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Harrogate Retail Study

Main Report

Harrogate
BOROUGH COUNCIL
Working for you

On behalf of **Harrogate Borough Council**

Project Ref: 29078/002 | Final Report | Date: January 2014

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1 Introduction

1.1 Purpose of the Study

1.1.1 In September 2013 Harrogate Borough Council commissioned Peter Brett Associates to prepare the Harrogate Retail Study on its behalf. The Borough Council wishes to update its evidence base to support the preparation of the Harrogate Borough Local Plan. A previous Retail Study was published in 2004 and was based on survey work undertaken in 2003. The Council adopted a Core Strategy in 2009 which identified a hierarchy of centres but did not include retail floorspace requirements over the plan period or any specific allocations for retail development. The Council consulted on a draft version of its Sites & Policies DPD in May and June 2013.

1.1.2 In accordance with the Study Brief this report provides:

- a comprehensive summary of existing shopping patterns within the District and beyond its boundaries, based on the findings of a new household survey;
- an assessment of the capacity for convenience and comparison retail floorspace over the plan period, taking account of commitments and forecast growth in population and expenditure;
- an assessment of the capacity of existing centres within the District to accommodate any floorspace requirements that are identified, including the identification of appropriate sites;
- a health-check of the District's existing centres which assesses their relative vitality and viability;
- the identification of centres in decline and where change needs to be managed, and proposals for such management; and
- a review of existing town centre boundaries and consideration of the need to identify primary and secondary retail frontages, including their location and approaches to maintaining an appropriate balance of retail and non-retail uses.

1.2 Structure of the Report

1.2.1 The remainder of our report is structured as follows:

- Section 2 summarises national planning policy requirements in respect of main town centre uses and plan-making, together with the provisions of local planning policy in Harrogate;
- Section 3 provides our performance analysis of the District's six town centres which includes a healthcheck of each centre's vitality and viability;
- Section 4 summarises current patterns of retail spending within the study area based on our household survey;
- Section 5 contains our assessment of quantitative requirements for additional retail floorspace;
- Section 6 provides our qualitative assessment of retail floorspace requirements;

- Section 7 provides our assessment of opportunities to accommodate additional floorspace requirements;
- Section 8 reviews the town centre boundaries of the six main centres; and
- Section 9 provides a summary of our findings and our recommendations.

2 Planning Policy Review

2.1 The National Planning Policy Framework

2.1.1 The National Planning Policy Framework (NPPF) was published by the Government on 27 March 2012, and consolidates guidance set out in preceding Planning Policy Statements (PPS), Planning Policy Guidance (PPG), and a number of related circulars, into a single document. Following its publication, this document now forms the statutory national planning policy guidance setting out the Government's planning policies for England and how these are expected to be applied.

2.1.2 However, in relation to retail matters, the DCLG has confirmed that the 'Practice Guidance' which accompanied PPS4 (the predecessor to the NPPF in relation to retail matters) remains extant, prior to the Government producing replacement guidance. Therefore, we continue to refer to the Practice Guidance where appropriate.

Achieving Sustainable Development

2.1.3 Paragraph 6 of the NPPF confirms that *'the purpose of the planning system is to contribute to the achievement of sustainable development'*. This has three dimensions which give rise to the need for the planning system to perform a number of roles:

- **an economic role** – contributing to building a strong, responsive and competitive economy;
- **a social role** – supporting strong, vibrant and healthy communities; and
- **an environmental role** – contributing to protecting and enhancing our natural, built and historic environment.

2.1.4 Paragraph 9 adds that *'pursuing sustainable development involves seeking positive improvements in the quality of the built, natural and historic environment, as well as in people's quality of life'* through a variety of means, including *'making it easier for jobs to be created in cities, towns and villages',* and '*replacing poor design with better design'.*

Presumption in Favour of Sustainable Development

2.1.5 The NPPF makes clear that there should be a presumption in favour of sustainable development. The Ministerial Foreword to the NPPF makes this point clear from the outset, stating that *'Development that is sustainable should go ahead, without delay — a presumption in favour of sustainable development that is the basis for every plan, and every decision'*.

2.1.6 This is detailed further in the main text of the NPPF, with paragraph 14 stating that *'At the heart of the NPPF is a presumption in favour of sustainable development, which should be seen as a golden thread running through both plan-making and decision-taking'.*

2.1.7 For plan-making, this presumption in favour of sustainable development means that *'local planning authorities should positively seek opportunities to meet the development needs of their area'* and *that 'Local Plans should meet objectively assessed needs, with sufficient flexibility to adapt to rapid change'* (unless the adverse impacts of doing so would significantly outweigh the benefits, or specific policies contained within the NPPF indicate that development should be restricted).

2.1.8 Paragraph 15 of the NPPF explains that *'Policies in Local Plans should follow the approach of the presumption in favour of sustainable development, so that it is clear that development which is sustainable can be approved without delay. All plans should be based upon and* *reflect the presumption in favour of sustainable development, with clear policies that will guide how the presumption should be applied locally'*.

Core Planning Principles

2.1.9 Paragraph 17 of the NPPF sets out a series of 12 'Core Planning Principles' which should underpin both plan-making and decision-taking. These 12 principles include a requirement that planning should be 'genuinely plan-led', with 'succinct plans' to shape the development of an area. LPAs should also support sustainable economic development, and plans should take account of market signals to set out a clear strategy for allocating sufficient land for development.

Building a Strong, Competitive Economy

2.1.10 Paragraph 18 of the NPPF confirms that the Government is committed to securing economic growth in order to create jobs and prosperity. To this end the planning system should encourage and not act as an impediment to sustainable growth. LPAs should plan proactively to meet the development needs of business and support an economy fit for the 21st century, and panning policies should recognise and seek to address potential barriers to investment.

2.1.11 To this end, local planning authorities should:

- set out a clear economic vision and strategy for their area;
- set criteria, or identify strategic sites, for local and inward investment to match the strategy and to meet anticipated needs;
- support existing business sectors and where possible identify and plan for new or emerging sectors likely to locate in their area;
- plan positively for the location, promotion and expansion of clusters or networks of knowledge driven, creative or high technology industries;
- identify priority areas for economic regeneration, infrastructure provision and environmental enhancement; and
- facilitate flexible working practices such as the integration of residential and commercial uses within the same unit.

Ensuring the Vitality of Town Centres

2.1.12 Paragraphs 23 to 27 of the NPPF are of particular relevance to town centre planning. The NPPF retains the approach set out in PPS6, PPS4 and preceding national planning guidance by advocating a 'town centres first approach', stating that planning policies should positively promote competitive town centre environments (paragraph 23). In drawing up Local Plans, LPAs should:

- pursue policies to support the viability and vitality of town centres;
- define a network and hierarchy of centres that is resilient to anticipated future economic changes;
- define the extent of town centres and primary shopping areas;
- promote competitive town centres that provide customer choice and a diverse retail offer;

- retain and enhance existing markets and, where appropriate, re-introduce or create new ones;
- allocate a range of suitable sites to meet the scale and type of development needed in town centres, including looking at the need to expand town centres to ensure a sufficient supply of suitable sites;
- allocate appropriate edge-of-centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available;
- set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;
- recognise that residential development can play an important role in ensuring the vitality of centres; and
- plan positively for the future of declining centres to encourage economic activity.

2.1.13 Paragraphs 24 to 27 of the NPPF discuss the principal 'tests' which LPAs should apply to applications for retail development which fall outside defined town centre locations. Firstly, applications for 'town centre uses' (such as retail) outside defined centres will need to demonstrate compliance with the sequential approach - i.e. they must demonstrate the proposed scheme cannot be accommodated on an in-centre site (if the application site is in an edge-of-centre location), or either an in-centre or an edge-of-centre (if the application site is in an out-of-centre location). Both applicants and local planning authorities are expected to demonstrate flexibility on issues such as format and scale.

2.1.14 Applications for 'town centre uses' outside defined centres which are above 2,500 sq.m (or a locally-set threshold) must also submit an impact assessment, to assess the impact of the proposal on existing, committed, and planned investment in defined centres in an appropriate catchment area, as well as the impact on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area. The NPPF is clear that in instances where a planning application cannot demonstrate compliance with either the sequential or impact 'tests', it should be refused planning permission.

Plan-Making

2.1.15 Paragraph 150 of the NPPF makes clear that '*Local Plans are the key to delivering sustainable development' and that 'planning decisions must be taken in accordance with the development plan, unless material considerations indicate otherwise'*.

2.1.16 Paragraph 156 states that LPAs should set out the strategic priorities for the area in the Local Plan, including policies to deliver *'the provision of retail, leisure and other commercial development'*. Crucially, Local Plans should:

- plan positively for the development and infrastructure required in the area;
- be drawn up over an appropriate time scale;
- be based on co-operation with neighbouring authorities, public, voluntary and private sector organisations;
- indicate broad locations for strategic development on a key diagram and land-use designations on a proposals map;
- allocate sites to promote development and flexible use of land;

- access and quantum of development where appropriate;
- identify areas where it may be necessary to limit freedom to change the uses of buildings;
- identify land where development would be inappropriate; and
- contain a clear strategy for enhancing the natural, built and historic environment.

Evidence Base

2.1.17 Paragraph 158 of the NPPF explains that the Local Plan must be based on '*adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area*' and that LPAs should be comprehensive in their assessments, ensuring that they are '*integrated and that they take full account of relevant market and economic signals'*.

2.1.18 Paragraph 161 confirms that the evidence base should assess:

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

Examining Local Plans

2.1.19 The NPPF stipulates that Local Plans must undergo independent examination. In addition to showing that a Local Plan has been prepared in accordance with the Duty to Cooperate, legal and procedural requirements, the Local Plan must also be found to be 'sound'. Paragraph 182 stipulates that a 'sound' plan is one that is:

- positively prepared – based on a strategy which seeks to meet objectively assessed development and infrastructure requirements;
- justified – the plan should be the most appropriate strategy, when considered against reasonable alternatives, based on proportionate evidence base;
- effective – the plan should be deliverable over the plan period; and
- the plan should enable the delivery of sustainable development in accordance with policies in the Framework.

Planning Policy Statement 4 – Practice Guidance (2009)

2.1.20 The Government published the 'Practice guidance on need, impact and the sequential approach' to accompany PPS4 (subsequently referred to in this study as the 'Practice Guidance'). This Practice Guidance does not constitute a statement of Government policy. However, its contents are likely to be a consideration when the retail aspects of emerging development plan documents are examined in public. As noted above, in the absence of an equivalent publication alongside the NPPF, the Government has confirmed that the Practice Guidance remains extant.

2.1.21 When assessing the need for retail and leisure developments, local planning authorities are advised to (paragraph 2.4):

- take account of the quantitative and qualitative need for different types of retail and leisure developments;
- in deprived areas, which lack access to a range of services and facilities, give additional weight to meeting these qualitative deficiencies;
- when assessing quantitative need, have regard to relevant market information and economic data; and
- when assessing qualitative need, assess whether there is provision and distribution of shopping and other services which allow genuine choice to meet the needs of the whole community; and take into account the degree to which shops may be overtrading and whether there is a need to increase competition and retail mix.

2.1.22 The guidance provides detailed advice on how to produce an evidence base for retail and leisure developments, which is taken into account in this study.

2.2 Harrogate Local Plan

2.2.1 The Harrogate Local Plan was adopted in 2001 and updated by way of a 'selective alteration' in 2004. Some policies were deleted and others saved by direction of the Secretary of State in 2007 and some of these saved policies have now been superceded by policies contained within the Harrogate Core Strategy that was adopted in 2011. However, a number of shopping policies from the Local Plan continue to be saved and should be afforded weight in accordance with their conformity with the NPPF.

2.2.2 Policy S2 states that new shopping development within, or as an extension to, the Borough's defined main town centres and Harrogate's district centres will be permitted. Policy S4 controls retail development in the countryside and is permissive of such development where it is ancillary to employment or tourism uses and subject to other controls.

2.2.3 Policy S5 of the Local Plan seeks to control non-retail uses within the main centres. Within the primary shopping frontages of Harrogate, Knaresborough and Ripon, the loss of existing ground floor retail floorspace will only be permitted if the proposal would lead to an improvement in the vitality and viability of the centre. Within the secondary shopping frontages, Policy S5 is permissive of uses with Classes A1, A2 and A3 provided that any such development does not create concentrations of similar uses that would cumulatively result in conflict with other plan policies or adversely impact on the retail character, vitality and viability of the centre.

2.2.4 Proposal Policy S6 of the Local Plan identified town centre sites for new shopping development. These are as follows:

- Royal Baths, Harrogate (2,500 sq. m);
- Station Parade, Harrogate (4,500 sq. m);
- Union Street Car Park, Harrogate (1,000 sq. m);
- Bus Station/Fisher Street, Knaresborough (1,000 sq. m);
- East of Market Place, Ripon (1,000 sq. m); and
- West of Market Place, Ripon (3,000 sq. m).

2.3 Harrogate Core Strategy

2.3.1 The Harrogate Core Strategy was adopted in February 2011 and Policy JB4 identifies Harrogate as a Sub Regional Town that will be reinforced through expansion of its main shopping area and additional food and non-food shopping floorspace. The role of Ripon as a Principal Town and the second largest shopping centre in the Borough will be protected mainly through the expansion of retailing adjacent to the City's shopping area. Knaresborough is also identified as a Principal Town whose role will be protected mainly through improvements to its food retailing.

2.4 Emerging Sites and Policies Development Plan Document

2.4.1 The submission version of the Harrogate Sites and Policies Development Plan Document (DPD) was published in November 2013. The submission draft includes Policy JB7 which is concerned with town and local centre management. This retains and increases controls over non-retail uses within the centres. Within the primary shopping frontages proposals for non-retail uses will only be allowed where they would not harm the vitality and viability of the shopping centre and the premises have been actively marketed.

2.4.2 In the secondary shopping frontages appropriate non Class A1 uses will be permitted provided that they do not have an adverse cumulative effect on the vitality and viability of the centre, the retail character or amenity of the frontage, generate levels of traffic that would cause significant congestion or road safety problems, result in three or more consecutive shop units in non-A1 use or conflict with other policies in the plan. It must also be demonstrated that all vacant premises within the shopping centre that were last in non-Class A1 use have been considered in terms of their availability and suitability.

2.4.3 Draft Policy JB7 goes on to say that the defined shopping areas will be considered to be 'in-centre' locations for the purposes of the application of the sequential test of paragraph 24 of the NPPF to proposed retail development. This effectively designates these areas as 'primary shopping areas' in the terminology of the NPPF. Policy JB7 also sets local thresholds for impact assessment which, in accordance with the NPPF, requires assessment of retail proposals outside the boundaries of the shopping centres (or primary shopping areas) and proposals for leisure development outside of the town centre boundaries. In the smaller centres of Boroughbridge, Masham and Pateley Bridge the shopping centre boundary is the relevant boundary for the impact assessment of all town centre uses.

3 Performance Analysis

3.1 Introduction

3.1.1 We have undertaken performance analyses (commonly referred to as ‘health checks’) of the Borough’s existing town centres at Harrogate, Ripon, Knaresborough, Boroughbridge, Pateley Bridge and Masham, looking at a range of key vitality and viability indicators. Our appraisals have involved on-foot surveys of each centre, together with desk-based research which draws on published data from national data-providers and town centre monitoring information collected by the Borough Council.

3.1.2 As well as providing the base position for the future monitoring of town centre vitality and viability, this exercise identifies the key strengths of the town centres as well as deficiencies and areas that would benefit from improvement. We then use this information to inform the recommendations in subsequent sections of our report.

3.2 Performance Analysis of Harrogate Town Centre

3.2.1 Harrogate is the District’s principal town centre and is by far its largest with a comprehensive range of retail, leisure and service facilities. Where relevant, we compare the performance of Harrogate with that of competing centres outside of the Borough but also in Yorkshire. These are Leeds City Centre, York City Centre, Bradford City Centre and Skipton Town Centre.

Movement in the National Retail Rankings

3.2.2 The movement in national retail rankings of Harrogate, the Borough’s other key town centres and comparator centres can be tracked using time-series data from Javelin Group’s Venuescore. Venuescore ranks the UK’s retail centres on the basis of a weighted count of multiple retailers comprising fashion retailers, non-fashion multiples and anchor stores. Javelin’s Venuescore index was first published in 2006 and has since been updated in 2010 and again in April 2013.

3.2.3 In 2006 Harrogate ranked in 73rd position but experienced a marked improvement to 51st position in 2010 before slipping back slightly to 55th in 2013. The overall improvement in national ranking since 2006 indicates that Harrogate has performed well and has been less affected by the impacts of the prolonged economic downturn than other centres within the Index. The performance of Harrogate and competing centres is summarised in Table 3.1 below.

3.2.4 In terms of the Venuescore rankings Harrogate has performed better than most other competing centres, with the most marked improvement in its position since 2006. Due to its size, Leeds City Centre was already ranked amongst the top destinations in the UK and has managed to improve its position from 6th to 4th between 2006 and 2013, an improvement which has been supported by the opening of the substantial Trinity Leeds retail and leisure scheme in early 2013. York City Centre has maintained its position in 26th place (recovering from a slight decline to 30th in 2010). Bradford City Centre has fared less well, falling from 101st to 122nd, whilst Skipton Town Centre has broadly maintained its position at around 300th place in the Index.

Table 3.1 Javelin Venuescore rankings for Harrogate and competing centres (2006-2013)

Centre	Javelin Venuescore Ranking		
	2006	*2010*	*2013*
Leeds	6	5	4
York	26	30	26
Harrogate	**73**	**51**	**55**
Bradford	101	112	122
Skipton	303	300	309

Source: Javelin Group Venuescore 2006 and 2013/14.

Diversity of Main Town Centre Uses

3.2.5 Experian GOAD data[1] indicate that Harrogate Town Centre contains approximately 540 units of which 28 are convenience retail outlets. This equates to 5.2 per cent of the total units in the town centre compared to the UK average of 8.8 per cent, as shown by Table 1 of Appendix A. However, there is a reasonably good range of convenience retail outlets in Harrogate, with the town centre benefiting from two main foodstores (Asda and Waitrose), as well as a Tesco Express on Cambridge Road and a Morrisons M Local store on Cambridge Street.

3.2.6 These stores are complemented by a range of bakers, confectioners, grocers and delicatessens that comprise both national and independent operators. In our assessment these convenience retail facilities generally meet local residents' needs and the town centre's convenience retail offer is healthy, albeit with some scope for the provision of a frozen food specialist and additional top-up shopping facilities such as a Sainsbury's Local or Co-operative.

3.2.7 Table 1 of Appendix A also shows that the 274 comparison goods outlets in the town centre equate to 50.7 per cent of the total units in the centre, which is markedly higher than the UK average of 41.2 per cent (though slightly narrower in floorspace percentage terms, reflecting the relatively small size of units in Harrogate). Harrogate has above-average representation in each of the clothing and footwear sub-sectors, which is a key determinant of a centre's attractiveness to shoppers. No sub-sectors are significantly under-represented, although it is notable that the proportion of charity shops is well below the national average. Thus, in numeric terms at least, Harrogate Town Centre has a very good representation of comparison retail outlets.

3.2.8 The town centre contains a good array of national comparison sector multiples including Debenhams, Next, River Island, Topshop, Marks & Spencer, H&M, Primark, TK Maxx, Dorothy Perkins, Burton, Waterstones, WH Smith, Argos and Boots. However, Harrogate's distinctive strength for a centre of its size arise from the strong levels of representation from high end comparison operators. These operators are concentrated in and around James Street and they include Molton Brown, L'Occitane, LK Bennett, Viyella, Whistles, Jigsaw, Joules, Jack Wills, Hobbs and White Stuff.

3.2.9 The strong offer in terms of national multiples is complemented by a wide range of good quality independent operators across the various comparison retail sub-sectors. The town centre benefits from two independent department stores – Beale's and Hoopers. Smaller independent operators are concentrated in the area to the west of Parliament Street, which

[1] Survey date of June 2013. All references to UK averages refer to figures published by Experian in November 2013.

has a very pleasant shopping environment. Commercial Street at the northern end of the town centre also appears to be an emerging location for quality independents. The town centre's offer in terms of kitchen, bathrooms and furniture is unusually good with a concentration of such retailers on Crescent Road. Overall, we consider the comparison retail offer in Harrogate Town Centre to be very healthy.

3.2.10 A farmers market (operated by the Otley Town Partnership) takes places at Cambridge Street on every second Thursday of the month. Other occasional markets, including a Christmas Market, are held on open space adjacent to Montpellier Hill. The Christmas Market was in operation at the time of our visit and appeared to be generating significant footfall in this part of the town centre.

3.2.11 The overall proportion of service sector outlets in Harrogate Town Centre (33.8 per cent) is slightly lower than the UK average (36.4 per cent). However, the proportion of town centre floorspace in such use is higher than the national average and this is mainly as a result of healthy representation in the '*restaurants, cafes, coffee bars'* sub-category (the data in respect of these uses may actually be an under-estimate as we observed several cafes and restaurants in the town centre that were at first floor or basement level). The health of this sector is underlined by the fact that a Jamie's Italian restaurant is due to open on Parliament Street.

3.2.12 Representation in the *'banks & financial services'*, *'hairdressers', 'estate agents'* and *'travel agents'* sub-categories was all slightly below the UK average but we consider this to be largely a function of the vitality of Harrogate's retail offer and above-average representation of comparison retail outlets. We can therefore conclude that Harrogate is well catered for in terms of local services, and particularly in terms of the important food and drink sub-category, with no clear quantitative or qualitative deficiencies.

Operator Demand

3.2.13 CoStar Focus' most recent Town Report for Harrogate (which we accessed in November 2013) only provides time-series data on retailer requirements up to January 2010. This shows that the number of published retailer requirements[2] for Harrogate declined from a peak of 84 in October 2007 to 38 requirements in January 2010.

3.2.14 Further interrogation of the Focus database undertaken in November 2013 revealed that operator requirements for Harrogate remain consistent with the levels identified in 2010. Notable A1 retail requirements include:

- Al Murad Tiles: 3,000-10,000 sq. ft
- Austin Reed Group: 650-6,250 sq. ft
- Multiyork: 3,000-7,500 sq.ft
- Brighthouse: 2,250-3,500 sq. ft
- Chesca: 750-2,500 sq.ft
- Jo Malone: 500-1,500 sq.ft
- Neal's Yard: 500-1,000 sq.ft

[2] It should be noted that reported retailer requirements include all A1-A4 requirements.

3.2.15 Notable non-retail operator requirements include:

- Frankie & Benny's: 3,700-5,000 sq. ft
- Tragus: 3,000-4,000 sq. ft
- Pret a Manger: 600-3,000 sq. ft
- Brewdog: 1,000-2,000 sq. ft

3.2.16 Overall, whilst total levels of operator demand for Harrogate have not yet recovered to pre-recession levels, current requirements are well balanced between different uses and operators. Demand from premium brands is particularly encouraging. In addition to requirements for the likes of Jo Malone and Neal's Yard, there are current requirements for Christy, Liz Earle, Peony and The Whisky Shop. This reflects well on the attractiveness of Harrogate as a retail destination.

3.2.17 Retailer requirements in competing centres have also fallen considerably since 2007 as shown in Table 3.2 below. There is some overlap in current requirements between centres, particularly in terms of demand from high end retailers for representation in Harrogate and York. Given the relatively close proximity of these centres, and the fact that many of these premium operators only have a limited store portfolio, it likely that there is some competition between Harrogate and York to satisfy these requirements.

Table 3.2 Retail Requirements in Harrogate and competing centres

Location	Retailer Requirements	
	October 2007	*November 2013*
Leeds	201	87
York	124	62
Harrogate	**84**	**38**
Bradford	72	17
Skipton	33	10

Source: CoStar Focus

Proportion of Vacant Street Level Property

3.2.18 Harrogate Town Centre contained 46 vacant units in June 2013, equating to 8.5 per cent of all town centre units, which is lower than the UK average of 12.6 per cent. The Borough Council's own Town Centre Frontage Analysis (March 2013) indicates that the vacancy rate is around 7.9 per cent.

3.2.19 Most town centres across the country have been affected by the closure of various national multiple retailers and struggling independent operators, who have been unable to weather the difficult economic conditions over the past four or five years. However, the fact that Harrogate's vacancy rate is well below the national average and appears to be falling is indicative of the overall health of the town centre.

Pedestrian Flows

3.2.20 We observed relatively high levels of footfall throughout the town centre. The pedestrianised core of the centre and the James Street area were the busiest areas. Footfall was also strong on Parliament Street and Montpellier Hill (aided by the Christmas Market and an event at the Conference Centre). The Victoria Centre mall was reasonably busy with the top floor TK Maxx and access to the multi-storey car parking driving footfall through the centre. As would be expected, peripheral areas of the town centre were quieter and in particular the northern and eastern fringes including Cheltenham Crescent/Parade, Commercial Street and Station Parade. However, no parts of the town centre appeared to be unusually quiet and it is clear that the town centre is very busy in terms of both pedestrian and vehicular traffic.

State of the Town Centre Environment

3.2.21 The general physical condition and environmental quality of Harrogate Town Centre is very good. Most of the town centre falls within the Harrogate Conservation Area (on revised boundaries approved in 2010) and is characterised by the architectural splendour of a Victorian spa town. The low vacancy rate within the centre is reflected in the good condition of most buildings with very little dereliction and few signs of poor up-keeping.

Figure 3.1 Images of Harrogate Town Centre

3.2.22 The public realm is generally in good condition in terms of paving, street furniture and planting. The town centre is adjoined by large areas of parkland to the south and west. Both The Stray and Crescent Gardens can be easily accessed and provide attractive gardens and recreational space for shoppers and visitors.

3.2.23 Parts of the town centre do suffer from traffic congestion and associated noise and air pollution. This is particularly the case on Parliament Street (where traffic queues to the junction with Kings Road) and on Station Parade. We also consider that there is scope to extend the town centre's pedestrianised zone to the James Street area. Provided this did not exacerbate town centre congestion, such improvements would reinforce the attractiveness of this location for high end comparison retailers and help to create a pedestrianised loop within the primary shopping area.

3.2.24 Car parking facilities within the town centre do seem to be under some pressure. Town centre car parks were reaching full capacity by late morning at the time of our most recent visit (a weekday in November). This appeared to be aggravating town centre congestion (requiring drivers to circle the town centre seeking available parking) and could be restraining the overall performance of Harrogate.

Summary

3.2.25 In summary, we consider that Harrogate Town Centre is in good health. It is performing well for a centre of its size and is more than holding its own against competing centres and destinations. The town centre appears to have out-performed its key competitors in national retail rankings in which it has significantly improved its position in recent years, despite the recession. Leeds has consolidated its position and improved its ranking, York has maintained its position but both Bradford and Skipton have experienced decline.

3.2.26 We consider Harrogate's key strength to be the quality and diversity of its comparison retail offer with excellent representation from high end national retailers and independent operators. Premium retailers such as Hobbs and Moulton Brown are found on James Street whilst independent operators cluster around Montpellier Hill and Commercial Street. The good performance of these sub-sectors is reflected in current retailer requirements for the town and its low vacancy rate. There is also good representation from national multiples within the pedestrianised core of the town centre and the Victoria Shopping Centre, including River Island, Primark, Marks and Spencer and H&M. We have found no clear quantitative and qualitative deficiencies in the town centre's existing comparison retail offer.

3.2.27 The convenience retail offer of the town centre is also good with Asda and Waitrose foodstores located on the edges of the centre and providing opportunities for linked shopping trips with the rest of the town centre. There is a good selection of bakers, confectioners, grocers and delicatessens that provide a distinctive and bespoke offer for residents and visitors.

3.2.28 The strength of the comparison retail sector is complemented by a strong services offer, particularly in the important food and drink sub-sector. Harrogate is well served by a range of restaurants, cafes, pubs and bars that reflect the general vitality of the town centre and the success of its visitor economy. Although representation of other service uses such as banking, travel agents and hairdressers fall below the national average we believe this to be a function of Harrogate's strong comparison retail offer rather than any particular deficiencies.

3.2.29 Harrogate's town centre environment is generally very attractive with imposing Victorian architecture and well maintained buildings and public spaces. There may be scope for additional pedestrianisation and works to improve the public realm in peripheral locations. The town centre's success does result in some congestion and associated issues with car parking which appears to be operating at, or very close to, capacity. Improved transport facilities may be key to the future growth of the town centre.

3.2.30 The priority for Harrogate Town Centre should be to consolidate its existing strengths and to ensure that it can continue to grow despite its physical constraints. The position of the town centre's core shopping area should be protected and enhanced whilst the vitality and vibrancy of Harrogate's independent retail sector should be nurtured.

3.3 Performance Analysis of Ripon City Centre

3.3.1 Ripon City Centre is the second largest centre within the District but is much smaller than Harrogate. It is an attractive market town and cathedral city with good access to the A1(M) and a compact centre that serves the retail and service needs of local residents and visitors.

Movement in the National Retail Rankings

3.3.2 Javelin's Venuescore index shows that Ripon City Centre was placed in 633rd position in 2006 but subsequently improved to 541st place in 2011 before falling back slightly to 573rd in 2013. Ripon's ranking indicates that is has maintained and improved its position over the past 7-8 years. The town centre will have been assisted by the opening of Booths town centre foodstore and other large floorplate comparison units that were constructed as part of this development.

Diversity of Main Town Centre Uses

3.3.3 Experian GOAD survey data for Ripon is relatively up-to-date having been published in October 2013. It shows that the centre contains a total of 224 units of which 8 per cent were convenience goods outlets, roughly in line with the UK average of 8.8 per cent (see Table 2 of Appendix A). The city centre has good representation in the grocery and frozen food sub-categories, with Booths and Sainsbury's foodstores both located within the centre. It also has above average representation of butchers and off-licenses though no dedicated greengrocers, fishmongers or newsagents (all these facilities are available within other stores such as Sainsbury's and WH Smith). Overall, we consider Ripon's convenience retail offer to be good and that it is generally sufficient to meet the needs of local residents.

3.3.4 The proportion of comparison goods outlets in the city centre is 38.4 per cent, which is below the national average of 41.2 per cent. Ripon is under-represented in most clothing and footwear categories, as well as the furniture, DIY, electrical goods, jewellery, sports and toy sub-categories. However, the centre has above average representation in terms of booksellers, gift shops, florists and charity shops.

3.3.5 The number of national multiple comparison retailers with a presence in the city centre is limited. Retailers with representation include Boots, WH Smith, Superdrug, Argos, Home Bargains, Dorothy Perkins, Poundstretcher, M&Co., Edinburgh Woollen Mill, Fat Face, Yeomans and Card Factory. The centre has recently lost its Burton and Curry's stores. Ripon is therefore weak in its representation of national fashion retailers but does contain a number of independent clothing and footwear stores. The independent retail offer of the city centre is good and is concentrated on Kirkgate, Westgate and North Street. There is a mixture of traditional independents and some newer, high-end stores of the type found in Harrogate Town Centre.

3.3.6 In terms of service uses, the GOAD data indicate that Ripon has above average representation with 43.3 per cent of units in service use compared to the UK average of 36.4 per cent. The centre is well served in all sub-categories, including '*restaurants, cafes, coffee bars'* which is encouraging and may reflect the popularity of Ripon as a tourist destination.

Operator Demand

3.3.7 CoStar Focus' Town Report for Ripon shows that retailer requirements fell from a pre-recession peak of 39 in October 2007 to 13 in January 2010. Our update of this data in November 2013 indicates that there are currently only 3 such requirements. This further decline in operator demand is of some concern. The current published requirements for Ripon are as follows:

- Brighthouse: 2,250-3,500 sq. ft
- Bargain Book Time: 1,000-3,000 sq. ft
- Holland & Barrett: 800-1,700 sq. ft

Proportion of Vacant Street Level Property

3.3.8 Experian GOAD data indicates that Ripon had a vacancy rate of 9.4 per cent, which compares to the UK average of 12.6 per cent. The city centre is therefore performing reasonably well in this respect and although there are vacant units throughout the centre there are no particular concentrations of vacant property.

Pedestrian Flows

3.3.9 At the time of our visit we found the city centre to be reasonably busy with pedestrian flows at their heaviest in the vicinity of the centre's two anchor foodstores. Market Place, Fishergate and Queen Street were also reasonably busy. There may be scope to improve pedestrian linkages between the Booths site and the rest of the city centre, which we consider to be narrow and poorly signposted both from the new development and from Fishergate/North Street. Quieter parts of the city centre included the more peripheral areas of Kirkgate, Westgate and North Street where pedestrian flows were lighter.

State of the Town Centre Environment

3.3.10 The quality of the town centre environment in Ripon is generally good. The city centre contains some attractive architecture and public spaces are well maintained. The Market Place and Minster provide attractive focal points, with the latter enhanced by the undulating form of the landscape.

3.3.11 Although there is only limited pedestrianisation within the city centre, key roads were not heavily trafficked and so there were no particular issues with congestion or associated pollution. City centre parking facilities are provided in the Market Place, at Booths and at Victoria Grove/Sainsbury's (where there is also a coach park). These facilities appear to be adequate and provide good access into the centre. Although Ripon is not served by a railway station, public transport facilities within the city centre are reasonable with regular bus services calling at the small bus station on Moss Arcade, a short distance from the Market Place.

Figure 3.2 Images of Ripon City Centre

Summary

3.3.12 Ripon City Centre is an attractive centre with a good convenience retail offer, a good range of services and a below average vacancy rate. However, its comparison retail offer is relatively weak and the recent loss of national multiples from the city centre indicates vulnerability. The priority for Ripon should therefore be to strengthen the range and diversity of its comparison retail offer. Given that the withdrawal of national multiples from centres of similar size to Ripon is a longstanding national trend we would suggest that this might best be achieved by nurturing the city centre's independent retail offer so that it might provide quality independents of the type that are more readily evident within the District's other town centres.

3.4 Performance Analysis of Knaresborough Town Centre

3.4.1 Knaresborough Town Centre is the third largest centre within the District and is a historic market town located in close proximity to Harrogate. Knaresborough is also served by the St James Retail Park which is an out-of-centre shopping destination and the largest retail park within the District.

Movement in the National Retail Rankings

3.4.2 Knaresborough is currently placed in 1452nd position in the Javelin Venuescore index which represents a decline from 1354th in 2011 and 1290th in 2006. Fluctuations at the lower end of the Index are less significant as many smaller centres achieve similar scores. However, the data does suggest that Knaresborough's position has declined relative to other centres and that it has suffered from a loss of key retailer representation.

Operator Demand

3.4.3 Historical data on operator demand are not available for Knaresborough. There are currently only two published requirements on the Focus database, from Brighthouse (up to 3,500 sq. ft) and Costa (up to 2,000 sq. ft).

Diversity of Main Town Centre Uses

3.4.4 Experian GOAD data from September 2012 shows that there are approximately 182 units within the town centre (see Table 3 of Appendix A). Convenience retail outlets comprise 8.8 per cent of these units which is in-line with the UK national average, although in terms of town centre floorspace these outlets account for only 9 per cent compared to a national average of 17.7 per cent. The town centre is served by a Sainsbury's Local and Tesco Express, both located on High Street, a Fultons frozen food store and a number of independent butchers and bakers.

3.4.5 We consider Knaresborough's convenience retail offer to be reasonable in terms of meeting the day-to-day requirements of local residents. However, we note that unlike Harrogate and Ripon there are no larger foodstores within or on the edges of the town centre. Indeed, aside from modestly sized Lidl on York Road and the Co-operative on Chain Lane, there are no out-of-centre supermarkets or superstores in the town and we consider this to be a qualitative deficiency.

3.4.6 Comparison retail outlets account for 35.2 per cent of all town centre units which is below the UK average of 41.2 per cent. Knaresborough is under-represented in terms of all clothing and footwear sub-categories but has above average representation in the furniture, gift and homeware sub-categories. There are only a handful of national multiple comparison retailers within the town centre and these include Boots, M&Co, Superdrug and Lloyds Pharmacy. There are, however, a number of good quality independent operators throughout the centre.

3.4.7 The proportion of service uses within the town centre is above the national average and Knaresborough appears to be well served by banks, travel agents and estate agents, including Barclays, HSBC, Nat West, Yorkshire Bank, Thomas Cook and Bridgfords. Uses within the important food and drink sub-category far exceed the national average, accounting for 22 per cent of units within the town centre compared to a UK average of 16.4 per cent (in terms of floorspace the difference is more striking with 28.8 per cent of floorspace in food and drink use compared to a national average of 11.7 per cent).

Proportion of Vacant Street Level Property

3.4.8 GOAD data indicates that Knaresborough Town Centre has a vacancy rate of 9.3 per cent which is below the national average. The Council's own monitoring data compiled in March 2013 indicated a slightly lower vacancy rate of 8.7 per cent. We found a concentration of vacant units to the northern end of High Street (although we note that The Crown pub is to shortly re-open as a Wetherspoons).

Pedestrian Flows

3.4.9 The town centre was quiet at the time of our visit and pedestrian activity was concentrated at the southern end of the High Street and around Market Place/Silver Street. Other more peripheral areas of the town centre were quieter including Castlegate and the northern end of High Street where there are more vacant properties.

State of the Town Centre Environment

3.4.10 Knaresborough is a largely attractive and well maintained town centre. Many traditional buildings and attractive public spaces such as the Market Place create a pleasant environment. Knaresborough Castle and the River Nidd are also located in close proximity to the town centre. Street furniture appears to be adequate and in a good condition.

3.4.11 Traffic on the A59 does cause some air and noise pollution to High Street although there were no apparent issues with congestion at the time of our visit. The town centre appeared to have good accessibility with a small bus station at the junction of High Street and Silver Street. Town centre car parking seemed plentiful and is reasonably priced.

Figure 3.3 Images of Knaresborough Town Centre

Summary

3.4.12 Knaresborough is an attractive centre that meets the day-to-day shopping and service needs of the local population. However, despite the town centre's relatively low vacancy rate we consider it to be under-performing and vulnerable to further erosion of its offer as a result of competition from Harrogate Town Centre, out-of-centre stores and other destinations. We consider that Knaresborough would benefit from the presence of a new anchor retailer, most probably be a mid-sized foodstore that would help to support linked visits to other town centre retailers.

3.5 Performance Analysis of Other Town Centres

3.5.1 The District's other three town centres are much smaller and mainly perform the role of rural service centres. We summarise below our findings in respect of the performance of these centres.

Boroughbridge

3.5.2 Boroughbridge is a small, attractive market town with good access to the A1. The town centre is focused on High Street and St James Square but commercial activity also continues along Fishergate to its junction with Horsefair/Bridge Street. The centre's property offer comprises older, smaller, well-maintained units.

3.5.3 Boroughbridge town centre mainly serves local shopping needs and has a good mix of uses. The only national multiple retailer is Spar which operate a small store on High Street. Other convenience goods operators include two butchers, a bakers, grocers, delicatessen, newsagents and an off-licence. The centre's comparison retail offer includes an electrical appliances store, several gift/homeware shops, a florist and a small number of shops selling clothing (mainly high end ladieswear). Service uses include banks (HSBC and Barclays have branches), a post office, estate agents, hairdressers, hot food takeaways, and several cafes, restaurants and pubs.

3.5.4 Experian GOAD data for Boroughbridge dated November 2011 indicates that 40 per cent of units in the town centre were comparison retail outlets and that 9 per cent were convenience outlets (see Table 4 of Appendix A). These figures are in line with national averages. The proportion of service uses at 44 per cent is above the UK average of 36 per cent, mainly due to above average representation of banks and estate agents in the town centre.

Figure 3.4 Images of Boroughbridge Town Centre

3.5.5 The vacancy rate within the centre is very low (GOAD reported 3.75 per cent in 2011) and, at the time of our visit, there was only one vacant unit. The physical environment of the centre was generally good with attractive and clean public spaces. A 70 space public car park is located off Back Lane and was well used with no charges for parking. Local bus services call at stops located at St James Square.

3.5.6 We conclude that Boroughbridge is a small but vital and vibrant town centre with a good retail and service offer that serves local needs well. Boroughbridge has a pleasant environment and this is reflected in the number and range of quality, independent operators within the town centre and its low vacancy rate.

Pateley Bridge

3.5.7 Pateley Bridge is a small town located in the more rural western part of the District. It has a small town centre that is focused on High Street. The centre meets retail and service needs at a local level but also caters for tourists to Nidderdale. Retail units within traditional stone built buildings face either side of the High Street with a cluster of small units around King's Court.

Figure 3.5 High Street, Pateley Bridge

3.5.8 There is only one national multiple retailer in Pateley Bridge; a Spar foodstore. No Experian GOAD data is available for Pateley Bridge but other shops selling convenience goods include a butcher, a baker, a grocer and a newsagent. The comparison retail offer includes two antiques shops, a country clothing shop, a dress shop, gift shop, sweet shop, two art galleries, a hardware store, pharmacy and a pet shop. Services include a Barclays bank, a post office, and a number of teashops, restaurants and pubs. There is also a Tourist Information Centre on the High Street.

3.5.9 A short-stay car park with low parking charges is conveniently located to the south of High Street and appeared to be well used at the time of our visit. Public transport services are available but are limited, which is to be expected given Pateley Bridge's rural location. The town centre was generally clean and attractive, and the vacancy rate was very low.

3.5.10 We therefore conclude that Pateley Bridge was performing well as a small rural service centre meeting the needs of local residents and tourists with good quality shops and services.

Masham

3.5.11 Masham is a very attractive, small market town to the north of the Borough with town centre commercial activity concentrated on Park Street, Church Street and around the Market Place. As with Pateley Bridge, Experian GOAD data are not available for Masham. At the time of our visit there were no national multiples within the town centre, except for a branch of Barclays bank. A branch of HSBC bank has recently closed and the Co-operative foodstore has relocated to larger premises outside of the town centre on Leyburn Road.

Figure 3.6 Church Street, Masham

3.5.12 Within the town centre the convenience retail offer include two butchers, a greengrocers, and a delicatessen. The comparison offer includes an antiques shop, an art gallery, a pharmacy a confectioners, and homeware and gift shops. Services include the Barclays bank, a hot food takeaway, a café and a number of pubs. We only observed two vacant units, the aforementioned former Co-operative foodstore and HSBC bank on Park Street. Parking within the centre is on-street or within the large Market Place. The public realm is in good condition and traditional architecture adds historic interest to the town centre.

3.5.13 Masham contains some good quality operators and we consider that it adequately meets the needs of locals and visitors. The relocation of the Co-operative has left a prominent vacant unit on Park Street although the new store on Leyburn Road is larger and only a short walking distance from the town centre. The town centre is quite elongated and may benefit from some consolidation around the Market Place but this might be constrained by the interspersed residential properties and the historic nature of the built environment.

4 Current Patterns of Retail Spending

4.1 Household Survey Methodology

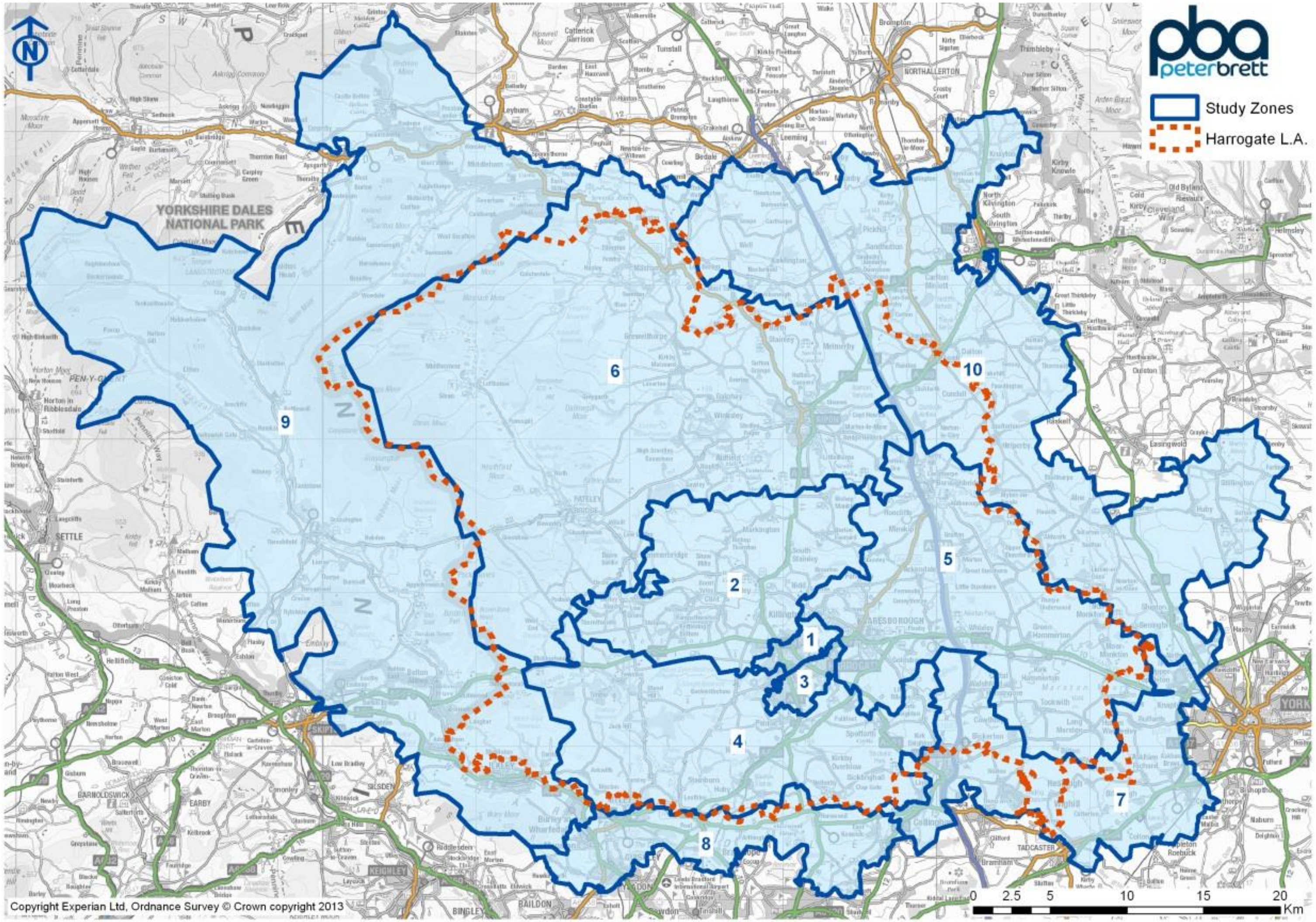
4.1.1 The last comprehensive district-wide survey of shopping patterns was undertaken nine years ago in 2004, and so the Council decided to commission a new household survey to provide up-to-date evidence of current shopping patterns and inform the present study. Accordingly, our assessment of local patterns of retail spending, as set out in this section of our report, is based on a new telephone survey of 1,004 households undertaken by NEMS Market Research in September 2013.

Survey Area

4.1.2 The survey area is based on the postcode sectors set out in Figure 4.1 below. This differs from the survey area used for the 2004 telephone survey, which was based on district boundaries. However, the overall geography of the survey area is broadly similar to that used in 2004, so that the findings of the new household survey remain generally comparable with those from the 2004 survey. The survey area covers the administrative area of Harrogate, but also includes other parts of North Yorkshire, West Yorkshire and the York conurbation.

4.1.3 We ensured that there was a minimum of 100 completed interviews in each zone and the results of the survey were weighted according to the actual population in each zone.

Figure 4.1 Survey Area Constituent Postcode Sectors



Survey Questionnaire

4.1.4 The survey questionnaire, which is reproduced in Appendix B, sought to establish:

i. patterns of convenience goods spending, based on the location of:

- the store where the household last undertook a main food and grocery shop, the store visited the time before that, the amount spent per week and frequency of main shop (questions 1 to 4);

- the shop where the household last undertook a 'top-up' food and grocery shop, the shop visited the time before that, the amount spent per week and frequency of top-up shop (questions 5 to 8); and

- spending on food and groceries in small shops (questions 9 to 12).

ii. patterns of comparison goods spending, based on the locations of the last two purchases of:

- clothes and shoes (questions 13 and 14);

- furniture, carpets or soft household furnishings (questions 15 and 16);

- DIY and decorating goods (questions 17 and 18);

- electrical items such as TVs, DVD players, digital cameras, MP3 players, mobile phones, computers or domestic appliances, such as washing machines, fridges or cookers (questions 19 and 20);

- health, beauty and chemist items (questions 21 and 22);

- recreational goods, such as sports equipment, bicycles, musical instruments and toys (questions 23 and 24); and

- other non-food items, such as books, CDs, jewellery, glass and china items (questions 25 and 26).

Composite Patterns of Spend on Comparison and Convenience Goods

4.1.5 The composite pattern of spending for comparison goods, as shown in Appendix C Table 5a, was achieved on the basis of expenditure data supplied by Experian in relation to the seven aforementioned categories of spend, as shown in Table 4.1 . The composite pattern of spending on convenience goods, as shown in Appendix C Table 8a, was achieved on the basis of the mean weekly household spend findings, as shown in Table 4.2.

Table 4.1 Composite Patterns of Comparison Goods Spend

	Percentage Weighting
Clothing and footwear	25.97%
Furniture, floorcoverings, household textiles	12.09%
Audio-visual equipment	28.51%
Hardware, DIY	6.96%
Chemist goods	2.89%
Recreational goods	10.71%
Other non-food	12.86%
All Comparison Goods	**100.0%**

Table 4.2 Composite Patterns of Convenience Goods Spend

	Mean Weekly Household Spend	Percentage Weighting
Main food and groceries	£83.42	79.30%
Top-up food and groceries	£14.26	13.55%
Small local shops	£7.52	7.15%
All Convenience Goods	**£94.33**	**100.0%**

4.2 Current Patterns of Spending on Comparison Goods

4.2.1 The resident population of the study area in 2013, disaggregated by zone, is shown in the second row of figures in Appendix C Table 1. The overall population in 2013 amounts to approximately 290,464 persons, which is derived by applying the revised ONS Based Population and Household Projections to the 2011 Mid-Year Population Estimates supplied by ONS.

4.2.2 The per capita spend on comparison goods in 2013 (Appendix C Table 2a) varies from a low of £2,872 in Zone 1 to a high of £3,597 in Zone 4.

4.2.3 The total amount of comparison goods spending for residents of the whole of the study area in 2013 is £935.26m (Appendix C Table 3a), of which £165.85m, is spent on special forms of trading (catalogue, TV and internet shopping, which we subsequently abbreviate as SFT), based on Experian data.

4.2.4 Appendix C Table 4a shows the market shares that each zone of the study area achieves of the total spend on comparison goods by residents of each zone within the study area, and Appendix 2 Table 4b sets out the pattern of expenditure flows for the comparison goods sector as a whole, as revealed by the survey of households.

4.2.5 Table 4.3, which is derived from the final column of Appendix C Table 4b, summarises the main destinations for comparison goods expenditure within and outside the study area. Harrogate Town Centre is the main destination for comparison retailing within the study area, attracting some £225.2m (29.3 per cent) of available spend. Plumpton Retail Park, Ripon City Centre, Guiseley Retail Park and Ilkley Town Centre are the main secondary destinations for comparison shopping within the study area, which in total attract £136.6m (17.8%) of spend. Other town, village and local centres, retail parks and freestanding stores located within the study area account for a further £161.9m (21 per cent) of the comparison goods expenditure available to residents of the study area. Thus, overall, some 68.1 per cent of expenditure on comparison goods available to the study area’s residents is spent in town, village and local centres, or in retail parks and freestanding stores, which are located within the study area. This is known as the aggregate retention rate.

Table 4.3 Broad Destinations for Comparison Goods Expenditure

Broad Destinations for Comparison Goods Expenditure	£m	%
Harrogate Town Centre	225.2	29.3%
Plumpton Retail Park	40.7	5.3%
Ripon City Centre	40.4	5.3%
Guiseley Retail Park, Guiseley	30.6	4.0%
Ilkley Town Centre	24.8	3.2%
Other destinations within the study area	161.9	21.0%
Total Retained Expenditure	**523.7**	**68.1%**
York area	95.2	12.4%
Leeds area	55.6	7.2%
Skipton area	12.5	1.6%
Other locations outside the study area	82.4	10.7%
Expenditure Outside Study Area	**245.7**	**31.9%**
TOTAL	**769.4**	**100.0%**

4.2.6 We consider that 68.1 per cent is a reasonably good level of expenditure retention for the Harrogate study area given its proximity to other higher-order centres to the east and south, namely York and Leeds.

4.2.7 Table 4.3 confirms that just under a third (31.9 per cent) of the comparison retail expenditure available within the study area leaks to destinations beyond the study area. A significant proportion of comparison goods expenditure flows to town and other centres, retail parks and freestanding stores located just outside the study area (mainly to York, Leeds and Skipton).

4.2.8 The market shares and estimated comparison goods turnovers of the main centres and retail parks/freestanding stores within the study area, prior to making any allowance for any expenditure inflow from those who are resident beyond the study area, are set out in the last column of Appendix C Table 4b and are summarised in Table 4.4 below.

Table 4.4 Comparison Goods Expenditure Retained Within the Study Area

Defined Centres Within the OCA	£m	%
Harrogate Town Centre	225.2	29.3%
Ripon City Centre	40.4	5.3%
Ilkley Town Centre	24.8	3.2%
Otley Town Centre	21.9	2.8%
Knaresborough Town Centre	21.0	2.7%
Guiseley Town Centre	19.6	2.6%
Boroughbridge Town Centre	5.0	0.7%
Retail Parks and Freestanding Stores Within the OCA	**£m**	**%**
Plumpton Retail Park	40.7	5.3%
Guiseley Retail Park, Guiseley	30.6	4.0%
St James Retail Park , Knaresborough	18.6	2.4%

4.2.9 Table 4.4 confirms that Harrogate is, by a significant margin, the main comparison shopping destination in the study area, achieving an overall market share of 29.3 per cent. Ripon City Centre achieves the second-highest comparison retail turnover, of £40.4m, and a market share of 5.3 per cent, followed by Ilkley Town Centre, with a comparison retail turnover of £24.8m and a market share of 3.2 per cent. This analysis highlights the dominance of Harrogate Town Centre compared to other town centre destinations within the study area.

4.2.10 The latest household survey indicates that Harrogate's market share has diminished slightly since the 2004 household survey. Previously in the 2004 study, Harrogate captured £226.3m (30.4 per cent) of available comparison goods expenditure within the defined study area. Moreover, the 2007 update, based on the 2004 figures, estimated that comparison spend in Harrogate in 2012 would total £314.5m. However, it should be noted that the 2013 survey picks up a greater dispersal of responses than the 2004 survey and provides a more realistic indication of the true market share that is achieved by centres.

4.2.11 The market share of Ripon has increased more significantly than expected. In the 2004 retail study Ripon had a market share of 2.6 per cent of comparison spend. In the 2007 update this equated to £27.3m of comparison expenditure by 2012. Whereas the 2013 survey shows that it is accounting for £40.4m (5.3 per cent market share within the study area).

4.2.12 The market shares of the other two main centres within the Harrogate Borough area, Knaresborough Town Centre and Boroughbridge Town Centre, have also increased since the 2004 household survey. In 2004 the market shares of Knaresborough and Boroughbridge were 1.5% and 0.3 per cent respectively. Whereas the 2013 study shows that the market share has increased to 2.6 per cent and 0.6 per cent respectively.

4.2.13 The main destinations for comparison goods expenditure leakage, again as shown in the last column of Appendix C Table 4b, are summarised in Table 4.5. The principal destination for comparison goods expenditure leakage is Leeds City Centre, which attracts more than a fifth of the leakage (£50.8m) of the study area's comparison goods expenditure, equating to 6.6 per cent of the available comparison expenditure of study area residents.

4.2.14 Other principal shopping destinations drawing expenditure away from the catchment area include York City Centre and Clifton Moor Retail Park. Together, these centres account for some 9 per cent of expenditure leakage.

Table 4.5 Main Destinations for Comparison Goods Expenditure Leakage

Town/City Centres Outside the Study Area	£m	%
Leeds City Centre	50.8	6.6%
York City Centre	34.7	4.5%
Skipton Town Centre	10.7	1.4%
Retail Parks and Freestanding Stores Outside the Study Area	**£m**	**%**
Clifton Moor Retail Park, York	34.6	4.5%
Monks Cross Retail Park, York	12.9	1.7%

4.2.15 The study area's retention level by zone (see Appendix C Table 4a, '*Sub-total for study area*' row) varies from a low of 11.7 per cent in Zone 10 to a high of 92.5 per cent in Zone 3.

4.2.16 The localised retention rate – which is the proportion of expenditure on comparison goods available to residents in a specific zone that is spent in centres and stores located within that zone – is highest for Zone 1, which contains Harrogate Town Centre (see Appendix C Table 4a, '*Zone 1*' column and '*Sub-total, survey zone 1* 'row, and Table 4.6 below) and Zone 6, which includes Ripon City Centre, at 65.7 per cent and 44.5 per cent respectively. The localised retention rate for Zone 8 (42.6 per cent), which contains Guiseley and Otley, is also relatively high. The retention level in Zone 5, which contains Knaresborough and

Boroughbridge, is lower at 25.0 per cent. Zone 9, which includes Ilkley Town Centre, Zone 7, which includes Wetherby Town Centre and Zone 3 all have retention rates of around 20 per cent. For each of the three remaining zones, the localised retention rates are below 3 per cent, although these zones encompass largely rural areas and contain no major town centres

Table 4.6 Localised Comparison Goods Retention Rate

	Zonal Retention Rate (%)
1	65.7
2	1.0
3	19.6
4	0.0
5	24.0
6	44.5
7	19.1
8	42.6
9	20.7
10	2.2

4.3 Comparison Goods Market Shares

4.3.1 Below, we provide an analysis of the comparison goods market shares achieved by each of the three main town centres in the District. Analyses of the market shares of the smaller centres within the Harrogate Borough area are also included. We also briefly examine a number of other significant centres within and just outside the Harrogate Borough area.

Centres within Harrogate

Harrogate Town Centre

4.3.2 Harrogate Town Centre achieves a comparison goods market share of 57.6 per cent in its own zone (Zone 1). In neighbouring zones 2, 3, 4 and 5, Harrogate secures healthy market shares of 57.7 per cent, 55.2 per cent, 35.3 per cent and 32.0 per cent, respectively. Harrogate Town Centre is also able to secure a reasonable market share in Zones 6, at 31.2 per cent. Its market share is lower in the remaining zones 7, 8, 9 and 10. This can be attributed to the close proximity of these zones to other centres outside the study area such as Leeds and York. These figures indicate that Harrogate Town Centre’s comparison retail offer is attractive to residents across the study area.

Ripon City Centre

4.3.3 Ripon City Centre achieves its highest comparison goods market share of 39.4 per cent in its own zone (Zone 6). Ripon does not achieve a market share in excess of 4 per cent in any of the remaining nine survey zones. This evidence indicates that the attraction of Ripon in terms of comparison goods retailing is very localised and largely restricted to residents of the city.

Knaresborough Town Centre

4.3.4 Knaresborough Town Centre achieves a maximum comparison goods market share of 14.0 per cent in its own zone (Zone 5) and does not achieve a market share of over 4 per cent in any of the other nine survey zones. This evidence confirms that Knaresborough is not currently a particularly significant centre of comparison goods retailing.

Boroughbridge Town Centre

4.3.5 Boroughbridge Town Centre achieves a low market share of 3.9 per cent in its own Zone (Zone 5) and has very limited influence in any of the other zones.

Other Centres within the Study Area

4.3.6 Wetherby Town Centre achieves a maximum comparison goods market share of 14.0 per cent in its own zone (Zone 7) and does not achieve a market share of over 2 per cent in any of the other nine survey zones. This evidence confirms that Wetherby is not a particularly significant centre for comparison goods retailing. Otley Town Centre achieves a comparison retail market share of 10.9 per cent in its own zone (Zone 8) but it attracts very little comparison trade from the other zones. This confirms that Otley also has a fairly limited comparison retail shopping role. Guiseley Town Centre achieves a market share of 11.3 per cent in its own Zone (Zone 8) and like Otley has limited market share in other zones. Lastly, Ilkley Town Centre has a market share of nearly a fifth (18.5 per cent) in its own Zone (Zone 9) but no more than 6 per cent in any other zones.

Centres Outside the Study Area

4.3.7 York City Centre achieves a comparison goods market share of 13.8 per cent and 20.2 per cent in Zones 7 and 10 respectively, which are the closest zones to the city. However, its appeal is fairly limited across the remaining 8 zones. Leeds City Centre secures a market share of 18.4 per cent and 11.9 per cent in Zone 8 and 9, which are located to the north of the Leeds urban area. Elsewhere within the study area, Leeds City Centre does not achieve a market share above 10 per cent, confirming that its influence within the study area is mainly limited to the south western part of the study area.

4.4 Overlapping Comparison Goods Catchments

4.4.1 Table 4.7 presents an analysis of dominant centres/out-of-centre retail parks – defined for this exercise as instances where the comparison goods market share exceeds 25 per cent – and centres of subsidiary influence, which are defined on the basis of having comparison goods market shares of between 10 per cent and 25 per cent. Table 4.6 reveals that:

- in five of the ten zones, there is at least one dominant centre, and at least one centre of subsidiary influence;
- Harrogate Town Centre is the dominant centre in six out of the ten zones and has subsidiary influence in three others;
- Ripon City Centre is the dominant centre in its own zone but has no significant influence in any other zone;
- Knaresborough, Wetherby, Otley, Guiseley and Ilkley Town Centres are not the dominant centres in any zones, but each exerts a subsidiary influence in their own zones; and
- Both Leeds and York City Centres exert a subsidiary influence in the two zones closest to them geographically.

Table 4.7 Dominant Comparison Centres/Retail Parks and Centres/Retail Parks of Subsidiary Influence

Zone	Dominant Centres/Retail Parks (Market Share 25%+)	Other Centres/Retail Parks of Subsidiary Influence (Market Share 10% to 25%)
1	Harrogate Town Centre	Plumpton Retail Park, Harrogate
2	Harrogate Town Centre	-
3	Harrogate Town Centre	Plumpton Retail Park, Harrogate
4	Harrogate Town Centre	Otley Town Centre
5	Harrogate Town Centre	Knaresborough Town Centre
6	Ripon City Centre Harrogate Town Centre	-
7	-	Wetherby Town Centre York City Centre Harrogate Town Centre
8	-	Leeds City Centre Guiseley Town Centre Otley Town Centre Harrogate Town Centre
9	-	Ilkley Town Centre Leeds City Centre Harrogate Town Centre
10	Clifton Moor Retail Park, York	York City Centre Monks Cross Retail Park, York

4.5 Comparison Goods Sub-Sectors

4.5.1 We now turn to the patterns of shopping for various comparison goods sub-sectors, as revealed by the household survey. The findings are set out in Appendix C Tables 5a and 5b, and are summarised below for each of the comparison goods sub-sectors as follows:

- clothes and shoes, which account for £199.9m of the comparison goods spending of the study area's residents;
- furniture, carpets, and soft household furnishings, which account for £93.1m;
- DIY and decorating goods, which account for £53.5m;
- electrical items and domestic appliances, which account for £219.3m;
- health, beauty and chemist items, which account for £22.2m;
- recreational goods (for example, sports equipment and musical instruments), which account for £82.5m; and
- specialist and other comparison retail items (for example, books, CDs, jewellery, glass and china items), which account for £98.9m of the comparison goods expenditure available to residents of the study area.

4.5.2 Below, we provide an analysis of the two primary comparison sub-sectors, '*clothes and shoes*' and *'electrical and domestic appliances'*, highlighting the levels of expenditure for both. There is also a brief overview of the other sub-sectors.

Clothes and Shoes

4.5.3 Overall, 62.2 per cent of the expenditure on clothes and shoes available to the study area's residents is spent in centres, retail parks and freestanding stores which are located within the study area (see final column of Appendix 2 Table 5c). This is a reasonable retention level for clothes and shoes, given the strong competition presented by centres outside the study area such as York and Leeds.

4.5.4 Harrogate Town Centre attracts £81.6m of the £199.9m of clothes and shoes expenditure available to the study area's residents, which equates to a market share of 40.8 per cent, followed by Ilkley Town Centre, which attracts £6.4m of expenditure, or 3.2 per cent, and Ripon City Centre which secures £5.7m of expenditure (2.9 per cent). This highlights the fact that Harrogate Town Centre is the primary location for clothes and shoes shopping in the study area, accounting for over 61 per cent of the study area's retained expenditure on clothes and shoes in this sub-sector.

Table 4.8 Main Destinations for Clothes and Shoes within the Study Area

Destination	Expenditure on Clothes & Shoes (£m)	Market Share (%)
Harrogate Town Centre	81.6	40.8
Ilkley Town Centre	6.4	3.2
Ripon Town Centre	5.7	2.9

4.5.5 The main destination outside of the study area is Leeds City Centre, which attracts £22m, or 11 per cent, of residents' spending on clothes and shoes, as shown in Table 4.9. The York area, including York City Centre, Monks Cross Retail Park and Clifton Moor Retail Park, also account for a large proportion of the expenditure leakage, attracting £29.8m of study area residents' spend on clothes and shoes.

Table 4.9 Main Destinations for Clothes and Shoes outside the Study Area

Destination	Expenditure on Clothes & Shoes (£m)	Market Share (%)
Leeds City Centre	22.0	11.0
York area	29.8	14.9

4.5.6 We consider Harrogate's Town Centre's clothes and shoes market share to be good. It is clearly the dominant centre within the study area. Other centres within the District have much lower market shares. A strong clothes and shoes offer serves as the foundation for an attractive comparison retail offer, and is vital in attracting the expenditure of residents.

Electrical Items and Domestic Appliances

4.5.7 Overall, 75.1 per cent of the expenditure on electrical items and domestic appliances available to the study area's residents is spent at destinations within the study area (see final column of Appendix C Table 5d). In our assessment this is a good retention level for this category of comparison goods.

4.5.8 The main destinations for expenditure on electrical items and domestic appliances within the study area, as shown in Table 4., are HarrogateTown Centre (£45.1m, equating to a market share of 20.6 per cent), Guiseley Retail Park (£21.6m, or 9.9 per cent) and Ripon City Centre

(£15.8m, or 7.2 per cent). Harrogate Town Centre is therefore the dominant destination for retained expenditure in the electrical items and domestic appliances sub-category.

Table 4.10 Main Destinations for Electrical Items and Domestic Appliances within the Study Area

Destination	Expenditure on Electrical Items and Domestic Appliances (£m)	Market Share (%)
Harrogate Town Centre	45.1	20.6
Guiseley Retail Park	21.6	9.9
Ripon City Centre	15.8	7.2

4.5.9 The main leakage destination for electrical items and domestic appliances is Clifton Moor Retail Park in York, which attracts £14.6m of expenditure on such goods, equating to a market share of 6.7 per cent, as shown in Table 4.11. Leeds City Centre attracts some of the leakage, along with York City Centre collectively attracting £12.9m of spend, equating to a market share of 5.9 per cent.

Table 4.11 Main Leakage Destinations for Electrical Items and Domestic Appliances

Destination	Expenditure on Electrical Items and Domestic Appliances (£m)	Market Share (%)
Clifton Moor Retail Park, York	14.6	6.7
Leeds City Centre	8.4	3.8
York City Centre	4.5	2.0

Other Comparison Sub-Sectors

4.5.10 Retention levels are relatively high for the other comparison sub-sectors, the highest being for the health, beauty and chemist items sector, with over 80 per cent of residents' spend being kept within the study area. The majority of spend within the study area for these sub-sectors is accounted for by Harrogate Town Centre. Another notable destination within the study area is the B&Q on Skipton Road in Harrogate, which has a key role in the hardware and DIY sub-sector.

Summary of Expenditure Retention and Leakage for Each of the Comparison Goods Sub-Sectors

4.5.11 Table 4.12 presents a summary of expenditure retention and leakage for each of the seven comparison goods sub-sectors.

4.5.12 Harrogate Town Centre is the primary destination within the study area for each of the seven comparison retail sub-sectors. Harrogate's highest market shares are within the recreation and clothing/shoes sub-sectors, at 39.1 per cent and 38.4 per cent, respectively. Conversely, the other centres within the study area have fairly low market shares across the different comparison sub-sectors.

4.5.13 Leeds City Centre has a relatively high market share in a number of the sub-sectors, including the critically important 'clothes and shoes' sub-sector where it achieves a market share of 11.0 per cent.

Table 4.12 Summary of Expenditure Retention and Leakage by Comparison Goods Sub-Sectors

	Clothes & Shoes	Furniture	DIY	Electrical	Health (etc)	Recreation	Specialist/ Other	All Comparison Goods
Harrogate Town Centre	38.4%	21.4%	14.2%	20.6%	27.3%	39.1%	37.8%	29.3%
Knaresborough Town Centre	2.5%	6.8%	0.5%	2.2%	3.9%	0.9%	2.9%	2.7%
Ripon City Centre	2.9%	6.5%	2.5%	7.2%	8.2%	3.4%	7.0%	5.3%
Wetherby Town Centre	1.3%	2.8%	2.7%	1.4%	6.6%	2.4%	1.7%	1.9%
Otley Town Centre	1.6%	2.8%	1.2%	1.6%	8.1%	6.5%	4.9%	2.8%
Ilkley Town Centre	3.2%	2.0%	3.3%	1.0%	6.2%	4.1%	8.0%	3.2%
Other centres/retail parks/stores within the OCA	12.4%	18.3%	35.1%	41.2%	21.3%	8.4%	13.1%	22.8%
Total Retained Expenditure	**62.2%**	**60.6%**	**59.5%**	**75.1%**	**81.7%**	**64.8%**	**75.4%**	**68.1%**
Leeds City Centre	11.0%	8.8%	1.2%	3.8%	3.3%	6.7%	5.5%	6.6%
York City Centre	6.8%	3.8%	2.0%	2.0%	3.2%	6.3%	6.1%	4.5%
Other locations outside the catchment	19.9%	26.8%	37.2%	19.0%	11.9%	22.1%	13.0%	20.8%
Total Leakage	**37.8%**	**39.4%**	**40.5%**	**24.9%**	**18.3%**	**35.2%**	**24.6%**	**31.9%**
TOTAL	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**

4.5.14 The overall retention rate achieved by the study area (*'Total Retained Expenditure'* row in Table 4.11) is highest for the health, beauty and chemist items, specialist items; and electrical goods sub-sectors, and is lowest for the DIY sub-sector. A high proportion of expenditure leakage in the clothes and shoes sub-sector is accounted for by Leeds and York City Centres.

4.6 Current Patterns of Spending on Convenience Goods

4.6.1 The per capita spend on convenience goods in 2013 (Appendix C Table 2b) varies from a low of £1,734 in Zone 1 to a high of £2,030 in Zone 4.

4.6.2 The total amount of convenience goods spending for residents of the whole study area in 2013 is £543.9m (Appendix C Table 3b), of which £16.7m, is spent on SFT (special forms of trading such as internet shopping). The pattern of expenditure flows for the convenience goods sector as a whole, as revealed by the survey of households, is set out in Appendix C Table 8a.

4.6.3 Table 4.13- which is derived from the final column of Appendix C Table 8b – reveals that, overall, some £441.3m, or 83.7 per cent, of the expenditure on convenience goods available to residents of the study area is spent in town and village centres and in freestanding stores which are located within the catchment area; this is known as the aggregate retention rate (see Appendix C Table 8b, final column, '*Overall sub-total for study area*' row). A total of 16.3 per cent of convenience retail expenditure (equating to £85.8m) currently flows to stores outside the study area.

Table 4.13 Broad Destinations for Convenience Goods Expenditure 2013

Broad Destination for Convenience Goods Expenditure	£m	%
Destinations within the study area	441.3	83.7
Total Retained Expenditure	**441.3**	**83.7**
Destinations outside the study area	85.8	16.3
Total Leakage	**85.8**	**16.3**
TOTAL	**527.1**	**100.0**

4.6.4 Overall, we consider that the current level of convenience expenditure retention (83.7 per cent) is reasonable, given the fact that there are a number of large foodstores outside of, but close to, the study area boundary and the largely rural nature of the study area.

Main destinations for food and grocery shopping

4.6.5 The estimated convenience goods turnovers of the main foodstores located within the study area, prior to making any allowance for expenditure inflow from those residents beyond the study area, are set out in the final column of Appendix C Table 8b, and are summarised in Table 4.14 below.

4.6.6 Table 4.14 shows that the most popular destination for food and grocery shopping within the study area is the Asda store in Harrogate, which has a convenience goods turnover of around £47.7m, and a market share of 9.0 per cent. The next most popular destinations for convenience shopping within the study area are the Morrisons and Sainsbury's stores in Harrogate with convenience turnovers of £44.5m and £39.9m respectively, equating to market shares of 8.4 per cent and 7.6 per cent. The other facilities in the study area which achieve a convenience retail turnover in excess of £10m are the Morrisons stores in Wetherby, Guiseley, Boroughbridge and Ripon, and the Sainsbury's and Waitrose stores in Otley. These nine foodstores within the study area collectively account for just over half of the convenience goods expenditure available to study area residents.

Table 4.14 Main Destinations for Convenience Goods Expenditure Retained within the Study Area

Foodstores within the Study Area	Convenience Goods Expenditure Retained within the Study Area (£m)	Market Share (%)
Asda, Bower Road, Harrogate	47.7	9.0
Morrisons, Plumpton Park, Hookstone Chase, Harrogate	44.5	8.4
Sainsbury's, Wetherby Road, Harrogate	39.9	7.6
Morrisons, Horsefair, Wetherby	30.9	5.9
Morrisons, 89 Otley Road, Guiseley	30.0	5.7
Morrisons, Stump Cross, Boroughbridge	28.8	5.5
Morrisons, Harrogate Road, Ripon	25.8	4.9
Sainsbury's, 11 Bondgate, Otley	21.6	4.1
Waitrose, 60 Westgate, Otley	15.7	3.0

4.6.7 The main leakage destinations for convenience goods expenditure are set out in Table 4.15. There is significant leakage to the Tesco store at Clifton Moor York, which accounts for £16.9m of the study area residents' convenience expenditure. However, it should be noted that this store is located just outside the study area and has a strong influence over the eastern fringes of the study area.

Table 4.15 Main Destinations for Convenience Goods Expenditure Leakage

Foodstores outside the OCA	Convenience Goods Expenditure Leakage (£m)	Market Share (%)
Tesco Extra, Clifton Moor, York	16.9	3.2
Tesco, Craven Street, Skipton	6.8	1.3
Morrisons, Broughton Road, Skipton	5.2	1.0
Tesco, Station Road, Thirsk	5.0	1.0
Tesco Extra, Tadcaster Road, York	3.7	0.7

4.6.8 The study area's retention level by zone – that is, the proportion of expenditure on convenience goods available to residents in a specific zone which is spent in town centres and stores located within the study area (see Appendix C Table 8a, *'Overall sub-total for study area'* row) – is highest in Zone 2 at 100 per cent, and is also high in Zone 3 (Harrogate, 99.8 per cent), Zone 1 (Harrogate, 97.6 per cent), Zone 6 (Ripon, 96 per cent), Zone 4 (94.1 per cent), Zone 5 (Boroughbridge and Knaresborough, 91 per cent) and Zone 8 (Guiseley and Otley, 86.7 per cent). The retention level by zone is a more modest 76.2 per cent for Zone 7 (Wetherby) and 66.3 per cent for Zone 9 (Ilkley). It is lowest in Zone 10 at 27.1 per cent which is located in close proximity to the Tesco store at Clifton Moor.

4.6.9 The localised convenience goods retention rate – the proportion of expenditure on convenience goods available to residents in a specific zone which is spent in centres and stores located within that zone – is highest for Zone 6, which encompasses Ripon City Centre, and has a localised retention rate of 78.5 per cent (see Appendix C Table 8a, '*Zone 6*' column and '*Sub-total, survey zone 6*' row, and Table 4.16). The localised retention rate of Zone 8, which takes in Guiseley and Otley Town Centres, is also high at 74.4 per cent.

4.6.10 The localised retention rate in Zones 7, 3, 1, 5 and 9 are a more modest 65.8 per cent, 65.7 per cent, 53.3 per cent, 52.5 per cent and 45.0 per cent, respectively. A number of residents in these zones shop in neighbouring zones. For example many of the residents of Zone 5 undertake their food and grocery shopping in nearby Harrogate Town Centre.

4.6.11 The localised retention rate in Zones 4, 10 and 2 are extremely low at 4.3 per cent, 5.2 per cent and 8.6 per cent respectively. This is to be expected as these zones are very rural and residents mainly shop at foodstore in larger towns. In Zones 2 and 4 a high proportion of their expenditure is contained within the study area. As stated above, the majority of convenience expenditure in Zone 10 is directed to destinations outside the study, with nearly a third spent in the Tesco in nearby York.

Table 4.16 Localised Convenience Goods Retention Rates

Zone	Zonal Retention Rate (%)
1	53.3
2	8.6
3	65.7
4	4.3
5	52.5
6	78.5
7	65.8
8	74.4
9	45.0
10	5.2

4.6.12 Overall, we consider that there are no zones with an acute deficiency in convenience retail provision. Whilst the convenience retail provision in Zones 2, 4 and 10 is limited, there are no main town centres located within these zones and residents are served by existing stores in Harrogate and other locations nearby.

4.7 Convenience Goods Market Shares

4.7.1 Table 4.17 shows, for each zone, '*dominant*' stores with a zonal market share of over 25 per cent, and stores with shares between 8 and 25 per cent, which have a '*subsidiary*' influence.

Table 4.17 Dominant Convenience Goods Stores, and Stores with Subsidiary Influence

Zone	Dominant Stores (Market Share of 25%+)	Subsidiary Stores (Market Share 8% to 25%)
1	Asda, Bower Road, Harrogate	Morrisons, Plumpton Park, Hookstone Chase, Harrogate, Sainsbury's, Wetherby Road, Harrogate
2	Asda, Bower Road, Harrogate	Morrisons, Plumpton Park, Hookstone Chase, Harrogate, Sainsbury's, Wetherby Road, Harrogate
3	Morrisons, Plumpton Park, Hookstone Chase, Harrogate	Asda, Bower Road, Harrogate, Sainsbury, Wetherby Road, Harrogate
4	-	Sainsbury's, 11 Bondgate, Otley, Waitrose, 60 Westgate, Otley Sainsbury's, Wetherby Road, Harrogate.
5	Morrisons, Stump Cross, Boroughbridge	Sainsbury's, Wetherby Road, Harrogate, Morrisons, Plumpton Park, Hookstone Chase, Harrogate
6	Morrisons, Harrogate Road, Ripon	Sainsbury's, 5 Market Place South, Ripon
7	Morrisons, Horsefair, Wetherby	-
8	Morrisons, 89 Otley Road, Guiseley	Sainsbury's, 11 Bondgate, Otley, Waitrose, 60 Westgate, Otley
9	-	Tesco, Springs Lane, Ilkley Booths, Leeds Road, Ilkley
10	-	Morrisons, Stump Cross, Boroughbridge

4.7.2 Table 4.16 shows that:

- no zone has three dominant stores;
- Zone 1 has one dominant store and two stores which have a subsidiary influence, all of which are located in Harrogate;
- In Zone 2 the dominant store is the Asda in Harrogate, with the Morrisons and Sainsbury's stores also in Harrogate having a subsidiary influence;
- Zone 3 has one dominant store, the Morrisons in Harrogate, and two stores which have a subsidiary influence, both of which are in Harrogate;
- Zone 4 has no dominant store with a market share of over 25 per cent, although there are three stores which have a subsidiary influence within the zone (the Sainsbury's and Waitrose stores in Otely and the Sainsbury's in Harrogate);
- Morrisons in Boroughbridge is the dominant store in Zone 5, with two stores having subsidiary influence in nearby Harrogate (no stores in Knaresborough have a market share of more than 10 per cent);

- In Zone 6 there is one dominant store (Morrisons in Ripon) along with one store with subsidiary influence, the Sainsbury's in Ripon. The new Booths store within the city centre does not achieve a market share of more than 10 per cent;
- in Zone 7 the Morrisons in Wetherby is the dominant store with no stores with subsidiary influence;
- in Zone 8 there is one dominant store (the Morrisons in Guiseley) and two subsidiary stores both located in Otley;
- in Zone 9 there is no dominant store with two stores in Ilkley having subsidiary influence; and
- in Zone 10 there is also no dominant store with the Morrisons in Boroughbridge having subsidiary influence.

4.7.3 The highest individual zonal market shares are enjoyed by:

- Morrisons in Wetherby, which accounts for 42.2 per cent of the convenience goods expenditure of Zone 7 residents;
- Morrisons in Ripon, which accounts for 40.1 per cent of the convenience goods expenditure of Zone 6 residents;
- Morrisons in Harrogate, which accounts for 37.8 per cent of the convenience goods expenditure of residents of Zone 3; and
- Morrisons in Guiseley, which accounts for 34.0 per cent of the convenience goods expenditure of residents of Zone 8.

4.7.4 The survey findings confirm that most convenience shopping is undertaken on a highly localised basis. Indeed, Appendix C Table 8a reveals that only two stores within the study area has a market share of over 10 per cent in three or more zones (Asda and Morrisons in Harrogate).

4.8 Conclusions in Relation to Retail Spending Patterns

Comparison Goods Spending

4.8.1 Overall, 68.1 per cent of the comparison goods expenditure available to residents of the study area is retained by town centres, retail parks and freestanding stores located in the study area. The main comparison retail destination within the study area is Harrogate Town Centre, which secures £225.2m of the residents' comparison goods expenditure.

4.8.2 Nearly a third of the total comparison goods expenditure available within the study area therefore '*leaks*' to destinations beyond the study area. Short-distance leakage to Leeds, York and Skipton accounts for 21.2 per cent of residents' comparison goods expenditure.

4.8.3 Harrogate Town Centre achieves a comparison goods market share of 50 per cent and above in three of the ten zones. It also achieves a market share of at least 30 per cent in three other zones. This indicates that Harrogate plays a key role in terms of comparison retailing across the study area. Ripon City Centre's comparison goods market share reaches a maximum of 39.4 per cent in its own zone (Zone 6), but Ripon achieves a market share of less than 4 per cent in the remaining nine study area zones.

4.8.4 Our analysis of the seven categories of comparison goods also shows that the overall retention rate is lowest for the DIY sub-sector, at 59.5 per cent. Nearly a fifth of clothing and shoes goods expenditure leeks to Leeds and York city centres.

Convenience Goods Spending

4.8.5 Overall, 84 per cent of the convenience goods expenditure available to residents of the study area is retained by town, village and other centres, retail parks and freestanding stores located in the study area. Thus, as might be expected, there is less leakage than in the comparison sector, because convenience shopping is generally undertaken on a more localised basis.

4.8.6 The highest individual convenience market shares within the study area are achieved by the Asda, Morrisons and Sainsbury's stores in Harrogate. There are no parts of the study area where there is an acute localised deficiency in convenience goods provision. The residents located in Zones 2, 4 and 10, are served by a more limited local food and grocery offer and they have to travel for their food and grocery shopping. There are no town centres located within these areas, but the residents of Zones 2, 4 and 10 are within easy travelling distance of existing convenience retail provision in the immediate surrounding areas.

4.8.7 The majority of Harrogate and Ripon residents' convenience expenditure is spread amongst a number of convenience stores in and around the respective towns. However, the Morrisons in Ripon and Boroughbridge both benefit from a high market share indicating that there may be scope for some increased convenience retail competition. Knaresborough is not served by any large foodstore and this does indicate a deficiency in local provision here.

5 Quantitative Need for Additional Retail Floorspace in the Study Area

5.1 Methodology for Assessing Quantitative Retail Need

5.1.1 Section 3 and Appendix B of the PPS4 Practice Guidance, which remains extant at the time of writing, provide advice on the assessment of quantitative and qualitative need. The Practice Guidance states that it does not *'seek to prescribe a single methodology'* and that *'alternative approaches may be equally acceptable, provided they are compliant with national policy objectives and clearly justified, transparently presented and robustly evidenced'* (paragraph 1.22). We accept, also, the advice given in paragraph B3 to the effect that *'forecasts of 'retail need' should not be regarded as prescriptive'* and that they *'inevitably involve judgments and ultimately policy choices'.*

5.1.2 Thus, we have refined the five step approach set out in Appendix B of the Practice Guidance into eight steps, as follows:

i. Establish an appropriate catchment area for the highest order centre being considered, in this case Harrogate. This catchment area is the study area.

ii. Assess the existing level of population and existing volume of retail expenditure for residents within the defined study area.

iii. Establish where the expenditure of the catchment area's residents is currently spent, through the use of an empirical survey of households in the catchment area, and thereby establish the proportion of expenditure which is currently retained by town centres and freestanding stores located within the catchment – that is, the current retention rate.

iv. Apply forecasts of population change and per capita expenditure growth, so as to establish the overall level of projected growth in expenditure for residents of the catchment area and an assessment of growth in retained expenditure, using, initially, a constant retention assumption.

v. Allow for 'claims' on the growth in retained expenditure as a result of:

- floorspace efficiency change (that is, the growth in turnover of existing retailers within the study area);
- growth over time in special forms of trading (SFT), mainly growth in internet sales; and
- planning commitments.

vi. Calculate the initial residual expenditure pot which is potentially available for new retail floorspace, based on steps iv) and v) above.

vii. Make an allowance for under-trading or over-trading in the base year, if this is justified.

viii. Develop alternative scenarios for calculating growth in residual expenditure, based on:

- increases or decreases in the projected retention level; or
- sensitivity testing of key assumptions.

5.1.3 Below, we describe each stage of our assessment of quantitative need and provide a summary of our findings.

5.2 Step i. Definition of the Overall Catchment Area

5.2.1 The study area is as described at the beginning of Section 4 of our report and is split into ten zones based on postcode boundaries, as shown in Figure 4.1. The boundaries of the study area reflect those used in the Council's previous retail studies albeit that we have made minor alterations to reflect changes to postcode boundaries and to minimise variations in the population of the ten individual zones. As shown in Tables 4.3 and 4.6 of section 4, Harrogate Town Centre attracts a significant proportion of expenditure from a number of the zones and so the entire study area can be regarded as the overall catchment area (OCA) of the District's highest-order centre, Harrogate.

5.3 Step ii. Existing Level of Population and Expenditure

5.3.1 The population by zone in 2013 is set out in the second row of Appendix C Table 1. The overall population in 2013 amounts to approximately 290,464 persons, which is derived by applying the revised ONS Based Population and Household Projections to the 2011 Mid-Year Population Estimates supplied by ONS.

5.3.2 The zonal per capita expenditure data for comparison and convenience goods were supplied by Experian for the year 2011, as set out in the top row of Appendix C Tables 2a and 2b, respectively. These data were then rolled forward to 2013 using the forecasts as provided by Experian[3] in October 2013.

5.3.3 The total expenditure pot in 2013 is derived from the product of Appendix C Tables 1 and 2a for comparison goods and from the product of Appendix C Tables 1 and 2b for convenience goods, and is as set out in the second row of figures in Appendix C Tables 3a and 3b, respectively. In total, £935.3m of comparison expenditure and £543.9m of convenience expenditure is estimated to be available to residents of the catchment area in 2013.

5.4 Step iii. Establish Existing Retail Spending Patterns

5.4.1 Next we use the household survey findings to establish current patterns of expenditure and the current retention rate, as described in Section 4 of our report. The current pattern of expenditure and the current retention rate for comparison goods is as set out in Appendix C Table 4b, with the overall retention rate for comparison goods being 68.1 per cent. For convenience goods, the pattern of expenditure and the current retention rate is as set out in Appendix C Table 8b, which reveals an overall convenience goods retention rate of 83.7 per cent.

5.5 Step iv. Forecast Growth in Expenditure and Forecast Growth in Retained Expenditure

5.5.1 The next steps are to apply forecasts of population change and per capita expenditure growth, so as to establish the overall level of projected growth in expenditure for all residents of the catchment area, and then assess growth in retained expenditure.

Population Growth

5.5.2 Population change is based on the mid-2011 Population Projections, from the ONS, as set out in Appendix C Table 1. Using this method, the resident population across the OCA is forecast to increase from 290,464 persons in 2013, to around 302,477 persons in 2026. This equates

[3] Figure 1a, Retail Planner Briefing Note 11, Experian, October 2013.

to a total population increase of approximately 12,013 persons, or 4.1 per cent, over the entire study period.

Expenditure Growth

5.5.3 The expenditure growth rates estimated by Experian in October 2013 are relatively low between 2011 and 2013, reflecting the recession's legacy of high unemployment, weak consumer confidence and reduced availability to credit. From 2013 comparison expenditure growth rates are expected to improve, although similar improvement in convenience expenditure growth rates is not expected until after 2016.

5.5.4 The per capita comparison and convenience goods expenditure growth rates that we have adopted are provided by Experian, and are set out in full for each forecast year in the footnotes to Appendix C Table 2a (for comparison goods) and Appendix C Table 2b (for convenience goods). For comparison goods the annual growth rate is 3.2 per cent between 2013-14, 2.4 per cent between 2014-15, 2.8 per cent between 2015-16, 3.0 per cent between 2016-20 and 2.9 per cent thereafter. For convenience goods the annual growth rate equates to -0.6 per cent between 2013-14, -0.3 per cent between 2014-15, 0.1 per cent between 2015-19 and 0.8 per cent thereafter.

5.5.5 The data on growth in per capita expenditure are as set out in Appendix C Tables 2a and 2b, which utilise the growth rates as described above, are summarised for each of the forecast periods in Table 5.1 below.

Table 5.1 Expenditure Growth Per Capita for each Forecast Period, 2013-2026

Period	Rate per Annum	
	Comparison Goods	Convenience Goods
2013-2014	3.2%	-0.6%
2014-2015	2.3%	-0.3%
2015-2016	2.8%	0.1%
2016-2020	3.0%	0.8%
2021+	2.9%	0.8%

Total Expenditure Pot

5.5.6 The available expenditure for all residents of the OCA is set out in the final column of Appendix C Table 3a for comparison goods, and in Appendix C Table 3b for comparison goods.

5.6 Step v. '*Claims*' on Growth in Retained Expenditure

5.6.1 The next stage is to make an allowance for further '*claims*' on the growth in retained expenditure, which are:

- growth in floorspace efficiency (growth in the turnover of existing retailers from their existing floorspace);
- growth over time in SFT; and
- an allowance for the predicted turnover of planning commitments.

Growth in Floorspace Efficiency

5.6.2 In making an allowance for growth in existing retailers' floorspace efficiency we adopted the rates of floorspace efficiency change set out in Table 5.2 below.

5.6.3 Sales density growth (also known as floorspace productivity growth) is the amount of expenditure which is '*ring fenced*' for existing floorspace to improve its turnover each year. The DCLG Practice Guidance (paragraph B.48) advises that such allowances should be *'realistic'* and the choice will depend on *the 'capacity of existing floorspace to absorb increased sales'* and should be '*compatible with assumptions about the growth in per capita expenditure'.* Allowances for sales density growth are linked to expenditure growth. The level of comparison and convenience sales density growth that we have allowed for in the study area is summarised in Table 5.2. Owing to the low levels of conveniences goods expenditure growth presently being forecast providers for the short term period, we do not make any allowance for sales density growth until after 2016.

Table 5.2 Rates of Floorspace Efficiency Change

Period	Rate per Annum	
	Comparison Goods	Convenience Goods
2013-2016	1.5%	0.0%
2016+	1.5%	0.3%

5.6.4 This is a blanket sales density growth for all floorspace in the study area. Inevitably, different types of floorspace have different abilities to absorb expenditure growth, with modern floorspace generally better equipped than older stock. However, since this is a District-wide study and we are aware that the main centres have both modern and older floorspace, we consider that such a uniform approach is robust.

Allowance for Growth in Special Forms of Trading (SFT)

5.6.5 The total spending on SFT in each of the forecast years is set out in the final column of Appendix C Table 3a for comparison goods and in Appendix C Table 3b for convenience goods. Spending on special forms for each zone of the study area has been calculated on the basis of the household survey results. Current rates of SFT within the study are range from 10.85 per cent (Zone 2) to 22.72 per cent (Zone 7) for comparison goods expenditure and 0.84 per cent (Zone 1) to 5.92 per cent (Zone 10) for convenience goods expenditure. These compare to Experian's national averages of 14.4 per cent for comparison goods and 8.3 per cent for convenience goods in 2013.

5.6.6 We have made allowances for increases in the local rates of SFT over the study period on the basis of the growth rates implied by the forecasts set out in Appendix 3 of Experian's Retail Planner Briefing Note 11 (October 2013). We have calculated the percentage growth in market share between the study interval years and these growth rates are set out in Table 5.3 below.

Table 5.3 Projected Rates of SFT Growth

Year	Comparison Goods	Convenience Goods
2013-2016	20.8%	30.1%
2016-2021	20.1%	40.7%
2021-2026	1.9%	12.5%

5.6.7 These rates are then applied to the local SFT rates identified by the household survey. For example, the 13.49 per cent comparison SFT rate in Zone 1 in 2013 is grown by 20.8 per cent to provide an estimated rate of 16.3 per cent for that zone in 2016.

Allowance for Planning Commitments

5.6.8 The next step is to allow for the future turnover requirements of commitments for new comparison and convenience retail floorspace, having made an assessment of how much of the commitments' turnovers will be derived from residents of the OCA.

5.6.9 Various extant planning permissions need to be taken into account, as follows:

- approval has been granted for erection of mezzanine floorspace and first floor extensions to the Asda store in Harrogate (12/02002/FULMAJ);
- a new Marks and Spencer foodstore has been granted planning permission on Leeds Road, Harrogate (12/00816/FULMAJ);
- a large new Tesco store has been granted permission in Harrogate (09/02704/FULMAJ);
- approval for an extension to the Co-operative foodstore in Knaresborough has been granted (11/01562/REPMAJ); and
- approval for a replacement Morrisons store in Ripon (11/01947/FULMAJ). We take account of the uplift in convenience and comparison sales floorspace to be provided by the replacement store. The existing Morrisons store is proposed to be converted to a DIY/Home store and a garden centre and so we include these as separate comparison floorspace commitments.

5.6.10 Our assessment of the comparison and convenience goods turnover of these permitted developments is set out in Appendix C Table 6. We have assumed that all elements of these schemes will be open and trading by 2016 and have, where appropriate, grown the estimated turnover of these developments to 2016 by the sales density growth rates set out in Table 5.2 above.

5.6.11 Further details of the District's retail floorspace commitments are shown in Tables 5.4 and 5.5 below. The developments shown are all foodstore developments but they comprise both convenience and comparison retail floorspace.

Table 5.4 Comparison Retail Commitments (as at November 2013)

Application Ref.	Date Approved	Details of Proposal	Address	Gross Floorspace (sq.m)	Sales Area Floorspace (sq.m)*	Comparison Sales Density at 2016 (£ per sq.m)*	Comparison Turnover from OCA at 2016 (£m)**
12/02002/FULMAJ	24/08/2012	Erection of mezzanine floor, ground floor and first floor extensions	Asda Stores Limited Bower Road Harrogate HG1 5DE	1,043	877 (Foodstore)	5,690	4.5
12/00816/FULMAJ	24/08/2012	Erection of retail store with cafe and offices.	91 - 97 Leeds Road Harrogate HG2 8BE	3,017	692 (Foodstore)	8,423	5.5
09/02704/FULMAJ	27/02/2012	Erection of Class A1 superstore	Site Of North East Gas Offices Skipton Road Harrogate	7,345	1,317 (Foodstore)	10,318	12.9
11/01562/REPMAJ	24/10/2011	Erection of extension to supermarket including associated car parking	Co Operative Chain Lane Knaresborough HG5 0DH		196 (Foodstore)	3,953	0.8
11/01947/FULMAJ	25/06/2013	Erection of Class A1 superstore and conversion of existing Class A1 superstore to DIY store	Wm Morrisons Harrogate Road Ripon HG4 2SB		651 (Foodstore)	8,876	5.5
11/01947/FULMAJ	25/06/2013	Erection of Class A1 superstore and conversion of existing Class A1 superstore to DIY store	Wm Morrisons Harrogate Road Ripon HG4 2SB	4,237	3,601 (DIY/Home Store)	2,000	6.5
11/01947/FULMAJ	25/06/2013	Erection of Class A1 superstore and conversion of existing Class A1 superstore to DIY store	Wm Morrisons Harrogate Road Ripon HG4 2SB	1,035	1,035 (Garden Centre)	1,000	0.9
Total				**-**	**8,369**	**-**	**36.6**

* Data taken from planning applications or based on PBA assumptions. Turnover grown to 2016 on basis of sales density growth of 1.5%.** Calculated on the basis of a percentage of the total turnover (see Appendix C Table 6).

Table 5.5 Convenience Retail Commitments (as at November 2013)

Application Ref.	Date Approved	Details of Proposal	Address	Gross Floorspace (sq.m)	Sales Area Floorspace (sq.m)*	Comparison Sales Density at 2016 (£ per sq.m)*	Comparison Turnover from OCA at 2016 (£m)**
12/00816/FULMAJ	24/08/2012	Erection of retail store with cafe and offices	91 - 97 Leeds Road Harrogate HG2 8BE	3,017	846	10,928	8.8
09/02704/FULMAJ	27/02/2012	Erection of Class A1 superstore	Site Of North East Gas Offices Skipton Road, Harrogate	7,345	2,721	12,855	33.2
11/01562/REPMAJ	24/10/2011	Erection of extension to supermarket	Co Operative, Chain Lane Knaresborough HG5 0DH		950	7,000	6.7
11/01947/FULMAJ	25/06/2013	Erection of Class A1 superstore, andconversion of existing Class A1 superstore to DIY store	Wm Morrisons Harrogate Road Ripon North Yorkshire HG4 2SB		710	13,804	9.3
Total				**-**	**5,227**	**-**	**58.0**

*Data taken from planning applications or based on PBA assumptions.

** Calculated on the basis of a percentage of the total turnover (see Appendix C Table 6).

5.7 Step vi. Residual Expenditure Potentially Available for New Floorspace

5.7.1 Row G of Appendix C Table 7 for comparison goods and Row G of Appendix C Tables 9 for convenience goods, set out the initial residual expenditure pot potentially available for new retail floorspace, having allowed for all of the claims on the growth in retained expenditure – that is, growth in floorspace efficiency (shown in Row E of Tables 7 and 9), growth over time in SFT (accounted for in Row B of Tables 7 and 9) and commitments (shown in Row F of Tables 7 and 9). This initial residual expenditure capacity is negative for comparison goods until 2021 and negative throughout the whole study period for convenience goods.

5.8 Step vii. Adjustments for Under- or Over-trading and Inflow in the Base Year

Comparison Goods Sector

5.8.1 Next, we consider the current trading position of existing stores relative to their '*benchmark*' level.

5.8.2 Appendix C Table 4b reveals an estimated comparison goods turnover for Harrogate Town Centre of approximately £225.2m, excluding any expenditure inflow from those who live outside of the District. It is our professional judgment that around 10 per cent of the comparison retail turnover of the town centre is likely to be derived from beyond the catchment area; that is, from people who live outside the District, but travel into Harrogate for leisure or shopping purposes, or for work (see allowance made at Rows H, I and K of Appendix C Table 7). Taking into account this level of inflow, the total comparison retail turnover of Harrogate Town Centre rises to £247.7m in 2013.

5.8.3 Using the latest data from Experian GOAD, we estimate that there is around 38,100 sq.m of comparison retail sales floorspace in Harrogate Town Centre, which would imply a comparison sales density of approximately £6,500 per sq.m. This is a good comparison sales density for a town centre location and reflects the strength of Harrogate.

5.8.4 Appendix C Table 4b reveals a comparison goods turnover for Ripon Town Centre of £40.5m, excluding any expenditure inflow from residents beyond the OCA. Making an allowance for an additional 5 per cent from expenditure inflow – lower than the 10 per cent figure that we have assumed for Harrogate, given the narrower town centre offer in Ripon and, hence, a less extensive sphere of influence – indicates a total comparison goods turnover of £42.5m. Based on the floorspace data supplied by Experian GOAD, this suggests an average comparison goods sales density in Ripon of £4,350 per sq.m. This is lower than the average sales density achieved in Harrogate but reflects the smaller size of the centre and the fact that Ripon contains fewer national multiples, and is consistent with what we would expect.

5.8.5 Knaresborough Town Centre has a comparison goods turnover of £21.0m. As with Ripon we make an allowance of an additional 5 per cent from expenditure inflow, given its attraction as a tourist destination. This gives a comparison goods turnover of £22.1m. Based on the Experian GOAD data, the comparison floorspace of Knaresborough is approximately 4,500 sq.m. This gives an average comparison goods sales density in Knaresborough of £4,900 per sq.m, a reasonably good performance given the size of the town centre.

5.8.6 On the basis that the estimated sales densities of existing comparison floorspace in the District's three main centres is good and in line with expectations, we make no adjustments for over- or under-trading at comparison retail stores in Harrogate's main town centres for the year 2013.

Convenience Goods Sector

5.8.7 For the ten largest foodstores within the OCA, we have compared the survey-based turnover estimates with the 'benchmark' turnover levels, as shown in Table 5.6. We have also amended the survey-based turnover estimates to take into account inflow (i.e. expenditure received from outside the study area). We have considered this 'inflow' on a case by case basis, having regard to the size of the store, its operator and its position within the study area.

5.8.8 Our analysis indicates that the foodstores with the highest levels of overtrading are the Asda store in Harrogate and Morrisons store in Whetherby. The Morrisons stores in Guiseley and Ripon are also estimated to be over-trading whilst the Sainsbury's store in trading at around company benchmark levels. However, a number of the main foodstores are under-trading. The most significant of these are the Waitrose store in Harrogate and Sainsbury's store in Ripon. The former is quite surprising given the performance of other foodstores in Harrogate and we suspect that the household survey may have under-reported the turnover of Waitrose, particularly in terms of its top-up food shopping role. The under-trading of the Sainsbury's store in Ripon is of more concern but can probably be explained in terms of the recent opening of the new Booths foodstore in Ripon City Centre.

5.8.9 The aggregate level of over-trading is estimated to be £23.9 million in 2013. We apply this figure to our assessment of convenience floorspace requirements within the first interval period (Row L of Table 9 in Appendix C). We expect that current over-trading will be eliminated by the implementation of committed convenience goods floorspace.

5.8.10 It should be noted that we have only undertaken a detailed analysis of performance against benchmark turnovers for the main foodstores within the OCA, and we have not included smaller or independent traders in our analysis. Whereas published information in relation to benchmark sales densities for the major foodstore operators is available, there are no published data on sales densities for independent foodstores. The ten largest foodstores within the OCA collectively account for some two thirds of the aggregate convenience goods expenditure that is retained within the OCA, and our analysis therefore provides a good indication of the overall trading position of existing foodstores within the OCA.

Table 5.6 Benchmark Assessment of Convenience Turnover of the Main Foodstores in Study Area

Main Foodstores within Study Area	Location of Store (in, edge or out-of-centre)	Convenience Sales Area Floorspace[4] (sq.m)	Benchmark Sales Density (£ /sq.m)[5]	Benchmark Turnover (£m)	HHS derived from Study Area	Drawn from Study Area %	Total Turnover (£m)	Level of Under/ Over Trading (£m)
Sainsbury's, Wetherby Road, Harrogate	Out-of-Centre	3,173	13,184	41.8	39.9	95	41.9	0.1
Asda, Bower Road, Harrogate	Edge-of-Centre	2,614	14,317	37.4	47.7	90	52.4	15.0
Morrisons, 89 Otley Road, Guiseley	In-Centre	2,507	12,910	32.4	30.0	75	37.5	5.1
Morrisons, Stump Cross, Boroughbridge	Out-of-Centre	2,515	12,910	32.5	28.8	90	31.6	-0.8
Morrisons, Plumpton Park, Harrogate	Out-of-Centre	3,793	12,910	49.0	44.5	95	46.7	-2.2
Morrisons, Horsefair, Wetherby	In-Centre	1,771	12,910	22.9	30.9	90	33.9	11.1
Morrisons, Harrogate Road, Ripon	Out-of-Centre	1,868	12,910	24.1	25.8	95	27.1	3.0
Waitrose, Station Parade, Harrogate	Edge-of-Centre	2,100	11,612	24.4	12.9	90	14.2	-10.2
Tesco, Springs Lane, Ilkley	In-Centre	1,326	13,082	17.3	14.7	90	16.2	-1.2
Sainsbury's, 5 Market Place South, Ripon	In-Centre	1,483	13,184	19.6	10.9	90	12.0	-7.6
Total				**£301.4**	**£296.7**		**£325.4**	**£23.9**

[4] Sales area floorspace of all main foodstores are sourced from the IGD 2009 or data from Harrogate Borough Council's records which are based on recent RIAs which have accompanied various planning applications in the area.
[5] The benchmark sales densities used are PBA estimates derived from Verdict's UK Grocery Food and Retailers 2011 report.

5.9 Step viii. Sensitivity Test Alternative Scenarios for Calculating Growth in Retained Expenditure

Increase or Decrease in the Geographical Size of the Catchment Area

Comparison goods sector

5.9.1 Alternative scenarios for calculating growth in residual expenditure can be based on an increase or decrease in the geographical size of the catchment area, where this is justified as part of a strategy to raise the role and function of the centre(s) as part of the local development plan process.

5.9.2 As the Harrogate OCA is surrounded by higher order centres such as York and Leeds, expansion of the OCA is not likely to be achievable. The focus should instead be on ensuring that Harrogate's centres are able to retain at least the current level of comparison expenditure from residents within the OCA.

Convenience goods sector

5.9.3 The NPPF seeks to ensure that people's every day needs, such as convenience shopping, are met on as localised basis as possible. As a consequence, Harrogate's OCA is defined, primarily, on the basis of comparison goods spending patterns, where the very existence of the retail hierarchy demands that people travel to higher order centres for their higher order goods and services. There would be no justification for expanding the geographical size of the catchment area on this basis.

Changes to the Expenditure Retention Level

Comparison goods sector

5.9.4 In the comparison goods sector we have tested a '*constant retention*' scenario in Appendix C Table 7, in which the overall retention level remains at 68.1 per cent in the period up to 2026. We consider the current level of expenditure retention to be reasonably good. Due to significant competition from neighbouring centres outside the OCA we therefore consider that there is little scope for further improvement and as such we have not adopted a 'rising retention' level scenario for the comparison goods sector.

Convenience goods sector

5.9.5 In the convenience goods sector we similarly test a '*constant retention*' scenario in Appendix C Table 9, in which the overall retention level remains at 83.7 per cent in the period up to 2031. We consider this to be a relatively high rate of retention given the size of the OCA and that its more rural fringes are better served by foodstore in neighbouring towns such as Skipton and Thirsk. We therefore consider there to be very limited scope to improve the convenience expenditure retention rate within the OCA.

5.10 Findings in Relation to Retail Expenditure Capacity

5.10.1 Row N of Table 7 in Appendix C for comparison goods, and Row N of Table 9 for convenience goods, also in Appendix C, converts the final residual expenditure under the constant retention scenario to a floorspace requirement expressed as a net sales area. We have divided the residual expenditure by an average sales density for comparison goods of £6,000 per sq.m sales area in 2013[6] , which is an average PBA estimate for comparison goods. In relation to

[6] PBA estimate based on the fact that the town centres within the OCA contain a mixture of relatively modern comparison goods floorspace (which will trade at higher than £6,000 per sq.m) and older, smaller, less efficient units (often in secondary locations) which will trade at lower than £6,000 per sq.m

convenience goods, we have divided the residual expenditure by an average sales density of £10,000 per sq.m sales area in 2013[7]. Finally, we convert the sales area requirement to a gross floorspace requirement, as set out in Row O of Table 7 (comparison goods), and Row O of Tables 9 (convenience goods), using a gross to net ratio of 70 per cent for comparison goods and 65 per cent for convenience goods.

Comparison Goods Sector

5.10.2 Appendix C Table 7 sets out the quantitative comparison goods retail need under the constant retention rate scenario, which are summarised in Table 5.7 below.

Table 5.7 Quantitative Need in the Comparison Goods Sector

Period	Floorspace Requirements (sq.m net)
	Constant Retention
2013-16	-5,784
2016-21	3,426
2021-26	8,541
2013-26	**6,184**

5.10.3 Table 5.7 shows that the comparison retail floorspace requirement arising under the constant retention scenario is negative in the period up to 2016. This means that the growth in retained expenditure up to 2016 is not sufficient to support prior '*claims*' on that growth, namely an improvement in sales densities of existing centres and stores, growth in SFT and the turnover requirements of the extant comparison retail permissions noted in Table 5.4.

5.10.4 There is, however, a positive residual for additional comparison retail floorspace after 2021 with the 'oversupply' in comparison goods floorspace gradually reduced by expenditure growth in the 2016-2021 period. Table 5.7 shows that, there is capacity for approximately 6,184 sq. m over the entire study period which, on the assumption that existing commitments are implemented in the first part of the study period, mainly arises between 2021 and 2026.

5.10.5 We therefore suggest that the Council should work towards a requirement for up 6,184 sq. m of net additional comparison retail floorspace over the plan period. Given the scale of existing commitments there are no short-term requirements for additional comparison floorspace but the Council should monitor the implementation of existing planning permissions carefully. There would also be justification for additional convenience floorspace in the period prior to 2021 if this is required to support identified qualitative needs.

[7] PBA estimate based on averages of ten main national convenience retailers.

Convenience Goods Sector

5.10.6 Appendix C Table 9 sets out the quantitative convenience goods retail need under the constant retention rate scenario, as summarised in Table 5.8 below.

Table 5.8 Quantitative Need in the Convenience Goods Sector

Period	Floorspace Requirements (sq.m net) Constant Retention
2013-16	-3,853
2016-21	983
2021-26	1,516
2013-26	**-1,353**

5.10.7 Table 5.8 shows that for the catchment area as a whole, the quantitative need for additional convenience floorspace over the entire study period is negative. This means that the predicted growth in expenditure is not sufficient to support prior 'claims' on that growth, namely an improvement in sales densities of existing centres and stores, growth in SFT, and the turnover requirements of the commitments detailed in Table 5.5.

5.10.8 The turnover of existing commitments has a particularly significant impact on floorspace requirements and we recommend that the Council should carefully monitor the implementation of extant planning permissions, as non-implementation of these commitments could release significant additional expenditure capacity. In some circumstances the Council should also be prepared to allocate sites for additional convenience goods floorspace to address qualitative needs.

6 Qualitative Need for Additional Retail Facilities in the Study Area

6.1 Introduction

6.1.1 Paragraph 158 of the NPPF makes clear that local planning authorities should ensure that the Local Plan is based on adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area.

6.1.2 Paragraph 161 of the NPPF goes on to state that LPAs should use this evidence base to assess *'the needs for land or floorspace for economic development, including both the quantitative and qualitative needs for all foreseeable types of economic activity over the plan period, including for retail and leisure development'* (our emphasis added).

6.1.3 The PPS4 Practice Guidance explains that, although qualitative need is a subjective concept, there are five main factors that are frequently identified, as follows:

- deficiencies or 'gaps' in existing retail provision;
- consumer choice and competition;
- overtrading, congestion and overcrowding of existing stores;
- location specific needs such as deprived areas and under-served markets; and
- the quality of existing provision.

6.1.4 In this section, we consider the qualitative need for additional convenience and comparison retail floorspace in the District. We focus primarily on the main town centres of Harrogate, Ripon and Knaresborough which are most likely to attract interest from retail operators and developers. Major new retail development would not be appropriate in the smaller town centres of Boroughbridge, Pateley Bridge and Masham which primarily serve the role of rural service centres.

6.1.5 Below, we consider in turn the five main factors of qualitative need, as identified in the PPS4 Practice Guidance, drawing on the findings of our updated health checks of the main town centres where appropriate.

6.2 Assessment of Qualitative Retail Needs

Deficiencies and 'Gaps' in Existing Provision

6.2.1 As set out within Section 4 of this report, we consider that the study area has a reasonably good retention rate for both comparison and convenience goods expenditure when taking account of the size and distribution of centres within the District, the proximity of Leeds and York and that large parts of the study area are rural.

6.2.2 Our performance analysis of Harrogate Town Centre found the breadth of comparison retail provision within the centre to be good, and to reflect the findings of our household survey which confirmed that Harrogate is clearly the dominant retail centre within the study area. The town centre has very good representation from all types of comparison retailers including value, middle market and high end, together with a good complement of both national multiples and independent operators. Representation is good across almost all sub-sectors, including bulky goods such as furniture, kitchens and bathrooms. The town centre is well served by two large foodstores (in edge-of-centre locations) and by a range of specialist food and drink retailers. There is scope to improve top-up food shopping facilities within the centre but this does not represent a significant deficiency.

6.2.3 Our performance analysis of Ripon City Centre concluded that it has a good convenience goods offer with both Booths and Sainsbury's operating foodstores within the city centre, complemented by a relatively healthy independent offer. Whilst we note that the household survey results indicate that Ripon has improved its market share over the past decade, we consider the city centre's comparison goods sector to be less healthy than its convenience retail offer. Improvements in market share are likely to have resulted from the provision of new comparison retail units as part of the small schemes at Marshall Way and The Arcade. However, there remain qualitative deficiencies in provision, particularly in the important clothing and footwear sub-sector. Representation of national multiples within the city centre is limited and current retailer requirements for the centre are weak. We therefore identify a qualitative need for improvements in some comparison goods sub-sectors that should enhance the ability of the city centre to attract future investment and ensure its long term vitality and viability.

6.2.4 Experian GOAD data for Knaresborough Town Centre shows that the proportion of convenience and comparison units and floorspace within the centre is below the national average. As a smaller centre with strong competition from Harrogate Town Centre it is unsurprising that the centre's comparison retail offer is comparatively weak, though it would benefit from being reinforced to limit the potential for any further decline in the town centre's performance. However, the below-average representation from convenience retailers is a concern especially given the size of Knaresborough and its existing function, which is focused on meeting local shopping needs. We consider that the absence of a foodstore within the town centre that is capable of meeting main food shopping needs is a key qualitative deficiency.

6.2.5 In terms of the District's other centres at Boroughbridge, Masham and Pateley Bridge, we consider these to be performing in-line with their size and commensurate roles. Boroughbridge is a particularly healthy rural centre. We have not found any significant qualitative deficiencies in retail provision within these smaller centres.

Consumer Choice and Competition

6.2.6 Given the rural nature of large parts of the District we would expect consumer choice and competition to be more limited in some areas where the provision of additional retail facilities would not be commercially viable, particularly in the comparison goods sector. However, in terms of convenience shopping, the household survey results summarised in Section 4 show that almost every survey zone within the study area is served by a range of different foodstore facilities with no particular operator dominating any individual zone or zones.

6.2.7 Table 4.16 of Section 4 shows the dominant and subsidiary foodstores throughout the study area. The only zone where one store is particularly dominant is Zone 7 where the Morrisons at Wetherby is the only large foodstore. However, Wetherby itself is located outside of the District and large parts of Zone 7 are also served by foodstores outside the study area in Leeds and York.

6.2.8 Within Zone 5, which includes Boroughbridge and the larger settlement of Knaresborough, the Morrisons store at Boroughbridge is the dominant foodstore destination. Sainsbury's and Morrisons in Harrogate serve a subsidiary role, presumably attracting the bulk of convenience goods expenditure from residents of Knaresborough which is not served by a large foodstore. This gap in provision, together with the substantial market share of the two Morrisons stores indicates some scope for qualitative improvement.

6.2.9 The Harrogate urban area is well served by four large foodstores (Asda, Morrisons, Sainsbury's and Waitrose) of which Asda appears to hold the highest market share. Harrogate is therefore well served in terms of consumer choice and competition. Ripon also benefits from strong competition with Booths, Morrisons and Sainsbury's all operating large foodstores within the town.

6.2.10 Otley is the main destination for convenience goods shopping in Zone 4 (which falls substantially within Harrogate District) but we believe that this mainly reflects the distribution of population within that zone. Foodstore facilities in Ilkley dominate Zone 9 (which includes Ilkley itself) with the northern, more rural, areas of the zone well served by a number of foodstores in Skipton. Morrisons at Boroughbridge recorded the largest market share in Zone 10 which substantially lies outside of the District. This zone is also served by facilities in Thirsk and in York.

'Over-trading', Congestion and Overcrowding of Existing Stores

6.2.11 The PPS4 Practice Guidance explains that the extent to which the turnover of existing stores significantly exceeds benchmark turnovers may be a qualitative indicator of need, as well as informing quantitative need considerations. This issue is of more relevance in the convenience retail sector where it is easier to 'benchmark' trading performance on the basis of published data, and so we focus on this here. It is important to note that whilst over-trading may be an indicator of qualitative need for additional convenience retail floorspace, it is important to take account of whether these stores are in-centre or out-of-centre.

6.2.12 Our benchmark analysis in Table 5.6 shows that the aggregate trading position of the ten main foodstores in the OCA is some £23.9m above the corresponding benchmark level. For most stores the levels of over or under-trading identified by our analysis are marginal. However, the edge-of-centre Asda store at Harrogate was found to be over-trading by £15m (or 40 per cent above company benchmark levels) and the Sainsbury's foodstore in Ripon City Centre is under-trading by £7.6 m (or 39 per cent below company benchmark levels).

6.2.13 The over-trading of the Asda store in Harrogate is not considered to be problematic given that it is well connected to the town centre and that consumer choice is good within Harrogate. There may be a qualitative justification for the future expansion of this store to provide additional convenience goods floorspace if overtrading of this store is not reduced by committed convenience floorspace elsewhere within Harrogate. The under-trading of the Sainsbury's store at Ripon City Centre is of greater concern. Whilst it is likely that this store has suffered from the opening of a new Booths foodstore within the city centre, the out-of-centre Morrisons store at Ripon continues to trade at above benchmark levels and the impacts of the development of additional out-of-centre convenience retail floorspace in Ripon should be carefully considered.

Location-Specific Needs

6.2.14 As noted above, the main location-specific qualitative need we have identified is for improved convenience goods facilities in Knaresborough which currently contains no large foodstore and whose residents are dependent on facilities in Harrogate or Boroughbridge. This would help to reduce the need for Knaresborough's residents to travel and help to promote sustainable shopping patterns, particularly if any new development is located within the town centre. We note that there is a pending planning application at Manse Farm, Knaresborough (Ref: 13/00535/EIAMAJ), that includes the provision of a foodstore of 1,510 sq. m net outside of the town centre.

Quality of Existing Provision

6.2.15 The overall quality and range of retail floorspace in Harrogate Town Centre is good. Although much of the floorspace stock is accommodated in older buildings, these are generally attractive and well maintained properties. More modern, larger floorplate accommodation is available at the Victoria Shopping Centre and on Cambridge Street though opportunities should be sought to expand this supply in the future.

6.2.16 In both Ripon City Centre and Knaresborough Town Centre, the quality and condition of retail property is generally good and, as we have noted elsewhere, the physical environment of the two centres is generally attractive and well maintained throughout. Given the historic nature of both centres the existing accommodation is mainly traditional and therefore does provide some operational constraints. Both centres, and especially Ripon, would benefit from the development of additional modern retail floorspace that would provide the flexibility and efficiency required by national multiple retailers. The availability of such accommodation could help to reinforce the vitality and viability of these two centres.

6.3 Conclusion in Relation to Qualitative Retail Needs

6.3.1 Taking into account the findings of our performance analysis of the District's main town centres, and the five indicators of qualitative need listed in the PPS4 Practice Guidance, we have identified a particular qualitative need for:

- The provision of a new foodstore in Knaresborough. This is the most obvious deficiency in convenience goods provision within the District. A foodstore within the town centre could play a key role in reinforcing its vitality and viability, as well as promoting more sustainable shopping patterns.

- Additional modern retail units in Ripon City Centre to accommodate the requirements of 'high street' comparison operators. The City Centre is under-represented in several key comparison goods sub-sectors and has limited representation from national multiples. In order to address these deficiencies and bolster the performance of the centre, it is important to ensure that Ripon remains competitive and is able to offer the appropriate type of floorspace required to maintain operator interest and attract new occupiers.

7 Opportunities for Accommodating Retail Needs

7.1 Introduction

7.1.1 We have considered potential opportunities within the six main town centres to accommodate the development of new retail floorspace and therefore address the quantitative and qualitative requirements identified within Sections 5 and 6. At the outset we note that Boroughbridge, Masham and Pateley Bridge town centres are relatively small centres that perform the role of rural service centres. It would be inappropriate to direct any significant new retail development to these centres. It is also noted that the larger centres of Harrogate, Knaresborough and Ripon are all densely developed town centres where the scope for new development is constrained by the historic environment.

7.1.2 Our quantitative assessment of additional retail floorspace requirements set out in Section 5 identified requirements for approximately 6,200 sq. m of additional comparison retail floorspace over the development plan period. On the basis of a 70 per net:gross floorspace split this would indicate a requirement for around 8,900 sq. m of gross floorspace. We have found no capacity for additional convenience goods floorspace over the same period. However, in Section 6, we identified a qualitative requirement for additional foodstore provision within Knaresborough Town Centre. In addition to this we also found a qualitative need for modern retail floorspace for comparison goods retailers in Ripon City Centre.

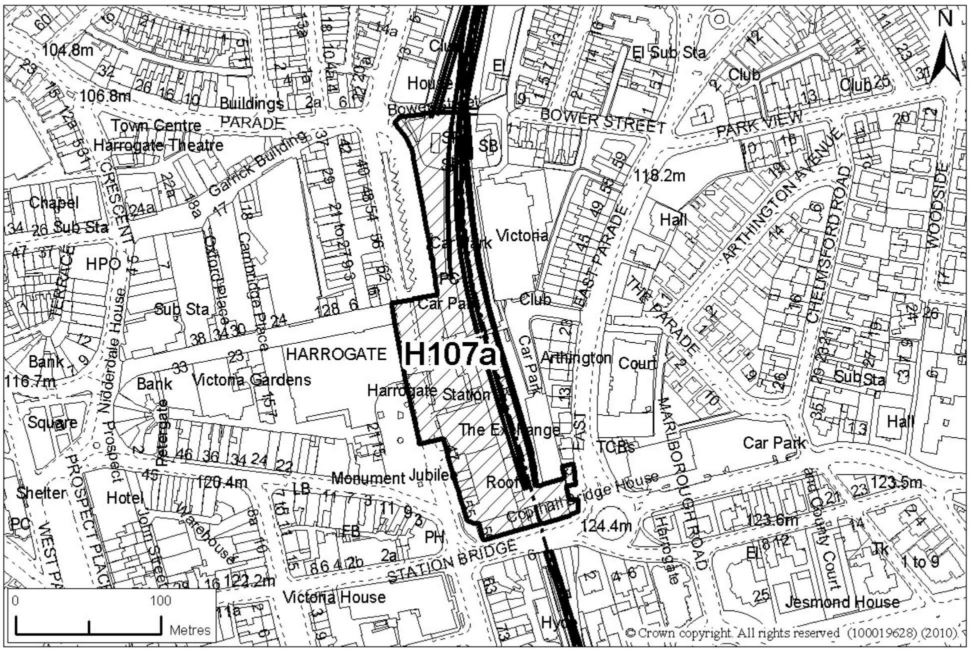
7.2 Harrogate Town Centre

7.2.1 The adopted Local Plan of 2001 identified three development sites within Harrogate Town Centre at the Royal Baths, Union Street and Station Parade. The rear of the Royal Baths site has now been redeveloped for residential development whilst the Union Street site has been developed to provide a new multi-storey car park. This leaves the Station Parade site which includes the railway station and bus station. The Borough Council prepared a development brief for this site in 2005.

Figure 7.1 Images of Station Parade/Station Bridge development site, Harrogate

7.2.2 The key town centre development site continues to be the allocated site at Station Parade. This site is well related to the existing shopping area and its redevelopment could deliver visual improvements to this part of the town centre and improved accessibility, which may help to tackle town centre congestion. The site is proposed to be re-allocated within the Council’s emerging Sites and Policies Development Plan Document (DPD) for mixed-use development including retail, transport interchange facilities, residential and/or office uses under draft Policy JB5. We suggest that the development area should be extended to the south to include adjacent properties fronting onto Station Bridge (as shown within the emerging Sites and Policies DPD – see Figure 7.2 below). The site’s development is complicated by its multiple ownership and its proximity to rail infrastructure but as the most appropriate site for additional retail floorspace we recommend that the Borough Council take a proactive approach to the release of this site.

Figure 7.2 Station Parade development site



Source: Appendix B, Harrogate Sites and Policies DPD (November 2013)

7.2.3 It is possible that the Station Parade site could be redeveloped in tandem with the site of the Odeon cinema on Station Avenue. New cinema facilities could be provided at upper level at Station Parade, enabling the Station Avenue site to accommodate existing uses that may potentially be displaced from Station Parade, such as office uses.

7.2.4 We have identified one other site within the vicinity of the town centre that may have redevelopment potential. This is the site of the Asda store on Bower Road and land to the north which is used as car parking and as a holding area for the exhibition centre. It is 120 metres from the boundaries of the ‘shopping centre’ and is therefore ‘edge-of-centre’ according to the definitions of the NPPF. There is scope for any new development to improve linkages with the rest of the town centre via the northern end of Station Parade or by using land to the west of Bower Street. The foodstore is a little dated but, according to the household survey results, trades very well and this may provide some justification for the redevelopment of the site. Dragon Road Car Park is a temporary car park which is at times used as a holding area for the Exhibition Centre. Provided suitable alternative facilities could be found for the latter we consider there to be potential to redevelop the northern end of the site for a replacement foodstore, releasing the site of the existing store for comparison retail development.

7.2.5 Elsewhere within the town centre (but outside of the ‘shopping centre’ identified by the Local Plan) there is a potential development site to the east of West Park on Tower Street (see Figure 7.3 below). It comprises the West Street multi-storey car park and vacant commercial buildings to its west. Part of the site has planning permission for the development of a hotel (Travelodge is the named operator), but this is yet to be implemented. There is potential here for a more comprehensive redevelopment to include the ageing multi-storey car park. However, due to the site’s distance from Harrogate’s ‘shopping centre’ and its location on a side road, it is unlikely that redevelopment of the site would be retail-led. Nevertheless, there could be some scope for retail uses at ground floor level, potentially accommodating showrooms for small bulky goods retailers or other specialist operators.

7.2.6 Other development opportunities within the existing boundaries of the main shopping area (as identified by the adopted Local Plan) are very limited. Future development is most likely to comprise small-scale infill and redevelopment. A potential candidate for redevelopment is Victoria House which is currently occupied by Beales department store (see Figure 7.3 below). Whilst it is important that such an anchor tenant can be retained within the town centre we consider that there is scope to provide additional retail floorspace at the site via improvements to the existing accommodation (for example, if the height of the existing building could be increased without having an adverse impact on the surrounding townscape).

Figure 7.3 Beales Department Store, Station Parade and Tower Street, Harrogate

7.3 Ripon City Centre

7.3.1 Our qualitative assessment of retail needs within the District suggests that Ripon would benefit from additional comparison goods floorspace in the city centre to help it to attract new operators and remedy some deficiencies in its current offer. The successful letting of the new units adjacent to the new Booths foodstore at Marshall Way suggests that there is demand for such floorspace when it can be made available.

7.3.2 The adopted Local Plan identified two development sites within Ripon City Centre at land to the rear of Fishergate and land adjacent to the Sainsbury's foodstore on the Market Place. The former site has been redeveloped to provide a Booths foodstore and a number of other retail units together with a new access road (Marshall Way). The latter site has been partly redeveloped to provide new retail units at 'The Arcade'. However, the Local Plan allocation allocated the entire area of the Victoria Avenue car parks.

7.3.3 It is our view that the car park site remains the best opportunity to accommodate additional retail floorspace within the city centre, provided that an appropriate design solution can be found and which protects the setting of the Cathedral. It is also likely that Sainsbury's will wish to ensure retention of good access to its store (including adjacent surface level car parking). However, we do consider there to be scope to extend 'The Arcade' and rationalise existing car parking to provide additional comparison retail floorspace and that this site represents the best opportunity to meet this objective within the city centre.

7.4 Knaresborough Town Centre

7.4.1 The adopted Local Plan identified the Fisher Street car parks as the only development site within the town centre. The northern part of the site, fronting the High Street, has been redeveloped since the adoption of the Local Plan to provide a ground floor retail unit that is occupied by Sainsbury's Local and residential accommodation at upper levels. The remainder of the site continues to comprise a freestanding building in retail use and an apparently well-used town centre car park (see images at Figure 7.4 below). We have also identified an edge-of-centre site in Knaresborough which is the former cattle market site to the north of High Street (see Figure 7.5 below). We are aware that the Council has explored the option to develop a foodstore on the cattle market site in the past and identified a number of constraints including, in particular, the ability to deliver suitable access, parking and servicing arrangements for such a use. The Council is also currently seeking to allocate this site in the emerging Site and Policies DPD for a mixed use development. However, this site is well-related to the town centre and, provided that suitable access and servicing arrangements can be made, then it would be suitable for accommodating additional town centre uses with freestanding convenience goods floorspace being the most appropriate use (comparison retail use is considered to be less appropriate given that the site has no main frontage).

Figure 7.4 Fisher Street car park site, Knaresborough

7.4.2 Earlier in this report we have identified a qualitative need for additional convenience goods provision in Knaresborough. We have also highlighted the need for the town centre to be served by an anchor retail facility to drive footfall within the centre and support smaller operators. We therefore recommend that opportunities be sought for the provision of a medium-sized foodstore on the site in order to address both of these issues. The two potential development sites that have been identified present several options to meet these objectives.

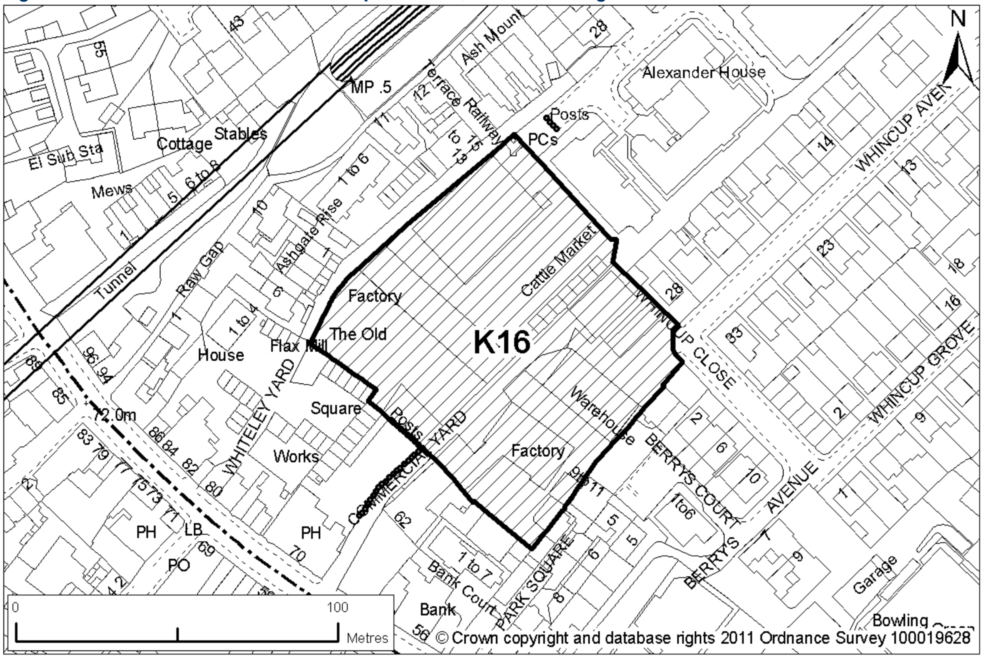
7.4.3 Whilst the 2001 Local Plan indicated that 1,000 sq. m of ‘shopping development’ (assumed to be a gross figure) could be accommodated at the Fisher Street site, we consider that this may need to be raised to accommodate the identified need. In bringing forward such development several constraints would need to be overcome (these constraints may have inhibited the development of the site over the past decade). Whilst we understand that the Borough Council owns the majority of the site, further land assembly may be required to create a developable parcel. The freestanding building at the centre of the site (on the corner of Fisher Street and Chapel Street is Grade II listed. Incorporation of this building into any future redevelopment scheme could be challenging.

7.4.4 Furthermore, the loss of town centre car parking as a result of any proposed development would need to be carefully managed. Any foodstore facility would need to be served by car parking which may require a multi-storey design solution. Such a solution would need to ensure that there were no unacceptable impacts on the historic environment. Sufficient car parking should also be available to support the rest of the town centre. We consider that the following development scenarios may be feasible for the Fisher Street and Cattle Market sites:

- The development of a medium sized foodstore and potentially some modern comparison retail units to link the foodstore to the Market Place or High Street. Given its potential links to the town centre’s primary shopping frontage we consider the Fisher Street site to be the preferred location for an anchor foodstore. This development option would, however, be likely to reduce car parking within the town centre, although compensatory parking facilities could be provided on the site of the former cattle market; or

- The development of a freestanding foodstore on the former cattle market. Subject to overcoming access and servicing constraints this site may be more readily developed for such a facility. The provision of additional car parking associated with a foodstore here may allow the rationalisation of existing car parking at Fisher Street and enable the development of some modern retail units that could help to attract national comparison multiple retailers that would strengthen the town centre's offer.

Figure 7.5 Former Cattle Market development site, Knaresborough



Source: Appendix B, Harrogate Sites and Policies DPD (November 2013)

7.5 Summary

7.5.1 In order to address the quantitative and qualitative needs for additional retail development identified in this report we recommend that the Council should give consideration to the allocation/re-allocation of the following sites for new retail development:

- The re-allocation of land to the east of Market Place and the south of Victoria Avenue within Ripon City Centre to provide additional comparison goods floorspace. We suggest that this site might be capable of accommodating up to 2,000 sq. m of additional gross retail floorspace.

- The re-allocation of the Station Parade site in Harrogate Town Centre and its extension to include buildings to the south, up to Station Bridge. We consider that this site could accommodate up to 4,500 sq. m gross of comparison retail development.

- The allocation of the Asda foodstore and Dragon Road Car Park, Harrogate, to facilitate the redevelopment of the existing store to provide additional retail floorspace and improved connections with the town centre. This site may be capable of accommodating 3,000 sq. m of gross comparison retail floorspace.

- The re-allocation of land at Fisher Street and/or the former Cattle Market in Knaresborough Town Centre for the development of a larger foodstore capable of serving main food shopping requirements and acting as an anchor for the rest of the town centre. We estimate that the chosen site would need to be capable of providing at least 2,000 sq. m gross of retail floorspace. Depending on the chosen option it may be possible to accommodate up to 1,000 sq. m of additional comparison floorspace on the Fisher Street site.

7.5.2 These possible development sites should be the subject of further analysis by the Borough Council to examine options with landowners and other interested parties. This should enable the Council to ascertain deliverable development options and to gain a firmer fix on the capacity of each individual site to accommodate additional retail floorspace.

7.5.3 Given the limited opportunities for new development in Harrogate, the Borough Council may wish to consider other measures that will encourage the efficient use of the existing building stock. Buildings within the town centre are notable for their height and the use of upper storeys for retail and leisure uses should be encouraged, taking a permissive approach to changes of use above ground floor. The Borough Council may also consider the use of local development orders to introduce permitted development rights for change of use from residential or office accommodation to Class A uses (subject to appropriate protections to residential amenity and retention of the highest quality office space).

8 Town Centre Boundaries & Shopping Frontages

8.1 Current Policy

8.1.1 Town centre boundaries for the District’s six town centres are currently set out on the Proposals Map accompanying the Harrogate District Local Plan (2001). The boundaries of the ‘shopping centres’ of all towns are identified in accordance with Policy S2, whilst primary and secondary frontages are identified within Harrogate Town Centre, Knaresborough Town Centre and Ripon City Centre, under the terms of Policy S5. Annex 2 of the NPPF confirms that primary frontages are likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods, while secondary frontages provide greater opportunities for a diversity of uses such as restaurants, cinemas and businesses.

8.1.2 As we highlighted in Section 2 of this report, Policy S2 of the adopted Local Plan is permissive of new shopping development within the defined boundaries of the six town centres. Policy S5 seeks to control non-retail uses within the main centres. Within the primary shopping frontages of Harrogate, Knaresborough and Ripon, the loss of existing ground floor retail floorspace will only be permitted if the proposal would lead to an improvement in the vitality and viability of the centre. Within the secondary shopping frontages, Policy S5 is permissive of uses with Classes A1, A2 and A3 provided that any such development does not create concentrations of similar uses that would cumulatively result in conflict with other plan policies or adversely impact on the retail character, vitality and viability of the centre.

8.1.3 Emerging local policy as set out within the submission version of the Sites and Policies Development Plan Document (November 2013) includes Policy JB7 which is concerned with town and local centre management. This retains and increases controls over non-retail uses within the centres. Within the primary shopping frontages, proposals for non-retail uses will only be allowed where they would not harm the vitality and viability of the shopping centre and the premises have been actively marketed.

8.1.4 In the secondary shopping frontages, appropriate non Class A1 uses will be permitted provided that they do not have an adverse cumulative effect on the vitality and viability of the centre, the retail character or amenity of the frontage, generate levels of traffic that would cause significant congestion or road safety problems, result in three or more consecutive shop units in non-A1 use or conflict with other policies in the plan. It must also be demonstrated that all vacant premises within the shopping centre that were last in non-Class A1 use have been considered in terms of their availability and suitability.

8.1.5 Draft Policy JB7 goes on to say that the defined shopping areas will be considered to be ‘in-centre’ locations for the purposes of the application of the sequential test of paragraph 24 of the NPPF to proposed retail development. This effectively designates these areas as ‘primary shopping areas’ in the terminology of the NPPF. Policy JB7 also sets local thresholds for impact assessment which, in accordance with the NPPF, requires assessment of retail proposals outside the boundaries of the shopping centres (or primary shopping areas) and proposals for leisure development outside of the town centre boundaries. In the smaller centres of Boroughbridge, Masham and Pateley Bridge the shopping centre boundary is the relevant boundary for the impact assessment of all town centre uses.

8.1.6 In the remainder of this section we provide our recommendations in respect of town centre boundaries (including shopping frontages) for the each of the District’s six town centres.

8.2 Harrogate Town Centre

8.2.1 The Proposals Map accompanying the adopted Local Plan identifies a large 'shopping centre' within Harrogate Town Centre that extends from Bower Road in the north to Raglan Street in the south. On the western side of the town centre it includes Montpellier Hill and the area around The Crown Hotel and to the east Station Parade up to the railway line. The town centre Waitrose and Asda foodstores are located in close proximity to this eastern boundary.

8.2.2 The town centre's primary shopping frontage comprises James Street, Prospect Crescent, Market Place and most of Cambridge Street. Most other frontages within the 'shopping centre' are defined as secondary shopping frontages with the exception of small areas such as the former Royal Baths site and Princess Square. Secondary frontages include main thoroughfares such as Parliament Street and Station Parade, and areas of independent retailing such as Commercial Street and Montpellier Gardens.

8.2.3 The overall boundary of the 'shopping centre' remains accurate, though it could be amended to exclude the Royal Baths site that has been redeveloped for residential use. In terms of the primary shopping frontage, we consider that there may be opportunities to extend the area covered by the protections associated with this policy designation to reflect changes within the town centre since the adoption of the Local Plan and to support wider objectives for the development of the town centre.

8.2.4 The increasing popularity of James Street with high-end retailers has been extended to Princes Street where retail occupiers include Hoopers, Fat Face and White Stuff. We consider that it would be appropriate to designate Princes Street (up to the junction with Albert Street) as primary shopping frontage to reflect its current role. This would also reinforce links with the Beale's department store on Albert Street ensuring that it remains well connect the main retail circuit.

8.2.5 There is also scope to use shopping frontage policies to ensure that the town centre's main retail circuit remains well linked to vibrant peripheral areas of the centre such as Montpellier Hill. We consider that this would be of benefit to both the core shopping areas and these secondary locations by helping to drive footfall between the two. The eastern section of Parliament Street up to the Debenhams department store and the entire length of Oxford Street from Parliament Street to Cheltenham Parade remain predominantly in A1 use. The designation of these areas as primary shopping frontage would help to maintain physical and functional linkages between retail activity within the core areas and independent retailers in the vibrant areas around Montpellier Hill and Commercial Street. It would also protect and reinforce the linkages between Debenhams and the main retail circuit.

8.3 Ripon City Centre

8.3.1 The existing boundaries of the 'shopping centre' within Ripon include the Market Place, Queen Street, Fishergate, Westgate, Kirkgate, High Skellgate, North Street and the western section of Moss Arcade. The primary shopping frontage includes the northern, eastern and western sides of the Market Place, both frontages to Fishergate and units on the western side of Queen Street. All other streets within the shopping centre boundary are designated as secondary frontage.

8.3.2 To the east and west the shopping centre boundary also includes part of the city centre redevelopment sites identified by the Local Plan. To the east the boundary extended around what is now 'The Arcade' shopping development and to the west it included part of the site of the new Booths foodstore on Marshall Way. The overall shopping centre boundary here appears to be accurate but we recommend that alterations should be made to the city centre's shopping frontages to take account of these new developments. We recommend that frontages into 'The Arcade' and to the new Marshall Way retail development are designated as primary shopping frontage. Retail uses within the smaller units adjoining Sainsbury's and

Booths help to integrate these foodstores with the rest of the city centre (encouraging linked visits) and help to prevent them from operating as freestanding retail facilities.

8.3.3 The overall boundary of the city centre as currently identified remains accurate and does not require any extension or contraction.

8.4 Knaresborough Town Centre

8.4.1 Knaresborough's shopping centre as identified on the Local Plan Proposals Map extends from the junction of High Street and Station Road in the north to the junction of High Street and Gracious Street in the south. The remainder of the town centre is located to the south of the High Street and comprises the Market Place, the eastern end of Kirkgate, Fisher Street, Castlegate and Cheapside.

8.4.2 The primary shopping frontage includes the central section of High Street and Market Place with the remaining sections of High Street and other streets designated as secondary retail frontage. There have been no major developments within the town centre that would affect the boundaries identified at the time of the adoption of the Local Plan. It is appropriate to continue to concentrate retail activity within the town centre on the Market Place and key sections of High Street, and the primary shopping frontage could be extended here to include the new Sainsbury's Local which occupies a relatively large town centre unit adjacent to the bus station. The overall boundary of the shopping centre could also be extended to include the entirety of the Fisher Street car parks site as discussed in Section 7. We recommend no further alterations to town centre boundaries within Knaresborough.

8.5 Other Centres

Boroughbridge Town Centre

8.5.1 The shopping centre boundary for Boroughbridge extends from Horsefair/Bridge Street, along Fishergate and along High Street to St James Square, where it encompasses all frontages to the square. This boundary remains accurate and the town centre has neither expanded beyond these boundaries nor contracted within them since the adoption of the Local Plan in 2001. Given the town centre's small size we do not consider it necessary to identify primary or secondary shopping frontages. We therefore recommend that no changes should be made to town centre boundaries within Boroughbridge.

Pateley Bridge Town Centre

8.5.2 Pateley Bridge Town Centre is focused on the High Street and the existing shopping centre boundary shown on the Local Plan Proposals Map extends from the junction of High Street and Millfield Street to just south of the junction with Old Church Lane. The boundary includes Kings Court and accurately reflects the extent of existing commercial activity within the town centre. Pateley Bridge is a small centre where it would not be necessary to identify primary and secondary shopping frontages and we therefore recommend no changes to existing boundaries.

Masham Town Centre

8.5.3 The shopping centre boundary within Masham stretches from Park Street, along Church Street to include the north-western section of the Market Place, and north along Silver Street to terminate at its junction with Quaker Terrace. Since the adoption of the Local Plan the Co-operative foodstore on Park Street has relocated to a new site on Leyburn Road, and the HSBC bank, also on Park Street, has closed. The Co-operative foodstore is the main retail facility in Masham and there would be opportunities for linked trips from its new Leyburn Road site to the remainder of the town centre.

8.5.4 However, we have noted in Section 3 that the town centre would benefit from some consolidation and we would not recommend any extension of the town centre boundary to include the new Co-operative store. Whilst there may be opportunity to contract the boundary of the town centre by excluding parts of Park Street and Church Street, we consider this to be inappropriate given that two of the largest commercial units (the vacant former Co-operative foodstore and HSBC bank) are located on Park Street. On balance we therefore consider that the existing boundaries og Masham Town Centre should be retained.

8.6 Summary

8.6.1 We have reviewed town centre boundaries in each of the Districts's six main centres to consider whether they remain accurate and whether there is any scope for their expansion or contraction. The boundaries considered are those shown on the Proposals Map accompanying the adopted Harrogate Local Plan (2001) and include defined 'shopping centres' within all six town centres and the identified primary and secondary shopping frontages within Harrogate, Ripon and Knaresborough.

8.6.2 In most cases we consider the defined 'shopping centre' boundaries to be accurate with only minor alterations proposed in Harrogate and Knaresborough. In Harrogate we recommend the exclusion of the Royal Baths site and in Knaresborough the inclusion of the car park at Fisher Street. These boundaries represent suitable 'primary shopping areas' for the application of the sequential and impact tests set out by the NPPF to proposals for retail development.

8.6.3 In terms of frontages we recommend a number of amendments. In Harrogate we suggest the expansion of the primary shopping frontage to reinforce the main retail circuit, protect linkages with two anchor department stores and encourage connections between the town centre's retail core and vibrant peripheral areas. In Ripon we recommend that the primary shopping frontages should be extended to take account of new retail development at The Arcade and Marshall Way in order to preserve the potential for linked trips between the Booths and Sainsbury's foodstores and the rest of the city centre.

8.6.4 Secondary shopping frontages in the three largest town centres require no significant amendments. We note the stricter policy tests proposed to apply to changes of use within secondary shopping frontages by draft Policy JB7 of the emerging Local Plan and consider these to be appropriate, subject to appropriate flexibility in the weaker centres of Ripon and Knaresborough.

9 Summary of Findings and Recommendations

9.1 Introduction

9.1.1 In September 2013 Harrogate Borough Council commissioned Peter Brett Associates to prepare the Harrogate Retail Study on its behalf. The Borough Council wishes to update its evidence base to support the preparation of the Harrogate Borough Local Plan. The purpose of this Retail Study is to provide a robust evidence base on the capacity for additional retail development in Harrogate District in the period to 2026. The study is supported by a new household survey of shopping patterns, and accurately reflects current circumstances, the latest available data inputs/assumptions, and changes to national planning policy.

9.1.2 In this section of our report we summarise the principal findings from the research and analysis that has informed the study, and set out our recommendations in terms of future planning policy and meeting identified needs.

9.2 Summary of Performance Analysis

Harrogate Town Centre

9.2.1 Harrogate Town Centre is in very good health. It is performing well for a centre of its size and is holding its own against competing centres and destinations. The town centre appears to have out-performed its key competitors in national retail rankings in which it has significantly improved its position in recent years, despite the recession.

9.2.2 We consider Harrogate's key strength to be the quality and diversity of its comparison retail offer with excellent representation from high end national retailers and independent operators. The good performance of these sub-sectors is reflected in current retailer requirements for the town and its low vacany rate. There is also good representation from national multiples within the pedestrianised core of the town centre and the Victoria Shopping Centre. We have found no clear quantitative and qualitative deficiencies in the town centre's existing comparison retail offer.

9.2.3 The convenience retail offer of the town centre is also good with Asda and Waitrose foodstores located on the edges of the centre and providing opportunities for linked shopping trips with the rest of the town centre. There is a good selection of bakers, confectioners, grocers and delicatessens that provide a distinctive and bespoke offer for residents and visitors. There may, however, be some scope to improve top-up convenience shopping facilities within the town centre.

9.2.4 Harrogate's town centre environment is generally very attractive with imposing Victorian architecture and well maintained buildings and public spaces. There may be scope for additional pedestrianisation and works to improve the public realm in peripheral locations. The town centre's success does result in some congestion and associated issues with car parking which appears to be operating at, or very close to, capacity. Improved transport facilities, including park and ride, may be critical to the future growth of the town centre.

9.2.5 The priority for Harrogate Town Centre should be to consolidate its existing strengths and to ensure that it can continue to grow despite its physical constraints. The position of the town centre's core shopping area should be protected and enhanced whilst the vitality and vibrancy of Harrogate's independent retail sector should be maintained and strengthened further.

Ripon City Centre

9.2.6 Ripon City Centre is an attractive centre with a good convenience retail offer, a good range of services and a below average vacancy rate. However, its comparison retail offer is relatively weak and the recent loss of national multiples from the city centre points to its vulnerability. The priority for Ripon should therefore be to strengthen the range and diversity of its comparison retail offer. This might be achieved by providing additional modern floorspace for comparison retailers and by nurturing the city centre's independent retail offer so that it might provide more quality independents of the type that are more evident in centres such as Harrogate and Boroughbridge.

Knaresborough Town Centre

9.2.7 The town centre at Knaresborough performs an important role in meeting the day-to-day shopping and service needs of the local population. It is an attractive and well-maintained market town with some good quality shops and a strong food and drink offer. However despite the town centre's relatively low vacancy rate we consider it to be under-performing and vulnerable to further erosion of its offer as a result of competition from Harrogate Town Centre, out-of-centre stores and other destinations. We consider that Knaresborough would benefit from the presence of a new anchor retailer to support linked visits to other town centre retailers.

Other Centres

9.2.8 The District's other town centres are considerably smaller than Harrogate, Ripon and Knaresborough. However, they are generally performing well as rural service centres meeting local shopping needs. Boroughbridge is a particularly vital and vibrant town centre containing a good range of comparison retail and service uses for a centre of its size. Masham and Pateley Bridge adequately serve the needs of tourists and residents, although we note that there are currently two large vacant units within Masham Town Centre and bringing these units into new use would support the overall viability of the centre.

9.3 Summary of Current Shopping Patterns

Comparison Goods

9.3.1 Overall, 68.1 per cent of the comparison goods expenditure available to residents of the study area is retained by town centres, retail parks and freestanding stores located in the study area. Harrogate is by far the dominant centre within the study area in terms of its comparison goods turnover which equates to £225.2 million of available expenditure (a market share of 29.3 per cent within the study area). It is a dominant centre in six of the ten study zones and has a market share of more than 10 per cent in all but one zone.

9.3.2 Ripon City Centre is the dominant destination for comparison expenditure within its own zone (with a market share of 39.4 per cent in Zone 6) but does not draw any significant market share from any other zone within the study area. Knaresborough Town Centre achieves a market share of 14 per cent in its own zone (Zone 5) but does not enjoy any significant market share in any other zone.

9.3.3 Approximately a third of the total comparison goods expenditure available within the study area 'leaks' to destinations beyond the study area. Short-distance leakage to Leeds and York accounts for almost 20 per cent of residents' comparison goods expenditure. This is unsurprising given the strong influence of these larger centres over parts of the study area.

Convenience Goods

9.3.4 Overall, 84 per cent of the convenience goods expenditure available to residents of the study area is retained by town, village and other centres, retail parks and freestanding stores located in the study area. Thus, as might be expected, there is less leakage than in the comparison sector, because convenience shopping is generally undertaken on a more localised basis.

9.3.5 The highest individual convenience market shares within the study area are achieved by the Asda, Morrisons and Sainsbury's stores in Harrogate. There are no parts of the study area where there is an acute localised deficiency in convenience goods provision. The residents located in Zones 2, 4 and 10, are served by a more limited local food and grocery offer and they have to travel for their food and grocery shopping. There are no town centres located within these areas, but the residents of Zones 2, 4 and 10 are within easy travelling distance of existing convenience retail provision in the immediate surrounding areas.

9.3.6 The majority of Harrogate and Ripon residents' convenience retail expenditure is spread amongst a number of convenience stores in and around the respective towns. However, the Morrisons in Ripon and Boroughbridge both benefit from a high market share indicating that there may be scope for some increased convenience competition. Knaresborough is not served by any large foodstore and this does indicate a deficiency in local provision here.

9.4 Summary of Quantitative Need for Retail Floorspace

9.4.1 The quantitative need for additional comparison goods retail floorspace (based on a constant retention rate) is summarised in Table 9.1 below:

Table 9.1 Quantitative Need in the Comparison Goods Sector

Period	Floorspace Requirements (sq.m net)
	Constant Retention
2013-16	-5,784
2016-21	3,426
2021-26	8,541
2013-26	**6,184**

9.4.2 Table 9.1 shows that the comparison floorspace requirement arising under the constant retention scenario that we have applied is negative in the period up to 2016. This means that the growth in retained expenditure up to 2016 is not sufficient to support prior 'claims' on that growth, namely an improvement in sales densities of existing centres and stores, growth in SFT and the turnover requirements of the extant comparison retail permissions.

9.4.3 There is, however, a positive residual for additional comparison retail floorspace after 2021 with the 'oversupply' in comparison goods floorspace gradually reduced by expenditure growth in the 2016-2021 period. Table 9.1 shows that, there is capacity for approximately 6,200 sq. m over the entire study period which, on the assumption that existing commitments are implemented in the first part of the study period, arises between 2021 and 2026.

9.4.4 The quantitative need for additional convenience goods retail floorspace (based on a constant retention rate) is summarised in Table 9.2:

Table 9.2 Quantitative Need in the Convenience Goods Sector

Period	Floorspace Requirements (sq.m net) Constant Retention
2013-16	-3,853
2016-21	983
2021-26	1,516
2013-26	**-1,353**

9.4.5 Table 5.8 shows that for the catchment area as a whole, the quantitative need for additional convenience floorspace over the entire study period is negative. The turnover of existing commitments has a particularly significant impact on floorspace requirements and we would recommend that the Council carefully monitors the implementation of extant planning permissions, as non-implementation of these commitments could release additional expenditure capacity. In some circumstances the Council should also be prepared to allocate sites for additional convenience goods floorspace to address qualitative needs such as a lack of consumer choice, unsustainable shopping patterns and the underperformance of a particular centre.

9.5 Summary of Qualitative Retail Needs

9.5.1 We have identified particular qualitative needs within the District for:

- The provision of a new foodstore in Knaresborough. This is the most obvious deficiency in convenience goods provision within the District. If located within the town centre such a facility could play a key role in reinforcing its vitality and viability, as well as promoting more sustainable shopping patterns.

- Additional modern retail units in Ripon City Centre to accommodate the requirements of 'high street' comparison operators. The City Centre is under-represented in several key comparison goods sub-sectors and has limited representation from national multiples. In order to address these deficiencies and bolster the performance of the centre, it is important to ensure that Ripon remains competitive and is able to offer the appropriate type of floorspace required to maintain operator interest and attract new occupiers.

9.6 Recommendations

9.6.1 In this report we have assessed the current performance of Harrogate's main town centres, and have undertaken a comprehensive and robust assessment of future quantitative and qualitative requirements for additional retail floorspace across the District in the period to 2026.

Retail Floorspace Requirements

9.6.2 The retail floorspace requirements identified in this report are provided as guidelines only and do not represent maximum limits on the quantum of retail floorspace that can be developed in Harrogate in the period to 2026. Should proposals over and above the identified requirements come forward, then these will need to be assessed against the wider policies and objectives of the development plan and national planning policy. Each proposal will need to be assessed on its own merits, and it is not appropriate for the retail study to set a prescriptive 'cap' on future retail development.

9.6.3 Proposals that meet specific qualitative needs, or that deliver other wider benefits even where there is little or no quantitative capacity, can still be approved provided there are no overriding negative impacts that would outweigh the benefits of doing so. Any new applications for retail floorspace on the edge of, or outside, the defined town centre boundaries in any of the centres in the District should demonstrate that there are no sequentially preferable sites available, and that no significant adverse impacts will arise on existing defined centres, reflecting guidance in the NPPF.

Comparison Retail

9.6.4 We suggest that the Council should work towards a requirement for up 6,200 sq. m of additional comparison retail sales area floorspace over the plan period. Given the scale of existing commitments there are no short-term requirements for additional comparison floorspace but the Council should monitor the implementation of existing planning permissions carefully (unimplementation of these consents may release additional capacity).

9.6.5 The comparison floorspace requirements identified in our study are relatively modest, and in the short term period to 2016, the identified comparison retail floorspace requirement is negative. Expenditure capacity arising in the 2016 to 2021 period reduces this oversupply but does not result in positive floorspace requirements until after 2021. We recommend that this surplus requirement should be directed to Ripon in the first instance to address some of the qualitative deficiencies of its existing comparison retail offer and to support its overall vitality and viability.

9.6.6 In the comparison sector, centres and stores within the study area currently retain some 68 per cent the available comparison expenditure which we consider to be a relatively healthy level of aggregate expenditure retention given the competition from nearby higher order centres. We therefore recommend that the Council's policy objectives should focus on maintaining the current retention rate whilst delivering appropriate improvements to address qualitative deficiencies and ensure that the District's centres, and particularly Harrogate, are able to compete with future developments in higher order centres such as Leeds and York.

Convenience Retail

9.6.7 The requirement for additional convenience retail floorspace over the study period is negative. On the basis of our assessment there is no quantitative need for any additional convenience floorspace in the District before 2026. This is as a result of the good levels of existing provision within Harrogate and Ripon and the scale of existing planning commitments. These commitments represent a large claim on surplus expenditure which is already estimated to be limited as a result of low expenditure growth rates and increasing rates of special forms of trading (e.g. online shopping).

9.6.8 The study area currently achieves a retention rate of 84 per cent and we consider this to be good given that some parts of the study area will be better served by nearby foodstores in Skipton, Thirsk and York. Expenditure retention rates in the District's main towns are high. There is therefore no need for the Council to seek to increase the overall level of convenience expenditure retention within the District.

9.6.9 However, we have identified a qualitative need for a large foodstore in Knaresborough whose residents are currently dependent on facilities within Harrogate. Whilst the consented extension of the existing Co-operative foodstore on Chain Lane will help to address this qualitative deficiency we do not consider that it will have a significant impact on the existing convenience shopping patterns of Knaresborough's residents. Our performance analysis has also identified that Knaresborough Town Centre is vulnerable to decline and that it would benefit from an anchor retail facility to support its overall vitality and viability. We therefore recommend that the Council should identify an appropriate site for a new foodstore within the town centre.

Town Centre Development and Management

9.6.10 In Section 7of this report we have provided the Council with advice in respect of potential opportunities to accommodate the floorspace requirements identified by our quantitative and qualitative assessment within, or on the edges of, the District's defined town centres. In Section 8 we have examined town centre boundaries, reflecting our findings in Section 7 as well as our performance analysis of the main town centres.

9.6.11 We summarise here the sites we have identified as possible options for accommodating the identified floorspace requirements and any proposed changes to town centre boundaries to assist town centre management and ensure that residents of the District are served by a well-balanced network of vital and vibrant town centres.

9.6.12 All six town centres within the District benefit from historic environments that add to their appeal and general vitality. However, the historic form of the town centres also places constraints on their expansion. Nevertheless we have identified a number of potential development sites within, or on the edges, of the town centres at Harrogate, Knaresborough and Ripon.

9.6.13 In Harrogate, the key town centre site is at Station Parade and is currently allocated for mixed use development in the adopted Local Plan. This site is well related to the existing shopping area and its redevelopment could deliver visual improvements to this part of the town centre and improved accessibility, which may help to tackle town centre congestion. We would suggest that the development area is extended to the south to include adjacent properties fronting onto Station Bridge.

9.6.14 We have also identified some redevelopment potential on the site of the Asda foodstore on Bower Road and the adjacent Dragon Road Car Park. This site is edge-of-centre but there is scope for any new development to improve linkages with the rest of the town centre via the northern end of Station Parade or by using land to the west of Bower Street. The foodstore is a little dated but, according to the household survey results, trades very well. Dragon Road Car Park is a temporary car park which is at times used as a holding area for the Exhibition Centre. Provided suitable alternative facilities could be found for the latter we consider there to be potential to redevelop the northern end of the site for a replacement foodstore, releasing the site of the existing store for comparison retail development.

9.6.15 In Ripon we consider the key development site to be the car parking to the east of the Market Place, off Victoria Avenue. The site was partly allocated in the Local Plan of 2001 and was subsequently developed to extend 'The Arcade' shopping centre. Provided that city centre car parking facilities were not compromised and that access to the existing Sainsbury's foodstore could be maintained then we consider that additional comparison retail development could be accommodated here as a further extension to 'The Arcade'. Such modern floorspace would help the city centre to attract and retain national multiple retailers.

9.6.16 In Knaresborough Town Centre we consider that the re-allocation of land at Fisher Street and/or the allocation of the former Cattle Market should be considered in order to accommodate the development of a larger foodstore capable of serving main food shopping requirements and acting as an anchor for the rest of the town centre. The development of the Fisher Street site would need to overcome design constraints and the development of the former cattle market would need to resolve potential access and servicing issues. The two sites could be developed in tandem to provide additional retail floorspace whilst ensuring that town centre car parking facilities are not compromised.

9.6.17 In most town centres we consider the existing town centre boundaries to be accurate. The 'shopping centre' boundaries identified in all six town centres should act as the primary shopping areas for the application of the sequential and impact tests of the NPPF. If the Borough Council decides to allocate any of the suggested development sites within the emerging Local Plan then minor amendments should be made to these boundaries in

Harrogate, Knaresborough and Ripon to ensure that sites are included in their entirety and that any future development proposals are not subject to unnecessary policy constraints.

9.6.18 The identified shopping frontages within the main three town centres – Harrogate, Knaresborough and Ripon – are also considered to be largely accurate, subject to a small number of suggested alterations. In Harrogate we recommend the expansion of the primary shopping frontage to reinforce the main retail circuit, protect linkages with two anchor department stores and encourage connections between the town centre's retail core and vibrant peripheral areas. In Ripon we recommend that the primary shopping frontages should be extended to take account of new retail development at The Arcade and Marshall Way in order to preserve the potential for linked trips between the Booths and Sainsbury's foodstores and the rest of the city centre.

Appendix A Performance Analysis Data

TABLE 1 - Harrogate Town Centre Diversity of Uses

Goad Code	Operator Type	No. of Units				Floorspace			
		No. of units	% of Total	UK Average %	Index (UK=100)	Floorspace (sq.m)	% of Total	UK Average %	Index (UK=100)
	Number (and %) of Convenience Goods Outlets								
G1A	Bakers	8	1.48%	2.16%	68	540	0.53%	1.09%	48
G1B	Butchers	2	0.37%	0.78%	47	160	0.16%	0.42%	37
G1C	Greengrocers & fishmongers	1	0.18%	0.62%	30	90	0.09%	1.30%	7
G1D	Grocery and frozen foods	12	2.22%	2.94%	75	10600	10.31%	12.81%	80
G1E	Off-licences and home brew	1	0.18%	0.51%	36	120	0.12%	0.31%	38
G1F	Confectioners, tobacconists, newsagents	4	0.74%	1.74%	42	830	0.81%	1.75%	46
	TOTAL	28	5.18%	8.75%	59	12340	12.00%	17.68%	68
	Number (and %) of Comparison Goods Outlets								
G2A	Footwear & repair	13	2.40%	1.82%	132	1250	1.22%	1.31%	93
G2B	Men's & boys' wear	10	1.85%	1.00%	185	2360	2.30%	0.88%	261
G2C	Women's, girls, children's clothing	47	8.69%	3.71%	234	8510	8.28%	3.58%	231
G2D	Mixed and general clothing	30	5.55%	3.99%	139	10640	10.35%	6.31%	164
G2E	Furniture, carpets & textiles	30	5.55%	3.42%	162	5080	4.94%	3.83%	129
G2F	Booksellers, arts/crafts, stationers/copy bureaux	26	4.81%	4.42%	109	3650	3.55%	3.20%	111
G2G	Electrical, home entertainment, telephones and video	21	3.88%	3.87%	100	2950	2.87%	3.00%	96
G2H	DIY, hardware & household goods	18	3.33%	2.54%	131	2080	2.02%	4.91%	41
G2I	Gifts, china, glass and leather goods	6	1.11%	1.64%	68	670	0.65%	0.88%	74
G2J	Cars, motorcycles & motor accessories	3	0.55%	1.19%	47	530	0.52%	1.83%	28
G2K	Chemists, toiletries & opticians	14	2.59%	3.89%	67	2680	2.61%	3.93%	66
G2L	Variety, department & catalogue showrooms	5	0.92%	0.59%	157	7660	7.45%	6.21%	120
G2M	Florists and gardens	3	0.55%	0.90%	62	110	0.11%	0.42%	25
G2N	Sports, toys, cycles and hobbies	15	2.77%	2.08%	133	3400	3.31%	2.26%	146
G2O	Jewellers, clocks & repair	19	3.51%	2.01%	175	1570	1.53%	0.92%	166
G2P	Charity shops, pets and other comparison	14	2.59%	4.09%	63	1290	1.25%	2.87%	44
	TOTAL	274	50.65%	41.16%	123	54430	52.93%	46.34%	114
	Number (and %) of Service Uses								
G3A	Restaurants, cafes, coffee bars, fast food & take-aways	100	18.48%	16.35%	113	18090	17.59%	11.67%	151
G3B	Hairdressers, beauty parlours & health centres	34	6.28%	9.24%	68	2660	2.59%	4.44%	58
G3C	Laundries & drycleaners	1	0.18%	0.93%	20	60	0.06%	0.42%	14
G3D	Travel agents	5	0.92%	1.16%	80	640	0.62%	0.71%	88
G3E	Banks & financial services (incl. accountants)	22	4.07%	4.25%	96	4460	4.34%	4.45%	97
G3F	Building societies	5	0.92%	0.58%	159	680	0.66%	0.48%	138
G3G	Estate agents & auctioneers	16	2.96%	3.85%	77	1930	1.88%	2.13%	88
	TOTAL	183	33.83%	36.36%	93	28520	27.74%	24.30%	114
	Number (and %) of Miscellaneous Uses								
G4A	Employment, careers, Post Offices and information	10	1.85%	1.17%	158	1160	1.13%	1.05%	107
G4B	Vacant units (all categories)	46	8.50%	12.57%	68	6380	6.20%	10.64%	58
	TOTAL	56	10.35%	13.74%	75	7540	7.33%	11.69%	63
	GRAND TOTAL	541	100%	100%		102830	100%	100%	

Source: Experian GOAD (June 2013)

TABLE 2 - Ripon City Centre Diversity of Uses

Goad Code	Operator Type	No. of Units				Floorspace			
		No. of units	% of Total	UK Average %	Index (UK=100)	Floorspace (sq.m)	% of Total	UK Average %	Index (UK=100)
	Number (and %) of Convenience Goods Outlets								
G1A	Bakers	4	1.79%	2.16%	83	510	1.54%	1.09%	141
G1B	Butchers	3	1.34%	0.78%	172	230	0.69%	0.42%	165
G1C	Greengrocers & fishmongers	0	0.00%	0.62%	0	0	0.00%	1.30%	0
G1D	Grocery and frozen foods	9	4.02%	2.94%	137	4690	14.14%	12.81%	110
G1E	Off-licences and home brew	2	0.89%	0.51%	175	290	0.87%	0.31%	282
G1F	Confectioners, tobacconists, newsagents	0	0.00%	1.74%	0	0	0.00%	1.75%	0
	TOTAL	18	8.04%	8.75%	92	5720	17.25%	17.68%	98
	Number (and %) of Comparison Goods Outlets								
G2A	Footwear & repair	4	1.79%	1.82%	98	290	0.87%	1.31%	67
G2B	Men's & boys' wear	2	0.89%	1.00%	89	370	1.12%	0.88%	127
G2C	Women's, girls, children's clothing	7	3.13%	3.71%	84	910	2.74%	3.58%	77
G2D	Mixed and general clothing	9	4.02%	3.99%	101	1600	4.83%	6.31%	76
G2E	Furniture, carpets & textiles	6	2.68%	3.42%	78	1710	5.16%	3.83%	135
G2F	Booksellers, arts/crafts, stationers/copy bureaux	14	6.25%	4.42%	141	1300	3.92%	3.20%	123
G2G	Electrical, home entertainment, telephones and video	4	1.79%	3.87%	46	460	1.39%	3.00%	46
G2H	DIY, hardware & household goods	3	1.34%	2.54%	53	1780	5.37%	4.91%	109
G2I	Gifts, china, glass and leather goods	5	2.23%	1.64%	136	830	2.50%	0.88%	284
G2J	Cars, motorcycles & motor accessories	2	0.89%	1.19%	75	160	0.48%	1.83%	26
G2K	Chemists, toiletries & opticians	8	3.57%	3.89%	92	1840	5.55%	3.93%	141
G2L	Variety, department & catalogue showrooms	2	0.89%	0.59%	151	1110	3.35%	6.21%	54
G2M	Florists and gardens	3	1.34%	0.90%	149	170	0.51%	0.42%	122
G2N	Sports, toys, cycles and hobbies	1	0.45%	2.08%	21	110	0.33%	2.26%	15
G2O	Jewellers, clocks & repair	3	1.34%	2.01%	67	250	0.75%	0.92%	82
G2P	Charity shops, pets and other comparison	13	5.80%	4.09%	142	1060	3.20%	2.87%	111
	TOTAL	86	38.39%	41.16%	93	13950	42.07%	46.34%	91
	Number (and %) of Service Uses								
G3A	Restaurants, cafes, coffee bars, fast food & take-aways	40	17.86%	16.35%	109	4880	14.72%	11.67%	126
G3B	Hairdressers, beauty parlours & health centres	25	11.16%	9.24%	121	1420	4.28%	4.44%	96
G3C	Laundries & drycleaners	2	0.89%	0.93%	96	140	0.42%	0.42%	101
G3D	Travel agents	3	1.34%	1.16%	115	360	1.09%	0.71%	153
G3E	Banks & financial services (incl. accountants)	14	6.25%	4.25%	147	2470	7.45%	4.45%	167
G3F	Building societies	3	1.34%	0.58%	231	330	1.00%	0.48%	207
G3G	Estate agents & auctioneers	10	4.46%	3.85%	116	590	1.78%	2.13%	84
	TOTAL	97	43.30%	36.36%	119	10190	30.73%	24.30%	126
	Number (and %) of Miscellaneous Uses								
G4A	Employment, careers, Post Offices and information	2	0.89%	1.17%	76	490	1.48%	1.05%	141
G4B	Vacant units (all categories)	21	9.38%	12.57%	75	2810	8.47%	10.64%	80
	TOTAL	23	10.27%	13.74%	75	3300	9.95%	11.69%	85
	GRAND TOTAL	224	100%	100%		33160	100%	100%	

Source: Experian GOAD (July 2013)

TABLE 3 - Knaresborough Town Centre Diversity of Uses

Goad Code	Operator Type	No. of Units				Floorspace			
		No. of units	% of Total	UK Average %	Index (UK=100)	Floorspace (sq.m)	% of Total	UK Average %	Index (UK=100)
	Number (and %) of Convenience Goods Outlets								
G1A	Bakers	4	2.20%	2.16%	102	320	1.68%	1.09%	154
G1B	Butchers	3	1.65%	0.78%	211	230	1.20%	0.42%	287
G1C	Greengrocers & fishmongers	1	0.55%	0.62%	89	90	0.47%	1.30%	36
G1D	Grocery and frozen foods	4	2.20%	2.94%	75	410	2.15%	12.81%	17
G1E	Off-licences and home brew	1	0.55%	0.51%	108	40	0.21%	0.31%	68
G1F	Confectioners, tobacconists, newsagents	3	1.65%	1.74%	95	620	3.25%	1.75%	186
	TOTAL	16	8.79%	8.75%	100	1710	8.96%	17.68%	51
	Number (and %) of Comparison Goods Outlets								
G2A	Footwear & repair	1	0.55%	1.82%	30	40	0.21%	1.31%	16
G2B	Men's & boys' wear	1	0.55%	1.00%	55	40	0.21%	0.88%	24
G2C	Women's, girls, children's clothing	6	3.30%	3.71%	89	360	1.89%	3.58%	53
G2D	Mixed and general clothing	4	2.20%	3.99%	55	630	3.30%	6.31%	52
G2E	Furniture, carpets & textiles	9	4.95%	3.42%	145	1420	7.44%	3.83%	194
G2F	Booksellers, arts/crafts, stationers/copy bureaux	8	4.40%	4.42%	99	700	3.67%	3.20%	115
G2G	Electrical, home entertainment, telephones and video	5	2.75%	3.87%	71	330	1.73%	3.00%	58
G2H	DIY, hardware & household goods	6	3.30%	2.54%	130	530	2.78%	4.91%	57
G2I	Gifts, china, glass and leather goods	4	2.20%	1.64%	134	190	1.00%	0.88%	113
G2J	Cars, motorcycles & motor accessories	0	0.00%	1.19%	0	0	0.00%	1.83%	0
G2K	Chemists, toiletries & opticians	7	3.85%	3.89%	99	1260	6.60%	3.93%	168
G2L	Variety, department & catalogue showrooms	0	0.00%	0.59%	0	0	0.00%	6.21%	0
G2M	Florists and gardens	1	0.55%	0.90%	61	90	0.47%	0.42%	112
G2N	Sports, toys, cycles and hobbies	1	0.55%	2.08%	26	30	0.16%	2.26%	7
G2O	Jewellers, clocks & repair	2	1.10%	2.01%	55	130	0.68%	0.92%	74
G2P	Charity shops, pets and other comparison	9	4.95%	4.09%	121	640	3.35%	2.87%	117
	TOTAL	64	35.16%	41.16%	85	6390	33.47%	46.34%	72
	Number (and %) of Service Uses								
G3A	Restaurants, cafes, coffee bars, fast food & take-aways	40	21.98%	16.35%	134	5500	28.81%	11.67%	247
G3B	Hairdressers, beauty parlours & health centres	23	12.64%	9.24%	137	1580	8.28%	4.44%	186
G3C	Laundries & drycleaners	0	0.00%	0.93%	0	0	0.00%	0.42%	0
G3D	Travel agents	2	1.10%	1.16%	95	140	0.73%	0.71%	103
G3E	Banks & financial services (incl. accountants)	9	4.95%	4.25%	116	1600	8.38%	4.45%	188
G3F	Building societies	1	0.55%	0.58%	95	80	0.42%	0.48%	87
G3G	Estate agents & auctioneers	7	3.85%	3.85%	100	570	2.99%	2.13%	140
	TOTAL	82	45.05%	36.36%	124	9470	49.61%	24.30%	204
	Number (and %) of Miscellaneous Uses								
G4A	Employment, careers, Post Offices and information	3	1.65%	1.17%	141	270	1.41%	1.05%	135
G4B	Vacant units (all categories)	17	9.34%	12.57%	74	1250	6.55%	10.64%	62
	TOTAL	20	10.99%	13.74%	80	1520	7.96%	11.69%	68
	GRAND TOTAL	182	100%	100%		19090	100%	100%	

Source: Experian GOAD (September 2012)

TABLE 4 - Boroughbridge Town Centre Diversity of Uses

Goad Code	Operator Type	No. of Units				Floorspace			
		No. of units	% of Total	UK Average %	Index (UK=100)	Floorspace (sq.m)	% of Total	UK Average %	Index (UK=100)
	Number (and %) of Convenience Goods Outlets								
G1A	Bakers	2	2.50%	2.16%	116	190	2.42%	1.09%	222
G1B	Butchers	2	2.50%	0.78%	321	280	3.57%	0.42%	850
G1C	Greengrocers & fishmongers	1	1.25%	0.62%	202	50	0.64%	1.30%	49
G1D	Grocery and frozen foods	0	0.00%	2.94%	0	0	0.00%	12.81%	0
G1E	Off-licences and home brew	1	1.25%	0.51%	245	60	0.77%	0.31%	247
G1F	Confectioners, tobacconists, newsagents	1	1.25%	1.74%	72	290	3.70%	1.75%	211
	TOTAL	7	8.75%	8.75%	100	870	11.10%	17.68%	63
	Number (and %) of Comparison Goods Outlets								
G2A	Footwear & repair	2	2.50%	1.82%	137	210	2.68%	1.31%	204
G2B	Men's & boys' wear	0	0.00%	1.00%	0	0	0.00%	0.88%	0
G2C	Women's, girls, children's clothing	2	2.50%	3.71%	67	140	1.79%	3.58%	50
G2D	Mixed and general clothing	3	3.75%	3.99%	94	190	2.42%	6.31%	38
G2E	Furniture, carpets & textiles	3	3.75%	3.42%	110	380	4.85%	3.83%	127
G2F	Booksellers, arts/crafts, stationers/copy bureaux	2	2.50%	4.42%	57	230	2.93%	3.20%	92
G2G	Electrical, home entertainment, telephones and video	2	2.50%	3.87%	65	420	5.36%	3.00%	179
G2H	DIY, hardware & household goods	1	1.25%	2.54%	49	80	1.02%	4.91%	21
G2I	Gifts, china, glass and leather goods	5	6.25%	1.64%	381	310	3.95%	0.88%	449
G2J	Cars, motorcycles & motor accessories	2	2.50%	1.19%	210	300	3.83%	1.83%	209
G2K	Chemists, toiletries & opticians	2	2.50%	3.89%	64	160	2.04%	3.93%	52
G2L	Variety, department & catalogue showrooms	0	0.00%	0.59%	0	0	0.00%	6.21%	0
G2M	Florists and gardens	1	1.25%	0.90%	139	50	0.64%	0.42%	152
G2N	Sports, toys, cycles and hobbies	2	2.50%	2.08%	120	170	2.17%	2.26%	96
G2O	Jewellers, clocks & repair	2	2.50%	2.01%	124	30	0.38%	0.92%	42
G2P	Charity shops, pets and other comparison	3	3.75%	4.09%	92	190	2.42%	2.87%	84
	TOTAL	32	40.00%	41.16%	97	2860	36.48%	46.34%	79
	Number (and %) of Service Uses								
G3A	Restaurants, cafes, coffee bars, fast food & take-aways	12	15.00%	16.35%	92	1810	23.09%	11.67%	198
G3B	Hairdressers, beauty parlours & health centres	10	12.50%	9.24%	135	460	5.87%	4.44%	132
G3C	Laundries & drycleaners	0	0.00%	0.93%	0	0	0.00%	0.42%	0
G3D	Travel agents	2	2.50%	1.16%	216	180	2.30%	0.71%	323
G3E	Banks & financial services (incl. accountants)	5	6.25%	4.25%	147	510	6.51%	4.45%	146
G3F	Building societies	0	0.00%	0.58%	0	0	0.00%	0.48%	0
G3G	Estate agents & auctioneers	6	7.50%	3.85%	195	490	6.25%	2.13%	293
	TOTAL	35	43.75%	36.36%	120	3450	44.01%	24.30%	181
	Number (and %) of Miscellaneous Uses								
G4A	Employment, careers, Post Offices and information	3	3.75%	1.17%	321	360	4.59%	1.05%	437
G4B	Vacant units (all categories)	3	3.75%	12.57%	30	300	3.83%	10.64%	36
	TOTAL	6	7.50%	13.74%	55	660	8.42%	11.69%	72
	GRAND TOTAL	80	100%	100%		7840	100%	100%	

Source: Experian GOAD (November 2011)

Appendix B Household Survey Questionnaire

Job No: 230913

Harrogate Retail Study

Good afternoon/evening, I am …… from NEMS market research, and we are conducting a short survey in your area about shopping on behalf of Harrogate Borough Council. Do you have time to answer some questions ? It will take about five minutes.

QA **Are you the main shopper in your household?**

1 Yes
2 No

IF 'YES' - CONTINUE INTERVIEW
IF 'NO' - ASK: "COULD I SPEAK TO THE PERSON WHO IS RESPONSIBLE FOR MOST OF THE SHOPPING?"
IF NOT AVAILABLE, THANK AND CLOSE THE INTERVIEW.

First we have a few questions about where you undertake food and groceries shopping. In answering these questions the location may be a supermarket, a smaller store or independent retailer, or a town centre, or could be the use of facilities such as the Internet.

Q01 **Where did your household last undertake a main food and grocery shop?**
DO NOT PROMPT, ONE ANSWER ONLY
IF 'OTHER' PLEASE SPECIFY STORE NAME AND LOCATION, IF 'MARKET STALL' PROBE FOR LOCATION

Specified Stores & Centres: Choose from Lists A and B

Other:
Internet / delivered
Home Catalogue
TV/Interactive Shopping
Market Stalls (PLEASE PROBE FOR LOCATION)
Other (PLEASE WRITE IN STORE NAME AND LOCATION)
(Don't know / varies)
(Don't do a main food shop) GO TO Q05

Q02 **And where did your household go the time before that for a main food and grocery shop (was it the same, or different, and if so, please specify)?**
DO NOT PROMPT. ONE ANSWER ONLY.

Specified Stores & Centres: Choose from Lists A and B

Other:
Internet / delivered
Home Catalogue
TV/Interactive Shopping
Market Stalls (PLEASE PROBE FOR LOCATION)
Other (PLEASE WRITE IN STORE NAME AND LOCATION)
(Don't know / varies)
(Nowhere else)

Q03 **Approximately how much money does your household normally spend on a main food and grocery shop?**

DO NOT PROMPT. PLEASE WRITE IN TO THE NEAREST £

1 To the nearest £: (PLEASE WRITE IN)
2 (Don't know / varies)
3 (Refused)

Q04 **How often does your household do a main food and grocery shop?**
DO NOT READ OUT. ONE ANSWER ONLY

1 More than once a week
2 Once a week
3 Once a fortnight
4 Once a month
5 Less often
6 (Don't know / varies / no particular pattern)

Q05 **Where did your household last undertake a 'top-up' food and grocery shop?**
DO NOT READ OUT. ONE ANSWER ONLY

Specified Stores & Centres: Choose from Lists A and B

Other:
Internet / delivered
Home Catalogue
TV/Interactive Shopping
Market Stalls (PLEASE PROBE FOR LOCATION)
Other (PLEASE WRITE IN STORE NAME AND LOCATION)
(Don't know / varies)
(Don't do top-up food shopping) GO TO Q13

Q06 **And where did your household shop the time before that for a 'top-up' food and grocery shop (was it the same, or different, and if different, please specify)?**
DO NOT READ OUT. ONE ANSWER ONLY

Specified Stores & Centres: Choose from Lists A and B

Other:
Internet / delivered
Home Catalogue
TV/Interactive Shopping
Market Stalls (PLEASE PROBE FOR LOCATION)
Other (PLEASE WRITE IN STORE NAME AND LOCATION)
(Don't know / varies)
(Nowhere else)

Q07 **Approximately how much money does your household normally spend on a 'top-up' food and grocery shop?**

DO NOT PROMPT. PLEASE WRITE IN TO THE NEAREST £

1 To the nearest £: (PLEASE WRITE IN)
2 (Don't know / varies)
3 (Refused)

Q08 **How often does your household normally do its top-up food shopping?**
DO NOT READ OUT. ONE ANSWER ONLY

1 Daily
2 More than 3 times a week
3 Two or three times a week
4 Once a week
5 Once a fortnight
6 Less often
7 (Don't know / varies / no particular pattern)

[IF RESPONDENT GIVES SUPERMARKET LOCATIONS IN EACH OF Q01, Q02, Q05 AND Q06 THEN ASK Q09, IF NOT GO TO Q13]

Q09 **Does your household also spend money on food and groceries in small shops?**
DO NOT READ OUT. ONE ANSWER ONLY

1	Yes	GO TO Q10
2	No	GO TO Q13

Q10 **Where are these small shops located?**
DO NOT READ OUT. ONE ANSWER ONLY.
QUOTE STORES ONLY IF RESPONDENT IS UNSURE OF DESTINATION.

Specified centre: Choose from List A
Specific stores (write in name and location)
Other (write in name and location)
(Don't know / varies)

Q11 **Approximately how much money does your household spend on food and groceries on a typical trip to these small shops?**
DO NOT PROMPT. PLEASE WRITE IN TO THE NEAREST £

1 To the nearest £: (PLEASE WRITE IN)
2 (Don't know / varies)
3 (Refused)

Q12 **How often do you normally visit these other small shops for food and groceries shopping?**
DO NOT READ OUT. ONE ANSWER ONLY

1 Daily
2 More than 3 times a week
3 Two or three times a week
4 Once a week
5 Once a fortnight
6 Less often
7 (Don't know / varies / no particular pattern)

We now have a few questions about where you go for non-food shopping. In answering these questions the location may be a town centre, a retail park, or a free standing store, or could be facilities such as the Internet, TV / interactive shopping or use of a home catalogue. In the following questions, please don't include trips made for the purposes of christmas shopping.

Q13 **So, speaking as an individual, can you tell me where you last made a purchase of clothes or shoes?**

DO NOT PROMPT. ONE ANSWER ONLY.

Specified Stores and Centres: Choose from Lists A, B and C

Other:
Internet / delivered
Home Catalogue
TV/Interactive Shopping
Market Stalls (PLEASE PROBE FOR LOCATION)
Other (PLEASE WRITE IN STORE NAME AND LOCATION)
(Don't know / can't remember) GO TO Q15
(Don't do this type of shopping) GO TO Q15

Not those who 'Don't do this type of shopping' or 'Don't know / can't remember' at Q13

Q14 **And the time before that, where did you go to make a purchase of clothes or shoes?**
DO NOT PROMPT. ONE ANSWER ONLY.

Specified Stores and Centres: Choose from Lists A, B and C

Other:
Internet / delivered
Home Catalogue
TV/Interactive Shopping
Market Stalls (PLEASE PROBE FOR LOCATION)
Other (PLEASE WRITE IN STORE NAME AND LOCATION)
(Don't know / can't remember)
(Don't do this type of shopping)

Q15 **Now can you tell me where your household last made a purchase of furniture, carpets, or soft household furnishings?**
DO NOT PROMPT. ONE ANSWER ONLY.

Specified Stores and Centres: Choose from Lists A, B and C

Other:
Internet / delivered
Home Catalogue
TV/Interactive Shopping
Market Stalls (PLEASE PROBE FOR LOCATION)
Other (PLEASE WRITE IN STORE NAME AND LOCATION)
(Don't know / can't remember) GO TO Q17
(Don't do this type of shopping) GO TO Q17

Not those who 'Don't do this type of shopping' or 'Don't know / can't remember' at Q15

Q16 **And the time before that, where did your household go to make a purchase of furniture, carpets, or soft household furnishings?**
DO NOT PROMPT. ONE ANSWER ONLY.

Specified Stores and Centres: Choose from Lists A, B and C

Other:
Internet / delivered
Home Catalogue
TV/Interactive Shopping
Market Stalls (PLEASE PROBE FOR LOCATION)
Other (PLEASE WRITE IN STORE NAME AND LOCATION)
(Don't know / can't remember)
(Don't do this type of shopping)

Q17 **Now can you tell me where your household last made a purchase of DIY and decorating goods?**
DO NOT PROMPT. ONE ANSWER ONLY.

Specified Stores and Centres: Choose from Lists A, B and C

Other:
Internet / delivered
Home Catalogue
TV/Interactive Shopping
Market Stalls (PLEASE PROBE FOR LOCATION)
Other (PLEASE WRITE IN STORE NAME AND LOCATION)
(Don't know / can't remember) GO TO Q19
(Don't do this type of shopping) GO TO Q19

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Not those who 'Don't do this type of shopping' or 'Don't know / can't remember' at Q17

Q18 **And the time before that, where did your household go to make a purchase of DIY and decorating goods?**

DO NOT PROMPT. ONE ANSWER ONLY.

Specified Stores and Centres: Choose from Lists A, B and C

Other:
Internet / delivered
Home Catalogue
TV/Interactive Shopping
Market Stalls (PLEASE PROBE FOR LOCATION)
Other (PLEASE WRITE IN STORE NAME AND LOCATION)
(Don't know / can't remember)
(Don't do this type of shopping)

Q19 **Can you tell me where you or your household last made a purchase of electrical items such as TVs, DVD players, digital cameras, MP3 players, mobile phones, computers or domestic appliances, such as washing machines, fridges or cookers?**
DO NOT PROMPT. ONE ANSWER ONLY.

Specified Stores and Centres: Choose from Lists A, B and C

Other:
Internet / delivered
Home Catalogue
TV/Interactive Shopping
Market Stalls (PLEASE PROBE FOR LOCATION)
Other (PLEASE WRITE IN STORE NAME AND LOCATION)
(Don't know / can't remember) GO TO Q21
(Don't do this type of shopping) GO TO Q21

Not those who 'Don't do this type of shopping' or 'Don't know / can't remember' at Q19

Q20 **And the time before that, where you or your household last made a purchase of electrical items such as TVs, DVD players, digital cameras, MP3 players, mobile phones, computers or domestic appliances, such as washing machines, fridges or cookers?**
DO NOT PROMPT. ONE ANSWER ONLY.

Specified Stores and Centres: Choose from Lists A, B and C

Other:
Internet / delivered
Home Catalogue
TV/Interactive Shopping
Market Stalls (PLEASE PROBE FOR LOCATION)
Other (PLEASE WRITE IN STORE NAME AND LOCATION)
(Don't know / can't remember)
(Don't do this type of shopping)

Q21 **Can you tell me where you or your household last made a purchase of health, beauty or chemist items?**

DO NOT PROMPT. ONE ANSWER ONLY.

Specified Stores and Centres: Choose from Lists A, B and C

Other:
Internet / delivered
Home Catalogue
TV/Interactive Shopping
Market Stalls (PLEASE PROBE FOR LOCATION)
Other (PLEASE WRITE IN STORE NAME AND LOCATION)
(Don't know / can't remember) GO TO Q23
(Don't do this type of shopping) GO TO Q23

Not those who 'Don't do this type of shopping' or 'Don't know / can't remember' at Q21

Q22 **And the time before that, where did you or your household go to make a purchase of health, beauty or chemist items?**
DO NOT PROMPT. ONE ANSWER ONLY.

Specified Stores and Centres: Choose from Lists A, B and C

Other:
Internet / delivered
Home Catalogue
TV/Interactive Shopping
Market Stalls (PLEASE PROBE FOR LOCATION)
Other (PLEASE WRITE IN STORE NAME AND LOCATION)
(Don't know / can't remember)
(Don't do this type of shopping)

Q23	**Can you tell me where you or your household last made a purchase of recreational goods such as sports equipment, bicycles, musical instruments or toys?** DO NOT PROMPT. ONE ANSWER ONLY.	
	Specified Stores and Centres: Choose from Lists A, B and C	
	Other:	
	Internet / delivered	
	Home Catalogue	
	TV/Interactive Shopping	
	Market Stalls (PLEASE PROBE FOR LOCATION)	
	Other (PLEASE WRITE IN STORE NAME AND LOCATION)	
	(Don't know / can't remember)	GO TO Q25
	(Don't do this type of shopping)	GO TO Q25
	Not those who 'Don't do this type of shopping' or 'Don't know / can't remember' at Q23	
Q24	**And the time before that, where did you or your household go to make a purchase of recreational goods such as sports equipment, bicycles, musical instruments or toys?** DO NOT PROMPT. ONE ANSWER ONLY.	
	Specified Stores and Centres: Choose from Lists A, B and C	
	Other:	
	Internet / delivered	
	Home Catalogue	
	TV/Interactive Shopping	
	Market Stalls (PLEASE PROBE FOR LOCATION)	
	Other (PLEASE WRITE IN STORE NAME AND LOCATION)	
	(Don't know / can't remember)	
	(Don't do this type of shopping)	
Q25	**Can you tell me where you or your household last made a purchase of other non-food items such as books, CDs, jewellery or china and glass items?** DO NOT PROMPT. ONE ANSWER ONLY.	
	Specified Stores and Centres: Choose from Lists A, B and C	
	Other:	
	Internet / delivered	
	Home Catalogue	
	TV/Interactive Shopping	
	Market Stalls (PLEASE PROBE FOR LOCATION)	
	Other (PLEASE WRITE IN STORE NAME AND LOCATION)	
	(Don't know / can't remember)	GO TO Q27
	(Don't do this type of shopping)	GO TO Q27
	Not those who 'Don't do this type of shopping' or 'Don't know / can't remember' at Q25	
Q26	**And the time before that, where did you or your household go to make a purchase of other non-food items such as books, CDs, jewellery or china and glass items?** DO NOT PROMPT. ONE ANSWER ONLY.	
	Specified Stores and Centres: Choose from Lists A, B and C	
	Other:	
	Internet / delivered	
	Home Catalogue	
	TV/Interactive Shopping	
	Market Stalls (PLEASE PROBE FOR LOCATION)	
	Other (PLEASE WRITE IN STORE NAME AND LOCATION)	
	(Don't know / can't remember)	
	(Don't do this type of shopping)	
Q27	**Do you use the Internet, a home catalogue, or TV / Interactive shopping to undertake any of the following food or non-food shopping?** READ OUT. CAN BE MULTICODED	
1	Food and Groceries	GO TO Q28A
2	Clothes and Shoes	GO TO Q28B
3	Furniture, Carpets, Soft Household Furnishings	GO TO Q28C
4	DIY and Decorating Goods	GO TO Q28D
5	Domestic Appliances and Electrical Items	GO TO Q28E
6	Health, Beauty and Chemist Items	GO TO Q28F
7	Recreational Goods, such as sports equipment, bicycles, musical instruments and toys	GO TO Q28G
9	Other Non-Food Items such as books, CDs, jewellery or china and glass items (PLEASE WRITE IN)	GO TO Q28H
A	(Don't use the Internet for shopping)	GO TO GEN
Q28A	**What proportion of your overall *food and grocery* spend is via the Internet, a home catalogue, or TV / Interactive shopping?** WRITE IN THE PERCENTAGE	
1	%age (PLEASE WRITE IN)	
2	(Don't know / varies)	

Q28B **What proportion of your overall *clothing and shoes* spend is via the Internet, a home catalogue, or TV / Interactive shopping?**
WRITE IN THE PERCENTAGE

1 %age (PLEASE WRITE IN)
2 (Don't know / varies)

Q28C **What proportion of your overall *furniture, carpets, soft household furnishing* spend is via the Internet, a home catalogue, or TV / Interactive shopping?**
WRITE IN THE PERCENTAGE

1 %age (PLEASE WRITE IN)
2 (Don't know / varies)

Q28D **What proportion of your overall *DIY and decorating goods* spend is via the Internet, a home catalogue, or TV / Interactive shopping?**
WRITE IN THE PERCENTAGE

1 %age (PLEASE WRITE IN)
2 (Don't know / varies)

Q28E **What proportion of your overall *domestic appliances and electrical items* spend is via the Internet, a home catalogue, or TV / Interactive shopping?**
WRITE IN THE PERCENTAGE

1 %age (PLEASE WRITE IN)
2 (Don't know / varies)

Q28F **What proportion of your overall health, beauty and chemist items spend is via the Internet, a home catalogue, or TV / Interactive shopping?**
WRITE IN THE PERCENTAGE

1 %age (PLEASE WRITE IN)
2 (Don't know / varies)

Q28G **What proportion of your overall *recreational goods* spend is via the Internet, a home catalogue, or TV / Interactive shopping?**
WRITE IN THE PERCENTAGE

1 %age (PLEASE WRITE IN)
2 (Don't know / varies)

Q28H **What proportion of your overall *other non-food items* spend is via the Internet, a home catalogue, or TV / Interactive shopping?**
WRITE IN THE PERCENTAGE

1 %age (PLEASE WRITE IN)
2 (Don't know / varies)

GEN **Gender of respondent.**
CODE FROM OBSERVATION

1 Male
2 Female

AGE **Could I ask how old you are please?**
ONE ANSWER ONLY. DO NOT READ OUT

1 18 to 24
2 25 to 34
3 35 to 44
4 45 to 54
5 55 to 64
6 65 +
7 (Refused)

OCC **What is the occupation of the chief income earner in your household?**
(IF RETIRED, ASK PREVIOUS OCCUPATION)

1 Occupation / job description (PLEASE WRITE IN)
2 Retired - Basic State Pension
3 (Refused)

CAR **How many cars does your household own or have the use of?**
ONE ANSWER ONLY. DO NOT READ OUT

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

WOR **Which of the following best describes the chief wage earner of your household's current employment situation?**
READ OUT. ONE ANSWER ONLY

1 Working full time
2 Working part time
3 Unemployed
4 Retired
5 A housewife
6 A student
7 Other (PLEASE WRITE IN)
8 (Refused)

Thank & close

Appendix C Quantitative Assessment

Table 1 — Population of study area to 2031

		Harrogate Catchment										
		Zone 1 persons	Zone 2 persons	Zone 3 persons	Zone 4 persons	Zone 5 persons	Zone 6 persons	Zone 7 persons	Zone 8 persons	Zone 9 persons	Zone 10 persons	Overall total persons
2011	actual	27,669	22,783	24,847	23,564	30,956	31,270	30,673	36,556	36,487	23,676	288,481
2013	estimate	27,970	23,620	24,427	23,604	30,242	32,287	30,075	36,428	38,603	23,208	290,464
2016	estimate	28,637	24,127	24,622	23,630	30,393	32,717	30,077	36,578	38,289	23,718	292,788
2021	estimate	29,904	24,823	24,937	23,856	30,825	33,437	30,320	36,936	38,038	24,411	297,487
2026	estimate	31,082	25,502	25,337	24,103	31,207	34,183	30,774	37,483	37,780	25,026	302,477

Baseline (2012) data source: Experian Micromarketer
Population projections sourced from Experian Micromarketer

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

		Harrogate Catchment									
		Zone 1 £	Zone 2 £	Zone 3 £	Zone 4 £	Zone 5 £	Zone 6 £	Zone 7 £	Zone 8 £	Zone 9 £	Zone 10 £
2011	actual	2,777	3,173	3,152	3,478	3,270	2,856	3,110	3,262	3,055	3,073
2013	estimate	2,872	3,281	3,259	3,597	3,381	2,953	3,216	3,373	3,159	3,178
2016	estimate	3,117	3,561	3,537	3,903	3,670	3,205	3,490	3,661	3,429	3,449
2021	estimate	3,613	4,128	4,101	4,525	4,254	3,716	4,046	4,244	3,975	3,998
2026	estimate	4,168	4,763	4,731	5,220	4,908	4,287	4,668	4,896	4,585	4,612

Applied expenditure growth rates:

2013 -14	3.20%	Experian Retail Planner 11, Figure 1a
2014 -15	2.30%	Experian Retail Planner 11, Figure 1a
2015 -16	2.80%	Experian Retail Planner 11, Figure 1a
2016 - 20	3.00%	Experian Retail Planner 11, Figure 1a
2021+	2.90%	Experian Retail Planner 11, Figure 1a

Baseline (2012) data source: Experian Micromarketer
Growth rates source: Experian Retail Planner 11

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

Harrogate Catchment

		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10
		£	£	£	£	£	£	£	£	£	£
2011	actual	1,786	1,906	1,941	2,090	1,991	1,855	1,941	1,978	1,927	1,869
2013	estimate	1,734	1,851	1,885	2,030	1,934	1,801	1,885	1,921	1,871	1,815
2016	estimate	1,721	1,836	1,870	2,013	1,918	1,787	1,870	1,906	1,856	1,801
2021	estimate	1,791	1,911	1,946	2,095	1,996	1,860	1,946	1,983	1,932	1,874
2026	estimate	1,863	1,988	2,025	2,180	2,077	1,935	2,025	2,064	2,010	1,950

Applied expenditure growth rates:

2011-12	-2.30%	Experian Retail Planner 11, Figure 1b
2012-13	-0.60%	Experian Retail Planner 11, Figure 1b
2013-14	-0.60%	Experian Retail Planner 11, Figure 1a
2014-15	-0.30%	Experian Retail Planner 11, Figure 1a
2015-16	0.10%	Experian Retail Planner 11, Figure 1a
2016-20	0.80%	Experian Retail Planner 11, Figure 1a
2021+	0.80%	Experian Retail Planner 11, Figure 1a

Baseline (2012) data source: Experian Micromarketer
Growth rates source: Experian Retail Planner 11

Table 3a — Comparison goods expenditure forecasts (total)

		Harrogate Catchment										
		Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Zone 6 £m	Zone 7 £m	Zone 8 £m	Zone 9 £m	Zone 10 £m	Overall total £m
2013	Base	80.32	77.50	79.62	84.89	102.26	95.36	96.72	122.88	121.95	73.75	935.3
	less SFT	10.84	8.41	13.17	13.92	18.46	14.12	21.97	25.14	26.11	13.71	165.85
	Residual	**69.48**	**69.09**	**66.45**	**70.97**	**83.80**	**81.24**	**74.75**	**97.74**	**95.84**	**60.04**	**769.41**
2016	Base	89.25	85.92	87.10	92.24	111.54	104.87	104.98	133.91	131.28	81.80	1022.88
	less SFT	14.55	11.27	17.41	18.27	24.33	18.76	28.82	33.11	33.96	18.37	218.85
	Residual	**74.70**	**74.65**	**69.69**	**73.96**	**87.21**	**86.10**	**76.16**	**100.80**	**97.32**	**63.43**	**804.03**
2021	Base	108.04	102.48	102.26	107.95	131.14	124.25	122.68	156.76	151.19	97.60	1204.35
	less SFT	21.16	16.14	24.55	25.69	34.36	26.70	40.45	46.55	46.98	26.33	308.91
	Residual	**86.88**	**86.34**	**77.71**	**82.26**	**96.78**	**97.54**	**82.23**	**110.20**	**104.21**	**71.27**	**895.44**
2026	Base	129.56	121.45	119.87	125.83	153.17	146.53	143.65	183.52	173.24	115.43	1412.26
	less SFT	25.86	19.49	29.33	30.52	40.90	32.10	48.27	55.55	54.86	31.73	368.60
	Residual	**103.70**	**101.96**	**90.54**	**95.31**	**112.27**	**114.44**	**95.38**	**127.98**	**118.38**	**83.70**	**1,043.66**
Total expenditure growth excluding SFT												**274.25**

Source: Table 1 applied to Table 2a

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

	Zone 1	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**Zone 9**	**Zone 10**
2013 HHS SFT %ages	13.49%	10.85%	16.54%	16.40%	18.05%	14.81%	22.72%	20.46%	21.41%	18.59%
2016	16.30%	13.11%	19.99%	19.81%	21.81%	17.89%	27.45%	24.72%	25.87%	22.46%
2021	19.58%	15.75%	24.01%	23.80%	26.20%	21.49%	32.97%	29.70%	31.07%	26.98%
2026	19.96%	16.05%	24.47%	24.25%	26.70%	21.90%	33.60%	30.27%	31.67%	27.49%

	Experian SFT Figures	**SFT % Growth**	
2013	14.40%	2013-2016	20.83%
2016	17.40%	2016-2021	20.11%
2021	20.90%	2021-2026	1.91%
2026	21.30%		

Source: Experian Retail Planner 11, Estimated and forecast market share of non-store retail sales

Table 3b — Convenience goods expenditure forecasts (total)

Harrogate Catchment

		Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Zone 6 £m	Zone 7 £m	Zone 8 £m	Zone 9 £m	Zone 10 £m	Overall total £m
2013	Base	48.51	43.72	46.04	47.91	58.47	58.16	56.69	69.97	72.24	42.12	543.9
	less SFT	0.41	0.91	1.14	1.92	2.25	1.14	2.05	2.61	1.82	2.49	16.7
	Residual	**48.11**	**42.81**	**44.90**	**45.99**	**56.22**	**57.02**	**54.64**	**67.36**	**70.42**	**39.63**	**527.1**
2016	Base	49.27	44.30	46.04	47.58	58.30	58.47	56.24	69.70	71.08	42.71	543.7
	less SFT	0.54	1.20	1.49	2.48	2.92	1.49	2.64	3.39	2.33	3.29	21.8
	Residual	**48.74**	**43.10**	**44.55**	**45.10**	**55.37**	**56.98**	**53.60**	**66.31**	**68.75**	**39.42**	**521.9**
2021	Base	53.54	47.43	48.53	49.99	61.53	62.18	59.00	73.24	73.48	45.74	574.7
	less SFT	0.82	1.81	2.20	3.67	4.34	2.23	3.90	5.01	3.39	4.96	32.3
	Residual	**52.72**	**45.62**	**46.32**	**46.32**	**57.19**	**59.95**	**55.10**	**68.23**	**70.09**	**40.78**	**542.3**
2026	Base	57.92	50.71	51.31	52.56	64.82	66.15	62.32	77.35	75.95	48.80	607.9
	less SFT	1.00	2.18	2.62	4.34	5.14	2.67	4.64	5.95	3.95	5.95	38.4
	Residual	**56.92**	**48.53**	**48.69**	**48.22**	**59.68**	**63.48**	**57.68**	**71.40**	**72.01**	**42.85**	**569.4**
Total expenditure growth excluding SFT												**42.3**

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

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

	Zone 1	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**Zone 9**	**Zone 10**
2013 HHS SFT %ages	0.84%	2.08%	2.48%	4.01%	3.85%	1.96%	3.61%	3.74%	2.52%	5.92%
2016	1.09%	2.71%	3.23%	5.21%	5.01%	2.55%	4.70%	4.86%	3.28%	7.70%
2021	1.53%	3.82%	4.54%	7.34%	7.05%	3.59%	6.62%	6.84%	4.62%	10.84%
2026	1.72%	4.29%	5.11%	8.26%	7.94%	4.04%	7.45%	7.70%	5.19%	12.20%

	Experian SFT Figures	**SFT % Growth**	
2013	8.30%	2013-2016	30.1%
2016	10.80%	2016-2021	40.7%
2021	15.20%	2021-2026	12.5%
2026	17.10%		

Source: Experian Retail Planner 11, Estimated and forecast market share of non-store retail sales

Table 4a — Comparison goods market shares, 2013

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

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

Table 4b — Comparison goods spending patterns, 2013

	Harrogate Catchment											
	Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Zone 6 £m	Zone 7 £m	Zone 8 £m	Zone 9 £m	Zone 10 £m	Overall total £m	Overall Market Share %
Total expenditure available to study area, 2013	**69.48**	**69.09**	**66.45**	**70.97**	**83.80**	**81.24**	**74.75**	**97.74**	**95.84**	**60.04**	**769.41**	
Stores and centres in Zone 1												
Harrogate Town Centre	40.04	39.84	36.69	25.05	26.84	25.32	9.44	10.16	9.54	2.29	**225.2**	**29.3%**
B&Q, Skipton Road, Harrogate	1.59	2.78	0.43	1.22	0.67	1.23	0.38	0.11	0.24	0.06	**8.72**	**1%**
Asda, Bower Road, Harrogate	2.76	1.53	2.66	0.39	0.09	0.87	0.20	0.00	0.25	0.00	**8.75**	**1%**
Other destinations, Zone 1	1.23	1.37	1.46	0.46	1.07	0.63	0.18	0.07	0.38	0.00	**6.86**	**1%**
Sub-total, survey zone 1	**45.63**	**45.52**	**41.25**	**27.12**	**28.67**	**28.05**	**10.20**	**10.34**	**10.42**	**2.35**	**249.54**	**32%**
Stores and centres in Zone 2												
Harrogate Retail Park (Oak Beck Retail Park)	0.51	0.54	0.48	0.25	0.98	0.20	0.21	0.00	0.00	0.00	**3.18**	**0%**
Other destinations, zone 2	0.25	0.15	0.22	0.00	0.17	0.42	0.11	0.00	0.00	0.00	**1.31**	**0%**
Sub-total, survey zone 2	**0.76**	**0.69**	**0.70**	**0.25**	**1.15**	**0.62**	**0.32**	**0.00**	**0.00**	**0.00**	**4.48**	**1%**
Stores and centres in Zone 3												
Plumpton Retail Park, Harrogate	7.31	6.63	9.88	6.37	4.91	2.49	2.72	0.31	0.00	0.10	**40.72**	**5.3%**
Other destinations, zone 3	2.41	0.99	3.13	0.42	0.79	0.07	2.23	0.82	0.00	0.21	**11.06**	**1%**
Sub-total, survey zone 3	**9.71**	**7.62**	**13.01**	**6.78**	**5.70**	**2.57**	**4.95**	**1.13**	**0.00**	**0.31**	**51.79**	**7%**
Stores and centres in Zone 4												
Co-operative Food, 119 Otley Road, Harrogate	0.04	0.00	0.00	0.02	0.00	0.00	0.00	0.00	0.00	0.00	**0.06**	**0%**
Other destinations, Zone 4	0.13	0.00	0.00	0.00	0.00	0.00	0.03	0.00	0.00	0.00	**0.16**	**0%**
Sub-total, survey zone 4	**0.17**	**0.00**	**0.00**	**0.02**	**0.00**	**0.00**	**0.03**	**0.00**	**0.00**	**0.00**	**0.22**	**0%**
Stores and centres in Zone 5												
Knaresborough Town Centre	1.30	0.78	1.81	0.79	11.71	1.22	2.57	0.42	0.21	0.18	**21.0**	**2.7%**
St James Retail Park , Knaresborough	1.28	1.24	3.49	2.17	4.23	1.79	2.96	0.67	0.27	0.47	**18.6**	**2.4%**
Boroughbridge Town Centre	0.76	0.11	0.10	0.12	3.25	0.61	0.00	0.00	0.00	0.08	**5.02**	**0.7%**
Other destinations, survey zone 5	0.00	0.03	0.12	0.03	1.73	0.22	0.00	0.00	0.00	0.04	**2.17**	**0%**
Sub-total, survey zone 5	**3.34**	**2.16**	**5.54**	**3.11**	**20.91**	**3.84**	**5.53**	**1.08**	**0.47**	**0.77**	**46.74**	**6%**
Stores and centres in survey zone 6												
Ripon City Centre	0.93	1.88	0.40	0.09	2.72	31.98	0.14	0.00	0.02	2.30	**40.5**	**5.3%**
Pateley Bridge Town Centre	0.00	0.00	0.00	0.20	0.00	2.67	0.00	0.00	0.00	0.00	**2.86**	**0%**
Other destinations, Zone 6	0.00	0.03	0.07	0.00	0.14	1.51	0.00	0.00	0.13	0.00	**1.88**	**0%**
Sub-total, survey zone 6	**0.93**	**1.91**	**0.48**	**0.28**	**2.86**	**36.15**	**0.14**	**0.00**	**0.15**	**2.30**	**45.21**	**6%**
Stores and centres in survey zone 7												
Wetherby Town Centre	0.12	0.89	0.14	1.17	0.99	0.27	10.50	0.71	0.00	0.00	**14.79**	**1.9%**
Morrisons, Horsefair, Wetherby	0.00	0.00	0.00	0.23	0.00	0.00	2.46	0.02	0.00	0.00	**2.71**	**0%**
Other destinations, survey zone 7	0.00	0.00	0.00	0.04	0.15	0.00	1.35	0.00	0.00	0.00	**1.55**	**0%**
Sub-total, survey zone 7	**0.12**	**0.89**	**0.14**	**1.45**	**1.14**	**0.27**	**14.31**	**0.74**	**0.00**	**0.00**	**19.05**	**2%**
Stores and centres in survey zone 8												
Guiseley Retail Park, Guiseley	0.09	0.00	0.00	4.27	0.00	0.00	0.00	18.34	7.90	0.00	**30.60**	**4.0%**
Otley Town Centre	0.00	0.00	0.07	8.73	0.00	0.00	0.13	10.63	2.34	0.00	**21.9**	**2.8%**
Guiseley Town Centre	0.00	0.00	0.00	2.99	0.00	0.00	0.00	11.01	5.63	0.00	**19.6**	**2.6%**
Other destinations, Zone 8	0.36	0.00	0.25	0.90	0.65	0.07	1.81	1.65	0.16	0.00	**5.85**	**1%**
Sub-total, survey zone 8	**0.44**	**0.00**	**0.32**	**16.88**	**0.65**	**0.07**	**1.95**	**41.63**	**16.04**	**0.00**	**77.98**	**10%**
Stores and centres in survey zone 9												
Ilkley Town Centre	0.27	0.00	0.00	1.28	0.00	0.48	0.00	5.00	17.77	0.00	**24.80**	**3.2%**
Other destinations, Zone 9	0.00	0.00	0.00	0.02	0.00	0.00	0.00	0.00	2.06	0.00	**2.08**	**0%**
Sub-total, survey zone 9	**0.27**	**0.00**	**0.00**	**1.30**	**0.00**	**0.48**	**0.00**	**5.00**	**19.84**	**0.00**	**26.89**	**3%**
Stores and centres in survey zone 10												
Bedale Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.48	1.04	**1.52**	**0%**
Other destinations, Zone 10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.26	**0.26**	**0%**
Sub-total, survey zone 10	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.48**	**1.30**	**1.79**	**0%**
Sub-total for study area	**61.37**	**58.80**	**61.44**	**57.19**	**61.09**	**72.04**	**37.42**	**59.92**	**47.40**	**7.04**	**523.70**	**68.1%**
Locations outside study area												
York												
Clifton Moor Retail Park, York	1.07	2.60	0.38	0.44	7.23	0.35	6.92	0.23	0.00	15.38	**34.62**	**4.5%**
York City Centre	1.19	1.19	0.39	1.23	6.24	1.17	10.34	0.52	0.37	12.14	**34.79**	**4.5%**
Monks Cross Retail Park, York	0.32	0.25	0.00	0.15	1.88	0.57	3.69	0.00	0.00	6.03	**12.90**	**1.7%**
Other locations, York	0.37	0.00	0.48	0.79	2.31	1.23	4.30	0.74	0.18	2.54	**12.94**	**2%**
Sub-total, York	**2.95**	**4.04**	**1.25**	**2.62**	**17.67**	**3.33**	**25.25**	**1.50**	**0.55**	**36.09**	**95.24**	**12.4%**
Leeds												
Leeds City Centre	1.61	3.16	1.53	3.88	1.35	1.83	7.05	18.01	11.38	1.05	**50.85**	**6.6%**
Other locations, Leeds	0.28	0.08	0.00	0.61	0.00	0.00	0.52	2.25	0.86	0.11	**4.72**	**1%**
Sub-total, Leeds	**1.89**	**3.24**	**1.53**	**4.49**	**1.35**	**1.83**	**7.58**	**20.26**	**12.24**	**1.17**	**55.6**	**7.2%**
Skipton												
Skipton Town Centre	0.00	0.00	0.10	0.89	0.00	0.09	0.00	0.11	9.57	0.00	**10.77**	**1.4%**
Other locations, Skipton	0.00	0.00	0.00	0.00	0.00	0.02	0.00	0.00	1.68	0.00	**1.70**	**0%**
Sub-total, Skipton	**0.00**	**0.00**	**0.10**	**0.89**	**0.00**	**0.12**	**0.00**	**0.11**	**11.25**	**0.00**	**12.5**	**1.6%**
Northallerton												
Northallerton Town Centre	0.00	0.32	0.32	0.00	0.67	1.08	0.00	0.21	1.50	4.27	**8.37**	**1%**
Other locations, Northallerton	0.03	0.00	0.00	0.00	0.00	0.26	0.00	0.00	0.27	0.58	**1.13**	**0%**
Sub-total, Northallerton	**0.03**	**0.32**	**0.32**	**0.00**	**0.67**	**1.34**	**0.00**	**0.21**	**1.76**	**4.85**	**9.50**	**1%**
Thirsk												
Thirsk Town Centre	0.28	0.11	0.18	0.13	0.14	0.61	0.00	0.00	0.00	2.23	**3.69**	**0%**
Other locations, Thirsk	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.06	**0.06**	**0%**
Sub-total, Thirsk	**0.28**	**0.11**	**0.18**	**0.13**	**0.14**	**0.61**	**0.00**	**0.00**	**0.00**	**2.29**	**3.75**	**0%**
Other locations												
Keighley Town Centre	0.14	0.00	0.00	0.47	0.00	0.14	0.00	0.23	6.34	0.00	**7.33**	**1%**
Easingwold Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.71	**2.71**	**0%**
Bradford City Centre	0.00	0.05	0.00	1.10	0.14	0.00	0.00	3.64	2.75	0.10	**7.79**	**1%**
All other locations outside study area	2.82	2.53	1.63	4.07	2.75	1.83	4.50	11.87	13.55	5.80	**51.36**	**7%**
Sub-total for outside study area	**8.1**	**10.3**	**5.0**	**13.8**	**22.7**	**9.2**	**37.3**	**37.8**	**48.4**	**53.0**	**245.71**	**31.9%**
Total	**69.5**	**69.1**	**66.4**	**71.0**	**83.8**	**81.2**	**74.8**	**97.7**	**95.8**	**60.0**	**769.4**	**100%**

Source: Table 4a, Table 3a

Table 5a — Percentage Splits of Comparison Goods Expenditure

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

Source: Experian MMG3 (2012)

Table 5b — Total Expenditure on Different Categories of Comparison Goods in 2013

	Harrogate Catchment										
	Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Zone 6 £m	Zone 7 £m	Zone 8 £m	Zone 9 £m	Zone 10 £m	Overall total £m
Clothing and footwear	19.14	17.83	17.46	19.04	21.24	20.57	19.04	25.59	24.99	14.95	**199.9**
Furniture, floorcoverings, household textiles	7.98	8.47	7.91	8.55	10.20	10.06	9.03	11.61	11.71	7.54	**93.1**
Audio-visual equipment	20.49	19.42	19.72	20.20	23.39	22.70	21.56	28.23	27.19	16.44	**219.3**
Hardware, DIY	4.08	4.81	4.32	4.75	6.17	6.11	5.26	6.48	6.88	4.67	**53.5**
Chemist goods	1.98	2.05	1.90	2.00	2.43	2.27	2.31	2.97	2.79	1.54	**22.2**
Recreational goods	7.30	7.66	7.00	7.22	9.38	8.84	8.04	10.50	9.79	6.72	**82.5**
Other Goods (books, CDs, jewellery, glass and china, etc)	8.52	8.84	8.14	9.20	11.00	10.69	9.51	12.34	12.49	8.17	**98.9**
Total Comparison Goods Expenditure	**69.48**	**69.09**	**66.45**	**70.97**	**83.80**	**81.24**	**74.75**	**97.74**	**95.84**	**60.04**	**769.4**

Source: Table 3a, Table 5a

Table 5c — Total Expenditure on Clothing and Shoes Goods in 2013

	Harrogate Catchment											
	Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Zone 6 £m	Zone 7 £m	Zone 8 £m	Zone 9 £m	Zone 10 £m	**Total £m**	**All Zones Market Share %**
Destinations in Zone 1												
Harrogate Town Centre	11.09	11.33	11.88	8.31	8.82	9.85	4.31	5.39	4.66	1.18	**76.8**	**38.4%**
Marks & Spencer, 36-38 Cambridge Street, Harrogate	1.24	0.79	0.78	0.35	0.60	0.51	0.18	0.00	0.38	0.00	**4.8**	**2.4%**
Other destinations, Zone 1	1.40	0.24	0.20	0.00	0.00	0.23	0.17	0.00	0.13	0.00	**2.4**	**1.2%**
Sub total, Zone 1	**13.72**	**12.36**	**12.86**	**8.66**	**9.42**	**10.59**	**4.65**	**5.39**	**5.17**	**1.18**	**84.0**	**42.0%**
Destinations in Zone 2												
Other destinations, zone 2	0.00	0.00	0.17	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.2**	**0.1%**
Sub total, Zone 2	**0.00**	**0.00**	**0.17**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.2**	**0.1%**
Destinations in Zone 3												
Sainsbury, Wetherby Road, Harrogate	0.96	0.00	0.47	0.09	0.11	0.00	0.23	0.10	0.00	0.00	**2.0**	**1.0%**
Other destinations, zone 3	0.00	0.00	0.08	0.00	0.10	0.00	0.00	0.00	0.00	0.00	**0.2**	**0.1%**
Sub total, Zone 3	**0.96**	**0.00**	**0.55**	**0.09**	**0.21**	**0.00**	**0.23**	**0.10**	**0.00**	**0.00**	**2.1**	**1.1%**
Destinations in Zone 4												
Other destinations, zone 4	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.0**	**0.0%**
Sub total, Zone 4	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.0**	**0.0%**
Destinations in Zone 5												
Knaresborough Town Centre	0.56	0.21	0.33	0.45	2.07	0.47	0.85	0.00	0.13	0.00	**5.1**	**2.5%**
St James Retail Park , Knaresborough	0.44	0.48	1.29	0.60	1.58	0.97	0.72	0.00	0.00	0.11	**5.1**	**2.5%**
Other destinations, Zone 5	0.00	0.00	0.00	0.00	0.23	0.00	0.00	0.00	0.00	0.00	**0.2**	**0.1%**
Sub total, Zone 5	**1.00**	**0.70**	**1.62**	**1.05**	**3.89**	**1.44**	**1.57**	**0.00**	**0.13**	**0.11**	**11.5**	**5.8%**
Destinations in Zone 6												
Ripon City Centre	0.75	0.45	0.00	0.08	0.41	3.72	0.00	0.00	0.00	0.34	**5.7**	**2.9%**
Other destinations, Zone 6	0.00	0.00	0.00	0.17	0.00	1.37	0.00	0.00	0.00	0.00	**1.5**	**0.8%**
Sub total, Zone 6	**0.75**	**0.45**	**0.00**	**0.25**	**0.41**	**5.09**	**0.00**	**0.00**	**0.00**	**0.34**	**7.3**	**3.6%**
Destinations in Zone 7												
Wetherby Town Centre	0.00	0.28	0.00	0.33	0.11	0.00	1.39	0.43	0.00	0.00	**2.5**	**1.3%**
Other destinations, Zone 7	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.0**	**0.0%**
Sub total, Zone 7	**0.00**	**0.28**	**0.00**	**0.33**	**0.11**	**0.00**	**1.39**	**0.43**	**0.00**	**0.00**	**2.5**	**1.3%**
Destinations in Zone 8												
Guiseley Retail Park, Guiseley	0.00	0.00	0.00	0.55	0.00	0.00	0.00	1.71	1.43	0.00	**3.7**	**1.8%**
Otley Town Centre	0.00	0.00	0.00	1.22	0.00	0.00	0.00	1.17	0.71	0.00	**3.1**	**1.6%**
Guiseley Town Centre	0.00	0.00	0.00	0.65	0.00	0.00	0.00	1.46	1.22	0.00	**3.3**	**1.7%**
Other destinations, Zone 8	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.0**	**0.0%**
Sub total, Zone 8	**0.00**	**0.00**	**0.00**	**2.42**	**0.00**	**0.00**	**0.00**	**4.34**	**3.35**	**0.00**	**10.1**	**5.1%**
Destinations in Zone 9												
Ilkley Town Centre	0.10	0.00	0.00	0.97	0.00	0.31	0.00	1.16	3.85	0.00	**6.4**	**3.2%**
Other destinations, Zone 9	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.21	0.00	**0.2**	**0.1%**
Sub total, Zone 9	**0.10**	**0.00**	**0.00**	**0.97**	**0.00**	**0.31**	**0.00**	**1.16**	**4.06**	**0.00**	**6.6**	**3.3%**
Destinations in Zone 10												
Other destinations, Zone 10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.0**	**0.0%**
Sub total, Zone 10	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.0**	**0.0%**
Sub-total for catchment area	**16.52**	**13.79**	**15.19**	**13.78**	**14.04**	**17.44**	**7.84**	**11.43**	**12.72**	**1.63**	**124.4**	**62.2%**
Destinations outside catchment area												
Leeds												
Leeds City Centre	0.83	1.40	0.57	2.12	0.42	0.42	3.00	8.84	4.08	0.34	**22.0**	**11.0%**
Other locations, Leeds	0.13	0.00	0.00	0.44	0.00	0.00	0.22	0.54	0.66	0.11	**2.1**	**1%**
Sub-total, Leeds	**0.95**	**1.40**	**0.57**	**2.57**	**0.42**	**0.42**	**3.22**	**9.38**	**4.74**	**0.45**	**24.1**	**12%**
York												
York City Centre	0.69	0.61	0.10	0.79	2.30	0.75	3.05	0.18	0.36	4.83	**13.7**	**7%**
Monks Cross Retail Park, York	0.10	0.14	0.00	0.15	1.32	0.28	1.75	0.00	0.00	2.93	**6.7**	**3%**
Clifton Moor Retail Park, York	0.26	0.76	0.13	0.00	0.92	0.00	0.38	0.00	0.00	1.33	**3.8**	**2%**
Other locations, York	0.10	0.00	0.48	0.62	0.74	0.90	1.63	0.45	0.12	0.63	**5.7**	**3%**
Sub-total, York	**1.16**	**1.52**	**0.72**	**1.57**	**5.27**	**1.93**	**6.81**	**0.63**	**0.48**	**9.73**	**29.8**	**14.9%**
Skipton												
Skipton Town Centre	0.00	0.00	0.08	0.15	0.00	0.00	0.00	0.12	1.28	0.00	**1.6**	**1%**
Other locations, Skipton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.14	0.00	**0.1**	**0%**
Sub-total, Skipton	**0.00**	**0.00**	**0.08**	**0.15**	**0.00**	**0.00**	**0.00**	**0.12**	**1.41**	**0.00**	**1.8**	**1%**
Northallerton												
Northallerton Town Centre	0.00	0.22	0.25	0.00	0.14	0.09	0.00	0.00	0.21	0.71	**1.6**	**1%**
Other locations, Northallerton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	**0.0**	**0%**
Sub-total, Northallerton	**0.00**	**0.22**	**0.25**	**0.00**	**0.14**	**0.09**	**0.00**	**0.00**	**0.21**	**0.71**	**1.6**	**1%**
Other destinations outside catchment area	0.50	0.90	0.65	0.98	1.37	0.69	1.17	4.05	5.43	2.44	**18.2**	**9%**
Sub-total for outside catchment area	**2.62**	**4.05**	**2.27**	**5.26**	**7.19**	**3.13**	**11.20**	**14.17**	**12.27**	**13.32**	**75.5**	**38%**
Overall total	**19.14**	**17.83**	**17.46**	**19.04**	**21.24**	**20.57**	**19.04**	**25.59**	**24.99**	**14.95**	**199.9**	**100%**

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

Table 5d — Total Expenditure on Electrical Items and Domestic Items in 2013

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

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

Table 6 — Retail planning commitments

Comparison goods planning commitments

	Application ref	Gross Floorspace sq.m	Net floorspace sq.m	Turnover per sq.m (2013) £	Total turnover (2013) £m	Turnover from study area (2013)	Turnover from study area (2013) £m
Asda, Bower Road	12/02002/FULMAJ	1,043	877	5,690	5.0	90%	4.5
M&S 91-97 Leeds Rd	12/00816/FULMAJ	3,017	692	8,423	5.8	95%	5.5
Tesco, Skipton Rd	09/02704/FULMAJ	7,345	1,317	10,318	13.6	95%	12.9
Co-Op Chain Lane	11/01562/REPMAJ		196	3,953	0.8	100%	0.8
Morrisons Harrogate Rd	11/01947/FULMAJ		651	8,876	5.8	95%	5.5
DIY Store, Harrogate Road	11/01947/FULMAJ	4,237	3,601	2,000	7.2	90%	6.5
Garden Centre, Harrogate Road	11/01947/FULMAJ	1,035	1,035	1,000	1.0	90%	0.9
Total			**8,369**	**-**	**39.2**		**36.6**

Convenience goods planning commitments

	Application ref	Gross Floorspace sq.m	Net floorspace sq.m	Turnover per sq.m (2013) £	Total turnover (2013) £m	Turnover from study area (2013)	Turnover from study area (2013) £m
M&S 91-97 Leeds Rd	12/00816/FULMAJ	3,017	846	10,928	9.2	95%	8.8
Tesco, Skipton Rd	09/02704/FULMAJ	7,345	2,721	12,855	35.0	95%	33.2
Co-Op Chain Lane	11/01562/REPMAJ		950	7,000	6.7	100%	6.7
Morrisons Harrogate Rd	11/01947/FULMAJ		710	13,804	9.8	95%	9.3
Total			**5,227**	**-**	**60.67**		**58.0**

Table 7 — Comparison goods capacity forecasts for study area

Constant market share

Row		2013	2016	2021	2026	Incremental Growth 2013-16	2016-21	2021-26	2013-26
	Total Retained Expenditure								
A	Total Population	290,464	292,788	297,487	302,477	2,324	4,699	4,990	12,013
B	Total Expenditure £m	769.41	804.03	895.44	1043.66	34.62	91.41	148.22	274.25
C	Retained Expenditure %	68.1%	68.1%	68.1%	68.1%				
D	Retained Expenditure £m	523.70	547.26	609.48	710.37	23.56	62.22	100.88	186.67
	Turnover of Comparison Stores in OCA Drawn from Catchment Area								
E	Total Comparison Retail Turnover of Stores in OCA £m	523.70	547.62	589.94	635.54	23.92	42.32	45.59	111.84
	Commitments								
F	Comparison Retail Commitments £m	0.00	38.29	41.25	44.43	38.29	2.96	3.19	44.43
G	**Initial Residual Comparison Retail Expenditure £m**	**0.00**	**-38.64**	**-21.71**	**30.40**	-38.64	16.94	52.10	30.40
	Inflow of Expenditure from Outside the Catchment Area								
H	Inflow (%)	10%	10%	10%	10%				
I	Inflow £m	52.37	54.73	60.95	71.04	2.36	6.22	10.09	18.67
	SUMMARY								
J	Initial Residual Comparison Retail Expenditure £m					-38.64	16.94	52.10	30.40
K	Growth in Inflow £m					2.36	6.22	10.09	18.67
L	FINAL RESIDUAL COMPARISON RETAIL EXPENDITURE £m					**-36.29**	**23.16**	**62.19**	**49.06**
	Conversion to floorspace need								
M	Turnover per sq m (assumed)					6,274	6,759	7,281	-
N	Floorspace Requirement for study area (sq.m net)					-5,784	3,426	8,541	6,184
O	Floorspace Requirement for study area (sq.m gross)					-8,263	4,895	12,202	8,834

Assumed Sales efficiency growth of 1.5% per annum

Turnover per sq.m at 2013 PBA estimate. Turnover per sq.m increased to 2026 in line with sales effiency growth rates shown above

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

Table 8a — Convenience goods market shares, 2013

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

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

Table 8b — Convenience goods spending patterns, 2013

	Harrogate Catchment											
	Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Zone 6 £m	Zone 7 £m	Zone 8 £m	Zone 9 £m	Zone 10 £m	Overall total £m	Overall Market Share %
Total expenditure available to study area	**48.11**	**42.81**	**44.90**	**45.99**	**56.22**	**57.02**	**54.64**	**67.36**	**70.42**	**39.63**	**527.1**	
Foodstores in Zone 1												
Asda, Bower Road, Harrogate	16.1	14.9	7.4	3.4	2.0	1.9	1.4	0.2	0.3	0.0	**47.7**	**9.0%**
Harrogate Town Centre	3.6	2.0	3.7	1.4	0.3	0.6	0.3	0.2	0.4	0.0	**12.5**	**2%**
Waitrose, 92 Station Parade, Harrogate	3.3	3.4	2.0	2.5	0.2	0.6	0.7	0.2	0.2	0.0	**12.9**	**2.4%**
Other destinations, Zone 1	2.6	2.1	1.0	1.5	0.6	0.7	0.8	0.4	0.1	0.2	**10.0**	**2%**
Sub-total, survey zone 1	**25.6**	**22.3**	**14.1**	**8.8**	**3.1**	**3.7**	**3.2**	**1.0**	**1.0**	**0.2**	**83.0**	**16%**
Foodstores in Zone 2												
Co-operative Food, Jennyfield Drive, Harrogate	0.8	2.2	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**3.3**	**1%**
Other destinations, Zone 2	0.8	1.5	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**2.4**	**0%**
Sub-total, survey zone 2	**1.6**	**3.7**	**0.3**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**5.7**	**1%**
Foodstores in Zone 3												
Morrisons, Plumpton Park, Hookstone Chase, Harrogate	9.8	5.6	17.0	3.3	7.3	1.0	0.3	0.3	0.0	0.0	**44.5**	**8.4%**
Sainsbury, Wetherby Road, Harrogate	6.4	6.2	8.9	4.9	7.8	1.6	1.4	2.8	0.0	0.0	**39.9**	**7.6%**
Other destinations, Zone 3	1.1	0.1	3.6	0.5	0.0	0.0	0.0	0.0	0.0	0.0	**5.4**	**1%**
Sub-total, survey zone 3	**17.3**	**12.0**	**29.5**	**8.7**	**15.1**	**2.6**	**1.6**	**3.0**	**0.0**	**0.0**	**89.8**	**17%**
Foodstores in Zone 4												
Sainsbury's Local, 67-71 Cold Bath Road, Harrogate	0.3	0.0	0.0	0.9	0.0	0.0	0.0	0.0	0.0	0.2	**1.3**	**0%**
Other destinations, Zone 4	0.6	0.0	0.1	1.1	0.0	0.0	0.0	0.0	0.0	0.0	**1.8**	**0%**
Sub-total, survey zone 4	**0.9**	**0.0**	**0.1**	**2.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.2**	**3.1**	**1%**
Foodstores in Zone 5												
Morrisons, Stump Cross, Boroughbridge	0.0	1.0	0.0	0.0	18.7	2.9	0.3	0.0	0.0	5.9	**28.8**	**5.5%**
Lidl, York Road, Knaresborough	0.5	0.0	0.3	0.3	3.3	0.0	0.5	0.0	0.0	0.0	**4.9**	**1%**
Knaresborough Town Centre	0.3	0.1	0.2	0.1	2.5	0.0	0.0	0.0	0.0	0.0	**3.1**	**1%**
Boroughbridge Town Centre	0.0	0.0	0.0	0.1	1.9	0.4	0.0	0.0	0.0	0.1	**2.5**	**0%**
Other destinations, Zone 5	0.7	0.2	0.0	0.0	3.1	0.0	0.1	0.2	0.0	0.0	**4.2**	**1%**
Sub-total, survey zone 5	**1.4**	**1.3**	**0.5**	**0.4**	**29.5**	**3.2**	**0.9**	**0.2**	**0.0**	**6.0**	**43.5**	**8%**
Foodstores in Zone 6												
Morrisons, Harrogate Road, Ripon	0.0	2.6	0.0	0.0	0.0	22.9	0.0	0.0	0.0	0.4	**25.8**	**4.9%**
Sainsbury, 5 Market Place South, Ripon	0.0	0.0	0.0	0.0	0.2	10.4	0.0	0.0	0.0	0.2	**10.9**	**2.1%**
Booths, Marshall Way, Ripon	0.0	0.3	0.1	0.0	0.2	4.5	0.0	0.0	0.0	0.2	**5.3**	**1.0%**
Ripon City Centre	0.0	0.2	0.0	0.0	0.1	3.4	0.0	0.0	0.0	0.0	**3.7**	**0.7%**
Pateley Bridge Town Centre	0.0	0.0	0.0	0.0	0.0	2.3	0.0	0.0	0.0	0.0	**2.3**	**0%**
Other destinations, Zone 6	0.0	0.1	0.0	0.0	0.0	1.3	0.0	0.0	0.0	0.3	**1.7**	**0%**
Sub-total, survey zone 6	**0.0**	**3.1**	**0.1**	**0.0**	**0.6**	**44.8**	**0.0**	**0.0**	**0.0**	**1.2**	**49.8**	**9%**
Foodstores in Zone 7												
Morrisons, Horsefair, Wetherby	0.0	0.0	0.0	3.1	1.6	0.2	23.0	3.0	0.0	0.0	**30.9**	**5.9%**
Sainsbury, Mill Lane, Tadcaster	0.0	0.0	0.0	0.0	0.2	0.0	4.0	0.0	0.0	0.0	**4.2**	**1%**
Wetherby Town Centre	0.0	0.0	0.1	0.5	0.2	0.0	3.7	0.1	0.0	0.0	**4.6**	**1%**
Sainsbury's Local, 13 Crossley Street, Wetherby	0.0	0.0	0.0	2.2	0.6	0.0	0.9	0.0	0.0	0.0	**3.7**	**1%**
Other destinations, Zone 7	0.0	0.0	0.0	0.2	0.2	0.0	4.3	0.3	0.0	0.1	**5.1**	**1%**
Sub-total, survey zone 7	**0.0**	**0.0**	**0.1**	**5.9**	**2.9**	**0.2**	**36.0**	**3.4**	**0.0**	**0.1**	**48.5**	**9%**
Foodstores in Zone 8												
Morrisons, 89 Otley Road, Guiseley	0.0	0.0	0.0	2.3	0.0	0.0	0.0	22.9	4.8	0.0	**30.0**	**5.7%**
Sainsbury, 11 Bondgate, Otley	0.0	0.0	0.0	6.0	0.0	0.0	0.0	11.9	3.7	0.0	**21.6**	**4.1%**
Waitrose, 60 Westgate, Otley	0.0	0.2	0.0	5.5	0.0	0.0	0.0	6.9	3.0	0.0	**15.7**	**3.0%**
Otley Town Centre	0.0	0.0	0.0	2.2	0.0	0.0	0.0	3.4	0.1	0.0	**5.7**	**1%**
Other destinations, Zone 8	0.0	0.0	0.0	1.0	0.0	0.0	0.0	5.1	2.5	0.9	**9.6**	**2%**
Sub-total, survey zone 8	**0.0**	**0.2**	**0.0**	**17.1**	**0.0**	**0.0**	**0.0**	**50.1**	**14.0**	**0.9**	**82.5**	**16%**
Destinations in Zone 9												
Tesco, Springs Lane, Ilkley	0.0	0.1	0.0	0.3	0.0	0.0	0.0	0.1	14.1	0.0	**14.7**	**2.8%**
Booths, Leeds Road, Ilkley	0.0	0.0	0.1	0.0	0.0	0.2	0.0	0.3	8.6	0.0	**9.3**	**2%**
Ilkley Town Centre	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.1	4.0	0.0	**4.2**	**1%**
Other destinations, Zone 9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	5.0	0.0	**5.1**	**1%**
Sub-total, Zone 9	**0.1**	**0.1**	**0.1**	**0.3**	**0.0**	**0.2**	**0.0**	**0.6**	**31.7**	**0.0**	**33.2**	**6%**
Destinations in Zone 10												
Bedale Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	**0.4**	**0%**
Other destinations, Zone 10	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.7	**1.7**	**0%**
Sub-total, Zone 10	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**2.1**	**2.1**	**0%**
Overall sub-total for study area	**46.95**	**42.81**	**44.83**	**43.27**	**51.16**	**54.73**	**41.66**	**58.41**	**46.71**	**10.73**	**441.3**	**83.7%**
Foodstores outside study area												
Tesco Extra, Clifton Moor, York	0.00	0.00	0.00	0.20	1.46	0.19	3.38	0.00	0.00	11.65	**16.9**	**3.2%**
Tesco, Station Road, Thirsk	0.00	0.00	0.00	0.00	0.00	0.89	0.00	0.00	0.00	4.13	**5.0**	**1.0%**
Tesco, Craven Street, Skipton	0.00	0.00	0.00	0.00	0.00	0.30	0.00	0.00	6.46	0.00	**6.8**	**1.3%**
Easingwold Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.11	**3.1**	**0.6%**
Morrisons, Broughton Road, Skipton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.12	5.13	0.00	**5.2**	**1.0%**
Tesco Extra, Tadcaster Road, York	0.00	0.00	0.00	0.03	0.00	0.00	3.35	0.00	0.00	0.27	**3.7**	**0.7%**
Keighley Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.12	0.00	**3.1**	**0.6%**
Other foodstores outside study area	1.16	0.00	0.07	2.48	3.61	0.92	6.25	8.83	9.00	9.74	**42.1**	**8.0%**
Overall sub-total for outside study area	**1.16**	**0.00**	**0.07**	**2.72**	**5.06**	**2.30**	**12.98**	**8.95**	**23.71**	**28.90**	**85.8**	**16.3%**
Total	**48.11**	**42.81**	**44.90**	**45.99**	**56.22**	**57.02**	**54.64**	**67.36**	**70.42**	**39.63**	**527.1**	**100%**

Source: Table 3b, Table 7a

Table 9 — Conveneince goods capacity forecasts for study area

Constant market share scenario

Row		2013	2016	2021	2026	Incremental Growth 2013-16	2016-21	2021-26	2013-26
	Total population and expenditure								
A	Total Population	290,464	292,788	297,487	302,477	2,324	4,699	4,990	12,013
B	Total Expenditure £m	527.11	521.92	542.33	569.45	-5.19	20.41	27.12	42.34
C	Retained Expenditure %	83.7%	83.7%	83.7%	83.7%				
D	Retained Expenditure £m	441.3	436.9	454.0	476.7	-4.34	17.09	22.70	35.44
	Turnover of Convenience Stores in OCA Drawn from Catchment Area								
E	Total Convenience Retail Turnover of Stores in OCA £m	441.3	441.3	447.9	454.7	0.00	6.66	6.76	13.42
	Commitments								
F	Convenience Retail Commitments £m	0.00	57.97	58.85	59.74	57.97	0.87	0.89	59.74
G	**Initial Residual Convenience Retail Expenditure £m**	**0.00**	**-62.32**	**-52.76**	**-37.71**	**-62.32**	**9.55**	**15.05**	**-37.71**
	Inflow of Expenditure from Outside the Catchment Area								
H	Inflow (%)	2.5%	2.5%	2.5%	2.5%				
I	Inflow £m	11.03	10.92	11.35	11.92	-0.11	0.43	0.57	0.89
	SUMMARY								
J	Initial Residual Convenience Retail Expenditure £m					-62.32	9.55	15.05	-37.71
K	Grow in Inflow £m					-0.11	0.43	0.57	0.89
L	Allowance for current stores over-trading					23.90			
M	FINAL RESIDUAL COMPARISON RETAIL EXPENDITURE £m					-38.53	9.98	15.62	-36.82
	Conversion to floorspace need								
N	Turnover per sq m (assumed)					10,000	10,151	10,304	-
O	Floorspace Requirement for study area (sq.m net)					**-3,853**	**983**	**1,516**	**-1,353**
P	Floorspace Requirement for study area (sq.m gross)					-5,927	1,513	2,332	-2,082

Sales efficiency growth of 0% per annum to 2016 and 0.3% per annum thereafter.

Turnover per sq.m at 2013 PBA-RTP estimate. Turnover per sq.m increased to 2026 in line with sales effiency growth rates shown above

Gross: net floorspace ratio (row R): 65%