	5,410	2,599	-
2015 [3]	12,432	27,911	*23,939*	13,398	8,160	3,024	1,370	5,502	2,640	74,436
Change										
2004-2010	140	3,370	-	336	452	120	-2	358	172	4,946
	1.2%	15.3%	-	2.6%	5.9%	4.2%	-0.1%	7.2%	7.2%	7.5%
2004-2014	469	5,870	-	622	541	172	22	553	247	8,495
	3.9%	26.6%	-	4.9%	7.1%	6.0%	1.6%	11.2%	10.3%	12.9%

Notes/Sources

Experian, Retail Planner - Summary Demographics Report, July 2006

[1] Baseline populations figure for Zone 2 have been increased by 3,704 to reflect the presence of military personnel within the Catterick Garrison Town Infantry Training Centre, and some of the personnel in Single Living Accommodation who were under-recorded by the 2001 Census.

[2] Population projections adjusted to include the additional population resulting from the expansion of the Catterick Garrison, combined with other housing development in Zone 2 but outside the Garrison, totalling 3,370 people by 2010, and a further 2,500 people by 2015

[3] Net population figures reflect the absence of some of the military personnel from the base during the year (for use in expenditure calculations)

[4] Allowing for one years additional growth post 2014, assuming same annual rate for period 2004-14.

Table 2a: Expenditure per Capita, 2004 ***(including SFT, figure given in 2004 prices)***

	Zone 1 £	Zone 2 £	Zone 3 £	Zone 4 £	Zone 5 £	Zone 6 £	Zone 7 £	Zone 8 £
Comparison Goods								
Clothing, Footwear & Fashion Goods	£609	£486	£539	£555	£593	£662	£658	£549
Furniture, Floor coverings & H'hold Textiles	£421	£264	£357	£487	£343	£399	£451	£367
DIY & Decorating Goods	£216	£141	£196	£242	£239	£253	£238	£197
Domestic Appliances	£325	£236	£320	£301	£219	£275	£337	£290
Personal/luxury goods [1]	£1,170	£1,168	£1,133	£1,168	£1,051	£1,255	£1,282	£1,195
Total Comparison	**£2,742**	**£2,296**	**£2,543**	**£2,752**	**£2,448**	**£2,843**	**£2,964**	**£2,596**

Notes/Sources
Experian, Retail Planner - Retail Expenditure (Coarse) Report, July 2006
Zone 2 Expenditure per capita adjusted to reflect population composition of the zone, taking account of the Catterick Garrison Town & Marne Army Barracks
[1] This category includes all comparison expenditure not otherwise identified e.g.books, jewellery, china, glass, cosmetics, musical instruments and sports equipment etc

Table 2b: Expenditure per Capita, 2004 ***(excluding SFT, figures given in 2004 prices)***

	Zone 1 £	Zone 2 £	Zone 3 £	Zone 4 £	Zone 5 £	Zone 6 £	Zone 7 £	Zone 8 £
Comparison Goods								
Clothing, Footwear & Fashion Goods	£574	£459	£508	£523	£559	£624	£620	£518
Furniture, Floor coverings & H'hold Textiles	£397	£249	£337	£459	£323	£376	£425	£346
DIY & Decorating Goods	£204	£133	£185	£228	£225	£239	£224	£186
Domestic Appliances	£306	£223	£302	£284	£207	£259	£318	£273
Personal/luxury goods	£1,103	£1,101	£1,068	£1,101	£991	£1,183	£1,209	£1,127
Total Comparison	**£2,586**	**£2,165**	**£2,398**	**£2,595**	**£2,308**	**£2,681**	**£2,795**	**£2,448**

Notes/Sources
Comparison goods expenditure per capita figures (from Table 2a) adjusted to exclude Special Forms of Trading (SFT) @5.7% of total comparison expenditure

0.943

Table 3: Total Expenditure, 2004 (in 2004 prices)

	Zone 1 £M	Zone 2 £M	Zone 3 £M	Zone 4 £M	Zone 5 £M	Zone 6 £M	Zone 7 £M	Zone 8 £M	Study Area Total (£M)
Clothing, Footwear & Fashion Goods	£6.87	£8.78	£6.49	£3.99	£1.59	£0.84	£3.07	£1.24	£32.88
Furniture, Floor coverings & H'hold Textiles	£4.75	£4.76	£4.30	£3.50	£0.92	£0.51	£2.10	£0.83	£21.68
DIY & Decorating Goods	£2.44	£2.55	£2.36	£1.74	£0.64	£0.32	£1.11	£0.44	£11.61
Domestic Appliances	£3.67	£4.27	£3.86	£2.16	£0.59	£0.35	£1.57	£0.65	£17.12
Personal/luxury goods [1]	£13.20	£21.07	£13.65	£8.39	£2.83	£1.60	£5.98	£2.70	£69.42
Total Comparison	**£30.93**	**£41.43**	**£30.64**	**£19.77**	**£6.58**	**£3.61**	**£13.83**	**£5.86**	**£152.66**

Notes/Sources

Table 1 (Population) x Table 2b (Expenditureper capita, 2004)

Table 4a: Expenditure per Capita Forecasts, 2010

	Zone 1 £	Zone 2 £	Zone 3 £	Zone 4 £	Zone 5 £	Zone 6 £	Zone 7 £	Zone 8 £
Total Comparison	£3,070	£2,583	£2,847	£3,081	£2,741	£3,183	£3,319	£2,907

Notes/Sources
Zone 2 Expenditure per capita adjusted to reflect population composition of the zone, taking account of the Catterick Garrison Town & Marne Army Barracks
Growth rates taken from Experian Business Strategies, Retail Planner Briefing Paper, April 2006, Consensus Forecast
Comparison Expenditure Growth (2004-2010) 3.9% pa *1.039*
Comparison goods expenditure per capita figures adjusted to exclude SFT @ c. 11% of total comparison expenditure *0.89*

Table 4b: Expenditure per Capita Forecasts, 2015

	Zone 1 £	Zone 2 £	Zone 3 £	Zone 4 £	Zone 5 £	Zone 6 £	Zone 7 £	Zone 8 £
Total Comparison	£3,540	£2,964	£3,283	£3,553	£3,161	£3,671	£3,827	£3,352

Notes/Sources
Zone 2 Expenditure per capita adjusted to reflect population composition of the zone, taking account of the Catterick Garrison Town & Marne Army Barracks
Growth rates taken from Experian Business Strategies, Retail Planner Briefing Paper, April 2006, Consensus Forecast
Comparison Expenditure Growth (2004-2015) 3.6% pa *1.036*
Comparison goods expenditure per capita figures adjusted to exclude SFT @12.5% of total comparison expenditure *0.875*

Table 5a: Total Expenditure Forecasts, 2010

	Zone 1 £M	Zone 2 £M	Zone 3 £M	Zone 4 £M	Zone 5 £M	Zone 6 £M	Zone 7 £M	Zone 8 £M	Total £M
Total Comparison	£37.2	£57.0	£37.3	£24.9	£8.1	£4.3	£17.6	£7.5	**£193.9**

Notes/Sources
Table 1 (Population) x Table 3a (Expenditure Forecasts, 2010)

Table 5b: Total Expenditure Forecasts, 2015

	Zone 1 £M	Zone 2 £M	Zone 3 £M	Zone 4 £M	Zone 5 £M	Zone 6 £M	Zone 7 £M	Zone 8 £M	Total £M
Total Comparison	£44.0	£71.0	£44.0	£29.0	£9.6	£5.0	£21.1	£8.8	**£232.4**

Notes/Sources
Table 1 (Population) x Table 3b (Expenditure Forecasts, 2015)

Table 6: Town Centre Floorspace & Benchmark Turnover - Comparison Goods

	Total Comparison Goods Floorspace		Benchmark Sales Density 2004/05	Benchmark Turnover 2004/05
	sqm (gross)	sqm (net)	£ psm	£M
Richmond Town Centre[1]	7,729	4,637	£2,500	£11.59
Richmond Edge of Centre[2]		485	£2,500	£1.21
Bedale Town Centre[3]		2,442	£1,500	£3.66
Catterick Garrison Town Centre[4]		3,168	£3,000	£9.50
Colburn		92	£1,500	£0.14
Hawes Town Centre		663	£2,000	£1.33
Leyburn Town Centre		2,090	£2,250	£4.70
Leyburn Out of Town Centre		2,369	£750	£1.78
Total				**£33.92**

Notes/Sources

Sources: GOAD, GVA Grimley, DPP (Tesco Planning Application)

[1]Figure estimated from GOAD, adjusted to reflect change in occupiers, upper floors etc, and to allow for Dorothy Perkins Concession within the Co-op store

[2]Figure includes Dorothy Perkins concession and comparison floorspace within the Co-op store

[3]Figure includes the floorspace of two edge of centre, 2 storey converted chapels/warehouse buildings, which account for roughly 40% of the total comparison floorspace in Bedale and the sales density has been adjusted to reflect this

[4]Figure includes comparison floorspace within Tesco, which accounts for roughly 40% of total comparison area. Also includes local shops at Hilyard Row.

Table 7a: Total Clothing & Footwear Expenditure Flows, 2004 (%)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Total
Within Study Area									
Bedale - Town Centre	0.0%	0.7%	1.1%	0.0%	0.0%	2.5%	0.0%	2.7%	0.6%
Catterick Garrison - Town Centre	0.7%	3.4%	1.7%	1.8%	1.9%	3.1%	0.0%	1.7%	1.6%
Colburn - Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hawes - Town Centre	0.0%	0.0%	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%	0.1%
Leyburn - Town Centre	0.0%	0.0%	0.0%	6.9%	0.0%	3.1%	0.0%	0.0%	1.0%
Leyburn - Out of Town Centre	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.1%
Masham - Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Reeth - Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Richmond - Town Centre	5.5%	3.1%	0.0%	2.7%	1.9%	4.4%	4.2%	0.3%	3.0%
Richmond - Edge/Out of Town Centre	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total Within Study Area	***6.2%***	***7.3%***	***2.8%***	***12.1%***	***5.6%***	***13.2%***	***4.2%***	***4.7%***	***6.4%***
Beyond Study Area									
Barnard Castle - Town Centre	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.2%
Bishop Auckland - Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Bishop Auckland - Out of Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Darlington - Town Centre	61.3%	62.8%	22.0%	48.3%	51.7%	45.6%	61.2%	39.0%	50.2%
Darlington - Out of Town Centre	0.1%	0.2%	0.7%	0.8%	0.0%	0.0%	0.8%	0.3%	0.4%
Durham - Town Centre	0.4%	0.0%	0.0%	1.0%	0.0%	0.0%	0.8%	0.0%	0.3%
Gateshead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Harrogate	2.2%	0.0%	11.7%	5.2%	0.6%	2.5%	2.3%	5.4%	4.1%
Hipswell - Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Kendal - Town Centre	0.0%	0.0%	0.0%	0.0%	8.0%	2.5%	0.0%	0.0%	0.5%
Kendal - Out of Town Centre	0.0%	0.0%	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%	0.1%
Leeds	1.4%	0.7%	2.2%	3.3%	0.3%	5.0%	0.6%	4.2%	1.9%
London	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Metrocentre - Gateshead	2.6%	2.7%	2.4%	0.6%	1.9%	8.1%	0.2%	3.3%	2.2%
Middlesborough/Stockton Town Centre	7.2%	5.8%	10.0%	2.9%	1.9%	2.5%	4.7%	3.9%	5.8%
Middlesborough/Stockton Out of Town Centre	1.1%	2.5%	1.4%	0.0%	0.0%	0.0%	0.2%	2.7%	1.1%
Newcastle - Town Centre	4.2%	2.4%	0.4%	3.5%	2.1%	0.6%	12.9%	1.7%	3.8%
Northallerton - Town Centre	9.0%	11.1%	26.6%	15.2%	16.3%	8.1%	6.9%	27.8%	14.7%
Northallerton - Out of Town Centre	0.4%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Other	0.8%	1.8%	4.5%	1.8%	8.0%	5.6%	2.5%	3.0%	2.7%
Penrith - Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ripon - Town Centre	0.0%	0.0%	4.9%	1.0%	0.0%	0.6%	0.0%	0.0%	1.0%
Ripon - Out of Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Thirsk - Town Centre	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.3%	0.1%
York	2.6%	2.7%	9.7%	4.3%	1.9%	5.6%	1.5%	3.6%	4.1%
Total Beyond Study Area	***93.8%***	***92.7%***	***97.2%***	***87.9%***	***94.4%***	***86.8%***	***95.8%***	***95.3%***	***93.6%***
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes/Sources

Figures from household telephone survey

Table 7b: Total Clothing & Footwear Expenditure Flows, 2004 (£m)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Total
Clothing & Footwear Expenditure	6.9	8.8	6.5	4.0	1.6	0.8	3.1	1.2	**32.9**
Within Study Area									
Bedale - Town Centre	0.0	0.1	0.1	0.0	0.0	0.0	0.0	0.0	**0.2**
Catterick Garrison - Town Centre	0.0	0.3	0.1	0.1	0.0	0.0	0.0	0.0	**0.6**
Colburn - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Hawes - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Leyburn - Town Centre	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	**0.3**
Leyburn - Out of Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Masham - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Reeth - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Richmond - Town Centre	0.4	0.3	0.0	0.1	0.0	0.0	0.1	0.0	**1.0**
Richmond - Edge/Out of Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Total Within Study Area	***0.4***	***0.6***	***0.2***	***0.5***	***0.1***	***0.1***	***0.1***	***0.1***	***2.1***
Beyond Study Area									
Barnard Castle - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.1**
Bishop Auckland - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Bishop Auckland - Out of Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Darlington - Town Centre	4.2	5.5	1.4	1.9	0.8	0.4	1.9	0.5	**16.7**
Darlington - Out of Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.1**
Durham - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.1**
Gateshead	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Harrogate	0.1	0.0	0.8	0.2	0.0	0.0	0.1	0.1	**1.3**
Hipswell - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Kendal - Town Centre	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	**0.1**
Kendal - Out of Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Leeds	0.1	0.1	0.1	0.1	0.0	0.0	0.0	0.1	**0.6**
London	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Metrocentre - Gateshead	0.2	0.2	0.2	0.0	0.0	0.1	0.0	0.0	**0.7**
Middlesborough/Stockton Town Centre	0.5	0.5	0.6	0.1	0.0	0.0	0.1	0.0	**2.0**
Middlesborough/Stockton Out of Town Centre	0.1	0.2	0.1	0.0	0.0	0.0	0.0	0.0	**0.4**
Newcastle - Town Centre	0.3	0.2	0.0	0.1	0.0	0.0	0.4	0.0	**1.1**
Northallerton - Town Centre	0.6	1.0	1.7	0.6	0.3	0.1	0.2	0.3	**4.8**
Northallerton - Out of Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Other	0.1	0.2	0.3	0.1	0.1	0.0	0.1	0.0	**0.9**
Penrith - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Ripon - Town Centre	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	**0.4**
Ripon - Out of Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Thirsk - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
York	0.2	0.2	0.6	0.2	0.0	0.0	0.0	0.0	**1.4**
Total Beyond Study Area	***6.4***	***8.1***	***6.3***	***3.5***	***1.5***	***0.7***	***2.9***	***1.2***	***30.8***
Total	**6.9**	**8.8**	**6.5**	**4.0**	**1.6**	**0.8**	**3.1**	**1.2**	**32.9**

Notes/Sources

Table 7a (Expenditure Flows) x Clothing & Footwear Expenditure

Table 8a: Total Furniture, Floor Covering & H'hold Textiles Flows, 2004 (%)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Total
Within Study Area									
Bedale - Town Centre	0.0%	0.0%	5.6%	4.0%	2.2%	0.0%	0.0%	1.8%	1.7%
Catterick Garrison - Town Centre	0.6%	0.2%	0.0%	2.0%	0.0%	0.0%	1.7%	0.0%	0.6%
Colburn - Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hawes - Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Leyburn - Town Centre	0.3%	0.8%	0.0%	14.4%	2.2%	4.5%	0.0%	1.8%	2.6%
Leyburn - Out of Town Centre	0.0%	0.0%	0.0%	5.0%	0.0%	0.0%	0.0%	0.0%	0.7%
Masham - Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Reeth - Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	3.7%	0.0%	0.0%	0.1%
Richmond - Town Centre	17.6%	5.8%	0.0%	1.4%	2.2%	18.0%	3.4%	0.4%	6.6%
Richmond - Edge/Out of Town Centre	1.3%	0.8%	0.8%	1.0%	0.0%	0.8%	2.2%	0.0%	1.0%
Total Within Study Area	***19.8%***	***7.5%***	***6.4%***	***27.8%***	***6.7%***	***27.0%***	***7.3%***	***4.0%***	***13.3%***
Beyond Study Area									
Barnard Castle - Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	0.1%
Bishop Auckland - Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Bishop Auckland - Out of Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Darlington - Town Centre	30.3%	34.0%	13.0%	26.6%	37.3%	26.8%	55.9%	44.0%	31.9%
Darlington - Out of Town Centre	24.4%	29.0%	4.8%	8.4%	6.1%	11.2%	9.0%	1.8%	14.7%
Durham - Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Gateshead	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	1.5%	0.0%	0.2%
Harrogate	0.6%	0.0%	3.2%	2.0%	0.0%	0.0%	0.0%	1.8%	1.1%
Hipswell - Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Kendal - Town Centre	0.0%	0.0%	0.0%	0.0%	7.1%	0.0%	0.0%	0.0%	0.4%
Kendal - Out of Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Leeds	0.0%	0.0%	0.8%	1.0%	4.5%	3.7%	0.0%	3.6%	0.9%
London	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Metrocentre - Gateshead	1.0%	2.0%	0.8%	0.4%	0.0%	4.5%	1.4%	0.4%	1.1%
Middlesborough/Stockton Town Centre	2.6%	1.8%	2.0%	1.0%	2.2%	0.0%	3.0%	0.0%	1.8%
Middlesborough/Stockton Out of Town Centre	4.2%	8.9%	9.6%	2.0%	0.0%	0.0%	0.0%	5.8%	4.8%
Newcastle - Town Centre	2.3%	1.1%	1.0%	2.2%	0.0%	0.0%	14.0%	2.2%	3.0%
Northallerton - Town Centre	8.6%	7.8%	36.1%	20.6%	22.3%	14.9%	3.2%	26.0%	16.3%
Northallerton - Out of Town Centre	4.7%	4.5%	8.5%	2.4%	8.9%	7.4%	2.2%	7.3%	5.2%
Other	0.5%	2.3%	4.3%	4.0%	2.6%	0.8%	0.0%	2.6%	2.2%
Penrith - Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Ripon - Town Centre	0.6%	0.0%	1.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.4%
Ripon - Out of Town Centre	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Thirsk - Town Centre	0.0%	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%
York	0.6%	1.1%	6.5%	1.0%	2.2%	3.7%	1.4%	0.4%	2.0%
Total Beyond Study Area	***80.2%***	***92.5%***	***93.6%***	***72.2%***	***93.3%***	***73.0%***	***92.7%***	***96.0%***	***86.7%***
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes/Sources

Figures from household telephone survey

Table 8b:Total Furniture, Floor Covering & H'hold Textiles Expenditure Flows,2004 (£m)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Total
Furniture & Floor Covering Expenditure	4.7	4.8	4.3	3.5	0.9	0.5	2.1	0.8	**21.7**
Within Study Area									
Bedale - Town Centre	0.0	0.0	0.2	0.1	0.0	0.0	0.0	0.0	**0.4**
Catterick Garrison - Town Centre	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	**0.1**
Colburn - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Hawes - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Leyburn - Town Centre	0.0	0.0	0.0	0.5	0.0	0.0	0.0	0.0	**0.6**
Leyburn - Out of Town Centre	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	**0.2**
Masham - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Reeth - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Richmond - Town Centre	0.8	0.3	0.0	0.0	0.0	0.1	0.1	0.0	**1.4**
Richmond - Edge/Out of Town Centre	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.2**
Total Within Study Area	***0.9***	***0.4***	***0.3***	***1.0***	***0.1***	***0.1***	***0.2***	***0.0***	***2.9***
Beyond Study Area									
Barnard Castle - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Bishop Auckland - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Bishop Auckland - Out of Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Darlington - Town Centre	1.4	1.6	0.6	0.9	0.3	0.1	1.2	0.4	**6.6**
Darlington - Out of Town Centre	1.2	1.4	0.2	0.3	0.1	0.1	0.2	0.0	**3.4**
Durham - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Gateshead	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.1**
Harrogate	0.0	0.0	0.1	0.1	0.0	0.0	0.0	0.0	**0.2**
Hipswell - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Kendal - Town Centre	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	**0.1**
Kendal - Out of Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Leeds	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.2**
London	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Metrocentre - Gateshead	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	**0.2**
Middlesborough/Stockton Town Centre	0.1	0.1	0.1	0.0	0.0	0.0	0.1	0.0	**0.4**
Middlesborough/Stockton Out of Town Centre	0.2	0.4	0.4	0.1	0.0	0.0	0.0	0.0	**1.2**
Newcastle - Town Centre	0.1	0.1	0.0	0.1	0.0	0.0	0.3	0.0	**0.6**
Northallerton - Town Centre	0.4	0.4	1.6	0.7	0.2	0.1	0.1	0.2	**3.6**
Northallerton - Out of Town Centre	0.2	0.2	0.4	0.1	0.1	0.0	0.0	0.1	**1.1**
Other	0.0	0.1	0.2	0.1	0.0	0.0	0.0	0.0	**0.5**
Penrith - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Ripon - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.1**
Ripon - Out of Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Thirsk - Town Centre	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	**0.1**
York	0.0	0.1	0.3	0.0	0.0	0.0	0.0	0.0	**0.5**
Total Beyond Study Area	***3.8***	***4.4***	***4.0***	***2.5***	***0.9***	***0.4***	***2.0***	***0.8***	***18.7***
Total	**4.7**	**4.8**	**4.3**	**3.5**	**0.9**	**0.5**	**2.1**	**0.8**	**21.7**

Notes/Sources

Table 8a (Expenditure Flows) x Furniture & Floor Covering Expenditure

Table 9a: Total DIY & Decorating Goods Flows, 2004 (%)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Total
Within Study Area									
Bedale - Town Centre	0.0%	0.8%	8.8%	0.9%	0.3%	0.0%	0.0%	0.0%	**1.8%**
Catterick Garrison - Town Centre	0.1%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	**0.1%**
Colburn - Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**
Hawes - Town Centre	0.0%	0.0%	0.0%	0.0%	9.7%	0.0%	0.0%	0.0%	**0.6%**
Leyburn - Town Centre	0.0%	0.2%	0.0%	24.8%	5.4%	8.9%	0.0%	0.0%	**4.0%**
Leyburn - Out of Town Centre	0.0%	0.0%	0.0%	4.3%	0.0%	0.0%	0.0%	0.0%	**0.6%**
Masham - Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**
Reeth - Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**
Richmond - Town Centre	15.2%	4.4%	0.1%	0.0%	1.8%	10.7%	1.8%	0.8%	**4.8%**
Richmond - Edge/Out of Town Centre	1.2%	0.5%	0.0%	0.0%	0.0%	3.0%	0.0%	0.0%	**0.4%**
Total Within Study Area	***16.5%***	***5.9%***	***9.0%***	***30.8%***	***17.2%***	***22.5%***	***1.8%***	***0.8%***	***12.5%***
Beyond Study Area									
Barnard Castle - Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.7%	0.0%	**0.7%**
Bishop Auckland - Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	**0.1%**
Bishop Auckland - Out of Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	**0.1%**
Darlington - Town Centre	23.1%	21.8%	4.3%	17.7%	33.4%	21.9%	55.5%	36.1%	**24.6%**
Darlington - Out of Town Centre	47.6%	47.5%	4.1%	13.9%	4.2%	38.5%	31.5%	10.5%	**27.5%**
Durham - Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**
Gateshead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**
Harrogate	0.0%	0.0%	0.1%	0.3%	0.0%	0.6%	0.2%	0.4%	**0.2%**
Hipswell - Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**
Kendal - Town Centre	0.0%	0.0%	0.0%	0.9%	3.6%	0.0%	0.0%	0.0%	**0.3%**
Kendal - Out of Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**
Leeds	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**
London	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**
Metrocentre - Gateshead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**
Middlesborough/Stockton Town Centre	0.0%	0.7%	1.4%	0.0%	1.8%	0.0%	0.0%	0.0%	**0.5%**
Middlesborough/Stockton Out of Town Centre	1.1%	2.5%	1.4%	0.9%	0.0%	0.0%	0.4%	2.7%	**1.2%**
Newcastle - Town Centre	0.0%	0.7%	0.0%	0.0%	1.8%	0.0%	0.0%	1.5%	**0.3%**
Northallerton - Town Centre	6.5%	4.9%	53.1%	18.4%	18.0%	7.1%	0.9%	39.1%	**18.5%**
Northallerton - Out of Town Centre	4.7%	15.9%	24.8%	14.6%	16.2%	3.6%	1.1%	9.0%	**12.0%**
Other	0.5%	0.0%	1.6%	2.6%	3.6%	5.9%	0.9%	0.0%	**1.3%**
Penrith - Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	**0.0%**
Ripon - Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**
Ripon - Out of Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**
Thirsk - Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**
York	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**
Total Beyond Study Area	***83.5%***	***94.1%***	***91.0%***	***69.2%***	***82.8%***	***77.5%***	***98.2%***	***99.2%***	***87.5%***
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes/Sources

Figures from household telephone survey

Table 9b: Total DIY & Decorating Goods Expenditure Flows, 2004 (£m)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Total
DIY & Decorating Goods Expenditure	2.4	2.6	2.4	1.7	0.6	0.3	1.1	0.4	**11.6**
Within Study Area									
Bedale - Town Centre	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	**0.2**
Catterick Garrison - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Colburn - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Hawes - Town Centre	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	**0.1**
Leyburn - Town Centre	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	**0.5**
Leyburn - Out of Town Centre	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	**0.1**
Masham - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Reeth - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Richmond - Town Centre	0.4	0.1	0.0	0.0	0.0	0.0	0.0	0.0	**0.6**
Richmond - Edge/Out of Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.1**
Total Within Study Area	***0.4***	***0.2***	***0.2***	***0.5***	***0.1***	***0.1***	***0.0***	***0.0***	***1.5***
Beyond Study Area									
Barnard Castle - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	**0.1**
Bishop Auckland - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Bishop Auckland - Out of Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Darlington - Town Centre	0.6	0.6	0.1	0.3	0.2	0.1	0.6	0.2	**2.6**
Darlington - Out of Town Centre	1.2	1.2	0.1	0.2	0.0	0.1	0.4	0.0	**3.3**
Durham - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Gateshead	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Harrogate	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Hipswell - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Kendal - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Kendal - Out of Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Leeds	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
London	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Metrocentre - Gateshead	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Middlesborough/Stockton Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.1**
Middlesborough/Stockton Out of Town Centre	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	**0.2**
Newcastle - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Northallerton - Town Centre	0.2	0.1	1.3	0.3	0.1	0.0	0.0	0.2	**2.2**
Northallerton - Out of Town Centre	0.1	0.4	0.6	0.3	0.1	0.0	0.0	0.0	**1.5**
Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.1**
Penrith - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Ripon - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Ripon - Out of Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Thirsk - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
York	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Total Beyond Study Area	***2.0***	***2.4***	***2.1***	***1.2***	***0.5***	***0.2***	***1.1***	***0.4***	***10.1***
Total	**2.4**	**2.6**	**2.4**	**1.7**	**0.6**	**0.3**	**1.1**	**0.4**	**11.6**

Notes/Sources

Table 13a (Expenditure Flows) x DIY Expenditure

Table 10a: Total Electrical Goods (Domestic Appliances) Flows, 2004 (%)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Total
Within Study Area									
Bedale - Town Centre	0.0%	0.7%	19.8%	2.8%	0.0%	0.0%	0.0%	3.3%	**4.2%**
Catterick Garrison - Town Centre	0.2%	0.7%	0.7%	2.6%	0.0%	0.0%	0.0%	0.0%	**0.6%**
Colburn - Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**
Hawes - Town Centre	0.0%	0.0%	0.0%	0.9%	47.2%	3.4%	0.0%	0.0%	**3.5%**
Leyburn - Town Centre	0.0%	0.0%	0.0%	27.1%	5.4%	6.8%	0.2%	0.0%	**4.5%**
Leyburn - Out of Town Centre	0.0%	0.0%	0.0%	3.4%	0.0%	0.0%	0.0%	0.0%	**0.5%**
Masham - Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**
Reeth - Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**
Richmond - Town Centre	13.5%	3.8%	0.0%	1.7%	1.8%	6.8%	3.2%	0.3%	**4.5%**
Richmond - Edge/Out of Town Centre	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.1%**
Total Within Study Area	***14.4%***	***5.3%***	***20.5%***	***38.5%***	***54.4%***	***16.9%***	***3.4%***	***3.6%***	***18.0%***
Beyond Study Area									
Barnard Castle - Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.8%	0.0%	**0.6%**
Bishop Auckland - Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	**0.1%**
Bishop Auckland - Out of Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**
Darlington - Town Centre	29.0%	24.5%	8.0%	21.7%	16.7%	16.9%	51.3%	34.5%	**25.5%**
Darlington - Out of Town Centre	42.1%	39.9%	5.2%	14.6%	5.4%	48.3%	25.2%	8.5%	**24.5%**
Durham - Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**
Gateshead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**
Harrogate	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**
Hipswell - Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**
Kendal - Town Centre	0.6%	0.0%	0.0%	0.0%	3.6%	0.0%	0.0%	0.0%	**0.4%**
Kendal - Out of Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**
Leeds	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**
London	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**
Metrocentre - Gateshead	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.1%**
Middlesborough/Stockton Town Centre	1.5%	0.0%	2.3%	0.9%	1.8%	0.0%	1.6%	0.3%	**1.2%**
Middlesborough/Stockton Out of Town Centre	4.1%	16.7%	10.5%	4.5%	0.0%	3.4%	9.1%	11.4%	**8.2%**
Newcastle - Town Centre	1.1%	0.7%	0.1%	0.0%	1.8%	0.0%	1.0%	0.0%	**0.6%**
Northallerton - Town Centre	5.9%	6.9%	31.9%	13.5%	7.4%	7.7%	2.0%	34.9%	**13.6%**
Northallerton - Out of Town Centre	0.7%	3.8%	5.2%	1.7%	1.8%	0.0%	0.2%	4.9%	**2.5%**
Other	0.2%	2.2%	5.5%	2.6%	7.2%	3.4%	0.4%	2.0%	**2.6%**
Penrith - Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**
Ripon - Town Centre	0.0%	0.0%	7.8%	1.1%	0.0%	0.0%	0.0%	0.0%	**1.5%**
Ripon - Out of Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**
Thirsk - Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**
York	0.0%	0.0%	2.8%	0.9%	0.0%	3.4%	0.0%	0.0%	**0.7%**
Total Beyond Study Area	***85.6%***	***94.7%***	***79.5%***	***61.5%***	***45.6%***	***83.1%***	***96.6%***	***96.4%***	***82.0%***
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes/Sources

Figures from household telephone survey

Table 10b: Total Electrical Goods (Domestic Appliances) Flows, 2004 (£m)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Total
Electrical (Domestic Appliances) Expenditure	3.7	4.3	3.9	2.2	0.6	0.3	1.6	0.7	**17.1**
Within Study Area									
Bedale - Town Centre	0.0	0.0	0.8	0.1	0.0	0.0	0.0	0.0	**0.9**
Catterick Garrison - Town Centre	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	**0.1**
Colburn - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Hawes - Town Centre	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	**0.3**
Leyburn - Town Centre	0.0	0.0	0.0	0.6	0.0	0.0	0.0	0.0	**0.6**
Leyburn - Out of Town Centre	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	**0.1**
Masham - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Reeth - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Richmond - Town Centre	0.5	0.2	0.0	0.0	0.0	0.0	0.1	0.0	**0.8**
Richmond - Edge/Out of Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Total Within Study Area	***0.5***	***0.2***	***0.8***	***0.8***	***0.3***	***0.1***	***0.1***	***0.0***	***2.8***
Beyond Study Area									
Barnard Castle - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	**0.1**
Bishop Auckland - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Bishop Auckland - Out of Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Darlington - Town Centre	1.1	1.0	0.3	0.5	0.1	0.1	0.8	0.2	**4.1**
Darlington - Out of Town Centre	1.5	1.7	0.2	0.3	0.0	0.2	0.4	0.1	**4.4**
Durham - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Gateshead	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Harrogate	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Hipswell - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Kendal - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Kendal - Out of Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Leeds	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
London	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Metrocentre - Gateshead	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Middlesborough/Stockton Town Centre	0.1	0.0	0.1	0.0	0.0	0.0	0.0	0.0	**0.2**
Middlesborough/Stockton Out of Town Centre	0.1	0.7	0.4	0.1	0.0	0.0	0.1	0.1	**1.6**
Newcastle - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.1**
Northallerton - Town Centre	0.2	0.3	1.2	0.3	0.0	0.0	0.0	0.2	**2.4**
Northallerton - Out of Town Centre	0.0	0.2	0.2	0.0	0.0	0.0	0.0	0.0	**0.5**
Other	0.0	0.1	0.2	0.1	0.0	0.0	0.0	0.0	**0.4**
Penrith - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Ripon - Town Centre	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	**0.3**
Ripon - Out of Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Thirsk - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
York	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	**0.1**
Total Beyond Study Area	***3.1***	***4.0***	***3.1***	***1.3***	***0.3***	***0.3***	***1.5***	***0.6***	***14.3***
Total	**3.7**	**4.3**	**3.9**	**2.2**	**0.6**	**0.3**	**1.6**	**0.7**	**17.1**

Notes/Sources

Table 10a (Expenditure Flows) x Electrical Goods Expenditure

Table 11a: Total Personal & Luxury Goods Flows, 2004 (%)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Total
Within Study Area									
Bedale - Town Centre	0.0%	2.3%	4.6%	1.0%	0.0%	0.0%	0.0%	1.4%	**1.4%**
Catterick Garrison - Town Centre	0.6%	4.1%	0.0%	1.0%	0.0%	0.0%	0.0%	0.4%	**1.0%**
Colburn - Town Centre	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.1%**
Hawes - Town Centre	0.0%	0.0%	0.0%	0.0%	9.1%	0.0%	0.0%	0.0%	**0.5%**
Leyburn - Town Centre	0.3%	0.2%	0.1%	24.3%	4.6%	9.6%	0.0%	0.0%	**3.9%**
Leyburn - Out of Town Centre	0.0%	0.0%	0.0%	0.0%	2.3%	0.0%	0.0%	0.0%	**0.1%**
Masham - Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**
Reeth - Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	6.4%	0.0%	0.0%	**0.3%**
Richmond - Town Centre	28.6%	6.4%	0.7%	3.6%	2.3%	7.6%	6.1%	2.8%	**9.3%**
Richmond - Edge/Out of Town Centre	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**
Total Within Study Area	***29.5%***	***13.9%***	***5.5%***	***29.8%***	***18.3%***	***23.6%***	***6.1%***	***4.5%***	***16.7%***
Beyond Study Area									
Barnard Castle - Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.9%	0.0%	**0.8%**
Bishop Auckland - Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**
Bishop Auckland - Out of Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**
Darlington - Town Centre	51.7%	56.8%	17.0%	34.6%	32.3%	45.9%	65.1%	34.0%	**43.1%**
Darlington - Out of Town Centre	0.0%	0.8%	0.9%	0.0%	0.0%	0.0%	2.0%	0.0%	**0.5%**
Durham - Town Centre	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.1%**
Gateshead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**
Harrogate	1.3%	0.9%	5.8%	4.3%	0.3%	0.6%	1.3%	1.7%	**2.4%**
Hipswell - Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**
Kendal - Town Centre	0.0%	0.0%	0.0%	0.0%	11.4%	0.0%	1.0%	0.0%	**0.8%**
Kendal - Out of Town Centre	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.1%**
Leeds	0.0%	0.0%	0.7%	1.9%	4.6%	3.2%	0.0%	2.8%	**1.0%**
London	0.2%	0.5%	1.5%	1.0%	0.0%	0.0%	4.7%	0.4%	**1.1%**
Metrocentre - Gateshead	1.9%	1.7%	1.5%	1.9%	0.0%	9.6%	0.0%	1.7%	**1.7%**
Middlesborough/Stockton Town Centre	1.8%	0.9%	0.7%	0.0%	2.6%	0.0%	2.3%	1.4%	**1.2%**
Middlesborough/Stockton Out of Town Centre	1.2%	6.2%	0.7%	1.0%	0.3%	0.0%	2.3%	0.7%	**1.9%**
Newcastle - Town Centre	2.3%	2.6%	0.7%	0.0%	2.3%	0.0%	4.9%	1.4%	**1.9%**
Northallerton - Town Centre	6.2%	10.0%	49.8%	19.5%	18.3%	6.4%	3.1%	46.5%	**20.0%**
Northallerton - Out of Town Centre	1.0%	1.5%	1.8%	1.1%	0.6%	0.0%	0.0%	1.4%	**1.1%**
Other	1.7%	0.8%	2.2%	1.9%	6.9%	3.2%	0.0%	1.4%	**1.8%**
Penrith - Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**
Ripon - Town Centre	0.0%	0.0%	3.9%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.7%**
Ripon - Out of Town Centre	0.0%	0.0%	0.4%	0.2%	0.0%	0.0%	0.0%	0.0%	**0.1%**
Thirsk - Town Centre	0.2%	0.4%	1.2%	0.8%	0.0%	1.3%	1.2%	0.7%	**0.7%**
York	1.1%	1.5%	5.8%	1.9%	2.3%	6.4%	0.0%	1.4%	**2.3%**
Total Beyond Study Area	***70.5%***	***86.1%***	***94.5%***	***70.2%***	***81.7%***	***76.4%***	***93.9%***	***95.5%***	***83.3%***
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes/Sources

Figures from household telephone survey

Table 11b: Total Personal & Luxury Goods Flows, 2004 (£m)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Total
Personal & Luxury Goods Expenditure	13.2	21.1	13.7	8.4	2.8	1.6	6.0	2.7	**69.4**
Within Study Area									
Bedale - Town Centre	0.0	0.5	0.6	0.1	0.0	0.0	0.0	0.0	**1.2**
Catterick Garrison - Town Centre	0.1	0.9	0.0	0.1	0.0	0.0	0.0	0.0	**1.0**
Colburn - Town Centre	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	**0.2**
Hawes - Town Centre	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	**0.3**
Leyburn - Town Centre	0.0	0.0	0.0	2.0	0.1	0.2	0.0	0.0	**2.4**
Leyburn - Out of Town Centre	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	**0.1**
Masham - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Reeth - Town Centre	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	**0.1**
Richmond - Town Centre	3.8	1.4	0.1	0.3	0.1	0.1	0.4	0.1	**6.1**
Richmond - Edge/Out of Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Total Within Study Area	***3.9***	***2.9***	***0.7***	***2.5***	***0.5***	***0.4***	***0.4***	***0.1***	***11.5***
Beyond Study Area									
Barnard Castle - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0	**0.4**
Bishop Auckland - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Bishop Auckland - Out of Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Darlington - Town Centre	6.8	12.0	2.3	2.9	0.9	0.7	3.9	0.9	**30.5**
Darlington - Out of Town Centre	0.0	0.2	0.1	0.0	0.0	0.0	0.1	0.0	**0.4**
Durham - Town Centre	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	**0.2**
Gateshead	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Harrogate	0.2	0.2	0.8	0.4	0.0	0.0	0.1	0.0	**1.7**
Hipswell - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Kendal - Town Centre	0.0	0.0	0.0	0.0	0.3	0.0	0.1	0.0	**0.4**
Kendal - Out of Town Centre	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	**0.2**
Leeds	0.0	0.0	0.1	0.2	0.1	0.1	0.0	0.1	**0.5**
London	0.0	0.1	0.2	0.1	0.0	0.0	0.3	0.0	**0.7**
Metrocentre - Gateshead	0.2	0.4	0.2	0.2	0.0	0.2	0.0	0.0	**1.2**
Middlesborough/Stockton Town Centre	0.2	0.2	0.1	0.0	0.1	0.0	0.1	0.0	**0.8**
Middlesborough/Stockton Out of Town Centre	0.2	1.3	0.1	0.1	0.0	0.0	0.1	0.0	**1.8**
Newcastle - Town Centre	0.3	0.6	0.1	0.0	0.1	0.0	0.3	0.0	**1.4**
Northallerton - Town Centre	0.8	2.1	6.8	1.6	0.5	0.1	0.2	1.3	**13.4**
Northallerton - Out of Town Centre	0.1	0.3	0.2	0.1	0.0	0.0	0.0	0.0	**0.8**
Other	0.2	0.2	0.3	0.2	0.2	0.1	0.0	0.0	**1.1**
Penrith - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Ripon - Town Centre	0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.0	**0.5**
Ripon - Out of Town Centre	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	**0.1**
Thirsk - Town Centre	0.0	0.1	0.2	0.1	0.0	0.0	0.1	0.0	**0.4**
York	0.2	0.3	0.8	0.2	0.1	0.1	0.0	0.0	**1.6**
Total Beyond Study Area	***9.3***	***18.1***	***12.9***	***5.9***	***2.3***	***1.2***	***5.6***	***2.6***	***58.0***
Total	**13.2**	**21.1**	**13.7**	**8.4**	**2.8**	**1.6**	**6.0**	**2.7**	**69.4**

Notes/Sources

Table 11a (Expenditure Flows) x Personal/Luxury Goods Expenditure

Table 12a: Total Comparison Goods Expenditure Flows, 2004 (£m)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Total
Total Comparison Expenditure	30.9	41.4	30.6	19.8	6.6	3.6	13.8	5.9	**152.7**
Within Study Area									
Bedale - Town Centre	0.0	0.6	1.9	0.3	0.0	0.0	0.0	0.1	**3.0**
Catterick Garrison - Town Centre	0.2	1.2	0.1	0.3	0.0	0.0	0.0	0.0	**1.9**
Colburn - Town Centre	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	**0.2**
Hawes - Town Centre	0.0	0.0	0.0	0.0	0.6	0.0	0.0	0.0	**0.7**
Leyburn - Town Centre	0.1	0.1	0.0	3.8	0.2	0.3	0.0	0.0	**4.5**
Leyburn - Out of Town Centre	0.0	0.0	0.0	0.4	0.1	0.0	0.0	0.0	**0.4**
Masham - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Reeth - Town Centre	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	**0.1**
Richmond - Town Centre	5.8	2.2	0.1	0.5	0.1	0.3	0.6	0.1	**9.8**
Richmond - Edge/Out of Town Centre	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	**0.3**
Total Within Study Area	***6.2***	***4.3***	***2.2***	***5.3***	***1.1***	***0.8***	***0.7***	***0.2***	***20.8***
Beyond Study Area									
Barnard Castle - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.6	0.0	**0.6**
Bishop Auckland - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Bishop Auckland - Out of Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Darlington - Town Centre	14.1	20.7	4.7	6.5	2.4	1.4	8.4	2.2	**60.4**
Darlington - Out of Town Centre	3.9	4.5	0.7	0.9	0.1	0.3	1.1	0.1	**11.5**
Durham - Town Centre	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	**0.3**
Gateshead	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.1**
Harrogate	0.3	0.2	1.7	0.6	0.0	0.0	0.1	0.1	**3.2**
Hipswell - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Kendal - Town Centre	0.0	0.0	0.0	0.0	0.6	0.0	0.1	0.0	**0.7**
Kendal - Out of Town Centre	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	**0.2**
Leeds	0.1	0.1	0.3	0.3	0.2	0.1	0.0	0.2	**1.2**
London	0.0	0.1	0.2	0.1	0.0	0.0	0.3	0.0	**0.7**
Metrocentre - Gateshead	0.5	0.7	0.4	0.2	0.0	0.2	0.0	0.1	**2.2**
Middlesborough/Stockton Town Centre	0.9	0.8	1.0	0.2	0.1	0.0	0.4	0.1	**3.5**
Middlesborough/Stockton Out of Town Centre	0.6	2.7	1.0	0.3	0.0	0.0	0.3	0.2	**5.1**
Newcastle - Town Centre	0.7	0.9	0.2	0.2	0.1	0.0	1.0	0.1	**3.2**
Northallerton - Town Centre	2.2	3.9	12.6	3.6	1.1	0.3	0.5	2.2	**26.4**
Northallerton - Out of Town Centre	0.5	1.1	1.4	0.5	0.2	0.0	0.1	0.2	**4.0**
Other	0.3	0.5	1.0	0.5	0.4	0.1	0.1	0.1	**3.1**
Penrith - Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**
Ripon - Town Centre	0.0	0.0	1.2	0.1	0.0	0.0	0.0	0.0	**1.3**
Ripon - Out of Town Centre	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	**0.1**
Thirsk - Town Centre	0.0	0.1	0.3	0.1	0.0	0.0	0.1	0.0	**0.6**
York	0.4	0.6	1.8	0.4	0.1	0.2	0.1	0.1	**3.6**
Total Beyond Study Area	***24.7***	***37.1***	***28.5***	***14.5***	***5.5***	***2.9***	***13.1***	***5.6***	***131.8***
Total	**30.9**	**41.4**	**30.7**	**19.8**	**6.6**	**3.6**	**13.8**	**5.9**	**152.7**

Notes/Sources
Table 7b + Table 8b + Table 9b + Table 10b + Table 11b

Table 12b: Total Comparison Goods Expenditure Flows, 2004 (%)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Total
Within Study Area									
Bedale - Town Centre	0.0%	1.4%	6.2%	1.5%	0.3%	0.6%	0.0%	1.8%	**1.9%**
Catterick Garrison - Town Centre	0.5%	2.9%	0.4%	1.5%	0.4%	0.7%	0.3%	0.5%	**1.3%**
Colburn - Town Centre	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.1%**
Hawes - Town Centre	0.0%	0.0%	0.0%	0.1%	9.5%	0.3%	0.0%	0.0%	**0.4%**
Leyburn - Town Centre	0.2%	0.2%	0.1%	19.4%	3.3%	7.0%	0.0%	0.3%	**2.9%**
Leyburn - Out of Town Centre	0.0%	0.0%	0.0%	1.8%	1.0%	0.0%	0.0%	0.0%	**0.3%**
Masham - Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**
Reeth - Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	3.3%	0.0%	0.0%	**0.1%**
Richmond - Town Centre	18.9%	5.3%	0.3%	2.5%	2.1%	8.5%	4.6%	1.5%	**6.4%**
Richmond - Edge/Out of Town Centre	0.4%	0.2%	0.1%	0.2%	0.0%	0.4%	0.3%	0.0%	**0.2%**
Total Within Study Area	***20.0%***	***10.4%***	***7.2%***	***26.9%***	***16.7%***	***20.9%***	***5.2%***	***4.1%***	***13.6%***
Beyond Study Area									
Barnard Castle - Town Centre	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	4.0%	0.0%	**0.4%**
Bishop Auckland - Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	**0.0%**
Bishop Auckland - Out of Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	**0.0%**
Darlington - Town Centre	45.6%	50.0%	15.4%	33.0%	36.4%	38.2%	60.5%	36.7%	**39.5%**
Darlington - Out of Town Centre	12.5%	10.8%	2.2%	4.5%	1.8%	9.7%	7.8%	2.1%	**7.6%**
Durham - Town Centre	0.1%	0.4%	0.0%	0.2%	0.0%	0.0%	0.2%	0.0%	**0.2%**
Gateshead	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.2%	0.0%	**0.0%**
Harrogate	1.1%	0.5%	5.5%	3.3%	0.3%	0.9%	1.1%	2.2%	**2.1%**
Hipswell - Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**
Kendal - Town Centre	0.1%	0.0%	0.0%	0.1%	8.5%	0.6%	0.4%	0.0%	**0.4%**
Kendal - Out of Town Centre	0.0%	0.4%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	**0.1%**
Leeds	0.3%	0.2%	0.9%	1.7%	2.7%	3.1%	0.1%	2.7%	**0.8%**
London	0.1%	0.3%	0.6%	0.4%	0.0%	0.0%	2.0%	0.2%	**0.5%**
Metrocentre - Centre	1.6%	1.7%	1.3%	1.0%	0.4%	6.7%	0.3%	1.6%	**1.4%**
Middlesborough / Stockton - Town Centre	2.9%	1.9%	3.1%	0.9%	2.2%	0.6%	2.7%	1.5%	**2.3%**
Middlesborough / Stockton - Out of Town Centre	2.0%	6.6%	3.4%	1.3%	0.1%	0.3%	2.1%	3.2%	**3.4%**
Newcastle - Town Centre	2.4%	2.1%	0.6%	1.1%	1.8%	0.1%	7.2%	1.4%	**2.1%**
Northallerton - Town Centre	7.2%	9.3%	41.0%	18.1%	17.4%	8.2%	3.7%	37.8%	**17.3%**
Northallerton - Out of Town Centre	1.7%	2.6%	4.6%	2.3%	3.2%	1.4%	0.5%	2.9%	**2.6%**
Other	1.0%	1.3%	3.3%	2.4%	6.3%	3.7%	0.7%	1.9%	**2.0%**
Penrith - Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**
Ripon - Town Centre	0.1%	0.0%	3.9%	0.4%	0.0%	0.1%	0.0%	0.0%	**0.9%**
Ripon - Out of Town Centre	0.0%	0.0%	0.2%	0.1%	0.0%	0.0%	0.0%	0.0%	**0.1%**
Thirsk - Town Centre	0.1%	0.2%	0.9%	0.4%	0.0%	0.6%	0.5%	0.4%	**0.4%**
York	1.1%	1.5%	5.9%	2.0%	1.7%	5.0%	0.6%	1.5%	**2.4%**
Total Beyond Study Area	***80.0%***	***89.6%***	***92.8%***	***73.1%***	***83.3%***	***79.1%***	***94.8%***	***95.9%***	***86.4%***
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes/Sources

Table 16b

Table 13: Comparison Trading Analysis 2004

	Actual Turnover from Survey Data *(Table 12a)* £M	Allowance for Tourist Spending £M	Total Turnover £M	Benchmark Turnover *(Table 6)* £M
Richmond Town Centre	9.79	2.50	12.29	11.59
Richmond - Edge/Out of Town Centre	0.34	0.00	0.34	1.21
Bedale Town Centre	2.96	0.52	3.48	3.66
Catterick Garrison Town Centre	1.92	0.00	1.92	9.50
Colburn	0.16	0.00	0.16	0.14
Hawes Town Centre	0.66	0.12	0.77	1.33
Leyburn Town Centre	4.48	0.79	5.27	4.70
Leyburn Out of Town Centre	0.42	0.00	0.42	1.78
Other within Study Area	0.12	0.00	0.12	-
Total Within Study Area	***20.84***		***24.77***	***33.92***
Barnard Castle	0.58			-
Bishops Auckland	0.03			-
Bishops Auckland Out-of-Centre	0.01			-
Darlington	60.37			-
Darlington Out-of-Centre	11.55			-
Northallerton	26.39			-
Northallerton Out-of-Centre	3.97			-
Ripon	1.30			-
Ripon Out-of-Centre	0.08			-
Thirsk	0.55			-
Other	27.02			-
Total Beyond Study Area	***131.85***			**-**
Total	**152.69**			

Table 14: Comparison Capacity Assessment

	2004	2010	2015
Total Comparison Expenditure generated within the study area	£152.7	£193.9	£232.4
Retention within the study area (%)	13.6%	13.6%	13.6%
Turnover of existing stores (retained expenditure)	£20.8	£26.5	£31.7
Tourist spending	£3.9	£5.0	£6.0
Total turnover of existing stores	£24.8	£31.4	£37.7
Benchmark turnover of stores	£33.9	£37.1	£40.0
Residual	**-£9.2**	**-£5.6**	**-£2.2**
Less turnover of Tesco extension (comparison flrsp)	-	£1.9	£2.0
Surplus Expenditure	-	**-£7.5**	**-£4.3**
Adjustment for Improved Retention of expenditure			
(1) Better provision in Catterick Garrison to achieve 20% retention of Zone 2 expenditure within study area			
% clawback of leakage	2.5%	2.5%	2.5%
£m clawback	£3.9	£4.9	£5.9
(2) Additional clawback of leakage to take overall retention to 25% within study area			
% clawback of leakage	8.8%	8.8%	8.8%
£m clawback	£13.5	£17.1	£20.5
Overall Capacity (£m)	**£8.2**	**£14.5**	**£22.1**
Floorspace Equivalent			
Benchmark sales density (£psm)	£3,500	£3,827	£4,123
Comparison Sales Floorspace (sqm net)	**2,337**	**3,785**	**5,363**
Comparison Floorspace (sqm gross)*	**3,338**	**5,406**	**7,662**

Sources/Notes

[1] Allowing for efficiency growth of existing retailers @1.5% pa   1.015

[2] Assuming a gross to net ratio of 70%

Table 15a: Proposed Scheme Details

	A1 Floorspace Area Gross sqm	Net sqm	Benchmark Sales Density 2010 £ psm	Estimated Turnover £M
Catterick Garrison Scheme	6,304	4,413	£3,827	£16.9

Table 15b: Comparison Goods Trade Draw of Proposed Catterick Garrison Scheme

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Total
Comparison Expenditure, 2010 (£m)	£37.2	£57.0	£37.3	£24.9	£8.1	£4.3	£17.6	£7.5	£193.9
Trade draw of proposal (%)	20%	35%	10%	15%	5%	5%	5%	5%	100%
Trade draw of proposal, 2010 (£m)	**£3.4**	**£5.9**	**£1.7**	**£2.5**	**£0.8**	**£0.8**	**£0.8**	**£0.8**	**£16.9**

Table 16a: Impact Assessment for Catterick Garrison Proposal - Estimated Comparison Goods Trade Draw of Centres (First Model Table)

		Catchment Area Zones							
ZONES		**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**
ZONE POPULATION, 2010		**12,103**	**25,411**	**13,112**	**8,071**	**2,972**	**1,346**	**5,307**	**2,565**
COMPARISON SPENDING PER CAPITA, 2010		**£3,070**	**£2,583**	**£2,847**	**£3,081**	**£2,741**	**£3,183**	**£3,319**	**£2,907**
ZONE SPENDIN, 2010 (£M)		**£37.16**	**£57.00**	**£37.33**	**£24.87**	**£8.15**	**£4.28**	**£17.61**	**£7.46**
TOWNS/CENTRES	**COMPARISON GOODS TOTAL TURNOVER**								
Within Study Area									
Richmond Town Centre	12.22	7.02	3.00	0.12	0.62	0.17	0.37	0.81	0.11
Richmond Edge/Out of Town Centre	0.43	0.15	0.12	0.04	0.04	0.00	0.02	0.06	0.00
Bedale Town Centre	3.71	0.00	0.82	2.33	0.37	0.03	0.02	0.00	0.14
Catterick Garrison Town Centre	2.54	0.19	1.66	0.17	0.37	0.04	0.03	0.05	0.04
Colburn	0.22	0.00	0.22	0.00	0.00	0.00	0.00	0.00	0.00
Hawes Town Centre	0.82	0.00	0.00	0.00	0.02	0.78	0.01	0.00	0.00
Leyburn Town Centre	5.61	0.07	0.11	0.02	4.82	0.27	0.30	0.00	0.02
Leyburn Out of Town Centre	0.53	0.00	0.00	0.00	0.45	0.08	0.00	0.00	0.00
Other within Study Area	0.14	0.00	0.00	0.00	0.00	0.00	0.14	0.00	0.00
Beyond Study Area									
Barnard Castle	0.74	0.04	0.00	0.00	0.00	0.00	0.00	0.70	0.00
Bishops Auckland	0.03	0.00	0.00	0.00	0.00	0.00	0.00	0.03	0.00
Bishops Auckland Out-of-Centre	0.01	0.00	0.00	0.00	0.00	0.00	0.00	0.01	0.00
Darlington	77.39	16.94	28.50	5.74	8.22	2.97	1.64	10.66	2.74
Darlington Out-of-Centre	14.80	4.65	6.15	0.81	1.11	0.14	0.41	1.37	0.15
Northallerton	33.01	2.67	5.32	15.30	4.49	1.41	0.35	0.65	2.82
Northallerton Out-of-Centre	5.03	0.63	1.50	1.71	0.58	0.26	0.06	0.08	0.22
Ripon	1.58	0.03	0.00	1.45	0.10	0.00	0.01	0.00	0.00
Ripon Out-of-Centre	0.10	0.00	0.00	0.06	0.03	0.00	0.00	0.00	0.00
Thirsk	0.69	0.03	0.10	0.33	0.09	0.00	0.02	0.09	0.03
Other	34.24	4.75	9.50	9.24	3.55	2.00	0.90	3.10	1.20
TOTAL SPENDING	193.86	37.16	57.00	37.33	24.87	8.15	4.28	17.61	7.46
SPENDING DIVERSION TO PROPOSED SCHEME BY ZONE		**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**
Catterick Garrison Scheme	16.89	3.38	5.91	1.69	2.53	0.84	0.84	0.84	0.84

Table 17: Impact Assessment, 2010: Catterick Garrison Proposal

	Total Comparison Turnover (inc tourist spending) £m	Trade Diversion to Catterick Garrison Scheme £m	Impact %
Within Study Area			
Richmond Town Centre	15.32	0.78	5.1%
Richmond Edge/Out of Town Centre	0.43	0.01	2.0%
Bedale Town Centre	4.37	0.09	2.0%
Catterick Garrison Town Centre	2.54	0.17	6.6%
Colburn	0.22	0.00	2.2%
Hawes Town Centre	0.96	0.02	2.1%
Leyburn Town Centre	6.60	0.23	3.4%
Leyburn Out-of-Town	0.53	0.01	2.6%
Other within Study Area	0.14	0.00	0.0%
Beyond Study Area			
Barnard Castle	0.00	0.02	-
Bishops Auckland	0.00	0.00	-
Bishops Auckland Out-of-Centre	0.00	0.00	-
Darlington	216.45	7.91	3.7%
Darlington Out-of-Centre	83.65	1.55	1.9%
Northallerton	53.31	2.33	4.4%
Northallerton Out-of-Centre	0.00	0.38	-
Ripon	0.00	0.08	-
Ripon Out-of-Centre	0.00	0.01	-
Thirsk	0.00	0.03	-
Other	0.00	3.26	-
Total		16.89	n/a

Notes/Sources
Tables 15a/b and 16b

Tables 18a: Proposed Scheme Details

	Floorspace Area sqm gross	Floorspace Area sqm net	Comparison Floorspace sqm net	Benchmark Sales Density £ psm	Estimated Turnover £M
Catterick Garrison Proposal	6,304	4,413	4,413	£3,827	£16.9
Tesco (Extension only)	1,947	1,092	365	£5,159	£1.9
Total					**£18.8**

Table 18b: Cumulative Comparison Goods Trade Diversion: Catterick Garrison Proposed Scheme and Tesco Extension

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Total
Comparison Expenditure (£m)	£37.2	£57.0	£37.3	£24.9	£8.1	£4.3	£17.6	£7.5	£193.9
Trade Draw of Catterick Garrison Proposal									
%	20%	35%	10%	15%	5%	5%	5%	5%	100%
£m	£3.4	£5.9	£1.7	£2.5	£0.8	£0.8	£0.8	£0.8	£16.9
Trade Draw of Tesco Extension (comparison floorspace only)									
%	17%	40%	10%	15%	5%	5%	5%	3%	100%
£m	£0.3	£0.8	£0.2	£0.3	£0.1	£0.1	£0.1	£0.1	£1.9
Total Trade Draw (£m)	**£3.7**	**£6.7**	**£1.9**	**£2.8**	**£0.9**	**£0.9**	**£0.9**	**£0.9**	**£18.8**

Notes/Sources

Trade Draws estimated using the trade draw of the existing Tesco store as a guide for the extension.

Table 19a: Cumulative Impact Model for Catterick Garrison and Tesco (Comparison Goods Flrsp) - Estimated Trade Draw of Centres (First Model Table)

		Catchment Area Zones							
ZONES		**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**
ZONE POPULATION, 2010		**12,103**	**25,411**	**13,112**	**8,071**	**2,972**	**1,346**	**5,307**	**2,565**
COMPARISON SPENDING PER CAPITA, 2010		**£3,070**	**£2,583**	**£2,847**	**£3,081**	**£2,741**	**£3,183**	**£3,319**	**£2,907**
ZONE SPENDING, 2010 (£M)		**£37.16**	**£57.00**	**£37.33**	**£24.87**	**£8.15**	**£4.28**	**£17.61**	**£7.46**
TOWNS/CENTRES	**COMPARISON GOODS TURNOVER**								
<u>Within Study Area</u>									
Richmond Town Centre	12.22	7.02	3.00	0.12	0.62	0.17	0.37	0.81	0.11
Richmond Edge/Out of Town Centre	0.43	0.15	0.12	0.04	0.04	0.00	0.02	0.06	0.00
Bedale Town Centre	3.71	0.00	0.82	2.33	0.37	0.03	0.02	0.00	0.14
Catterick Garrison Town Centre	2.54	0.19	1.66	0.17	0.37	0.04	0.03	0.05	0.04
Colburn	0.22	0.00	0.22	0.00	0.00	0.00	0.00	0.00	0.00
Hawes Town Centre	0.82	0.00	0.00	0.00	0.02	0.78	0.01	0.00	0.00
Leyburn Town Centre	5.61	0.1	0.1	0.0	4.8	0.3	0.3	0.0	0.0
Leyburn Out of Town Centre	0.53	0.00	0.00	0.00	0.45	0.08	0.00	0.00	0.00
Other within Study Area	0.14	0.00	0.00	0.00	0.00	0.00	0.14	0.00	0.00
<u>Beyond Study Area</u>									
Barnard Castle	0.74	0.04	0.00	0.00	0.00	0.00	0.00	0.70	0.00
Bishops Auckland	0.03	0.00	0.00	0.00	0.00	0.00	0.00	0.03	0.00
Bishops Auckland Out-of-Centre	0.01	0.00	0.00	0.00	0.00	0.00	0.00	0.01	0.00
Darlington	77.39	16.94	28.50	5.74	8.22	2.97	1.64	10.66	2.74
Darlington Out-of-Centre	14.80	4.65	6.15	0.81	1.11	0.14	0.41	1.37	0.15
Northallerton	33.01	2.67	5.32	15.30	4.49	1.41	0.35	0.65	2.82
Northallerton Out-of-Centre	5.03	0.63	1.50	1.71	0.58	0.26	0.06	0.08	0.22
Ripon	1.58	0.03	0.00	1.45	0.10	0.00	0.01	0.00	0.00
Ripon Out-of-Centre	0.10	0.00	0.00	0.06	0.03	0.00	0.00	0.00	0.00
Thirsk	0.69	0.03	0.10	0.33	0.09	0.00	0.02	0.09	0.03
Other	34.24	4.75	9.50	9.24	3.55	2.00	0.90	3.10	1.20
TOTAL SPENDING	193.86	37.16	57.00	37.33	24.87	8.15	4.28	17.61	7.46
DIVERSION BY ZONE		**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**
Cumulative Diversion (Total)	18.77	3.70	6.66	1.88	2.82	0.94	0.94	0.94	0.90

Table 20: Cumulative Impact Assessment, 2010 - Catterick Garrison Proposal and Tesco Extension (comparison element)

	Total Comparison Turnover (inc. tourist spending) 2010	Cumulative Trade Diversion (Catterick Garrison & Tesco extension)	Impact
	£m	£m	%
Within Study Area			
Richmond Town Centre	15.32	0.86	5.6%
Richmond Edge/Out of Town Centre	0.43	0.01	2.2%
Bedale Town Centre	4.37	0.10	2.2%
Catterick Garrison Town Centre	2.54	0.19	7.4%
Colburn	0.22	0.01	2.5%
Hawes Town Centre	0.96	0.02	2.4%
Leyburn Town Centre	6.60	0.25	3.8%
Leyburn Out of Town Centre	0.53	0.02	2.9%
Other within Study Area	0.14	0.00	0.0%
Beyond Study Area			
Barnard Castle	0.00	0.03	-
Bishops Auckland	0.00	0.00	-
Bishops Auckland Out-of-Centre	0.00	0.00	-
Darlington	216.45	8.80	4.1%
Darlington Out-of-Centre	83.65	1.72	2.1%
Northallerton	53.31	2.58	4.8%
Northallerton Out-of-Centre	0.00	0.42	-
Ripon	0.00	0.08	-
Ripon Out-of-Centre	0.00	0.01	-
Thirsk	0.00	0.04	-
Other	0.00	3.63	n/a
Total		**18.77**	

Notes/Sources
Tables 19 and 29b

APPENDIX 3

RESULTS OF QUALITATIVE HOUSEHOLD SURVEY QUESTIONS

HOUSEHOLD SURVEY - QUALITATIVE QUESTIONS

Mode of travel normally used when shopping

	Zone								Total
	1	2	3	4	5	6	7	8	
Car / Van - driver	72.2%	81.0%	84.7%	81.3%	89.2%	89.5%	95.1%	80.8%	82.4%
Car / Van - passenger	13.4%	9.5%	6.3%	6.3%	1.5%	10.5%	0.0%	13.7%	8.0%
Bus	5.1%	8.3%	2.8%	5.6%	4.6%	0.0%	4.1%	2.7%	4.8%
Motorcycle	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Walk	6.5%	1.2%	4.5%	5.6%	4.6%	0.0%	0.0%	1.4%	3.6%
Taxi	1.9%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%
Train	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	0.1%
Bicycle	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other	0.5%	0.0%	1.1%	0.7%	0.0%	0.0%	0.0%	0.0%	0.4%
(Don't know)	0.5%	0.0%	0.0%	0.7%	0.0%	0.0%	0.8%	0.0%	0.3%

Occurrence of Linked Trips (visits made to other shops when food shopping)

	Zone								Total
	1	2	3	4	5	6	7	8	
Yes	44.0%	45.2%	46.0%	46.5%	18.5%	50.0%	43.1%	32.9%	42.6%
No	55.1%	54.8%	52.8%	52.1%	81.5%	50.0%	54.5%	67.1%	56.5%
Don’t know	0.9%	0.0%	1.1%	1.4%	0.0%	0.0%	2.4%	0.0%	0.9%

Centre visited on linked trips

	Zone								Total
	1	2	3	4	5	6	7	8	
Catterick Garrison Town Centre	23.2%	52.6%	6.2%	20.9%	8.3%	26.3%	5.7%	8.3%	21.6%
Darlington Town Centre	24.2%	26.3%	1.2%	11.9%	16.7%	15.8%	50.9%	20.8%	20.8%
Richmond Town Centre	42.1%	7.9%	0.0%	3.0%	0.0%	31.6%	20.8%	4.2%	15.5%
Northallerton Town Centre	0.0%	1.3%	43.2%	6.0%	16.7%	5.3%	1.9%	45.8%	12.9%
Leyburn Town Centre	0.0%	0.0%	0.0%	40.3%	8.3%	15.8%	0.0%	0.0%	7.3%
Bedale Town Centre	1.1%	0.0%	21.0%	4.5%	0.0%	0.0%	0.0%	0.0%	4.9%
Catterick Town Centre	3.2%	5.3%	2.5%	7.5%	0.0%	0.0%	0.0%	8.3%	3.8%
Ripon Town Centre	0.0%	0.0%	17.3%	0.0%	0.0%	0.0%	0.0%	0.0%	3.3%
Darlington Out of Town Centre	6.3%	1.3%	2.5%	1.5%	0.0%	0.0%	3.8%	4.2%	3.0%
Barnard Castle Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	17.0%	0.0%	2.1%
(Don't know)	0.0%	0.0%	0.0%	1.5%	33.3%	0.0%	0.0%	0.0%	1.2%
Colburn Town Centre	0.0%	3.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%
Other	0.0%	0.0%	2.5%	1.5%	0.0%	0.0%	0.0%	0.0%	0.7%
Hawes Town Centre	0.0%	0.0%	0.0%	0.0%	16.7%	0.0%	0.0%	0.0%	0.5%
Middlesbrough / Stockton Town Centre	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	4.2%	0.5%
Middlesbrough / Stockton Out of Town Centre	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	4.2%	0.5%
Leyburn Out of Town Centre	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%	0.2%
Masham Town Centre	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Reeth Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	5.3%	0.0%	0.0%	0.2%
Thirsk Town Centre	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%

Zone 1 and Zone 2 Residents Only

Proportion shopping in Richmond for food and/or non-food

	Zone		Total
	1	2	
Yes	90.3%	61.9%	77.9%
No	9.7%	37.5%	21.9%
(Don't know)	0.0%	0.6%	0.3%

Importance of Reasons as to why Richmond is Not Used for Shopping

Car Parking too Expensive

	Zone		Total
	1	2	
1-Unimportant	66.7%	47.6%	52.4%
2	0.0%	6.3%	4.8%
3	0.0%	11.1%	8.3%
4	9.5%	0.0%	2.4%
5-Very important	9.5%	20.6%	17.9%
(Don't know)	14.3%	14.3%	14.3%

Covered market not good enough

	Zone		Total
	1	2	
1-Unimportant	57.1%	39.7%	44.1%
2	9.5%	6.3%	7.1%
3	9.5%	7.9%	8.3%
4	9.5%	6.3%	7.1%
5-Very important	4.8%	12.7%	10.7%
(Don't know)	9.5%	27.0%	22.6%

Infrequent public transport

	Zone		Total
	1	2	
1-Unimportant	61.9%	47.6%	51.2%
2	4.8%	3.2%	3.6%
3	4.8%	6.3%	6.0%
4	0.0%	6.3%	4.8%
5-Very important	9.5%	7.9%	8.3%
(Don't know)	19.0%	28.6%	26.2%

Lack of Multiples

	Zone		Total
	1	2	
1-Unimportant	19.0%	31.7%	28.6%
2	0.0%	6.3%	4.8%
3	4.8%	11.1%	9.5%
4	23.8%	11.1%	14.3%
5-Very important	33.3%	19.0%	22.6%
(Don't know)	19.0%	20.6%	20.2%

Lack of Specialist Shops

	Zone		Total
	1	2	
1-Unimportant	9.5%	22.2%	19.1%
2	0.0%	0.0%	0.0%
3	0.0%	12.7%	9.5%
4	28.6%	11.1%	15.5%
5-Very important	57.1%	39.7%	44.1%
(Don't know)	4.8%	14.3%	11.9%

Limited Range / Choice of Shops

	Zone		Total
	1	2	
1-Unimportant	0.0%	20.6%	15.5%
2	0.0%	1.6%	1.2%
3	4.8%	9.5%	8.3%
4	28.6%	12.7%	16.7%
5-Very important	61.9%	44.4%	48.8%
(Don't know)	4.8%	11.1%	9.5%

Main Foodstore is too Small

	Zone		Total
	1	2	
1-Unimportant	23.8%	27.0%	26.2%
2	9.5%	7.9%	8.3%
3	0.0%	7.9%	6.0%
4	28.6%	12.7%	16.7%
5-Very important	33.3%	28.6%	29.8%
(Don't know)	4.8%	15.9%	13.1%

Poor Car Parking Facilities

	Zone		Total
	1	2	
1-Unimportant	19.0%	27.0%	25.0%
2	0.0%	3.2%	2.4%
3	9.5%	12.7%	11.9%
4	14.3%	9.5%	10.7%
5-Very important	47.6%	34.9%	38.1%
(Don't know)	9.5%	12.7%	11.9%

Shop Opening Times

	Zone		Total
	1	2	
1-Unimportant	61.9%	41.3%	46.4%
2	14.3%	17.5%	16.7%
3	9.5%	9.5%	9.5%
4	0.0%	6.3%	4.8%
5-Very important	9.5%	6.3%	7.1%
(Don't know)	4.8%	19.0%	15.5%

Shops are too Small

	Zone		Total
	1	2	
1-Unimportant	23.8%	31.7%	29.8%
2	4.8%	11.1%	9.5%
3	33.3%	17.5%	21.4%
4	9.5%	12.7%	11.9%
5-Very important	19.0%	11.1%	13.1%
(Don't know)	9.5%	15.9%	14.3%

Street Market too Infrequent

	Zone		Total
	1	2	
1-Unimportant	47.6%	38.1%	40.5%
2	33.3%	9.5%	15.5%
3	9.5%	11.1%	10.7%
4	4.8%	7.9%	7.1%
5-Very important	0.0%	7.9%	6.0%
(Don't know)	4.8%	25.4%	20.2%

Work Elsewhere

	Zone		Total
	1	2	
1-Unimportant	47.6%	34.9%	38.1%
2	0.0%	4.8%	3.6%
3	9.5%	6.3%	7.1%
4	14.3%	6.3%	8.3%
5-Very important	9.5%	11.1%	10.7%
(Don't know)	19.0%	36.5%	32.1%

Importance of Factors that Would Encourage Residents to Shop More in Richmond for Non-food Items

Better Car Parking

	Zone		Total
	1	2	
1-Unimportant	28.6%	31.7%	31.0%
2	9.5%	7.9%	8.3%
3	4.8%	9.5%	8.3%
4	4.8%	7.9%	7.1%
5-Very important	47.6%	31.7%	35.7%
(Don't know)	4.8%	11.1%	9.5%

Improved Environment

	Zone		Total
	1	2	
1-Unimportant	28.6%	31.7%	31.0%
2	14.3%	4.8%	7.1%
3	19.0%	19.0%	19.1%
4	19.0%	12.7%	14.3%
5-Very important	19.0%	17.5%	17.9%
(Don't know)	0.0%	14.3%	10.7%

Improved Public Transport

	Zone		Total
	1	2	
1-Unimportant	66.7%	49.2%	53.6%
2	4.8%	4.8%	4.8%
3	4.8%	4.8%	4.8%
4	4.8%	6.3%	6.0%
5-Very important	9.5%	15.9%	14.3%
(Don't know)	9.5%	19.0%	16.7%

Larger Main Foodstore

	Zone		Total
	1	2	
1-Unimportant	23.8%	30.2%	28.6%
2	4.8%	6.3%	6.0%
3	9.5%	7.9%	8.3%
4	14.3%	3.2%	6.0%
5-Very important	47.6%	38.1%	40.5%
(Don't know)	0.0%	14.3%	10.7%

More Shops

	Zone		Total
	1	2	
1-Unimportant	4.8%	20.6%	16.7%
2	4.8%	4.8%	4.8%
3	0.0%	4.8%	3.6%
4	19.0%	9.5%	11.9%
5-VeryMore S important	71.4%	49.2%	54.8%
(Don't know)	0.0%	11.1%	8.3%

More Specialist Shops to Complement the Facilities in Catterick Garrison

	Zone		Total
	1	2	
1-Unimportant	4.8%	22.2%	17.9%
2	4.8%	1.6%	2.4%
3	4.8%	6.3%	6.0%
4	23.8%	7.9%	11.9%
5-Very important	57.1%	49.2%	51.2%
(Don't know)	4.8%	12.7%	10.7%

Miscellaneous

Sex of Respondent

	Zone								Total
	1	2	3	4	5	6	7	8	
Male	25.9%	35.1%	31.3%	30.6%	35.4%	26.3%	30.9%	27.4%	30.4%
Female	74.1%	64.9%	68.8%	69.4%	64.6%	73.7%	69.1%	72.6%	69.6%

Age of Respondent

	Zone								Total
	1	2	3	4	5	6	7	8	
18–24 years	3.7%	9.5%	4.0%	4.9%	3.1%	13.2%	8.1%	5.5%	5.9%
25-34	8.8%	11.9%	14.2%	8.3%	10.8%	10.5%	9.8%	11.0%	10.7%
35-44	16.2%	22.0%	23.9%	20.8%	23.1%	13.2%	23.6%	16.4%	20.4%
45-54	22.7%	20.8%	19.9%	15.3%	24.6%	15.8%	15.4%	26.0%	20.0%
55-64	21.3%	18.5%	19.3%	25.7%	30.8%	23.7%	17.1%	26.0%	21.6%
65+	26.9%	17.3%	17.0%	24.3%	6.2%	23.7%	22.8%	15.1%	20.3%
(Refused)	0.5%	0.0%	1.7%	0.7%	1.5%	0.0%	3.3%	0.0%	1.0%

Number of Adults in Household

	Zone								Total
	1	2	3	4	5	6	7	8	
One	25.0%	27.4%	18.8%	22.2%	21.5%	21.1%	20.3%	28.8%	23.2%
Two	52.3%	57.1%	67.0%	61.8%	55.4%	60.5%	57.7%	50.7%	58.1%
Three	16.2%	10.1%	10.2%	9.7%	15.4%	10.5%	13.8%	11.0%	12.3%
Four or more	6.0%	5.4%	2.8%	6.3%	6.2%	5.3%	8.1%	9.6%	5.9%
(Refused)	0.5%	0.0%	1.1%	0.0%	1.5%	2.6%	0.0%	0.0%	0.5%

Number of Children Aged Under 16 Years Old in Household

	Zone								Total
	1	2	3	4	5	6	7	8	
None	81.5%	69.0%	69.3%	77.1%	69.2%	81.6%	72.4%	75.3%	74.3%
One	8.8%	17.9%	11.9%	11.1%	9.2%	5.3%	12.2%	5.5%	11.3%
Two	6.9%	10.7%	13.1%	7.6%	13.8%	7.9%	10.6%	13.7%	10.2%
Three	1.9%	2.4%	4.5%	4.2%	6.2%	0.0%	4.1%	4.1%	3.4%
Four or more	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.8%	1.4%	0.3%
(Refused)	0.9%	0.0%	0.6%	0.0%	1.5%	5.3%	0.0%	0.0%	0.6%

Number of Cars Owned by Household

	Zone								Total
	1	2	3	4	5	6	7	8	
None	13.9%	12.5%	6.3%	10.4%	4.6%	2.6%	3.3%	9.6%	9.2%
One	45.4%	50.6%	49.4%	45.1%	53.8%	39.5%	35.8%	39.7%	45.7%
Two	31.5%	28.6%	32.4%	36.1%	27.7%	42.1%	46.3%	35.6%	34.1%
Three or more	8.8%	8.3%	11.9%	8.3%	12.3%	13.2%	13.0%	15.1%	10.6%
(Refused)	0.5%	0.0%	0.0%	0.0%	1.5%	2.6%	1.6%	0.0%	0.5%

Socio-Economic Group

	Zone								Total
	1	2	3	4	5	6	7	8	
A	3.2%	2.4%	3.4%	2.1%	4.6%	5.3%	8.1%	8.2%	4.1%
B	21.3%	14.3%	19.3%	21.5%	24.6%	36.8%	22.8%	19.2%	20.6%
C1	21.3%	25.0%	26.1%	13.9%	23.1%	13.2%	28.5%	19.2%	22.2%
C2	29.2%	38.7%	21.6%	34.7%	27.7%	21.1%	21.1%	30.1%	28.9%
D	13.0%	14.9%	19.9%	18.8%	15.4%	13.2%	12.2%	15.1%	15.6%
E	5.6%	4.2%	5.7%	4.2%	1.5%	2.6%	3.3%	4.1%	4.4%
(Refused)	6.5%	0.6%	4.0%	4.9%	3.1%	7.9%	4.1%	4.1%	4.2%

APPENDIX 4

COPY OF HOUSEHOLD SURVEY QUESTIONNAIRE

Job No 290904

North Yorkshire Household Telephone Survey

Good morning/afternoon. I am calling from NEMS market research, we are conducting a shopping survey in your area. Would you be kind enough to take part in this survey - the questions will only take a few minutes of your time?

QA Are you the person responsible for most of the shopping in your household?

1 Yes
2 No

IF 'YES' - CONTINUE INTERVIEW

IF 'NO' - ASK, COULD I SPEAK TO THE PERSON WHO RESPONSIBLE FOR MOST OF THE SHOPPING, IF NOT AVAILABLE THANK AND CLOSE INTERVIEW

Q01 In which shop or shopping centre do you do most of your main food shopping?

ONE ANSWER ONLY. DO NOT PROMPT
1 Aldi – Saddler St, Bishop Auckland
2 Aldi – Yarm Rd, Darlington
3 Asda – South Church Rd, Bishop Auckland
4 Asda – Whinbush Way, Darlington
5 Co-op – Horsemarket, Barnard Castle
6 Co-op – Market Place, Thirsk
7 Co-op – Queens Rd, Richmond
8 Iceland – Queen St, Darlington
9 Iceland – Watling Rd, Bishop Auckland
A Iceland – Yarm Rd, Darlington
B Kwik Save – Cockerton Green, Darlington
C Kwik Save – Market Place, Richmond
D Kwik Save – Market Place, Thirsk
E Kwik Save – Watling Place, Bishop Auckland
F Lidl – Catterick Rd – Colburn
G Local Shops - Barnard Castle Town Centre
H Local Shops - Bedale Town Centre
I Local Shops - Bishop Auckland Town Centre
J Local Shops - Catterick Garrison Town Centre
K Local Shops - Colburn Town Centre
L Local Shops - Darlington Town Centre
M Local Shops - Hawes Town Centre
N Local Shops - Leyburn Town Centre
O Local Shops - Masham Town Centre
P Local Shops - Northallerton Town Centre
Q Local Shops - Reeth Town Centre
R Local Shops - Richmond Town Centre
S Local Shops - Ripon Town Centre
T Local Shops - Thirsk Town Centre
U Local Shops - Catterick Town Centre
V Morrisons – Harrogate Rd, Ripon
W Morrisons – Morton Park, Darlington
X Morrisons – North Rd, Darlington
Y Morrisons- Newgate Park Centre, Bishop Auckland
Z Safeway- Calgate, Barnard Castle
a Safeway, High St, Northallerton
b Safeway, Victoria Rd, Darlington
c Sainsbury – Market Place, Ripon
d Sainsbury – Victoria Rd, Darlington
e Somerfield – High St, Northallerton
f Somerfield – Market Ave, Richmond
g Tesco – Gough Rd, Catterick Garrison
h Tesco – Northallerton East Rd, Northallerton

i Tesco – Station Rd, Thirsk
J Other (PLEASE WRITE IN STORE AND LOCATION)
k (Don't know)
l (Don't do main food shopping)

Q02 Where do you do most of your small-scale top-up food shopping?

ONE ANSWER ONLY. DO NOT PROMPT

List of stores as per Q01

Q03 How often do you usually carry out your main food shopping?
ONE ANSWER ONLY. DO NOT PROMPT
1 Daily
2 Weekly
3 Fortnightly
4 Monthly
5 Less often than monthly
6 Other (PLEASE WRITE IN)

Q04 If Tescos at Catterick Garrison expanded its store by about 50% (half) and devoted the extra space to food, would you use it more often than you do now?

1 Yes
2 No
3 (Don't know)

Q05 Which store would you use less frequently?
ONE ANSWER ONLY. DO NOT PROMPT

List of stores as per Q01

Q06 In which town centre, freestanding store or retail park do you do most of your shopping for clothes, footwear and other fashion?

ONE ANSWER ONLY. DO NOT PROMPT
1 Barnard Castle - Town Centre
2 Bedale - Town Centre
3 Bishop Auckland - Town Centre
4 Bishop Auckland - Out of Town Centre Store/Retail Warehouse
5 Catterick - Town Centre
6 Catterick Garrison - Town Centre
7 Colburn - Town Centre
8 Darlington - Town Centre
9 Darlington - Out of Town Centre Store/Retail Warehouse
A Durham - Town Centre
B Hawes - Town Centre
C Hipswell - Town Centre
D Kendal - Town Centre
E Kendal - Out of Town Centre
F Leyburn - Town Centre
G Leyburn - Out of Town Centre Store/Retail Warehouse
H Masham - Town Centre
I Metrocentre - Centre
J Middlesbrough / Stockton-on-Tees - Town Centre
K Middlesbrough / Stockton-on-Tees - Out of Town Centre Store/Retail Warehouse
L Newcastle - Town Centre
M Northallerton - Town Centre
N Northallerton - Out of Town Centre Store/Retail Warehouse
O Penrith - Town Centre
P Reeth - Town Centre
Q Richmond - Town Centre
R Ripon - Town Centre

S Ripon - Out of Town Centre Store/Retail Warehouse
T Thirsk - Town Centre
U Other (PLEASE WRITE IN - noting whether Town Centre or Out-of-Town Centre)
V (Don't know)
W (Don't buy these goods)

Q07 Do you regularly use any other town centres, freestanding stores or retail parks when shopping for clothes, footwear and other fashion goods?

1 Yes
2 No
3 (Don't know)

Q08 Which other town centres, freestanding stores or retail do you use when shopping for clothes, footwear and other fashion goods?
ONE ANSWER ONLY. DO NOT PROMPT

List of Stores as per Q06

Q09 How would you say your expenditure on clothing, footwear and fashion goods is split between the two locations mentioned?
ONE ANSWER ONLY. READ OUT
1 Nearly all at 1st named location, rest at 2nd named location (ie: 90% / 10% split)
2 Most at 1st named location, rest at 2nd named location (ie: 75% / 25% split)
3 Slightly more than half at 1st named location, rest at 2nd named location (i.e. 60%/40% split)
4 (Don't know)

Q10 In which town centre, freestanding store or retail park do you do most of your shopping for furniture, floor coverings and household textiles?

ONE ANSWER ONLY. DO NOT PROMPT

List of Centres as per Q06

Q11 Do you regularly use any other town centres, freestanding stores or retail parks when shopping for furniture, floor coverings and household textiles?

1 Yes
2 No
3 (Don't know)

Q12 Which other town centres, freestanding stores or retail do you use when shopping for furniture, floor coverings and household textiles?

ONE ANSWER ONLY. DO NOT PROMPT

List of Centres as per Q06

Q13 How would you say your expenditure on furniture, floor coverings and household textiles is split between the two locations mentioned?

ONE ANSWER ONLY. READ OUT

List as per Q09

Q14 In which town centre, freestanding store or retail park do you do most of your shopping for DIY and decorating goods?
ONE ANSWER ONLY. DO NOT PROMPT

List of Centres as per Q06

Q15 **Do you regularly use any other town centres, freestanding stores or retail parks when shopping for DIY and decorating goods?**

1 Yes
2 No
3 (Don't know)

Q16 **Which other town centres, freestanding stores or retail do you use when shopping for DIY and decorating goods?**

ONE ANSWER ONLY. DO NOT PROMPT

List of Centres as per Q06

Q17 **How would you say your expenditure on DIY and decorating goods is split between the two locations mentioned?**

ONE ANSWER ONLY. READ OUT

List as per Q09

Q18 **In which town centre, freestanding store or retail park do you do most of your shopping for domestic appliances such as washing machines, fridges, cookers, IT equipment, TV's and DVD/CD palyers?**

ONE ANSWER ONLY. DO NOT PROMPT

List of Centres as per Q06

Q19 **Do you regularly use any other town centres, freestanding stores or retail parks when shopping for domestic appliances such as washing machines, fridges, cookers, IT equipment, TV's and DVD/CD palyers?**

1 Yes
2 No
3 (Don't know)

Q20 **Which other other town centres, freestanding stores or retail do you use when shopping for domestic appliances such as washing machines, fridges, cookers, IT equipment, TV's and DVD/CD palyers?**

ONE ANSWER ONLY. DO NOT PROMPT

List of Centres as per Q06

Q21 **How would you say your expenditure on domestic appliances such as washing machines, fridges, cookers, IT equipment, TV's and DVD/CD palyers is split between the two locations mentioned?**

ONE ANSWER ONLY. READ OUT

List as per Q09

Q22 **In which town centre, freestanding store or retail park do you do most of your shopping for personal / luxury goods including books, jewellery, china, glass, cosmetics, musical instruments and sports equipment?**

ONE ANSWER ONLY. DO NOT PROMPT

List of Centres as per Q06

Q23 **Do you regularly use any other town centres, freestanding stores or retail parks when shopping for personal / luxury goods including books, jewellery, china, glass, cosmetics, musical instruments and sports equipment?**

1 Yes
2 No
3 (Don't know)

Q24 Which other other town centres, freestanding stores or retail do you use when shopping for Personal/Luxury including books, jewellery, china, glass, cosmetics, musical instruments and sports equipment?

ONE ANSWER ONLY. DO NOT PROMPT

List of Centres as per Q06

Q25 How would you say your expenditure on personal / luxury goods including books, jewellery, china, glass, cosmetics, musical instruments and sports equipment is split between the two locations mentioned?

ONE ANSWER ONLY. READ OUT

List as per Q09

Q26 How do you normally travel when shopping for main food/non food goods?
ONE ANSWER ONLY. DO NOT PROMPT
1 Car / Van – as driver
2 Car / Van – as passenger
3 Bus
4 Motorcycle
5 Walk
6 Taxi
7 Train
8 Bicycle
9 Other (PLEASE WRITE IN)
A (Don't know)

Q27 When you undertake your main food shopping at (STORE MENTIONED AT Q01) do you also visit other shops on the same shopping trip?

1 Yes
2 No
3 (Don't know)

Q28 At which town centre, store or retail park do you visit while undertaking your main food shopping?
ONE ANSWER ONLY. DO NOT PROMPT

List of Centres as per Q06

Q29 Zone 1 and Zone 2 Residents Only – If Richmond not mentioned at above Ask

Could you rank the following reasons on why you may not shop in Richmond or do not shop in Richmond most often on a scale of 1-5 where 1 means unimportant and 5 means very important?
READ OUT
1 Car parking too expensive
2 Covered market not good enough
3 Infrequent public transport
4 Lack of multiples
5 Lack of specialist shops
6 Limited range / choice of shops
7 Main foorstore is too small
8 Poor car parking facilities
9 Shop opening times
A Shops are too small
B Street market too infrequent
C Work elsewhere
D Other(PLEASE WRITE IN)

E (Don’t know)

Q30 Could you rank the following reasons on what may make you shop more in Richmond for non-food items on a scale of 1-5 where 1 means unimportant and 5 means very important?

1 Better car parking
2 Improved environment
3 Improved public transport
4 Larger main foodstore
5 More shops
6 More specialist shops to complement the facilities in Catterick
7 Other (PLEASE WRITE IN)
8 (Don't know)

SEX Sex of respondent

CODE FROM OBSERVATION
1 Male
2 Female

AGE Into which of the following age bands do you fall ?

ONE ANSWER ONLY. READ OUT
1 18–24 years
2 25-34
3 35-44
4 45-54
5 55-64
6 65+
7 (Refused)

ADU How many adults, including yourself, aged 16 years or over are there living in your household ?

ONE ANSWER ONLY
1 One
2 Two
3 Three
4 Four or more
5 (Refused)

CHI How many children aged under 16 years old are there living in your household ?

ONE ANSWER ONLY
1 None
2 One
3 Two
4 Three
5 Four or more
6 (Refused)

CAR How many cars does your household own or have the use of ?

ONE ANSWER ONLY
1 None
2 One
3 Two
4 Three or more
5 (Refused)

OCC What is the occupation of the chief income earner in the household ?

IF RETIRED ASK FOR PREVIOUS OCCUPATION
1 Occupation (PLEASE WRITE IN)
2 (Refused)

Thank and close interview