



Darlington Borough Council

Darlington Retail and Town Centre Study

Final Report

September 2014

Address: Quay West at MediaCityUK, Trafford Wharf Road, Trafford Park, Manchester, M17 1HH

Tel: 0161 872 3223

E-Mail: [planners.manchester@wyg.com](mailto:planners.manchester@wyg.com)

Web: [www.wyg.com](http://www.wyg.com)



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## 1.0 Introduction

### Instruction

- 1.01 WYG Planning (hereafter referred to as 'WYG') was commissioned by Darlington Borough Council ('the Council') in November 2013 to undertake a Retail and Town Centre Study for Darlington Borough. The Study acts to update and effectively supersede the previous Darlington Retail Study which reported in November 2008 and was the subject of an update in July 2010.
- 1.02 A key purpose of this Study is to provide an assessment of retail and leisure needs and capacity in the period to 2026, and to review the current performance of Darlington town centre, Cockerton and North Road district centres, and six further local centres across the Borough. This is of particular importance given the downturn in the UK economy since the previous Darlington Retail Study reported, which has had a notable impact upon many town centres and the retail sector in general. The Study will act as the evidence base to assist in the formulation of future development plan policy, as well as providing baseline information to assist in the determination of planning applications for retail development. The Study also provides recommendations in respect to the Council's future strategy for Darlington town centre in order to help safeguard its future vitality and viability.
- 1.03 The Study draws upon new empirical research, with NEMS Market Research Limited (NEMS) undertaking surveys of 1,000 households within a defined Study Area in November 2013. The Study Area for the household survey comprises nine zones which are based on postcode sectors grouped to reflect areas which are likely to exhibit similar patterns of shopping behaviour. The Study also draws upon the most recent Experian population and expenditure data (published February 2013) in order to establish the up-to-date position with regard to both convenience and comparison goods capacity.

### Structure of Report

- 1.04 Our report is structured as follows:
- Section 2 provides a context for the Retail Study by providing an analysis of key retail trends;
  - Section 3 considers the up-to-date position in respect of relevant national retail and town centre planning policy;
  - Section 4 sets out a review of the survey research and considers changes in shopping behaviour that have occurred since the undertaking of the previous Study;
  - Section 5 sets out an overview of the vitality and viability of the Borough's town, district and local centres;



- Section 6 identifies current and future population and expenditure levels within the Study Area;
- Section 7 provides our assessment of the quantitative and qualitative need for further convenience and comparison goods retail floorspace over the assessment period;
- Section 8 considers the need for additional commercial leisure development; and
- Section 9 sets out our recommendations in respect of Darlington's future retail and town centre strategy.





## 2.0 Current and Emerging Retail Trends

### Introduction

- 2.01 The retail property landscape across the UK has evolved significantly over the past 50 years, from post-war redevelopment in town centres, through to the emergence of retail warehouse parks and out-of-town regional shopping malls. For most of this period, the retail and leisure sectors have experienced considerable expenditure growth, which has been attributed to a number of factors, including greater disposable income, availability of credit, new technology and a general overall increase in our standard of living. However, recent economic conditions have had a clear impact on expenditure and convenience goods spending per capita has actually reduced in recent years. The way in which goods are purchased has also altered due to the increased popularity of 'e-tailing', which now claims more than one in every ten pounds spent in the UK.
- 2.02 The retail and leisure market and the need for new development continually evolves as a result of numerous factors including demographics, consumer demands, car ownership, planning policy and technological advancements. The share of retail spending has undergone a significant shift in the decade since 2002, with Verdict identifying that town centre spending as a proportion of overall spending declined from 47.7% to 39.9% at 2012. In contrast, spending in out of centre locations has increased over the same period by 2.1% and non-store locations (principally internet retailers) by 6.6%<sup>1</sup>. These changes have had a major impact on the format and location of retail and leisure floorspace, which has led to recent Governments reaffirming their commitment to the 'town centre first' policy approach that is now outlined in the National Planning Policy Framework (NPPF) (March 2012).

### Current Retail Picture

- 2.03 A recent report by Colliers<sup>2</sup> provides information regarding recent trends, together with forecasts for the future of retailing in the UK. The findings confirm that the retail sector has been significantly affected by the wider economic climate and that there is considerable uncertainty about the strength and durability of future growth. It is noted that whilst sales volumes and footfall were high at the start of 2011, the UK economy entered a double dip recession in the latter months of 2011 and the retail market has since continued to decline. The significant reduction in Government spending is also

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<sup>1</sup> 'UK Out of Town Retailing', Verdict Datamonitor, April 2012

<sup>2</sup> 'National Retail Barometer: Summer 2013', Colliers, August 2013



impacting on economic growth, and the UK unemployment rate was recorded at 7.7% in September 2013.

- 2.04 These factors have had a significant impact on the public's general confidence, thereby reducing their propensity to spend their earnings on retail goods. Since 2010 there have also been increases in taxation (for example in VAT, national insurance contributions and capital gains tax) which also impact upon households' spending. Furthermore, in recent years inflation has consistently been at a level beyond average earnings growth and a delay in reviewing business rates has been identified by Portas<sup>3</sup> as a key factor affecting the success of many operators.
- 2.05 Recent economic conditions have resulted in significant structural changes to the high street, whereby the pressure on retailers to remain solvent has meant that many are showing increased signs of caution in their investment decisions. In particular, retailers are rationalising their physical store portfolios by reducing their number of stores, abandoning their representation in weaker centres and concentrating on acquiring sites in city centres and major regional shopping centres. The Grimsey Review<sup>4</sup> identified that the national vacancy rate at 2013 equated to over 22,000 empty shops across the top 650 town centres. The Centre for Retail Research<sup>5</sup> estimates that overall store numbers will fall by 61,930 between 2012 and 2018, with the main impact to be upon non-food stores. The report also estimates that 316,000 people will become unemployed, permanently or temporarily, as a result of these store closures.
- 2.06 To address this, many retailers are re-negotiating their lease terms with landlords in order to enable them to switch from quarterly rents to monthly agreements, with several high street firms (including Monsoon and New Look) trying to ease the cash flow burden of paying rent three months in advance. Furthermore, some retailers are finding it increasingly difficult to justify being represented in every town in the UK and in less profitable markets. As a consequence, demand has reduced considerably for 'poorer quality premises' in secondary locations and in many smaller towns with a commensurate drop in value (and often rent). Large cities and towns are likely to suffer less compared to smaller centres, given that they provide an enhanced choice for customers and offer the greater retail and leisure 'experience' that consumers increasingly desire.

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<sup>3</sup> 'The Portas Review', December 2011

<sup>4</sup> 'The Grimsey Review – An Alternative Future for the High Street', September 2013

<sup>5</sup> 'Retail Futures 2018', Centre for Retail Research, May 2013



- 2.07 In summary, there has been a marked polarisation and divergence in retailer spending, characterised by diminishing demand for secondary premises in smaller peripheral centres and increasing interest for well located and appropriately configured floorspace in key centres. It is evident that whilst Central London, regional city centres and regional shopping malls are relatively stable, a significant number of small and medium sized towns which serve a localised catchment may need to implement innovative ideas in order to compete for expenditure and reduce trade leakage.
- 2.08 In terms of prime retail rental values, Colliers<sup>6</sup> notes that national rates fell by an average of -0.9% in 2011 and by a further -1.2% in 2012, with the average national prime retail rent now being £110 per sq.ft. Colliers also reports that there is a marked regional variation in terms of changes in rental rates, with London the only region to achieve rental growth over the 12 months to June 2012. In contrast, several other regions experienced significant reductions in their average prime rental values during the 12 month period to June 2012, notably Wales (-8.4%), the East Midlands (-5.7%), West Midlands (-3.7%) and the North West (-2.1%). Whilst prime retail rents in Yorkshire and the Humber proved to be more resilient than in these regions, Colliers still reported a -1.8% reduction in such rents across Yorkshire and the Humber in the 12 month period to June 2012.
- 2.09 Given current spending patterns and the wider uncertain economic climate, it is unsurprising that Experian, which monitors and forecasts retail consumer expenditure in the UK, has reviewed its forecast growth rates for both convenience and comparison goods expenditure in recent years. Experian's<sup>7</sup> forecast annual per capita convenience goods growth rate is now -0.6% at 2013, -0.3% at 2014 and +0.1% at 2015. However, forecast annual per capita comparison goods growth rates are slightly more positive than in the recent years and are similar to those recorded prior to the recession, with growth of +3.2% forecast at 2013, +2.3% at 2014 and +2.8% at 2015. Whilst this is encouraging, it is evident that the forecast convenience goods growth rates are still well below the annual growth rates which were recorded prior to the economic downturn. In this regard, we note that, in 2009, Experian<sup>8</sup> forecast that per capita convenience goods growth would equate to +1.1% per annum between 2013 and 2015.
- 2.10 It has been widely reported that a number of high street retailers suffered poor trading figures during 2009 and 2010, resulting in many operators going into administration. Indeed, despite heavy

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<sup>6</sup> Ibid

<sup>7</sup> Experian Retail Planner Briefing Note 11 (Figure 1a), October 2013

<sup>8</sup> Experian Retail Planner Briefing Note 6.1 (Table 3.2), October 2008





discounting over the 2008 festive period and the reduction in VAT from 17.5% to 15.0% until January 2010, a significant number of 'big name' retailers went into administration in 2008 and 2009, including Woolworths, Adams and Zavvi. Whilst retail administrations fell considerably in 2010, a further number of high street brands were affected in that year including Envy, Ethel Austin, Habitat, Faith Shoes and Suits You. In the first five months of 2012, 30 retailers had gone into administration affecting 3,000 stores, including Blacks Leisure (300 stores), GAME (333 stores) and Peacocks (550 stores). In the second quarter of 2012, Clinton Cards went into administration, though 397 stores were subsequently purchased by Lakeshore, a subsidiary of supplier American Greetings. JJB Sports also fell into administration in September 2012, and whilst 20 of the stores were sold to Sports Direct, the remaining 133 units have closed. In April 2013, HMV was rescued as part of a £50m deal which allowed 131 out of a total of 223 stores to remain open.

- 2.11 The Retail Futures 2018 report identifies that, between 2008 and 2012, 202 large and medium-scale retailers, which collectively employed approximately 184,000 staff, went into administration<sup>9</sup>. The report, which utilises Centre for Retail Research data, indicates that the number of retail businesses which have entered administration in recent years is significantly greater than that recorded before the start of the recession. We present Table 3 of the Retail Futures 2018 report below as our Table 2.1.
  
- 2.12 Table 2.1 indicates that in the three years prior to the 2008 recession, between 16 and 25 medium to large retail businesses entered administration annually. In more recent years, this figure has been as high as 54 (in both 2008 and 2012), and a significant number of businesses had also entered administration in the early part of 2013.
  
- 2.13 The Retail Futures 2018 report also predicts that overall store numbers are expected to fall by 61,930 (-22.0%) between 2012 and 2018, with non-food stores principally affected. The report estimates that 316,000 people will become unemployed as a result of these store closures.

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<sup>9</sup> 'Retail Futures 2018', Centre for Retail Research, May 2013



**Table 2.1: Business Failures Amongst Large and Medium-Sized Retailers**

Year	Companies Failing	Stores Affected	Employees Affected
2013 (to end March)	23	1,819	18,044
2012	54	3,951	48,142
2011	31	2,469	24,025
2010	26	944	10,930
2009	37	6,536	26,688
2008	54	5,793	74,539
2007	25	2,600	14,083
2006	22	1,370	9,257
2005	16	1,221	7,926

Source: Extracted from Retail Futures 2018 report, based on Centre for Retail Research data

2.14 Despite the difficulties outlined above and the general decline in the comparison goods sector, other specific types of goods continue to perform well. The market for recreational goods has, on the whole, performed well in recent years, with healthy growth attributed to supermarket sales together with the growing popularity of online shopping, which continues to see an increase in sales year-on-year. However, the manner in which such purchases are made has changed considerably, with the increasing popularity of the internet to purchase books and music having a notable impact on the composition of town centres, with such stores all but disappearing from the high street. Other businesses have experienced growth in the last two years, with a +12.4% increase (over 1,100 stores) in 'value-related retailing' outlets, including second-hand, discount and charity shops. The Grimsey Review also makes reference to the expansion of pawnbrokers, pay-day lenders and betting shops which have collectively experienced a 17% growth in the number of outlets since 2011.

### Trends in Comparison Goods Shopping

2.15 Whilst it is not anticipated that growth in retail spending over the next ten years will mirror that achieved after the turn of the millennium, there is expected to be some growth in comparison goods expenditure in coming years. Consequently, there is an increasing focus from retailers on achieving more efficient use of their floorspace, particularly given the recent poor performance of certain national multiples, many of which have been affected by the significant increase in e-tailing and increases in rental levels secured before 2008. As a result of the current economic climate, retailers are more reluctant to commit to new development than they have been in previous decades. Instead, they are more selective and are holding out for accommodation that is appropriate both in terms of location and the type of premises provided. Indeed, retailers are seeking to occupy larger units in order to achieve more efficient use of floorspace and attract shoppers from a wider area. These



larger floor plates enable operators to provide a greater range of goods; for example, in 2011, Primark opened one million sq.ft of new retail space.

- 2.16 International market conditions and price deflation in some key sectors have also meant that many high street names are becoming increasingly vulnerable to takeover. This is being pursued through disposals, company voluntary administrations (CVAs), informal arrangements with landlords, lease expiries and break options. More generally, whilst there is likely to be continued demand for larger, modern retail units in the future, increased sensitivity over future viability will mean a cautious approach to new investment for many key national retailers. Marginal locations within centres will increasingly be rejected. Many national retailers, who would have previously considered smaller/lower order centres in order to increase their market share, are now assessing their future strategies given the ongoing downturn in the economy. Consequently, many investment decisions will be influenced by the scale of commitment from other retailers; developers will increasingly need to promote large town centre redevelopment schemes if they are to attract high quality retailers.

### Trends in Food Retailing

- 2.17 In the aftermath of the growth in the number of edge and out of centre large format supermarkets during the 1990s, development of such facilities is now more limited due to stricter planning laws (following the publication of PPS4 and subsequently the NPPF) and a lack of suitable sites. As a result, the national multiples in the food retailing sector are finding a range of other measures to improve their market share. These include:
- Offering a wider product range, such as financial and insurance products, petrol and non-food goods;
  - Developing a wide range of retail models, for example small-format convenience stores in town centres (e.g. Sainsbury's Local, Tesco Express), smaller supermarkets mostly in town centres (e.g. Tesco Metro), superstores (e.g. Tesco) and hypermarkets (e.g. Tesco Extra, Asda Supercentres);
  - Extended opening hours;
  - Offering cheap products and no-frills service;
  - Providing an attractive and powerful brand image; and
  - Offering a home delivery service.



- 2.18 Mintel<sup>10</sup> identifies that the recession – allied with a period of higher inflation – has had an impact on consumer behaviour and the wider dynamics of grocery retailing. Price, or specifically value, is now identified as the key issue for consumers, and more shoppers are assessing whether purchases represent value for money. Shoppers now realise that they are able to ‘trade down’ and switch to own-label ranges to save money without sacrificing on quality. Indeed, customers are mixing value and premium in the same basket. It is noted that as weekly food budgets fall and consumers alter their shopping habits, growth will be limited and the battle for market share will intensify further. Winning a share of consumer spend will require more than low prices, with shoppers increasingly seeking to source high-quality, good value food.
- 2.19 The changing UK demographics are also having a major impact on the food and grocery sector. For example, there has been a rise in single occupancy young professional households who are ‘time poor’ and relatively ‘cash rich’. Though their baskets might be small, they tend to buy higher value items, therefore providing an opportunity to boost volume and value growth. Elsewhere, an ageing population profile is leading to a rise in time rich consumers who are likely to make more frequent small trips rather than do large weekly shops. The contrasting requirements of these markets means that retailers are seeking to open a variety of stores with a particular current focus on small convenience stores.
- 2.20 Verdict<sup>11</sup> estimates that the food and grocery sector was worth £136.0 billion in 2013, equating to an annual growth of 3.2%, representing 43.7% of total retail spend. The four key supermarket chains in the UK have respective market shares of 28.7% (Tesco), 15.9% (Asda), 15.6% (Sainsbury’s) and 10.1% (Morrisons). National multiple retailers, including the Co-operative Food (5.1%), Waitrose (4.0%) and Aldi (3.6%), represent a total grocery market share of 90.8%.
- 2.21 More recently, there has been a slowdown in the growth plans of the majority of the principal supermarket operators. Tesco, for example, indicated in April 2013 that it would scrap plans for 100 major store developments and would instead focus on developing medium size units. It is also in the process of investing around £1 billion on improving its current stores and adding new elements, including bakeries and restaurants (notably the Giraffe chain which it purchased in March 2013) which, it hopes, will make the store environment more attractive and encourage shoppers to spend more time and money there. Asda is the second largest supermarket retailer in the UK, with more

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<sup>10</sup> ‘Food & Drink Retailing’, Mintel, March 2013

<sup>11</sup> ‘UK Food & Grocery – Verdict Sector Report’, Verdict, October 2013



than 550 stores nationwide. In 2011, Asda opened 22 new stores and acquired 193 Netto stores which allowed the company to increase its smaller store portfolio. However, as a result of Competition Commission laws, it was later required to sell 47 of the stores to other retailers, including Morrisons. Asda has recently focused investment on its smallest store formats (known as Asda Supermarket), with the company having aspirations to deliver 250 such stores by 2015. Morrisons intend to deliver 2.5 million sq.ft of new retail floorspace by 2013/2014, both through the continued development of large foodstore schemes and the new small scale M-Local convenience format store. Due to the success of the initial trials, Morrisons now intend to open 50 additional M-Local stores by 2013/2014. The discount supermarket chain Aldi made a pre-tax profit of £57.8m in 2011, when it opened 29 new UK stores. It is currently seeking to develop a further 40 stores by the end of 2013, thus bringing its total number of UK stores to over 500.

- 2.22 The role of supermarkets also continues to develop, with the large operators now offering a greater diversity of goods and services, via a larger number of formats and locations. Food and non-food sales are also increasingly being driven by large supermarket growth, with half of town centres now competing with five or more supermarkets within a two mile radius<sup>12</sup>. Whilst the exact impacts which will arise from the opening of a new supermarket are dependent on local circumstances, BCSC notes that there has been a significant decline in the number of independent food retailers over recent years, including a reduction of 45% between 1996 and 2007 in the number of greengrocers. Over the same time period the market share of total retail sales secured by supermarkets has increased from 38% to 42%.

## Leisure Sector

- 2.23 The daytime and evening leisure sector has undergone a major shift in the last five years, with the reduction in the income levels of consumers having an impact on their ability to spend on these types of discretionary activities and items. Mintel calculated that the total UK leisure market was worth almost £70 billion in 2012, only 0.2% higher than in 2007<sup>13</sup>. A review of the leisure activity participation and frequency levels indicates that eating and drinking out of the home still remain the most popular activities which people do on a monthly basis, with the cinema the next most popular of the non-food and drink-led activities. Other activities, including going to a theatre, doing tenpin bowling and visiting a zoo are, on average, undertaken less frequently and this reflects their greater average cost. It is expected that the difficult trading conditions for the leisure sector are set to

<sup>12</sup> 'What Does the Future Hold for Town Centres?', BCSC, September 2011

<sup>13</sup> 'Leisure Review', Mintel, December 2012



continue for several more years as a result of the shortfall in the amount of money that consumers have available to spend.

2.24 The number of leisure centres and swimming pools has increased in the past five years and whilst there has been a demand on public finances due to budget constraints and in some cases Council's have had to scale back services, Mintel notes that 38% of adults currently use a health centre or swimming pool<sup>14</sup>. In addition, the health and fitness private sector had a market value of approximately £3.9 billion<sup>15</sup> in March 2012, an increase of 1.5% over the previous twelve month period. Mintel note that whilst only 15% of adults currently use a private health and fitness club, the potential for a further expansion of the market remains strong. The health and fitness sector is dominated by the David Lloyd Leisure and Virgin Active operators with these two health clubs having approximately 455,000 and 435,000 members<sup>16</sup>. There has also been a rapid growth in the number of the no-contract budget club operators, with Pure Gym (260,000 members) and The Gym (255,000 members) ranked fourth and fifth in the list of leading chains behind DW Sports Fitness which has 275,000 members. Mintel identifies that there has been a growth in the popularity of innovative exercise classes and technological features to attract additional people to these clubs, with many of the higher end clubs also adding spa facilities to their offer.

2.25 In terms of other leisure activities, the cinema sector is performing well, with the most recent data indicating that there were 173 million UK cinema admissions in 2012, an increase of 0.5% since 2011. The eating out market has grown by around 8% over the 2008-13 period to an estimated £32.1 billion. It recognises however that this has largely been driven by inflation, with consumer demand muted by the ongoing low consumer confidence levels<sup>17</sup>. Mintel also records<sup>18</sup> that 31% of respondents to their survey in September 2012 identified that they visited the cinema 'monthly or more often,' followed by 14% going to a nightclub, 12% visiting a museum, gallery or exhibition, 9% going to the theatre and 7% going tenpin bowling.

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<sup>14</sup> 'Leisure Centres and Swimming Pools', Mintel, January 2013

<sup>15</sup> 'State of the UK Fitness Industry', The Leisure Database Company, June 2013

<sup>16</sup> 'Health and Fitness Clubs', Mintel, June 2013

<sup>17</sup> 'Eating Out Review', Mintel, June 2013

<sup>18</sup> 'Leisure Review', Mintel, December 2012



## Out of Centre

- 2.26 Despite the 'town centre first' planning policies which have been adopted by recent Governments, research undertaken by Verdict<sup>19</sup> indicates that between 2007 and 2012, the amount of out of centre floorspace increased by 23%. However, in very recent years, Colliers notes that the demand for out of centre representation has been limited, with those retailers seeking to acquire stores having a pick of vacant stock which has been made available through the administration of MFI (in November 2008), Land of Leather (in January 2009) and Focus DIY (in May 2011), amongst others. However, only five retailers with any significant out-of-town presence have failed since June 2011, these being Allied Carpets, Clintons, Comet, GAME and Peacocks.
- 2.27 The national average vacancy rate in out of centre retail warehouses in 2012 was 3.9%, an increase of 0.3% since 2011. Some of the voids created by the administrations remain un-let and the flooding of the market with so much unwanted space has acted to reduce rents. Retailers who have had their pick of the best stores include Dunelm, Pets at Home, Dreams, Matalan, Dixons Group, Go Outdoors, B&M, Mothercare, Next Home and TK Maxx.
- 2.28 Looking forward, Colliers indicates that whilst out of centre locations have witnessed low levels of development during the last two years, it is estimated that one million sq.ft of new space was completed in 2012. There are also an increasing number of retailers acquiring larger stores, including several department-store type format operators including John Lewis Home, M&S and Primark. The large out of centre Oakgate scheme which was approved by the City of York Council in May 2012, for example, will accommodate M&S, John Lewis and Next stores and is due to open in March 2014.

## Shopping Centre Development

- 2.29 It is evident that shopping centre retail development is currently at a virtual standstill and that little activity is anticipated over the next few years. Colliers suggests that the UK will never see a return to the level of shopping centre openings that was evident in recent times. Whilst the Trinity development in Leeds City Centre opened in March 2013 with 90% of the units pre-let, it is the only major retail development which is due to open in the UK in 2013. In contrast to the average level of completions over the last five years (3.9 million sq.ft per annum), this level of shopping centre development is very modest. In 2008, for example, almost 8 million sq.ft of new floorspace opened across 14 new schemes nationwide.

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<sup>19</sup> 'UK Out of Town Retailing', Verdict Datamonitor, April 2012



- 2.30 The viability of shopping centre retail development remains challenging no matter how well designed or well located a scheme is. There are three types of scheme which have a better chance of success in the current economic climate. The first of these will be where a town has a large, affluent catchment and an acknowledged undersupply of retail floorspace in both town centre and out-of-town locations. The second scenario relates to schemes which were very close to happening before the recession took hold, which may be revised to better meet the current needs of the market. Barnsley, Macclesfield, Bradford and Lichfield are examples of such schemes. The third opportunity relates to development where the key anchor is a foodstore and, as a result, demand remains strong.
- 2.31 Proposed schemes which will conform to one of these models are considered to be few and far between, and for development to begin again in earnest, it will be necessary for improvements in retailer demand, a strengthening of rental levels, further improvement in the investment market and, critically, the availability of finance at viable levels to occur. For those towns without an oversupply of floorspace and with sites which can be brought forward without excessive levels of cost, some development may be able to be brought forward within the next five years. However, such opportunities may be the exception rather than the rule.
- 2.32 In addition to their retail offer, consumers are increasingly travelling to larger centres for their overall experience and to use the leisure facilities. Colliers notes that the largest destinations draw from a wide catchment, hence the need to retain consumers for as long as possible. In the past, it was recognised that non-retail uses typically occupied less than 10% of the space, though this has increased in recent schemes, including Westfield in Stratford where catering and leisure units occupy over 20% of the space.

### Growth in E-tailing ('E-commerce')

- 2.33 Many consumers who previously shopped in town centres and at retail parks are now using the internet for some of their purchases. It is estimated that internet sales accounted for 9.7% of all UK retail spending at August 2013<sup>20</sup> and this trend is set to continue. Mintel estimate that e-commerce sales in the UK was £28.9 billion in 2012, with store-based retailers accounting for 54% of online retail sales<sup>21</sup>.

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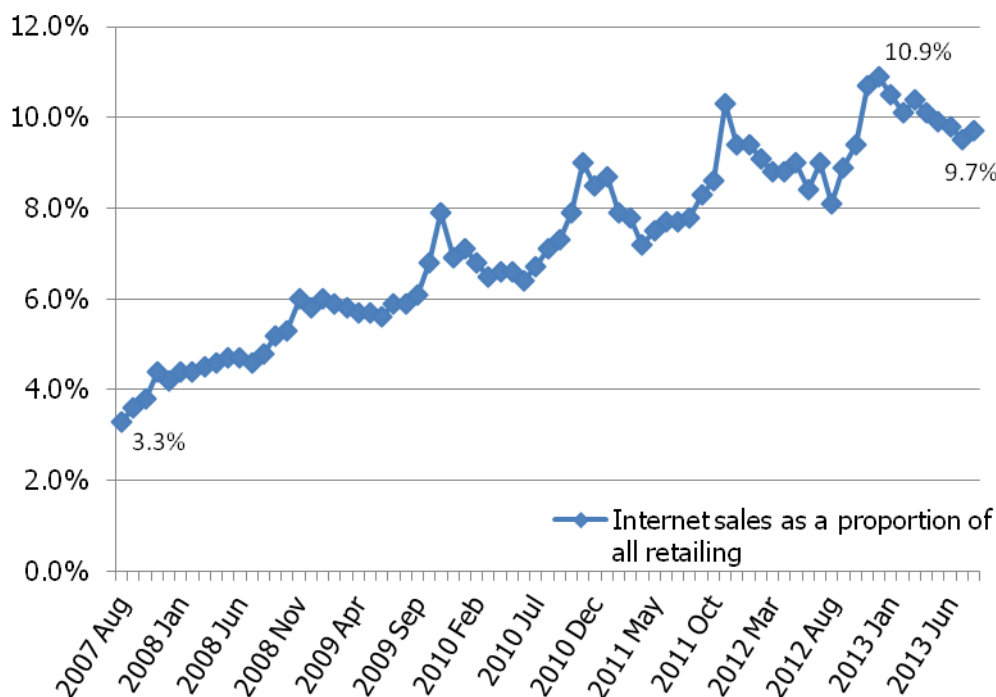
<sup>20</sup> 'Retail Sales', Office for National Statistics, August 2013

<sup>21</sup> 'E-Commerce', Mintel, July 2013



2.34 The rise in recent years of e-commerce has had a major impact upon retailers, developers and investors alike, with the top 10 e-retailers in 2012 including Amazon UK (16%), Shop Direct (5%), and Next (4%)<sup>22</sup>. As access to the internet/online shopping continues to grow through digital televisions, tablets and mobile phones, proportionally less money is anticipated to be spent on the high street or at retail parks.

**Figure 2.1: Internet Sales as a Proportion of All Retailing**



Source: 'Retail Sales,' Office for National Statistics, August 2013

2.35 The growth in internet as a sales medium has been enabled by the increase in access to the internet by households, which has reportedly<sup>23</sup> risen from 57% at 2006, to 77% at 2011, 80% at 2012 and 83% in 2013. A total of 21 million households in Great Britain now have internet access, an increase of 7.1 million since 2006. In addition, the proportion of households with access to the internet is expected to increase further over the coming years, alongside the growth in mobile phone and tablets with access via the new 4G spectrum. The ONS states that access to the internet using a mobile phone more than doubled between 2010 and 2013, from 24% to 53%. This has supported the strong growth recorded, together with improved consumer confidence in the security of online payment,

<sup>22</sup> Ibid

<sup>23</sup> 'Statistical Bulletin: Internet Access Households and Individuals', Office for National Statistics, August 2013



deliveries and heavy demand for expensive electrical products available online. The option of using the internet to 'click and collect' in-store at a dedicated counter is also increasing in popularity (particularly within stores with large sales areas), with the service now accounting for around a fifth of John Lewis internet orders.

- 2.36 Online spending continues to be the key growth opportunity for national and independent retailers, accounting for increasing proportions of total sales. For example, online sales at Next in 2011 accounted for 44% of operating profit and 32% of group sales. With regard to foodstore operators, food accounts for 20.5% of all internet sales, which equates to 3.1% of all food retailing<sup>24</sup>. Verdict's research identifies that, with the exception of Morrisons (though it is currently in the process of establishing an online presence via Ocado), major retailers have seen their business grow as online shopping has increased and, as a result, the likes of Asda and Sainsbury's have improved their geographical coverage and capacity. In particular, online sales at Tesco currently exceed £2 billion, with Colliers noting that the operator has a reported 48% online grocery market share.
- 2.37 In further support of this, Office for National Statistics (ONS) data<sup>25</sup> indicates that the number of people using the internet to purchase goods continues to rise, with 72% of the UK population purchasing products over the internet in 2013, compared to 53% in 2008. The most popular online purchases were clothes/sports goods, with 47% of internet users buying these items. In addition, 44% of users bought household goods and 21% bought food or groceries. Additional research conducted by the Interactive Media in Retail Group (IMRG) and analysts Capgemini<sup>26</sup> indicates that British shoppers spent over £23 billion online in the first three months of 2014, with March e-tail sales up 16% year-on-year. IMRG identifies that certain sectors performed particularly strongly, with accessories (up 34%), footwear (up 22%), health and beauty (up 23%) and home and garden (up 21%) all recording impressive year-on-year growth..
- 2.38 It is evident that internet shopping as a whole is having an impact upon traditional high streets, in light of increased competition and lower prices. Consequently, there is a possibility that online retailing will put some pressure on retail rental growth over the next five to ten years. However, it will be difficult to understand the true impact as the current economic downturn is also having a significant impact on rental levels. Having said that, it would appear that smaller town centres (which

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<sup>24</sup> 'Shop Expansion and the Internet', CBRE, May 2012

<sup>25</sup> 'Statistical Bulletin: Internet Access Households and Individuals', Office for National Statistics, August 2013

<sup>26</sup> 'IMRG Capgemini E-retail Sales Index', March 2014



may be less able to offer a complete 'shopping experience') are likely to be the subject of greater impacts from online retailing.

2.39 Despite some variance in the estimated future growth of online shopping, it is clear that e-tailing will not replace the 'shopping experience' as shopping is a social activity. In this regard, retailers are already adopting innovative approaches to encourage people to visit their store through 'try before you buy' concepts. For example, Ellis Bingham has installed Vertical Chill indoor ice climbing walls at five stores for customers to try equipment and to interact with products. For successful retailers, online selling provides an additional route to the market. Online retailers benefit from demand generated through physical channels whilst high-street outlets can benefit from reaching a wider customer base through the internet. Those retailers who are likely to have a healthy future are those who are able to combine a strong high street presence with an interesting and closely related e-tail offer.



## 3.0 Planning Policy Context

### Introduction

- 3.01 Given that this Study seeks to provide important evidence to assist in the production of future retail planning policy, it is important to review existing national planning policy of pertinence to retail and town centre matters to explore the context for the Study and how it may impact upon the production of the Local Plan. We also summarise Darlington’s adopted and emerging planning policy, insofar as it is relevant to retail and town centre matters, in order to consider the Council’s strategy in respect of its centres.

### National Planning Policy Framework

- 3.02 The National Planning Policy Framework was published in March 2012. The NPPF replaces all former Planning Policy Statements, Planning Policy Guidance Notes and some Circulars in a single consolidated document.
- 3.03 The main theme of the NPPF is that there should be ‘a presumption in favour of sustainable development’. In terms of plan-making, it is stated that local planning authorities should positively seek opportunities to meet the development needs of their area, with an emphasis on Local Plans having sufficient flexibility to adapt to rapid change.
- 3.04 In terms of economic development, it is set out within the NPPF’s core principles that planning should proactively drive and support economic development to deliver the homes, business and industrial units, infrastructure and thriving local places that the country needs. Every effort should be made to objectively identify and then meet the business and other development needs of an area, with positive responses made to wider opportunities for growth.
- 3.05 The NPPF stresses the Government’s commitment to securing economic growth in order to create jobs and prosperity, with paragraph 17 stating that the planning system should do everything it can to support sustainable economic growth.
- 3.06 Paragraph 19 indicates that planning should operate to encourage and not to act as an impediment to sustainable growth, and that significant weight should be placed on the need to support economic growth through the planning system. The NPPF seeks to ensure that local planning authorities plan proactively to meet the development needs of business and support an economy fit for the 21<sup>st</sup> century.



3.07 The NPPF still recognises the need to promote the vitality and viability of towns and cities through the promotion of competition and growth management during the plan period. Paragraph 23 of the NPPF provides guidance for local planning authorities in drawing up Local Plans, it indicates that they should:

- recognise town centres as the heart of their communities and pursue policies to support their vitality and viability;
- 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, based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations;
- promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;
- retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;
- allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centre. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability. Local planning authorities should therefore undertake an assessment of 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. If sufficient edge of centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre;
- 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 set out policies to encourage residential development on appropriate sites; and
- where town centres are in decline, local planning authorities should plan positively for their future to encourage economic activity.

3.08 Paragraph 23 also indicates that needs for retail, leisure, office and other main town centre uses should be met in full and should not be compromised by limited site availability.

3.09 Paragraph 24 requires local planning authorities to adopt a sequential approach to the consideration of planning applications for main town centre uses that are not in an existing centre or in accordance



with an up-to-date Local Plan. The following paragraph 25 indicates that that the sequential approach should not apply to applications for small scale rural offices or other small scale development.

- 3.10 Paragraph 26 indicates that local planning authorities should require an impact assessment for retail, leisure and office development outside of town centres which are not in accordance with an up-to-date Local Plan and if the development is over a proportionate, locally set threshold. Where there is no locally defined threshold, the default threshold will be 2,500 sq.m.
- 3.11 Paragraph 27 indicates that where an application fails to satisfy the sequential test or is likely to have a significant adverse impact on the vitality and viability of a town centre or on existing, planned, committed investment in a centre it should be refused.
- 3.12 The NPPF also recognises that retail activity should still, where possible, be focused in existing town centres. Retail and leisure proposals which cannot be accommodated in or adjacent to the town centre will have to satisfy a dual impact test and the sequential test.

### **Ensuring the Vitality of Town Centres Planning Practice Guidance**

- 3.13 Ensuring the Vitality of Town Centres National Planning Practice Guidance was published in March 2014 and replaces the previous Planning for Town Centres Practice Guidance. It provides a more concise summation of how retail and main town centre planning policy is to be applied in practice. However, the objectives of the Practice Guidance remain comparable with those of its predecessor, with there being a stated requirement for local planning authorities to plan positively and support town centres to generate local employment, promote competition within and between town centres, and create attractive and diverse places for users.
- 3.14 The Practice Guidance requires local planning authorities to fully assess and plan to meet needs for main town centre uses through the adoption of a 'town centre first' approach. Paragraphs 002 and 003 confirm that this should be delivered through a positive vision or strategy which is communicated through the development plan. The strategy should be facilitated through active engagement with the private sector and other interested organisations (including Portas Pilot organisations, Town Teams and so on). Any strategy should be based on evidence which clarifies the current state of town centres and opportunities to meet development needs and support centres' vitality and viability.



3.15 Such strategies should seek to address the following matters:

- the appropriate and realistic role, function and hierarchy of town centres in the area of over the plan period, including an audit of the vitality and viability of existing town centres and their ability to accommodate new development;
- consideration of the vision for the future of each town centre and the most appropriate mix of uses;
- the assessment of the scale of development that a town centre can accommodate;
- the timeframe for new that new retail floorspace can be delivered;
- what other complementary strategies are necessary or appropriate to enhance the town centre to deliver the vision in the future; and
- the consideration of the enhancement of car parking provision including charging and enforcement mechanisms.

3.16 Paragraph 005 of the Practice Guidance identifies a series of key indicators which are of relevance in assessing the health of a centre over time. Paragraph 005 goes on to state that not all successful town centre regeneration initiatives have been retail led or focused on substantial new development, but have instead involved improvements such as renewed public realm, parking, and accessibility and other partnership mechanisms. Paragraph 007 identifies the importance of planning for tourism as an important component of any overall vision and indicates that local planning authorities should consider specific tourism needs (including locational or operational requirements) and opportunities for tourism to support local services, vibrancy and the built environment.

3.17 Paragraph 009 reaffirms the town centre first policy in the form of the sequential test, which requires local planning authorities to undertake an assessment of candidate sites' availability, suitability and viability when preparing their local plan. Such an assessment should also consider the scale of future needs and the type of land needed to accommodate main town centre uses.

## **Housing and Economic Development Needs Assessment Planning Practice Guidance**

3.18 The Government has issued further Practice Guidance to provide specific instruction in respect of the undertaking of needs assessments (including those for main town centre uses). Paragraph 032 of the Practice Guidance states that plan makers should consider forecasts of quantitative and qualitative need based on a range of data which is current and robust. Local planning authorities will need to



take account of business cycles and make use of forecasts and surveys to assess employment land requirements.

### **The Portas Review - An Independent Review Into the Future of Our High Streets**

- 3.19 The Portas Review was published in December 2011. It is an independent review undertaken by Mary Portas into the state of Britain’s high streets and town centres. The review considers the reasons why retail spending on the high street is falling, why there has been a decline of Britain’s high streets, and the benefits that can be brought about through the protection of Britain’s high streets. Portas puts forward 28 recommendations which include actions that Government, businesses and other organisations should take in order to create diverse, sustainable high streets where retailers can thrive.
  
- 3.20 The Government published a response to the Portas Review in March 2012. The response acknowledges that in response to the challenges facing the high street, including out-of-centre retail development and online retailing, the high street will have to offer something new and different in order to create a diverse and competitive environment. In its response, the Government accepts a number of recommendations put forward in the Portas Review, including: the implementation of Town Teams (described as visionary, strategic and strong operational management teams for high streets); the provision of funding for pilot areas who are judged to have the best ideas for improving their town centres and high streets; investing in Business Improvement Districts; and support for a new National Market Day. The Government’s response seeks to encourage areas to think creatively about how their town centres can be enhanced in order to entice people back, including improvements which could be secured through the redesign of high streets, and the promotion of the evening and night time economy.

### **Relaxation of Permitted Development Rights**

- 3.21 At a national level, recent changes to the Town and Country Planning (General Permitted Development) Order 1995 have sought to support the diversification and vitality of town centres. The changes follow the Portas Report recommendation to make it easier to change surplus space in order to provide for the effective re-use of buildings.
  
- 3.22 The Town and Country Planning (General Permitted Development) (Amendment) (England) Order 2013 came into force on 30 May 2013. It provides, for a period of three years, for the change of use of Use Class B1 offices to residential without the need for planning permission. The Order also







provides for the temporary change of use (for up to two years) of uses falling within Use Classes A1, A2, A3, A4, A5, B1, D1 and D2 to uses falling within Classes A1, A2, A3 and B1, subject to the use relating to no more than 150 sq.m of floorspace and subject to the temporary provision not previously being relied upon.

- 3.23 From 6 April 2014, permitted development rights have been further extended to provide for certain additional changes of use without the need for planning permission. The changes come into force under the Town and Country Planning (General Permitted Development) (Amendment and Consequential Provisions) (England) Order 2014 and result in the introduction of two new classifications that affect commercial premises.
- 3.24 The first provides for the change of use of premises and land from Use Class A1 to use as a 'deposit taker' (effectively comprising banks, building societies, credit unions and friendly societies). The second provides for the change of use from Use Classes A1 and A2 to residential. There are certain restrictions as to where and when the rights can be exercised.
- 3.25 The intended consequence of such measures is to secure the redevelopment and reuse of premises. However, it is considered that the relaxation in respect of changes of use to residential are more likely to encourage re-use of offices in larger metropolitan areas which may benefit from a greater supply of office buildings and where previously there may have been some reluctance to grant planning permission for residential uses. Notwithstanding this, the changes set out above are of relevance to Darlington and we return to them in the concluding section of this report.

### Development Plan

- 3.26 The adopted development plan for Darlington Borough currently comprises the 'saved' policies of the Borough of Darlington Local Plan (adopted 1997, with alterations in 2001) read together with the Darlington Core Strategy Development Plan Document (adopted 2011).
- 3.27 Of the Local Plan policies which have been saved, we consider the following to be of greatest pertinence to Darlington's retail strategy.
- 3.28 Policy S4 and Policy S5 seek to respectively restrict the change of use of retail primary shopping frontages to financial and professional services and to food and drink uses. Each policy also seeks to limit such non-retail uses in secondary shopping frontages where the overall concentration of such uses could undermine the character of the shopping frontage. Policy S6 states that uses outside of



Classes A1, A2, A3 or amusement centres will not be permitted on ground floors in the primary or secondary shopping frontages of the town centre.

3.29 Policy S9 relates to the fringe shopping areas of Northgate, Parkgate, Victoria Road, Duke Street and Bondgate and states that small new shops, limited extensions to existing shops and Class A2 service uses will be permitted in the defined fringe shopping areas.

3.30 In respect of district and local centres, Policy S10 states that:

**'The Council will safeguard and enhance the vitality and viability of the district centres at North Road and Cockerton, and the local centres at Yarm Road, Neasham Road, Whinfield and Mowden, and in particular will safeguard their role for food shopping. Development which when taken with other recent and proposed developments would undermine that vitality and viability will not be permitted.'**

3.31 Policy S11 relates to future development and indicates that shopping development, including new food supermarkets up to 2,500 sq.m gross floorspace, and Class A2 service uses will be permitted within and immediately adjacent to the defined district and local centres provided that they are physically integrated with and have good pedestrian links with the rest of the centre.

3.32 The Core Strategy sets out the spatial vision for Darlington, which reads as follows:

**'By 2026 Darlington will be a more sustainable community, where a real step change has been achieved in enhancing the quality of life and local environment, and expanding local opportunities for work and for sustainable travel. Those who live in, work in or visit the Borough will enjoy the opportunities and vibrant life of an ambitious city, but with the fabric of a friendly, historic market town with a distinctive atmosphere, surrounded by attractive countryside and villages.'**

3.33 Policy CS1 acts to encourage growth and development where, *inter alia*, it helps Darlington to fulfil its historic role as a market town and host to a thriving town centre. Priority will be given to the development in the following order:

- the Town Centre, for retailing and other town centre uses;
- Central Park, for mixed use development, principally housing and employment; and
- The Town Centre Fringe, for mixed use development, principally housing and employment.



3.34 Policy CS6 seeks to promote a sustainable, vibrant tourism and cultural sector in the town by, *inter alia*, promoting new tourist attractions, particularly in the town centre and the Town Centre Fringe which raise awareness of, and interest in, the Borough’s railway, industrial and cultural heritage, and encourage provision of a diverse range of cultural facilities and creative arts industries to create the Darlington Cultural Quarter.

3.35 Policy CS7 relates specifically to the town centre and states that:

**‘The vitality and viability of Darlington town centre will be safeguarded and enhanced by protecting and promoting its role as the sub-regional centre for the western part of the Tees Valley City Region and the neighbouring parts of North Yorkshire and south and west Durham, including its role as a market town.**

**It will be the locational focus for the development of retail, office, leisure, entertainment, intensive sport and recreation, arts, culture, tourism and other main town centre uses needed within the Borough, and such uses will be encouraged and directed there as a first preference. A diversity of such uses, including for the evening and night-time economy, will be encouraged within the centre, in locations appropriate to their particular characteristics.**

**The first priority for retail development in the Borough is the completion of a major, multi-unit, retail-led scheme in the Commercial Street area, physically and functionally integrated with the primary shopping area, for occupation mainly by retailers of comparison goods. Incorporation of this within a mixed-use development would be encouraged.**

**Other than as part of a mixed-use scheme at Commercial Street, the first priority location for the development of major non-retail town centre uses in Borough will be other parts of the present town centre, including the Feethams/Beaumont Street area.**

**When the present town centre can physically accommodate no further major non-retail development, it will be extended into the Town Centre Fringe and such development will be encouraged there. Extension will be in phases, with the initial priority direction being eastwards from the present centre towards the East Coast Main Line railway. Extension will be conditional on improvements in connections across the ring road, particularly for pedestrians and other non-car users, being in place.’**

3.36 In respect of additional retail provision, Policy CS8 indicates that the need for additional comparison goods floorspace should be met mainly or wholly by a retail-led scheme at Commercial Street. A further 4,000 sq.m gross could be needed, provided its development would not undermine the



implementation of Commercial Street. In addition to this, the policy makes it clear that an additional 12,000 sq.m gross comparison goods floorspace is expected to be needed in the five-year period to 2021 and a further 10,000 sq.m of comparison goods floorspace could be required in the five years to 2026. The policy indicates that the town centre primary shopping area should be the focus for additional floorspace.

3.37 Policy CS8 identifies that there is no quantitative need for additional convenience retail floorspace in the Borough before 2021. There is expected to be a quantitative need for an additional 2,000 sq.m gross floorspace in the five year period between 2021 and 2026.

3.38 Policy CS9 seeks to provide for locally accessible shops and services. It sets out the following hierarchy to be taken account in considering proposals for development:

- a) Darlington town centre (sub-regional centre);
- b) Cockerton and North Road centres (district centres);
- c) Mowden, Neasham Road, Whinfield, Yarm Road, West Park and Middleton St George centres (local centres).

The policy goes on to state that the role of the district and local centres in providing food shopping and a range of other shops, leisure uses (including public houses and social clubs) and services to meet people’s day-to-day needs in accessible locations will be safeguarded and enhanced. Policy CS9 also states that any proposed new shops within these centres will be limited to maximum individual sizes of approximately 400 sq.m gross floorspace for convenience shops and 100 sq.m for comparison shops.

### Emerging Development Plan

3.39 The Darlington Making and Growing Places Preferred Options Development Plan Document was published for consultation in June 2013. Once adopted, the policies in the Making and Growing Places Development Plan Document will, together with the Core Strategy, form part of the development plan and will replace the remaining ‘saved’ policies in the Darlington Local Plan. The Preferred Options draft sets out the Councils draft policies and proposals for using and developing land.

3.40 In respect of non-food retail development, paragraph 3.1.13 of the Preferred Option document indicates that land at Commercial Street represents the single opportunity for delivering major non-food retail development in Darlington town centre. The site previously benefitted from planning



permission (references 06/00953/FULE and 10/00042/FUL) for a large scale multi-unit retail-led scheme on the site. Paragraph 3.1.13 clarifies that:

**'Although the permitted scheme is unlikely to be viable under current economic conditions, other ways of delivering a scheme there that allows linked trips with the existing town centre offer are being explored, potentially accommodating a realignment of the inner ring road. There are considered to be no other options for delivering major non-food retail development in the town centre.'**

- 3.41 With regard to food retail development, paragraph 3.1.14 states that the Council does not consider there to be any site currently available with the town centre that could accommodate a food store of the size likely required to satisfy qualitative needs. Areas outside of, but on the edge of the town centre, are therefore being investigated for this provision.
- 3.42 Paragraph 3.1.15 indicates that the Feethams/Beaumont Street area will be a priority area for non-retail main town centre uses (including office development).
- 3.43 Draft Policy MGP 2 identifies two sites in Darlington town centre which will be a focus for regeneration.
- 3.44 Site 'TC1 Commercial Street' will be reserved for new comparison-led shopping development in the period 2016 to 2021. Development of the site will be required to achieve:
  - a range of larger footprint (300 sq.m or above) comparison shopping units;
  - design that takes account of the wider area, not just the site itself; and
  - appropriate car parking provision.
- 3.45 Site 'TC2 Feethams' will be reserved for office and leisure development and car parking and will be developed in accordance with an agreed planning brief for the site.
- 3.46 Draft Policy MGP3 indicates that the defined Town Centre Fringe areas will be suitable for a range of different development, including local shops of up to 400 sq.m to meet local needs and that the delivery of a site on the edge of the town centre, capable of accommodating a 4,000 sq.m foodstore, should be facilitated, subject to a need for such a store being demonstrated.



- 3.47 Draft Policies MGP 12, MGP 13, MGP 14 and MGP 15 provide development management policies to help safeguard the vitality and viability of town, district and local centres.
- 3.48 Draft Policy MGP 12 states that proposals that include more than 500 sq.m gross of new or additional floorspace for main town centre uses in an out of centre location should demonstrate that:
- a) there are no sequentially preferable sites that are suitable, viable and available; and
  - b) there will be no significant adverse impact on the vitality and/or viability of existing centres when considered cumulatively with other developments; and
  - c) the site is sustainably located and accessible by modes of transport other than the private car.
- 3.49 Draft Policy MGP 13 indicates that proposals which would involve the loss of ground floor Class A1 shops within primary frontages will generally be resisted. Within secondary shopping frontages, proposals for non-retail uses will be considered on their own merits and proposals will be supported where it can be demonstrated that the proposal:
- a) would not result in an over-concentration of non-retail uses where the cumulative impact would lead to a negative impact on the shopping character of the frontage;
  - b) would not result in an over-concentration of similar uses that would lead to amenity problems;
  - c) will have an attractive shop front which contributes to the appearance of the street;
  - d) would not result in the creation of 'dead' frontage not in use during the day;
  - e) is compatible with adjoining uses; and
  - f) the proposal does not prevent upper floors from being used.
- 3.50 Draft Policy MGP 13 goes on to state that, elsewhere in the town centre, planning permission will be granted for retail, food and drink outlets, financial and professional services and other leisure and tourist related uses (Classes A1 to A5, B1, D1 and D2) and appropriate residential development where an acceptable level of residential amenity can be achieved.
- 3.51 Draft Policy MGP 14 states that within defined Fringe Shopping Areas adjacent to the town centre, the Council will permit small new shops of 100 sq.m gross floorspace or less, and other services in Classes A2, A3, A4, A5, B1, D1 and D2, together with appropriate residential development, provided that the proposal satisfies the requirements of other policies in the Local Plan.
- 3.52 Draft Policy MGP 15 identifies two district centres (Cockerton and North Road) and six local centres (Mowden, Neasham Road, Whinfield, Yarm Road, West Park and Middleton St George) to meet the



day to day needs of residents. New shopping development (comprising Classes A1, A2, A3, A4 and A5) and leisure and community uses will be permitted within these centres where it does not, on its own or cumulatively with other developments, significantly harm the vitality and viability of the centre itself or any other centre in Darlington’s hierarchy. The policy also makes provision for the extension of West Park local centre.

### **Darlington Town Centre Regeneration Strategy Part 1: Developing the Vision – Cherishing the Assets**

3.53 The Town Centre Regeneration Strategy seeks to guide future development in Darlington and to help bring forward Council assets to increase footfall and underpin the centre’s vitality and viability. The opportunity sites identified in the Regeneration Strategy include:

- Feethams and Beaumont Street – part of which is being developed as a new cinema, but which also provides additional land which could accommodate additional uses, such as offices and leisure, which would benefit from a riverside location.
- Commercial Street – which is identified as the Council’s preferred location for additional comparison goods retailing.
- Garden Street – which is constrained in terms of the scale of development which might be supported, but which the Regeneration Strategy identifies as having some potential to accommodate additional food retail.

3.54 In addition, the indoor market is recognised as a key town centre building which is currently underutilised. The Regeneration Framework indicates that a new vision should be formulated for the market, which in turn, will inform its refurbishment and the future lettings’ strategy. The Framework also suggests that the feasibility of delivering a department store in the Town Centre should be considered.



## 4.0 Original Market Research

### Introduction

- 4.01 The undertaking of original market research enables in-depth analysis at a local level and allows the evaluation of the trade draw of particular town centres. The use of specifically commissioned and tailored survey research is fundamental to identifying the likely capacity for future retail floorspace across the Study Area. Notwithstanding this, WYG acknowledges that there can be limitations to survey research, particularly with regard to the sample size which can be achieved, and the results should therefore be taken to be a broad indication of consumer preferences.
- 4.02 A key requirement of this Study is the detailed understanding of shopping patterns in terms of the use of retail centres and the identification of the centres' catchment areas. WYG commissioned specialist market researchers NEMS to undertake a comprehensive household telephone survey to identify consumers' habits and preferences in the Study Area.

### Study Area

- 4.03 In November 2013, a survey of 1,000 households was undertaken across the defined Study Area which comprises nine separate zones, together stretching some distance beyond the Darlington authority boundary to incorporate outlying areas which may look to the town to meet retail and leisure needs. The Study Area incorporates Bishop Auckland to the north, Yarm to the east, Catterick Garrison and Richmond to the south, and Barnard Castle to the west. At the request of the Council, the Study Area differs from that adopted for the 2008 Retail Study and includes two additional zones in order to provide a more comprehensive overview of shopping patterns in the wider area. These two zones are focused around Bishop Auckland (Zone 8) and Yarm (Zone 9) respectively.
- 4.04 The other seven zones correspond to those utilised by the 2008 Retail Study and correspond to the following broad areas:
- Zone 1 – Darlington South West;
  - Zone 2 – Darlington South East;
  - Zone 3 – Darlington North East;
  - Zone 4 – Darlington North West;
  - Zone 5 – Rural Darlington;
  - Zone 6 – Newton Aycliffe; and
  - Zone 7 – Dales.





4.05 The questions and full tabulation of results from the household survey are provided at Appendix 1. Table 4.1 below sets out the postcode sectors which comprise each zone and a map of the catchment is provided at Appendix 2. Appendix 3 provides a more detailed map of the postcode sectors which surround the Darlington authority area.

**Table 4.1: Postcodes by Survey Zone**

Survey Zone	Postcode Sectors
Zone 1	DL3 7, DL3 8 and DL3 9
Zone 2	DL1 1, DL1 4 and DL1 5
Zone 3	DL1 2 and DL1 3
Zone 4	DL3 0 and DL3 6
Zone 5	DL2 1, DL2 2 and TS21 1
Zone 6	DL4 1, DL4 2, DL5 4, DL5 5, DL5 6, DL5 7, DL17 0, DL17 8 and TS21 1
Zone 7	DL2 3, DL6 2, DL7 0, DL8 3, DL8 4, DL8 5, DL9 3, DL9 4, DL10 4, DL10 5, DL11 6, DL11 7, DL12 0, DL12 8 and DL12 9
Zone 8	DL14 0, DL14 6, DL14 7, DL14 8 and DL14 9
Zone 9	TS15 9, TS16 0 and TS16 9

4.06 The results of the household survey are utilised to calculate the expenditure claimed by each existing retail facility within the Study Area, a process which is considered in Section 7 of this report.

4.07 The household survey is also of assistance in identifying the market share claimed by specific retail destinations, the frequency of visit to purchase various types of goods, the incidence of linked trips, the most popular means of accessing town centre facilities, the use of other town centre facilities, and so on. In order to allow direct comparison with the findings of the 2008 Study in respect of market share, we have subdivided the Study Area into a Primary area and a Secondary area. The Primary Study Area corresponds to Zones 1 to 7, i.e. the same zones which comprised the Study Area for the 2008 Retail Study. The differentiation between Primary and Secondary allows changes in market share to be monitored across a comparable Study Area. The Secondary area has not been utilised for the purpose of market share analysis, but has been used in the quantitative assessment of retail need which follows at Section 7 of this report.

4.08 The 2008 Retail Study considered the market share of facilities for convenience and comparison goods shopping across the Greater Darlington area (Zones 1 to 5), the Newton Aycliffe area (Zone 6) and



the Dales area (Zone 7)<sup>27</sup>. We use the same groupings in order to allow comparison between the two datasets. In order to compare the 2008 and 2013 survey results on a 'like for like' basis in respect to shopping trips made to tangible stores, we have stripped out any survey responses which suggest that a particular type of purchase was committed through special forms of trading.

4.09 It should be noted that the 2008 and 2013 household surveys differ slightly in the wording of the questions, with the former apparently asking respondents as to the favoured destinations for undertaking particular types of shopping and our survey asking respondents as to their last destination visited to purchase particular types of goods. In our experience, asking shoppers where they last undertook particular types of shopping provides more accurate results as it is more likely to record infrequent purchases which typically may be made at smaller centres and stores. This slight revision to the methodology may contribute to any changes in shopping patterns identified since 2008 and the analysis which follows should be viewed in this context. We consider that this revision in methodology will have greatest impact on top up food shopping, which is often undertaken in a variety of locations and which requires the survey to ask the location of the last shop in order to identify the location of more occasional shopping destinations. For other goods categories, we consider that marginal variations in market share may be attributable to this revision in methodology, but that substantial changes in market share will generally be reflective of changes in shopper behaviour.

#### Food Shopping Patterns

4.10 Tables 4.2 and 4.3 summarise the proportion of main food and 'top up' food shopping trips which are directed to retailers located within the Greater Darlington area, based upon the results of the household survey.

4.11 Table 4.2 indicates that foodstores located within Greater Darlington currently claim a market share of 50.1% of all main food shopping trips which originate inside the Primary Study Area. Whilst this is exactly the same proportion of trips claimed in the same area in 2008, it is evident that particular stores have been the subject of varying fortunes over this period. For example, Table 4.2 indicates that the main food shopping market shares claimed across the Primary Study Area by the North Road Morrisons and the Whinfield Asda have reduced notably between 2008 and 2013 (from 17.8% to 12.8% in the case of the Morrisons store and from 6.9% to 5.0% in the case of the Asda). By way of contrast, the Yarm Road Aldi's main food shopping market share across the Primary Study Area increased from 1.7% at 2008 to 4.5% at the time of the new survey.

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<sup>27</sup> It should be noted that the Greater Darlington area does not precisely correspond to the Darlington administrative as it is based on the postcode areas which forms the Study Area zones



- 4.12 As would be expected, the food shopping market share secure by facilities in Darlington is significantly higher in the 'core' Greater Darlington zones (comprising Zones 1 to 5). Each of these zones provides good accessibility to a range of main food shopping facilities in Darlington and, as a consequence, 92.1% of main food shopping trips which originate in the Greater Darlington area are undertaken in the Darlington area. Whilst this represents a slight reduction in the 95.2% retention rate recorded in 2008, it is still evident that the vast majority of main shopping trips which originate within Zones 1 to 5 are retained in these zones.
- 4.13 Greater Darlington secures a significantly lower market share of main food shopping trips which originate at the periphery of the Study Area. This is to be expected and, indeed, is not problematic as large parts of Zones 6 and 7 afford better access to main food shopping facilities outside of the Greater Darlington area. In particular, we note that a lesser proportion of main food shopping trips which originate in Zone 6 (Newton Aycliffe) are now directed to the Greater Darlington area. This would at least in part appear to be a consequence of two new food superstore opening in Bishop Auckland (a Sainsbury's and a Tesco Extra) subsequent to the undertaking of the previous household survey in 2008. These two stores provide additional choice for residents of the northern part of the Primary Study Area. As a consequence of such choice, the market share of main food shopping trips originating in Newton Aycliffe which are undertaken in Greater Darlington has slipped from 15.0% at 2008 to 9.0% at 2013.

**Table 4.2: Main Food Shopping Trips Analysis by Zone (%)**

	GD 2008	GD 2013	NA 2008	NA 2013	DA 2008	DA 2013	PSA 2008	PSA 2013
Morrisons Morton Park	20.3%	20.4%	2.8%	1.0%	7.4%	5.4%	12.0%	11.3%
Morrisons North Road	34.7%	25.3%	8.3%	3.3%	1.5%	0.8%	17.8%	12.8%
Sainsbury's Victoria Road	12.0%	16.4%	0.6%	0.0%	3.0%	7.1%	6.4%	9.8%
Whinfield Asda	14.0%	9.1%	2.0%	2.3%	0.8%	0.5%	6.9%	5.0%
Yarm Road Aldi	3.4%	8.8%	0.0%	0.0%	0.8%	1.3%	1.7%	4.5%
Other Darlington	10.8%	11.9%	1.2%	2.3%	0.8%	2.0%	5.3%	6.7%
<b>Greater Darlington Total</b>	<b>95.2%</b>	<b>92.1%</b>	<b>15.0%</b>	<b>9.0%</b>	<b>14.2%</b>	<b>17.0%</b>	<b>50.1%</b>	<b>50.1%</b>
Newton Aycliffe	0.8%	0.6%	53.2%	42.5%	0.0%	0.4%	13.6%	10.5%
Dales Area	0.2%	0.3%	0.0%	0.0%	71.8%	65.0%	22.3%	19.4%
<b>Primary Study Area Total</b>	<b>96.2%</b>	<b>93.0%</b>	<b>68.2%</b>	<b>51.5%</b>	<b>85.9%</b>	<b>82.4%</b>	<b>86.0%</b>	<b>80.0%</b>
Other	3.8%	7.0%	31.8%	48.5%	14.1%	17.6%	14.0%	20.0%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Source: MT Planning Darlington Retail Study 2008 and WYG Table 3, Appendix 6



- 4.14 Top up shopping is typically undertaken close to home and, as expected, Greater Darlington claims a very high proportion of such shopping trips which originate in the area. This pattern is replicated elsewhere in the Primary Study Area, with most top up food shopping trips being undertaken in the zone in which they originate. The market share of such trips claimed across the Primary Study Area by facilities in Greater Darlington is broadly comparable with that achieved in 2008 (indeed, there has actually been a slight increase as 47.9% of such trips originating in the Primary Study Area were directed to Greater Darlington at 2013 which compares to 46.8% of such trips in 2008).
- 4.15 Overall, both the main food shopping and top up shopping market shares secured in zones located within Greater Darlington are considered to be healthy and reflect the fact that a range of food shopping options are available across the Greater Darlington area.

**Table 4.3: Top Up Food Shopping Trips Analysis by Zone (%)**

	GD 2008	GD 2013	NA 2008	NA 2013	DA 2008	DA 2013	PSA 2008	PSA 2013
Morrisons Morton Park	12.2%	4.1%	0.8%	0.0%	1.9%	2.6%	6.2%	2.6%
Morrisons North Road	13.5%	6.1%	0.8%	1.4%	0.0%	0.0%	6.2%	3.1%
Sainsbury's Victoria Road	7.5%	8.3%	0.0%	0.0%	4.2%	2.0%	4.6%	4.5%
Whinfield Asda	12.2%	11.5%	0.0%	0.0%	0.0%	1.1%	5.4%	5.8%
Yarm Road Aldi	4.7%	6.6%	0.8%	0.0%	1.0%	0.0%	2.7%	3.1%
Other Darlington	45.7%	58.0%	3.6%	3.7%	1.0%	2.5%	21.6%	28.7%
<b>Greater Darlington Total</b>	<b>95.8%</b>	<b>94.5%</b>	<b>6.0%</b>	<b>5.2%</b>	<b>8.0%</b>	<b>7.6%</b>	<b>46.8%</b>	<b>47.9%</b>
Newton Aycliffe	1.6%	0.4	73.9%	67.4%	0.0%	0.6%	18.8%	14.1%
Dales Area	0.0%	0.0%	0.0%	0.0%	82.6%	80.2%	25.4%	26.3%
<b>Primary Study Area Total</b>	<b>97.3%</b>	<b>94.9%</b>	<b>79.9%</b>	<b>72.6%</b>	<b>90.7%</b>	<b>88.5%</b>	<b>91.0%</b>	<b>88.3%</b>
Other	2.7%	5.1%	20.1%	27.4%	9.3%	11.5%	9.0%	11.7%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Source: MT Planning Darlington Retail Study 2008 and WYG Table 3, Appendix 6

- 4.16 From scrutiny of the household survey results, we also note the following convenience goods shopping trends.
- Five stores within Darlington cumulatively attract 43.4% of the Primary Study Area main food shopping market share, these being: Morrisons at North Road (12.8%); Morrisons at Morton Park (11.3%); Sainsbury's at Victoria Road (9.8%); Asda at Whinfield Shopping Centre (5.0%); and, Aldi at Yarm Road (4.5%).



- More than four out of every ten surveyed (43.7%) indicated that the principal reason for choosing their main food shopping destination was the store's proximity to their home, followed by the fact that the store offers low prices (11.5%) and then due to habit or loyalty to the retailer (9.3%).
- A large majority of shoppers (81.2%) do their main food shop once a week or more frequently, with 9.9% undertaking main food shopping at least once a fortnight and 4.4% doing such shopping on a monthly basis.
- Just 3.1% of respondents suggested that their last main food shop was undertaken via the internet.
- A large majority of respondents use the car in travelling to do their main food shop (87.6%), with the next most popular means of transport being by foot (5.7%) and then by bus (3.7%).
- More than half of respondents (62.4%) do not link their main food shopping trip with any other activity, with the most popular activities of those that do being the undertaking of non-food shopping (6.7%) and travelling to and from work (5.9%).
- In terms of top up food shopping, given the relatively extensive reach of the Study Area, a very large number of stores have been identified as attracting top up food shopping expenditure. There are seven stores within the Greater Darlington area which each claim more than 2.0% of Primary Study Area market share for top up food shopping, these being: Asda at Whinfield Shopping Centre (5.8%); Sainsbury's at Victoria Road (4.5%); Aldi at Yarm Road (3.1%); Morrisons at North Road (3.1%); Marks & Spencer at Northgate (2.7%); Morrisons at Morton Park (2.6%); and, Asda at Neasham Road (2.5%).
- As would be expected, the household survey indicates that top up shopping trips tend to be undertaken on a more frequent basis than main food shopping trips, with 7.7% of respondents undertaking such shopping trips on a daily basis, 44.4% at least twice weekly and 34.6% at least weekly.

#### Comparison Goods Shopping Patterns: Clothing

- 4.17 As Table 4.4 demonstrates, Darlington is the single most popular destination for clothes shopping in the Study Area, attracting almost half of all such trips (49.6%) which originate in the Primary Study Area and almost six out of every ten such trips (59.7%) which originate in the Greater Darlington Zones 1 to 5. Whilst the attraction of Darlington does fall in the Newton Aycliffe and Dales zones, the town centre still remains by far the most popular destination in which to undertake clothes shopping in these areas.
- 4.18 However, it is evident that Darlington's market share has reduced notably since the undertaking of the 2008 survey. In 2008, Darlington town centre claimed 59.6% of all clothing and footwear trips



originating within the Primary Study Area, which is 10.0 percentage points greater than the market share recorded by the current survey. The principal beneficiaries of Darlington’s reduced market share appear to be the Metro Centre and Teesside Retail Park. The 2013 survey also suggests that a greater market share has been claimed by destinations further afield, although we would suggest that some of this difference may be attributable to the change in survey methodology as a consequence of WYG’s preference in asking respondents where they last made such a purchase.

**Table 4.4: Clothing and Footwear Shopping Market Share by Town (%)**

	GD 2008	GD 2013	NA 2008	NA 2013	DA 2008	DA 2013	PSA 2008	PSA 2013
Darlington Town Centre	70.3%	59.7%	49.3%	42.3%	53.5%	37.0%	59.6%	49.6%
Matalan	4.4%	0.9%	0.7%	0.0%	1.9%	0.5%	2.8%	0.6%
Darlington Retail Park	0.4%	1.4%	0.0%	0.7%	0.5%	2.1%	0.3%	1.4%
Morton Park	0.2%	0.4%	0.0%	0.0%	0.5%	0.0%	0.2%	0.2%
Other Darlington	5.9%	4.5%	4.0%	0.0%	4.8%	0.4%	5.2%	2.4%
<b>Greater Darlington Total</b>	<b>81.2%</b>	<b>66.9%</b>	<b>54.0%</b>	<b>43.0%</b>	<b>61.3%</b>	<b>40.0%</b>	<b>68.1%</b>	<b>54.2%</b>
Newton Aycliffe	0.1%	0.0%	8.9%	7.5%	0.0%	0.0%	2.2%	1.7%
Dales Area	0.1%	0.4%	0.2%	0.0%	11.1%	10.0%	3.8%	2.9%
<b>Primary Study Area Total</b>	<b>81.4%</b>	<b>67.3%</b>	<b>63.2%</b>	<b>50.5%</b>	<b>72.4%</b>	<b>50.0%</b>	<b>74.2%</b>	<b>58.8%</b>
Middlesbrough	6.0%	6.1%	4.9%	1.1%	2.6%	5.4%	4.7%	4.8%
Newcastle	3.2%	3.5%	3.7%	1.8%	4.1%	3.9%	3.6%	3.2%
Metro Centre	1.9%	3.9%	6.1%	10.6%	2.4%	4.4%	3.1%	5.6%
Teesside Retail Park	3.4%	6.6%	3.1%	9.5%	4.0%	12.3%	3.5%	8.8%
Other Outside PSA	4.0%	12.4%	18.9%	26.3%	14.6%	23.9%	10.8%	18.7%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Source: MT Planning Darlington Retail Study 2008 and WYG Table 10, Appendix 6

#### Comparison Goods Shopping Patterns: Books, CDs and DVDs

- 4.19 The 2008 survey subdivided the books, CDs and DVDs comparison goods category into two separate subcategories ('books and stationery' and 'CDs, DVDs, tapes and computer games'). Whilst direct comparison between the two sets of survey results is therefore not possible, we have included the 2008 results in respect of books and stationery in the below Table 4.5 for information.
- 4.20 The 2013 household survey records broadly similar shopping patterns in respect of the purchase of books, CDs and DVDs as it does for clothes shopping, albeit with Darlington town centre securing a slightly greater market share of such trips. Indeed, as Table 4.5 demonstrates, slightly more than half of all such shopping trips which originate within the Primary Study Area are directed to Darlington town centre. The popularity of Darlington is particularly evident in the Greater Darlington area (where



a market share of 74.5% is secured), with the centre proving significantly less attractive to residents of the Newton Aycliffe and Dales Area zones. The Metro Centre has been a beneficiary of the reduction in Newton Aycliffe residents purchasing books, CDs and DVDs in Darlington town centre, as the Metro Centre’s market share in this zone has increased significantly from 3.5% in 2008 to 14.0% at 2013.

**Table 4.5: Books, CDs and DVDs Shopping Market Share by Town (%)**

	GD 2008	GD 2013	NA 2008	NA 2013	DA 2008	DA 2013	PSA 2008	PSA 2013
Darlington Town Centre	75.5%	74.5%	34.5%	18.9%	43.1%	36.6%	55.6%	50.5%
Matalan	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Darlington Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Morton Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Darlington	13.8%	13.8%	2.6%	1.4%	2.8%	5.6%	7.6%	8.5%
<b>Greater Darlington Total</b>	<b>89.2%</b>	<b>88.3%</b>	<b>37.1%</b>	<b>20.3%</b>	<b>45.9%</b>	<b>42.1%</b>	<b>63.3%</b>	<b>59.0%</b>
Newton Aycliffe	0.8%	0.0%	32.8%	32.4%	0.0%	0.0%	8.4%	6.8%
Dales Area	0.3%	0.0%	0.0%	0.0%	33.9%	35.5%	10.5%	11.6%
<b>Primary Study Area Total</b>	<b>90.3%</b>	<b>88.3%</b>	<b>69.8%</b>	<b>52.7%</b>	<b>79.8%</b>	<b>77.6%</b>	<b>82.1%</b>	<b>77.4%</b>
Middlesbrough	1.1%	1.5%	1.7%	0.0%	0.0%	0.0%	0.9%	0.7%
Newcastle	0.8%	0.4%	1.7%	0.9%	1.8%	0.0%	1.3%	0.4%
Metro Centre	0.2%	0.4%	3.5%	14.0%	1.8%	0.0%	1.5%	3.1%
Teesside Retail Park	4.7%	2.3%	1.7%	3.2%	1.0%	7.0%	2.8%	4.0%
Other Outside PSA	2.9%	7.1%	21.6%	29.2%	15.6%	15.4%	11.1%	14.4%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Source: MT Planning Darlington Retail Study 2008 and WYG Table 12, Appendix 6

Comparison Goods Shopping Patterns: Small Household Goods

- 4.21 Table 4.6 below identifies that Darlington town centre attracts 35.6% of shopping trips to purchase small household goods (including such items as tableware, household utensils, jewellery, watches and appliances for personal care) which originate from within the Primary Study Area. Darlington town centre attracts almost half of such trips (46.7%) which originate in the Greater Darlington Zones 1 to 5. The identified market shares are comparable with those achieved in 2008, with the market share secured across the Primary Study Area at 2013 representing a modest (0.9 percentage point) reduction over the five year period.
- 4.22 Other popular destinations to shop for small household goods include large food superstores, reflecting the wide household product range typically carried by such stores. Given the number of retailers which now sell a wide range of household goods, the market share claimed by Darlington is



considered to be encouraging and reflective of the relative strength of the offer provided by town centre operators.

**Table 4.6: Small Household Goods Shopping Market Share by Town (%)**

	GD 2008	GD 2013	NA 2008	NA 2013	DA 2008	DA 2013	PSA 2008	PSA 2013
Darlington Town Centre	47.4%	46.7%	15.7%	17.9%	27.2%	30.1%	34.7%	35.6%
Matalan	6.7%	1.1%	0.0%	0.0%	1.1%	0.7%	3.3%	0.7%
Darlington Retail Park	0.6%	6.6%	0.0%	6.2%	0.0%	2.1%	0.3%	5.2%
Morton Park	3.3%	1.3%	0.0%	0.0%	1.1%	0.0%	1.8%	0.6%
Other Darlington	20.6%	16.1%	2.9%	0.0%	10.9%	3.5%	13.2%	8.9%
<b>Greater Darlington Total</b>	<b>81.6%</b>	<b>71.7%</b>	<b>18.6%</b>	<b>24.0%</b>	<b>40.3%</b>	<b>36.4%</b>	<b>53.4%</b>	<b>51.0%</b>
Newton Aycliffe	1.3%	1.1%	50.8%	30.6%	0.0%	0.0%	13.2%	7.1%
Dales Area	0.4%	0.3%	0.0%	0.0%	31.6%	20.8%	9.9%	6.3%
<b>Primary Study Area Total</b>	<b>83.3%</b>	<b>73.1%</b>	<b>69.5%</b>	<b>54.6%</b>	<b>71.9%</b>	<b>57.2%</b>	<b>76.5%</b>	<b>64.5%</b>
Middlesbrough	2.3%	1.7%	2.8%	2.0%	1.1%	0.0%	2.0%	1.2%
Newcastle	1.8%	3.0%	1.9%	0.0%	3.2%	2.4%	2.3%	2.2%
Metro Centre	4.6%	1.4%	3.7%	8.3%	7.6%	1.2%	5.3%	2.8%
Teesside Retail Park	1.5%	4.3%	1.9%	5.5%	0.0%	4.8%	1.1%	4.7%
Other Outside PSA	6.3%	16.5%	20.4%	29.6%	16.5%	34.3%	12.8%	24.6%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Source: MT Planning Darlington Retail Study 2008 and WYG Table 14, Appendix 6

Comparison Goods Shopping Patterns: Toys, Games, Bicycles and Recreation Goods

- 4.23 Table 4.9 identifies that Darlington town centre secures more than half (53.5%) of all shopping trips to purchase toys, games, bicycles and similar items which originate within the Greater Darlington zones, but a substantially lesser market share of such trips originating in the other two zones in the Primary Study Area. This is a consequence of the significant choice which exists elsewhere in the wider area, not least at Teesside Retail Park which has secured a significantly improved market share since 2008.
  
- 4.24 Across the whole Primary Study Area, Darlington town centre secures market share of 35.6% of such shopping trips which represents a 6.1 percentage point reduction on the 41.7% market share recorded by the 2008 survey. Given that Teesside Retail Park has secured an 8.4 percentage point increase in market share to 22.9% over the same period, it is evident that Darlington has managed to remain competitive in this market in the face of strong competition.





**Table 4.7: Toys, Games, Bicycles and Recreation Goods Shopping Market Share by Town (%)**

	GD 2008	GD 2013	NA 2008	NA 2013	DA 2008	DA 2013	PSA 2008	PSA 2013
Darlington Town Centre	56.2%	53.5%	21.0%	10.5%	37.4%	27.5%	41.7%	35.6%
Matalan	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Darlington Retail Park	1.3%	1.6%	0.0%	0.0%	0.0%	0.0%	0.6%	0.7%
Morton Park	0.3%	0.0%	1.1%	0.0%	0.0%	0.0%	0.5%	0.0%
Other Darlington	11.4%	6.3%	5.8%	0.0%	5.6%	0.0%	8.2%	2.9%
<b>Greater Darlington Total</b>	<b>69.2%</b>	<b>61.4%</b>	<b>27.9%</b>	<b>10.5%</b>	<b>43.0%</b>	<b>27.5%</b>	<b>51.0%</b>	<b>39.2%</b>
Newton Aycliffe	0.3%	0.4%	36.0%	21.8%	1.3%	0.0%	9.5%	4.9%
Dales Area	0.6%	0.0%	0.0%	0.0%	13.9%	16.5%	4.5%	5.4%
<b>Primary Study Area Total</b>	<b>70.1%</b>	<b>61.8%</b>	<b>64.0%</b>	<b>32.3%</b>	<b>58.2%</b>	<b>44.1%</b>	<b>64.9%</b>	<b>49.6%</b>
Middlesbrough	2.7%	0.9%	3.5%	0.0%	0.0%	1.6%	2.1%	0.9%
Newcastle	1.3%	0.0%	2.3%	4.7%	2.8%	2.5%	2.1%	1.8%
Metro Centre	0.9%	1.0%	5.8%	10.0%	2.8%	5.8%	2.7%	4.6%
Teesside Retail Park	19.0%	22.9%	5.8%	15.3%	15.2%	27.9%	14.5%	22.9%
Other Outside PSA	5.9%	13.4%	18.5%	37.7%	20.7%	18.2%	13.6%	20.3%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Source: MT Planning Darlington Retail Study 2008 and WYG Table 16, Appendix 6

#### Comparison Goods Shopping Patterns: Chemist Goods

- 4.25 Chemist goods are typically purchased in a similar manner to convenience items, with a large proportion of such trips taking place close to home (due principally to the similar nature of many such goods which reduces the propensity to 'shop around'). Accordingly, a wide range of facilities attract such shopping journeys, including Darlington town centre, but also food superstores, district and local centres and shopping parades. In this context, whilst Darlington town centre has suffered a decline in market share since 2008 (with 35.5% of all such trips originating in the Primary Study Area now being directed to the town centre, which compares with a recorded market share of 40.3% at 2008), its current performance is considered to be consistent with how such purchases are generally made and does not give particular rise for concern.
- 4.26 The overall retention rate of such trips within the Greater Darlington area (i.e. the proportion of trips to purchase such products which originate within Greater Darlington and stay within Greater Darlington) is 90.2%, which is considered to be strong and, once again, reflective of the fact that such goods are generally bought locally.



**Table 4.10: Chemist Goods Shopping Market Share by Town (%)**

	GD 2008	GD 2013	NA 2008	NA 2013	DA 2008	DA 2013	PSA 2008	PSA 2013
Darlington Town Centre	66.8%	61.8%	8.5%	7.9%	28.6%	12.1%	40.3%	35.5%
Matalan	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Darlington Retail Park	0.7	0.1%	0.0%	0.0%	0.0%	0.0%	0.3%	0.1%
Morton Park	0.5%	0.8%	0.0%	0.0%	0.0%	0.0%	0.2%	0.4%
Other Darlington	26.6%	27.5%	2.1%	0.5%	0.0%	3.0%	12.1%	14.4%
<b>Greater Darlington Total</b>	<b>94.6%</b>	<b>90.2%</b>	<b>10.6%</b>	<b>8.5%</b>	<b>28.6%</b>	<b>15.1%</b>	<b>53.0%</b>	<b>50.4%</b>
Newton Aycliffe	0.5%	0.1%	71.8%	59.9%	0.0%	0.0%	17.8%	13.5%
Dales Area	0.3%	0.2%	0.0%	0.0%	60.4%	66.6%	19.3%	19.1%
<b>Primary Study Area Total</b>	<b>95.4%</b>	<b>90.5%</b>	<b>82.4%</b>	<b>68.4%</b>	<b>89.0%</b>	<b>81.7%</b>	<b>90.0%</b>	<b>83.0%</b>
Middlesbrough	0.8%	0.7%	0.7%	1.4%	0.0%	0.0%	0.5%	0.6%
Newcastle	0.0%	0.6%	0.7%	1.4%	1.5%	0.0%	0.7%	0.6%
Metro Centre	0.1%	0.4%	2.1%	2.8%	0.0%	0.6%	0.6%	1.0%
Teesside Retail Park	1.4%	3.2%	0.7%	0.0%	0.0%	0.0%	0.8%	1.6%
Other Outside PSA	2.4%	4.6%	13.4%	26.0%	9.6%	17.8%	7.3%	13.2%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Source: MT Planning Darlington Retail Study 2008 and WYG Table 18, Appendix 6

Comparison Goods Shopping Patterns: Electrical

- 4.27 Darlington town centre claims a much improved market share of shopping trips to purchase electrical goods originating from within the Primary Study Area compared to that recorded in 2008. The increase in market share across the Primary Study Area (a 5.8 percentage point increase to 18.1% at 2013) is principally reflective of the increased popularity of the town centre with Greater Darlington residents as a destination to purchase electrical items. Darlington town centre’s increase in market share has been at the expense of Darlington Retail Park, which has been the subject of a 25.1 percentage point reduction in market share since the undertaking of the previous 2008 survey. This very significant reduction can be attributed, at least in part, to the closure of the Currys store at the Retail Park.
  
- 4.28 Clearly, a significant proportion of electrical items are bulky goods, which are often purchased at out of centre locations. Given the choice of such shopping locations across the wider area (including Teesside Retail Park), both the Darlington town centre market share and the fact that 79.3% of trips to purchase electrical goods which originate within Greater Darlington are retained in the Greater Darlington, are considered to represent a relatively encouraging performance.



**Table 4.11: Electrical Shopping Market Share by Town (%)**

	GD 2008	GD 2013	NA 2008	NA 2013	DA 2008	DA 2013	PSA 2008	PSA 2013
Darlington Town Centre	18.8%	25.1%	4.5%	2.0%	8.9%	18.5%	12.3%	18.1%
Matalan	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Darlington Retail Park	62.5%	33.8%	22.7%	17.7%	50.5%	16.2%	49.4%	24.3%
Morton Park	1.4%	8.4%	2.7%	3.1%	0.9%	8.9%	1.6%	7.5%
Other Darlington	7.2%	11.9%	0.0%	0.0%	3.5%	6.5%	4.3%	7.6%
<b>Greater Darlington Total</b>	<b>90.0%</b>	<b>79.3%</b>	<b>29.9%</b>	<b>22.9%</b>	<b>63.8%</b>	<b>50.1%</b>	<b>67.6%</b>	<b>57.4%</b>
Newton Aycliffe	1.1%	2.4%	38.2%	31.4%	0.0%	0.0%	9.4%	7.5%
Dales Area	0.0%	0.0%	0.0%	0.0%	12.4%	10.9%	4.0%	3.9%
<b>Primary Study Area Total</b>	<b>91.1%</b>	<b>81.7%</b>	<b>68.1%</b>	<b>54.4%</b>	<b>76.3%</b>	<b>61.0%</b>	<b>81.0%</b>	<b>68.8%</b>
Middlesbrough	0.9%	1.2%	0.0%	0.0%	0.0%	0.0%	0.3%	0.5%
Newcastle	0.7%	1.8%	1.8%	0.0%	1.8%	1.6%	1.3%	1.4%
Metro Centre	0.4%	0.2%	1.8%	1.0%	0.9%	0.9%	0.9%	0.6%
Teesside Retail Park	4.4%	10.1%	3.7%	11.4%	8.0%	17.6%	5.3%	13.0%
Other Outside PSA	2.6%	5.0%	24.5%	33.2%	13.5%	19.0%	11.1%	15.7%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Source: MT Planning Darlington Retail Study 2008 and WYG Table 20, Appendix 6

#### Comparison Goods Shopping Patterns: Furniture

- 4.29 Furniture is the comparison goods category for which there has been the greatest increase in Darlington town centre's market share. This can be attributed to the relatively strong proliferation of national multiple or large format furniture retailers (including Barker and Stonehouse, Argos and Bed SOS) in proximity to the town centre.
- 4.30 As a consequence of Darlington's strong offer, its market share in the Greater Darlington zones increased from 28.9% at 2008 to 48.6% at 2013 and its market share in the Primary Study Area increased from 20.8% to 34.8%. Both of these increases (equating to 19.7 percentage points and 14.8 percentage points respectively) are significant.
- 4.31 A large proportion of this increase has been achieved at the expense of Darlington Retail Park, which was the subject of a near 50% reduction in market share in the Greater Darlington area (with the proportion of shopping trips directed to this location reducing from 31.4% at 2008 to 15.8% at 2013).



**Table 4.12: Furniture Shopping Market Share by Town (%)**

	GD 2008	GD 2013	NA 2008	NA 2013	DA 2008	DA 2013	PSA 2008	PSA 2013
Darlington Town Centre	28.9%	48.6%	18.0%	28.9%	11.8%	18.0%	20.8%	34.8%
Matalan	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Darlington Retail Park	31.4%	15.8%	17.1%	12.3%	20.0%	8.3%	24.3%	12.7%
Morton Park	2.0%	5.2%	0.9%	4.1%	2.8%	2.6%	2.0%	4.2%
Other Darlington	21.7%	11.1%	3.6%	2.0%	5.4%	1.6%	12.2%	6.1%
<b>Greater Darlington Total</b>	<b>84.1%</b>	<b>80.7%</b>	<b>39.6%</b>	<b>47.4%</b>	<b>40.1%</b>	<b>30.6%</b>	<b>59.3%</b>	<b>57.7%</b>
Newton Aycliffe	0.4%	0.4%	20.8%	7.6%	0.9%	0.0%	5.5%	1.9%
Dales Area	0.5%	0.3%	0.9%	0.0%	24.6%	31.2%	8.4%	9.8%
<b>Primary Study Area Total</b>	<b>85.0%</b>	<b>81.4%</b>	<b>61.3%</b>	<b>55.0%</b>	<b>65.6%</b>	<b>61.8%</b>	<b>73.2%</b>	<b>69.4%</b>
Middlesbrough	0.9%	0.3%	1.8%	2.1%	1.8%	0.0%	1.5%	0.6%
Newcastle	2.2%	1.4%	0.0%	0.0%	1.8%	1.1%	1.6%	1.0%
Metro Centre	2.4%	1.7%	2.7%	1.7%	3.6%	2.4%	2.8%	1.9%
Teesside Retail Park	1.1%	0.5%	0.0%	1.9%	1.8%	0.0%	1.0%	0.7%
Other Outside PSA	8.5%	14.7%	34.2%	39.3%	25.4%	34.7%	20.2%	26.4%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Source: MT Planning Darlington Retail Study 2008 and WYG Table 22, Appendix 6

#### Comparison Goods Shopping Patterns: DIY

- 4.32 Darlington town centre’s market share of DIY trips is relatively low, which is to be expected given that such facilities are often sited at out of centre locations. By far the most popular DIY store in the Study Area is the B&Q at Morton Park to the east of the town. The B&Q attracts almost half of DIY goods shopping trips which originate within the Greater Darlington area, which is around three times the share secured by Darlington town centre (14.3%). Darlington’s existing DIY offer would appear to appropriately meet most needs as the retention rate secured in the Greater Darlington zones is particularly high at 91.5%.



**Table 4.13: DIY Shopping Market Share by Town (%)**

	GD 2008	GD 2013	NA 2008	NA 2013	DA 2008	DA 2013	PSA 2008	PSA 2013
Darlington Town Centre	15.4%	14.3%	4.6%	2.4%	8.0%	5.2%	10.4%	9.1%
Matalan	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Darlington Retail Park	7.5%	6.4%	1.5%	1.6%	5.3%	5.3%	5.4%	5.0%
Morton Park	32.4%	47.2%	10.7%	24.8%	23.0%	31.5%	24.1%	37.9%
Other Darlington	37.7%	23.6%	19.9%	5.4%	10.7%	2.4%	24.8%	13.9%
<b>Greater Darlington Total</b>	<b>93.1%</b>	<b>91.5%</b>	<b>36.6%</b>	<b>34.1%</b>	<b>47.0%</b>	<b>44.5%</b>	<b>64.7%</b>	<b>65.9%</b>
Newton Aycliffe	0.0%	0.0%	16.8%	10.8%	0.0%	0.0%	4.1%	2.6%
Dales Area	0.2%	0.4%	0.0%	1.4%	10.6%	35.8%	3.4%	9.6%
<b>Primary Study Area Total</b>	<b>93.3%</b>	<b>91.9%</b>	<b>53.4%</b>	<b>46.3%</b>	<b>57.6%</b>	<b>80.3%</b>	<b>72.2%</b>	<b>78.1%</b>
Middlesbrough	0.3%	0.0%	0.0%	0.0%	0.9%	0.0%	0.4%	0.0%
Newcastle	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.3%	0.0%
Metro Centre	0.0%	0.0%	0.0%	0.0%	2.7%	0.0%	0.8%	0.0%
Teesside Retail Park	0.0%	0.4%	1.5%	0.0%	0.9%	0.0%	0.6%	0.2%
Other Outside PSA	6.4%	7.6%	45.2%	53.7%	37.3%	19.7%	25.4%	21.7%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Source: MT Planning Darlington Retail Study 2008 and WYG Table 24, Appendix 6



## 5.0 Health Check Assessments

5.01 The NPPF identifies a number of factors which will be of relevance in delivering sustainable development, with one such factor being the need to ensure the vitality of town centres. Paragraph 23 of the NPPF indicates that local authorities should promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. Paragraph 23 also requires local planning authorities to recognise that town centres are at the heart of their communities and to pursue policies that support their viability and vitality. It is also noted that competitive town centre environments should be promoted in order to enhance customer choice, provide a diverse retail offer and in order to reflect the individuality of town centres.

5.02 Whilst the NPPF does not provide a list of indicators to be used to assess the health of a centre, such criteria has recently been published in the Government's Ensuring the Vitality of Town Centres Planning Practice Guidance of March 2014. Indicators which should be monitored on a regular basis in order to judge the health of a centre and its performance over time include the following:

- **Diversity of uses** – Data on the diversity of uses in the town centre and the district and local centres was collated during our surveys in December 2013 and January 2014.
- **Proportion of vacant street level property** – Vacant properties were identified during the undertaking of the surveys.
- **Customers' views and behaviour** – Information on customers' views is based on the NEMS household survey results.
- **Retailer representation and intentions to change representation** – Information on the current strength of centres, retailer representation and retailer requirements has been derived from Venuescore's UK Shopping Venue Rankings and from other published sources.
- **Commercial rents** – Zone A rental data has been sourced from Estates Gazette Interactive (EGi), which is a widely recognised source of such data.
- **Pedestrian flows** – General footfall and pedestrian flows were observed during the undertaking of the centre surveys and is supplemented by data from Darlington Council.
- **Accessibility** – Consideration of access to and around each centre is informed by WYG's surveys.
- **State of town centre environmental quality** – Consideration of the quality of the buildings and public realm in each of the centres has also been informed by WYG's 'on the ground' observations.



5.03 We have also had particular regard to the proliferation of vacant land and premises and the opportunities which may exist for future growth in Darlington. The commentary below provides an analysis of Darlington town centre in respect of each of the above indicators. We have also visited each defined district and local centre in Darlington and, whilst not all of the above indicators are applicable to smaller centres, we also provide our assessment of the health of these centres in this section of our report.

5.04 We commence our assessment by considering the role of Darlington’s centres in the sub-regional shopping hierarchy.

### Sub-Regional Retail Hierarchy

5.05 Table 5.1 illustrates the position of the sub-region’s principal centres based on the Venuescore’s UK Shopping Venue Rankings 2013-14. Venuescore’s index ranks 2,711 retail venues within the UK (including town centres, stand-alone malls, retail warehouse parks and factory outlet centres) based on the strength of their current retail provision. Towns and major shopping centres are rated using a scoring system which takes account of the presence in each location of multiple retailers – including anchor stores, fashion operators and non-fashion multiples.

5.06 Venuescore allocates each centre within a tier, reflecting its level of retail provision. The eight tiers comprise (highest to lowest): ‘Major City’, ‘Major Regional’, ‘Regional’, ‘Sub-Regional’, ‘Major District’, ‘District’, ‘Minor District’ and ‘Local’. The rankings in the table represent the position of the centres at the time of the most recent 2013 Rankings, as well as competing surrounding destinations. The market position index and classification, as set out in the below table provides an indication as to whether a retail venue’s focus is upmarket (luxury goods) or more downmarket (discount stores).

5.07 Darlington is classed as a regional centre by Venuescore and is ranked 66<sup>th</sup> of all the centres surveyed, placing it within the top 3% of the UK shopping venues considered in the Rankings. As would be expected, Darlington is the highest ranked centre in the Study Area, with its role ensuring that it occupies a significantly more elevated position in the Rankings than nearby towns such as Bishop Auckland and Richmond. Within the North East region it is the fourth highest ranked centre which places it ahead of Durham and Sunderland, but below the other larger centres of Middlesbrough and Newcastle (located approximately 25 kilometres and 60 kilometres away from Darlington by road) and below the Metro Centre (approximately 55 kilometres). Shopping patterns, notably in the north and eastern areas of the Study Area, are therefore influenced to some degree by these higher-order venues.



5.08 Despite this, Darlington does have a diverse retail offer and continues to accommodate a variety of independent traders, particularly within the Victorian Covered Market and in the Grange Road area. The open-air and speciality markets in the town also help to distinguish Darlington from other competing centres and are likely to assist in attracting visitors from further afield. Morton Park, North Road district centre and Yarm Road local centre are included in the Venuescore list as several national operators are accommodated in these locations, including Aldi, Morrisons and B&Q.

**Table 5.1: Venuescore’s Sub-Regional Shopping Hierachy**

Centre	Score	Classification	Rank 2013	Market Position Classification	Market Position Index (Average 100)
Newcastle	409	Major City	11	Middle	108
MetroCentre, Gateshead	241	Major Regional	47	Middle	109
Middlesbrough	215	Regional	57	Middle	91
<b>Darlington</b>	<b>203</b>	<b>Regional</b>	<b>66</b>	<b>Middle</b>	<b>96</b>
Sunderland	182	Regional	87	Lower Middle	87
Durham	134	Sub-Regional	167	Middle	106
Stockton	127	Sub-Regional	182	Lower	79
South Shields	112	Sub-Regional	203	Lower Middle	80
Redcar	101	Sub-Regional	234	Lower	72
Washington	97	Sub-Regional	241	Lower	76
Bishop Auckland	91	Sub-Regional	252	Lower Middle	82
Newton Aycliffe	34	Minor District	781	-	-
Barnard Castle	25	Minor District	1,061	-	-
Richmond	21	Local	1,263	-	-
<b>Yarm Road Local Centre</b>	<b>12</b>	<b>Local</b>	<b>2,061</b>	-	-
<b>Morton Park</b>	<b>11</b>	<b>Local</b>	<b>2,216</b>	-	-
<b>North Road District Centre</b>	<b>10</b>	<b>Local</b>	<b>2,428</b>	-	-

Source: Venuescore UK Shopping Venue Rankings 2013-2014

## Darlington Town Centre

5.09 Darlington is a traditional market town with a historic role as an important industrial and manufacturing centre. It now acts as the key focus for retailing, leisure and commercial activities within both the Borough and beyond, attracting visitors from further afield including County Durham and North Yorkshire. It performs a regional role in the shopping hierarchy, with the Darlington Core Strategy (adopted May 2011) recognising that Darlington is one of the Borough’s key assets and that the retailing of comparison goods, such as clothing, underpins the town centre’s economy.





- 5.10 The main focus for retailing in Darlington is concentrated along the pedestrianised areas of High Row, the southern section of Northgate and also within the indoor Queen Street and Cornmill Shopping Centres. These are designated as Primary Shopping Frontages by the Borough of Darlington Local Plan Proposals Map (adopted November 1997) and accommodate many of the national retailers in the centre. The Secondary Shopping Frontages of the town include the quieter areas along Skinnergate, Bondgate and Grange Road, with these areas accommodating a mix of independent traders and national multiple businesses.
- 5.11 In addition to the permanent indoor Covered Market, Darlington accommodates a number of frequent outdoor markets. Each Monday and Saturday, an outdoor market is held selling food, clothing, household goods, furnishings and so on. The Saturday and Monday markets are located along Northgate, Prospect Place, High Row and West Row.
- 5.12 The regular markets are supplemented by a series of specialist markets throughout the year. A summer market is due to take place in August this year, selling gifts and produce, supplemented with live music and entertainment, and regular Christmas markets take place annually from late November. A People’s Market also takes place on the first Sunday of every month, seeking to provide ‘something for everyone’, including hand-made jewellery, gifts and crafts, cakes, fudge, jams, dairy and flowers.
- 5.13 We also note the efforts that are being made to bolster the market by offering new Darlington-based businesses the opportunity to take a market stall free of charge once a year to promote and showcase their business and help reach a new customer base. Local charities are also able to take advantage of a similar offer.
- 5.14 As a sub-regional centre, Darlington also sustains a diverse variety of administrative and civic facilities, including the Town Hall and Crown Street library. The centre also contains a number of leisure venues, including Dolphin Leisure Centre, which helps bring visitors to the town and add to its vibrancy. The Odeon Cinema and Darlington Civic Theatre are both located outside the town centre boundary, within the defined Northgate and Parkgate Fringe Shopping Areas.
- 5.15 The previous 2008 Darlington Retail Study identified that there were two main development sites in the town, namely land at Commercial Street and the Feethams area on the site of the former bus depot. The Darlington Core Strategy also identifies that the Commercial Street area provides the greatest opportunity to accommodate further significant comparison goods floorspace in the town. However, this planned development has stalled for several years due to the economic downturn,



though the Making and Growing Places Preferred Options Development Plan Document of June 2013 clarifies that the Council is still working with potential developers to realise a scheme in this area.

- 5.16 Planning permission was however granted in December 2013 for a large scale leisure development at Feethams, which is to provide a nine-screen Vue cinema, 80 bed Premier Inn hotel and a number of food and drink units. We are aware that recent press reports<sup>28</sup> suggest that a start is to be made on site in late summer 2014, with the development open to the public in spring 2016. In addition, a new office development at Feethams, adjacent to the Town Hall, will open at the start of 2015 and will accommodate around 400 Department for Education employees. Clearly, the former development has the potential to help kick-start the town centre's evening and cultural economy and both have the potential to create 'spin off' benefits for existing businesses.
- 5.17 The Council regularly surveys the Borough's centres to monitor their composition and vacancy rate. The latest survey of the town was completed in August 2012 and includes details of the stores within the boundaries of the town centre and Fringe Areas, as defined by the Local Plan Proposals Map. An update of the survey was undertaken by WYG in December 2013 to inform this Study. It is noted that the Making and Growing Places Preferred Options document does recommend that the town centre boundary should be extended to include several additional areas, including two of the existing Fringe Shopping Areas (Duke Street and Bondgate) to the west. However, for the purposes of this analysis, and in order to compare the updated store details with those from previous years, the existing Local Plan Proposals Map town centre boundary has been used as the basis for our detailed analysis of the composition of the centre.

#### Diversity of Uses

- 5.18 We have reviewed the diversity of retail and leisure uses accommodated in the town centre (by number, type and quantum of floorspace provided) and provide our findings below. A plan illustrating the location and use of each unit in the town centre (as defined by Experian Goad) is provided at Appendix 4.
- 5.19 It should be noted that, in order to ensure consistency with the Council's own methodology in respect of recording the composition of the centre, Tables 5.2 and 5.3 exclude a number of uses, including hotels (falling within Use Class C1), health centres and religious institutions (Use Class D1), sports centres (Use Class D2) and amusement arcades (sui generis).

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<sup>28</sup> Northern Echo article of 21 April 2014 headlined 'New Details of Darlington Cinema and Leisure Development Revealed Ahead of Summer Start Date'



5.20 Table 5.2 indicates that the current level of convenience stores in the town centre is marginally below the national average level of provision, with the 34 units comprising 8.4% of the stock and providing a total floorspace of 4,802 sq.m. Despite there being a slight increase in the number of food stores since July 2009, the existing provision in the centre still tends to be small in scale and generally only meets the top-up needs of shoppers in the area. Although national convenience goods retailers in Darlington include Greggs and Thorntons, the majority of convenience stores are run by independent traders. The Victorian Covered Market accommodates a variety of local convenience and comparison businesses, with the frequent outdoor markets also enabling visitors to purchase goods from niche retailers.

**Table 5.2: Darlington Town Centre Diversity of Use Figures**

	Convenience		Comparison		A1 Services		A2		A3/A4/A5		Vacant	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
July 2009	31	7.3%	186	44.1%	53	12.6%	31	7.3%	66	15.6%	55	13.0%
June 2011	33	7.8%	188	44.7%	58	13.8%	30	7.1%	69	16.4%	43	10.2%
Dec 2013	34	8.0%	183	43.2%	62	14.6%	30	7.1%	69	16.3%	46	10.8%
<b>Average</b>	-	<b>8.6%</b>	-	<b>34.4%</b>	-	<b>13.5%</b>	-	<b>12.2%</b>	-	<b>19.7%</b>	-	<b>11.6%</b>

Source: Darlington Council database and WYG site visit of December 2013

Note: UK average figure derived from Experian Goad December 2013 dataset and adjusted to be comparable with Council's classifications

**Table 5.3: Darlington Town Centre Floorspace Figures**

	Convenience	Comparison	A1 Services	A2	A3/A4/A5	Vacant
	sq.m	sq.m	sq.m	sq.m	sq.m	sq.m
July 2009	4,720	77,543	6,772	4,133	9,417	10,086
June 2011	4,780	79,438	7,348	4,085	9,648	8,136
Dec 2013	4,802	78,419	7,339	4,215	9,373	9,449

Source: Darlington Council database and WYG site visit of December 2013

Note: The Council's database does not record the relevant floorspace figures for several types of units, including banks, restaurants and public houses and therefore it should be recognised that the data in the above table omits these types of business

5.21 The relatively strong level of comparison goods units and floorspace in Darlington town centre reflects its role as a higher order centre in the regional retail hierarchy. Although there has been a small reduction in the number of comparison goods operators in the town centre since 2009, Darlington still accommodates 24 of the top 27 comparison retailers identified by Experian Goad, including Next, Primark and Topshop. These tend to be located in the largest outlets in the town, notably in the purpose-built indoor Cornmill Shopping Centre and along the Primary Shopping Frontages on Northgate. Other large outlets elsewhere in the town centre include TK Maxx at Crown Street and Wilkinsons at Quebec Street.



- 5.22 Darlington town centre also accommodates a number of lower order stores, including 15 charity shops and five discount goods units.
- 5.23 There has been a notable increase in the provision of Use Class A1 service outlets in the town since July 2009, with the majority of new units operating as hairdressers (there are 24 such units in total), reflecting the national growth trend for this sector. As we would expect, these units tend to be located within the smaller units with lower rental values along the Secondary Shopping Frontages and in more peripheral areas of the town. Other key service units in the centre include five opticians, four national travel agents and a Post Office on Crown Street.
- 5.24 The financial and professional services sector (falling within Use Class A2) includes a variety of national and independent businesses, including banks, building societies, estate agents and betting shops. Although there is a slight under representation of these units in Darlington compared to the national average, the town does accommodate a total of 18 banks (including Barclays, HSBC and Santander), seven betting shops (including Coral and Ladbrokes) and four estate agents.
- 5.25 Unsurprisingly, the national bank operators tend to be located in the largest units within the Primary Shopping Frontages, whilst the betting shops are usually situated within the Secondary Shopping Frontages and the peripheral areas of the centre. There is also a particular concentration of professional businesses (notably estate agents) along the existing Duke Street Fringe Area.
- 5.26 The Use Class A3, A4 and A5 food and drink sector comprises restaurants and cafes, drinking establishments and hot food takeaway units, but excludes other types of leisure outlets such as cinemas, sports centres and bingo halls. All of the outlets, with the exception of eight of the cafes and restaurants, are located either within the Secondary Shopping Frontages or elsewhere in the town, with a particular concentration of evening economy leisure activities along Skinnergate, including several public houses and takeaways.
- 5.27 Darlington also accommodates a mix of other non-commercial and administrative uses which complements its existing retail and service offer, including a library and numerous public and private sector offices. In January 2014, a change of use application to convert the vacant 1970s Northgate House office, to the north of the town centre boundary, into 50 flats was granted planning permission and it is currently being marketed for sale. We also note that Regent House at Commercial Street is in the process of being converted by Coast & Country Housing into affordable homes, with the development expected to be ready for occupation in Spring 2015.



### Vacancies

- 5.28 The number of vacant units within a centre can provide a good indication of how a town is performing. However, care should be taken when interpreting figures as vacant units will be found in even the strongest of town centres as it is to be expected that there is some 'churn' in the market with units changing representation. However, on other occasions properties may lay vacant because they are poorly maintained, unsuited to modern retailing requirements or are simply not being actively marketed. Conversely, a low vacancy rate does not necessarily mean that a centre is performing well. For example, if there is a proliferation of charity shops and other uses not usually associated with a town centre it may be a sign of decline, particularly where these uses are located in prime locations.
- 5.29 Our site visit of December 2013 identified approximately 9,449 sq.m of vacant floorspace across 46 units within the centre. There are 15 vacant units within defined Primary Shopping Frontage areas (notably within the Queen Street Shopping Centre), 21 in the Secondary Shopping Frontage areas and 10 within the wider town centre boundary. The units range in size from 15 sq.m to the 900 sq.m former Peacocks clothing store on Northgate. There is also a particular concentration of vacant units which are slightly outside the centre boundary to the north of the A167, including several large warehouse units which previously accommodated Allied Carpets and Storey Carpets. A plan illustrating the location of each vacant unit in the town centre is provided at Appendix 5.
- 5.30 Although the number of vacant units has declined from a peak of 55 in July 2009, there has been a marginal increase since June 2011 when only 43 units were recorded as being vacant. A total of 25 of the previously vacant units in 2011 now accommodate new tenants, whilst 28 previously open units are now vacant. In addition, 13 units have been recorded as being vacant at all three survey dates (July 2009, June 2011 and December 2013), with these units ranging in size from 25 sq.m to 600 sq.m. Two of these stores are located in the indoor Queen Street Shopping Centre within the Primary Shopping Frontages, though the majority are located in Secondary Frontage areas and elsewhere in the town centre.
- 5.31 Whilst the number and proportion of town centre vacancies is not considered particularly problematic given recent wider economic conditions, it is evident that certain units have been vacant for a considerable period. This suggests that these units may either fail to appropriately meet the needs of modern retailers or that the premises are not sufficiently visible in the centre (or are not sufficiently integrated into the centre's 'retail circuit'). Whilst the vacancy level is not considered exceptional, long term vacant units adversely impacts on users' perception of a centre and appropriate proposals to bring such units back into active use should be welcomed.



### Customer Views and Behaviour

5.32 The household survey undertaken by NEMS sought to identify how frequently respondents visited particular centres and what their views were in respect of the centres they did visit. We summarise the principal findings of the survey in respect to those questions of relevance to the health of Darlington town centre and the other centres below.

#### Do you ever visit any of the retail centres in Darlington Borough?

5.33 Unsurprisingly, Darlington town centre was the centre frequented by the highest number of respondents, with 88.1% of those questioned across the Study Area stating that they visited at least on occasion. As would be expected, the likelihood of respondents visiting Darlington was directly proportional to their proximity to the centre, with Zones 1 and 2 – the zones which are mostly tightly focused around the centre – providing the highest positive response rates (with respectively 97.8% and 95.4% of all respondents in these zones visiting Darlington town centre).

5.34 The relatively limited proportion of respondents visiting other centres in the Borough serves to emphasise the key role Darlington town centre plays in meeting the needs of residents. As Table 5.4 below identifies, the centre with the next highest number of respondents who visit is Yarm Road local centre (with 35.6% of all Study Area respondents visiting), followed by North Road district centre (25.5%) and then Cockerton district centre (23.1%).

**Table 5.4: Proportion of Respondents who have Visited Particular Centres**

Centre	Proportion of Respondents who have Visited
Darlington town centre	88.1%
Cockerton district centre	23.1%
North Road district centre	25.5%
Middleton St George local centre	6.5%
Mowden local centre	10.3%
Neasham Road local centre	22.7%
West Park local centre	9.0%
Whinfield local centre	15.0%
Yarm Road local centre	35.6%
Don't visit any of the centres	8.1%

Source: Question 27 of Household Survey, Appendix 1

#### Which centre do you visit the most?

5.35 Once again, as expected, Darlington town centre is by a very significant margin the centre which respondents visit the most. Across the Study Area as a whole, Darlington is the most visited centre for



70.1% of respondents, with Yarm Road in second position (being the most visited centre for 10.4% of respondents), followed then by Neasham Road local centre (4.5%) and then Cockerton district centre (4.3%). Table 5.5 identifies that there are two centres – Middleton St George and West Park local centres – which fewer than a single percent of respondents identify as their most visited centre.

**Table 5.5: The Centre Respondents Visit Most Frequently**

Centre	Proportion of Respondents who have Visited
Darlington town centre	70.9%
Cockerton district centre	4.3%
North Road district centre	3.0%
Middleton St George local centre	0.8%
Mowden local centre	1.5%
Neasham Road local centre	4.5%
West Park local centre	0.8%
Whinfield local centre	3.8%
Yarm Road local centre	10.4%

Source: Question 28 of Household Survey, Appendix 1

#### How frequently do you visit your most visited centre?

- 5.36 When asked about the frequency of visit to particular centres, it is evident that those who visit Darlington does so on a less frequent basis than those who visit smaller centres. This is to be expected as the smaller centres generally meet 'day to day' convenience and service needs. Accordingly, as Table 5.6 identifies, the proportion of respondents who identified Darlington as their most visited centre and visit the town centre once a week or more was 30.6%, whereas more than eight out of ten respondents stated that they visit Cockerton district centre and Mowden district centre more than once a week. More than six out of ten respondents for whom Darlington is the most visited centre visit once a month or more frequently.



**Table 5.6: The Frequency of Trips to Respondents' Most Visited Centre**

Centre	Once a Week or More	Once a Fortnight to Once a Month	Once Every Two or Three Months	Less Often than Once Every three Months
Darlington town centre	30.6%	33.1%	21.2%	15.1%
Cockerton district centre	84.1%	12.6%	0.0%	3.3%
North Road district centre	65.2%	14.8%	6.1%	13.9%
Middleton St George local centre	57.6%	11.0%	0.0%	31.3%
Mowden local centre	82.2%	0.0%	0.0%	17.8%
Neasham Road local centre	52.0%	19.3%	14.4%	14.3%
West Park local centre	68.9%	0.0%	0.0%	31.1%
Whinfield local centre	69.1%	10.8%	5.5%	14.6%
Yarm Road local centre	44.8%	24.0%	19.8%	11.4%

Source: Question 29 of Household Survey, Appendix 1

How do you usually travel to your most visited centre?

5.37 Table 5.7 indicates that more than three-quarters of respondents (76.8%) visiting Darlington travel by private motor vehicle, with 14.3% making their visit by bus. As would be expected, given its size and the fact that it serves a wide catchment, Darlington is the centre which receives the lowest proportion of trips on foot. Three centres secure more than a third of trips on foot, these being Cockerton district centre, Mowden local centre and West Park local centre. Yarm Road local centre secures the greatest proportion of trips by private motor vehicle (91.1%), which is a consequence of its relatively peripheral location, main food shopping and bulky goods role, and plentiful car parking.

**Table 5.7: The Mode of Travel Used to Access Respondents' Most Visited Centre**

Centre	Car or Van	Bus	On Foot	Other
Darlington town centre	76.8%	14.3%	5.6%	3.3%
Cockerton district centre	57.5%	2.5%	34.1%	5.9%
North Road district centre	68.6%	0.0%	25.6%	5.8%
Middleton St George local centre	65.1%	0.0%	25.2%	9.7%
Mowden local centre	66.1%	0.0%	33.9%	0.0%
Neasham Road local centre	62.5%	8.1%	23.1%	6.3%
West Park local centre	66.1%	0.0%	33.9%	0.0%
Whinfield local centre	62.5%	8.1%	23.1%	6.3%
Yarm Road local centre	91.1%	1.8%	7.1%	0.0%

Source: Question 30 of Household Survey, Appendix 1





What is the main reason for visiting your most visited centre?

5.38 By far the most popular reason for respondents to visit Darlington town centre is the choice and range of shops, which was mentioned by 60.3% of respondents as their main reason for visiting. Whilst this was also the most popular reason to visit four of the other eight centres, there is only one other centre where it was identified as the main reason to visit by more than half of respondents (this being Neasham Road district centre). Table 5.8 identifies that the second most frequently cited reason to visit a centre is that it is close to home, which was the most popular reason to visit three centres and the second most popular reason to visit six centres.

**Table 5.8: The Main Reason for Respondents Visiting Their Most Visited Centre**

Centre	1 <sup>st</sup> Most Popular	2 <sup>nd</sup> Most Popular	3 <sup>rd</sup> Most Popular	4 <sup>th</sup> Most Popular
Darlington town centre	Choice and range shops (60.3%)	Close to home (11.9%)	Choice of services (4.6%)	Choice of leisure facilities (4.5%)
Cockerton district centre	Close to home (34.9%)	Choice and range of shops (30.2%)	Choice of leisure facilities (10.2%)	Choice of services (6.6%)
North Road district centre	Choice and range shops (36.6%)	Close to home (16.3%)	New supermarket (12.4%)	Close to friends or family (7.2%)
Middleton St George local centre	Close to home (31.4%)	Close to friends or family (27.8%)	Choice of services (18.3%)	Choice and range shops (9.0%)
Mowden local centre	Choice and range of shops (41.0%)	Close to home (18.2%)	Close to work (11.2%)	Choice of leisure facilities (9.3%)
Neasham Road local centre	Choice and range of shops (56.5%)	Close to home (30.6%)	Nothing in particular (4.9%)	Convenient car parking (2.3%)
West Park local centre	Choice of services (42.2%)	Close to home (24.8%)	Close to friends (17.5%)	Choice of leisure facilities (15.5%)
Whinfield local centre	Close to home (47.1%)	Choice and range of shops (14.7%)	Nothing in particular (11.0%)	New supermarket (9.1%)
Yarm Road local centre	Choice and range of shops (49.9%)	Close to home (13.2%)	New supermarket (8.3%)	Close to work (6.0%)

Source: Question 31 of Household Survey, Appendix 1

Are there any measures that would encourage you to visit your most visited centre more?

5.39 Table 5.9 identifies that the most frequently cited measure which would encourage respondents to visit centres more frequently is the provision of an increased choice and range of shops. This was the most popular measure identified for four centres and the second most popular measure identified for three centres. In Darlington town centre, cheaper car parking was the most frequently cited measure which would encourage additional visits (mentioned by 16.6% of respondents), followed by an increase in the choice and range of shops (11.1%) and then by additional car parking (10.8%).



**Table 5.9: Measures Which Would Encourage Respondents to Visit Their Most Visited Centre More**

Centre	1 <sup>st</sup> Most Popular	2 <sup>nd</sup> Most Popular	3 <sup>rd</sup> Most Popular	4 <sup>th</sup> Most Popular
Darlington town centre	Cheaper parking (16.6%)	Increased choice and range of shops (11.1%)	More parking (10.8%)	Increased public transport (2.7%)
Cockerton district centre	More parking (6.6%)	Better environment (6.3%)	Presence of a bank or more banks (6.0%)	Improvement in non-food shops (5.3%)
North Road district centre	Increased choice and range of shops (8.4%)	Improved quality of shops (7.7%)	More parking (6.1%)	Cheaper parking (3.6%)
Middleton St George local centre	Increased choice and range of shops (14.6%)	Less traffic congestion (11.6%)	More parking (joint 3 <sup>rd</sup> , 5.8%)	Increased public transport (joint 3 <sup>rd</sup> , 5.8%)
Mowden local centre	Increased choice and range of shops (11.2%)	More parking (4.3%)	Increased public transport (3.8%)	None mentioned
Neasham Road local centre	Increased choice and range of shops (9.5%)	Less traffic congestion (7.1%)	Better prices (3.3%)	Discount foodstores within town centre (1.7%)
West Park local centre	Increased public transport (24.8%)	Increased choice and range of shops (joint 2 <sup>nd</sup> , 17.5%)	More parking (joint 2 <sup>nd</sup> , 17.5%)	None mentioned
Whinfield local centre	Improved street cleaning (7.3%)	Increased choice and range of shops (5.4%)	Improved leisure facilities (4.3%)	More parking (3.7%)
Yarm Road local centre	More parking (5.1%)	Less traffic congestion (4.0%)	Cheaper parking (3.6%)	Increased public transport (3.3%)

Source: Question 32 of Household Survey, Appendix 1

### Why don't you visit Darlington town centre more?

5.40 The majority of respondents who do not visit Darlington town centre failed to find particular fault with the offer of the centre and instead provided more practical reasons to explain their failure to visit. As we set out below at Table 5.10, the most popular reason given was that the respondent had no particular reason to visit (which was cited by 43.0% of respondents), followed by the fact that the centre is too far away from either home or work to merit a visit (21.8%). A significant proportion of respondents also mentioned their dissatisfaction with car parking which was stated to be either inconveniently located (14.3%) or too expensive (12.9%).



**Table 5.10: Reasons Why Respondents Don't Visit Darlington Town Centre More**

Response	Proportion of Respondents who Gave Response
No particular reason to visit	43.0%
Too far away from home	21.8%
Inconveniently located car parking	14.3%
Expensive car parking	12.9%
Environmental Quality of Centre	5.1%
Too busy	2.9%
Lack of choice and range of shops	2.0%
Not accessible by public transport	2.0%

Source: Question 33 of Household Survey, Appendix 1

5.41 A comprehensive overview of customers' shopping patterns was provided at the previous Section 4 of this report.

Retailer Representation

5.42 The retailer representation indicator is an important sign of the vitality and viability of a centre as it demonstrates the existing and potential future level of operators in the locality. We have reviewed the number of national and independent retailers which are present within Darlington town centre, recognising that multiple retailers (such as Boots, Marks & Spencer and Primark) can act as anchor tenants in the centre and can add to its appeal and create additional pedestrian footfall.

5.43 The Venuescore UK Shopping Venue Rankings has also already been used to identify the retail hierarchy of Darlington and other nearby centres, using a weighted scoring system which takes account of the presence in each location of multiple retailers. The Venuescore ranking identifies Darlington as being a key centre in the North East with a high street retail offer bettered by only Newcastle, the Metro Centre and Middlesbrough.

5.44 It is therefore evident that Darlington town centre is performing well and continues to sustain a strong variety of both national and independent traders. It accommodates 24 of the top 27 Experian Goad defined top comparison retailers (with the exceptions being Debenhams, H&M and John Lewis), reflecting its important role within the Study Area. The key multiple retailers are concentrated within the larger stores on Northgate (including BHS, Marks and Spencer and Next) and within the indoor Cornmill Shopping Centre (including Primark and WH Smith), which reflects their overall requirements for the largest store footprints in the busiest locations. The previous Retail Study of 2008 noted that many of the national operators (notably River Island and Primark) had increased the size of their



stores by relocating into amalgamated units. This trend has continued, with Next moving into a newly extended unit (which includes the former Woolworths store) within the Cornmill Shopping Centre in 2010.

- 5.45 The town also successfully distinguishes itself from other retail destinations in the region by accommodating a significant number of independent retailers within town centre units and at the indoor and outdoor markets. The Sunday People's Market, for example, was named 'Britain's Favourite Market' in 2013 and this and other market initiatives helped to boost visitor numbers and differentiate Darlington from other towns.
- 5.46 The WYG survey of December 2013 identified that a total of 68 retail and service operators either ceased trading, relocated or opened new stores in Darlington since the previous Council survey in August 2012. The largest unit with a new tenant is the former JJB Sports store on East Street (outside the Primary and Secondary Shopping Frontage areas) which opened as Sports Direct in March 2013. The former Sports Direct store in Cornmill Shopping Centre is now a Scotts menswear clothing store, whilst the previous Scotts unit on Northgate is vacant. Other notable national operators which have relocated in the past few years to more central units within the town centre include Superdrug and Bon Marche. The former Peacocks store in the Primary Shopping Frontage area on Northgate is also now vacant, though it should be noted that this also reflects the wider financial issues with the company which resulted in the nationwide closure of 224 outlets.
- 5.47 In assessing the health of centres, it is also relevant to consider which retailers may be intending to seek representation in Darlington in the future. EGI's records set out retailer requirements for additional floorspace in particular town centres, including Darlington. Whilst it should be noted that EGI principally records the requirements of high street multiple operators, it is of relevance in identifying the type and broad number of retailers currently seeking representation.
- 5.48 EGI records a total of 39 retail and leisure operators currently seeking premises in the town centre, including Bodycare, Maplin and Poundstretcher. This is an increase from the requirements recorded at the time of the previous 2008 Study, which identified 24 specific requirements for Darlington. The 2008 Study partly attributed this seemingly latent demand to the lack of large, modern units in the town centre having a floorspace of between 300 sq.m and 600 sq.m. We agree that the relative lack of such modern units is still an issue, particularly due to the delays associated with implementing the proposed Commercial Street development.



5.49 It had been envisaged that the scheme would address this particular issue and provide around 30 additional units which would likely be attractive to national multiples. However, as previously stated, this development has for the moment stalled as a result of the economic downturn.

Commercial Rents

5.50 EGi provides estimated Zone A rents across a number of town centres, based on Colliers International data. Zone A rents relate to the first six metres of floorspace from the shop window.

5.51 There has been a general decline in rents over the past five or six years and, whilst, Darlington has not been immune to the trend, the decline in its rents has not been as marked as in other centres. Table 5.11 indicates that rents in Newcastle reduced from a high of £325 per sq.ft in 2008 to £200 per sq.ft in 2013 (representing a reduction of 38.5%). However, even this reduction compares favourably to that experienced in Redcar (a reduction of 53.8%) and Stockton-on-Tees (a reduction of 46.2%). In Darlington, Zone A rents reduced from a high of £100 per sq.ft in 2008 to £75 per sq.ft in 2013 (equating to a reduction of 25.0%). Whilst this change is obviously significant, Zone A rents in Darlington have proved to be more resilient than those in many nearby centres, which may not only be reflective of ongoing demand, but also of the fact that there is a limited stock of larger format retail space in primary locations.

**Table 5.11: Zone A Rents in Darlington and Neighbouring Centres Between 2005 and 2013**

	2005	2006	2007	2008	2009	2010	2011	2012	2013	Change Between 2008 and 2013
Newcastle	£320	£325	£325	£325	£325	£320	£285	£260	£200	-38.5%
Durham	£100	£105	£110	£120	£90	£95	£90	£100	£105	-12.5%
Middlesbrough	£135	£135	£150	£150	£110	£110	£100	£100	£90	-40.0%
Hartlepool	£90	£110	£110	£110	£90	£90	£90	£85	£85	-22.7%
Darlington	£85	£90	£100	£100	£75	£75	£75	£80	£75	-25.0%
Stockton-on-Tees	£60	£60	£60	£65	£40	£40	£40	£35	£35	-46.2%
Redcar	£60	£60	£65	£65	£45	£40	£35	£35	£30	-53.8%

Source: EGi Town Reports based on Colliers International data, July 2014

Pedestrian Flows

5.52 During our survey of the centre in December 2013 and subsequent visits, we have observed pedestrian activity and considered the retail 'circuit' evident in Darlington town centre. The greatest levels of pedestrian traffic are evident along the pedestrianised routes of High Row, Northgate and in the Cornmill Shopping Centre, with lower levels noted along Tubwell Road and Grange Road. It is



evident that, whilst centrally located, the Queen Street Shopping Centre benefits from lesser footfall than might be anticipated, which is exacerbated by its relatively high proportion of vacancies. Skinnergate benefits from steady pedestrian traffic throughout the day and into the evening as a consequence of its food and drink offer. Whilst Darlington town centre does to some degree provide a logical 'circuit' for shoppers to follow without the need to double bank on themselves or venture too far afield to access particular shops, certain areas – most notably Queen Street Shopping Centre – appear less well integrated than we would expect. Whilst both entrances to Queen Street Shopping Centre are marked by an assortment of banners, the centre currently lacks the type of 'big name' high street multiple retailer which can act as a driver of footfall. Accordingly, Queen Street Shopping Centre appears to benefit from a lesser level of footfall than we would ordinarily expect in such a central location.

5.53 The Council benefits from pedestrian count data which is automatically generated by the permanent PFM Advantage system which records pedestrian movements at seven locations in Darlington town centre, namely Blackwellgate, Bondgate, High Row, Northgate, Post House Wynd, Skinnergate and West Row. We have analysed the overall movements recorded cumulatively at these destinations on an annual basis going back to 2008 and present this below at Table 5.12.

**Table 5.12: Annual PFM Advantage Count Summary at All Locations**

2008	2009	2010	2011	2012	2013	Change Between 2008 and 2013
25,156,881	24,720,738	24,336,345	24,127,019	23,249,614	21,398,964	-14.9%

Source: PFM Advantage footfall counts for Darlington Borough Council

5.54 The data indicates that the town centre has experienced a consistent decline in pedestrian traffic between 2008 and 2013, with each year experiencing a lesser level of traffic than the recorded in the preceding year. Particularly substantial reductions in pedestrian traffic were recorded between 2011 and 2012 (when total movements reduced from 24,127,019 to 23,249,614) and between 2012 and 2013 (when total movements reduced from 23,249,614 to 21,398,964). In total, the overall level of recorded movements has fallen from 25,156,881 in 2008 to 21,398,964 in 2013, which equates to a 14.9% reduction in traffic.

5.55 The Council has also made available pedestrian count data from October 2013 which identifies where pedestrians enter and exit the town centre. By far the busiest pedestrian 'gateway' into the centre appears to be along the Fringe Shopping Area of Duke Street. This may be attributable to its location



adjacent to a residential area and the fact that it represents a quieter access route into the centre, away from the busy A68/A167 ring road. Duke Street is also in proximity to the large Queen Elizabeth Sixth Form College and students from the college are regular users of Darlington town centre both at lunchtime and after lessons. Other busy entry points identified are Bondgate and St Augustines, with high levels of cycle traffic also recorded opposite the police and fire station on St Cuthberts Way.

- 5.56 We anticipate that the forthcoming Feethams leisure and office developments will have a tangible impact on both the number of people visiting the centre and how people make their way around the centre. Most obviously, the Feethams developments will act to anchor the southern part of the centre and drive pedestrian traffic from this part of the centre northwards. As a consequence, there will likely be opportunity for complementary businesses to benefit from 'spin off' trade on Blackwellgate, Horse Market, Church Row and other nearby thoroughfares.

#### Accessibility

- 5.57 The accessibility of a centre is determined by the ease and convenience of access by a choice of means of travel – including that which is provided to pedestrians, cyclists and disabled people – and the ease of access from the main arrival points to the principal attractions in the centre.
- 5.58 The main centre car parks are located within the multi-storey facilities on Crown Street (which provides approximately 420 spaces) and East Street (338 spaces), with additional off-street parking areas available in other areas including Feethams (122 spaces), Beaumont Street (152 spaces, but to be increased subsequent to the completion of a new multi-storey car park) and Commercial Street East and West (together providing 306 spaces). Other smaller car parks are located on Winston Street (81 spaces), Abbott's Yard (94 spaces), Archer Street (60 spaces) and Salt Yard (30 spaces). The recently published Darlington Draft Parking Strategy 2014-2026 identifies that there are more than 4,000 off-street parking spaces and around 375 on-street spaces within close proximity of the town centre, of which around two thirds are Council operated.
- 5.59 The Feethams leisure scheme application will result in the loss of an existing surface-level car park, but will provide a new 70 space car park. Planning permission for a substantial new multi-storey car park at Beaumont Street was granted in June 2014. The Beaumont Street car park will provide 650 spaces across five levels and will mitigate the loss of surface level car parking and result in an increased supply to help service future needs.
- 5.60 The short stay Council car parks charge £1 per hour and the Strategy identifies that parking charges are considered to be at an appropriate level when compared to similar towns, including Middlesbrough



and Stockton. A 'free after 3pm' parking campaign was also introduced during December 2013 to encourage greater numbers of shoppers to the town.

- 5.61 Darlington's former bus station to the south of the Town Hall, was demolished in 2009 and the centre now has a number of bus stops located throughout the retail core. There is a concentration of stops located on Tubwell Row, to the south of the Cornmill Shopping Centre and at the junction of Northgate and Crown Street. Darlington railway station is located within walking distance of the centre to the east of the Victoria Road Fringe Shopping Area. Both offer services to the wider sub-region, including to Middlesbrough, Durham, the outlying district and local centres and the wider national network. Accordingly, the centre is considered to provide relatively easy access to the outlying population by a range of different transport modes.
- 5.62 Within the centre, the £9.2m Pedestrian Heart Project was completed in 2007 and has involved rationalising bus access and improving pedestrian provision around the market hall and Horse Market. Bus routes were reconfigured, with a bus-only gate maintaining excellent access by bus into the centre. Car parking is provided at the edge of the core. Partly as a consequence of the project, the centre of Darlington is relatively easy for most to navigate on foot and is generally a pleasant environment for pedestrians. The centre itself is also relatively flat, though slopes are apparent to the south east, along Feethams, Priestgate and Horse Market, which, to some degree, will affect their usage by less mobile visitors.

Town Centre Environmental Quality

- 5.63 It was evident during the site visit in December 2013 that the overall environmental and public realm quality of the town centre was generally good, with little evidence of litter or other potential issues. The Distinct Darlington Business Improvement District (BID) appointed rangers appear effective at helping to ensuring that the centre is well maintained and assisting in ensuring that Darlington remains a safe and pleasant centre to visit.
- 5.64 The Pedestrian Heart Project has improved the streetscape quality along High Row, with the high quality granite surfacing, new street lighting, seating and planting improvements enabling it to become a popular focal area. The works undertaken as part of this project have generally weathered well and provide a high-quality and attractive public realm in the centre of the town.
- 5.65 The other pedestrianised areas along the main shopping routes are generally tidy, free from litter and tree-lined, with conveniently located street furniture and well-maintained streets. However, other areas in the centre, notably along Bondgate and the Northgate fringe areas, do appear somewhat





'tired' by comparison, primarily due to their location on busy arterial roads and less maintained shopping frontages.

5.66 Darlington also contains a distinct mix of modern facilities and historic features, with the majority of the centre within the designated town conservation area. Key landmark buildings include the covered market hall and St. Cuthbert's Church, alongside the 88 listed buildings which help to retain the traditional and distinctive street pattern of the town.

5.67 Much of the town centre is included within Darlington Town Centre Conservation Area, which was originally designated in 1976 and which has been the subject of two subsequent extensions. The Conservation Character Appraisal was published in March 2010. It indicates that the Market Place and Market Buildings provide a clear focal point in the centre and that the points of entry to the space direct attention towards the key features of the Market Buildings, High Row and the Clock Tower. The Character Appraisal states that these features help characterise the area and enrich the Darlington experience for residents and visitors alike. The Character Appraisal also notes the architectural variety through the Conservation Area, which is said to provide for **'...a rich tapestry of building style and age that are distinctively Darlington.'**

#### Summary

5.68 In summary, we consider Darlington to be a generally healthy centre, which continues to perform a vital role for residents in the Borough.

5.69 This is evidenced by:

- The diverse range of national and independent retail stores and markets which helps to distinguish the town from other competing destinations and is likely to attract visitors from a wide catchment area;
- The below average level of vacancies in the centre (though there are some clusters which should be addressed);
- The high quality and well maintained environment of the town which complements its historic features;
- The emerging Feethams leisure scheme which will encourage additional national leisure operators to Darlington and which demonstrates a high level of interest in the town; and
- The potential to bring forward a scheme at the Commercial Street site, which remains a major opportunity for the centre.



- 5.70 Notwithstanding this, it is evident that the centre has been the subject of a decline in footfall over recent years, which is broadly consistent with the identified decline in the market share of clothing and footwear expenditure claimed by Darlington town centre retailers subsequent to the undertaking of the previous household shopper survey in 2008. Whilst this is of concern, planned and committed development in the town centre has the potential to not only to increase the numbers visiting the centre, but also help persuade those that do visit to linger and spend more money whilst they do so.
- 5.71 In terms of Darlington town centre's weaknesses, the expansion of the town centre is physically constrained by the busy dual carriageway along three-quarters of its boundaries. However, there are strong levels of pedestrian footfall entering the town from the peripheral areas via the series of underpasses which does indicate that this is not a particular issue. There is also evidence of a shortage of larger shopping units (with a floorplate of around 300 sq.m or greater) in the town, with the out-of-centre locations accommodating a significant proportion of commercial floorspace. It is hoped though that this will be addressed by the proposed Commercial Street development. Overall, it is evident that Darlington exhibits many of the characteristics of a 'vital' and 'viable' town centre and plays an important role in meeting the needs of local residents and visitors alike.

### District and Local Centres

- 5.72 As part of our instruction, we have been asked to consider the current performance of the district and local centres which service the day to day shopping needs of the Borough's population. At present, there are two designated district centres (Cockerton and North Road) and six local centres (Middleton St George, Mowden, Neasham, West Park, Whinfield and Yarm Road). We provide below an overview of the role and function of each centre, and the composition of uses in each (as ascertained by our surveys of January 2014).

#### Cockerton District Centre

- 5.73 Cockerton District Centre is located approximately 1.5 kilometres north west of the town centre and is a relatively large service centre comprising of units located on both sides of the A68. The centre includes a 1960s parade which is anchored by a Co-op Food supermarket. A 100 space car park to the rear of the parade serves the centre.
- 5.74 The Co-op unit (providing a gross floorspace of 740 sq.m) was formerly a Somerfield store and changed representation following the Co-operative Group's acquisition of Somerfield in 2009. There is a smaller Co-op Food convenience store (gross floorspace 365 sq.m) which is accommodated in modern premises further to the north up West Auckland Road. As set out below at Table 5.4, the rest



of the centre accommodates a strong mix of convenience and comparison goods retailers supplemented by additional Use Class A1 services (occupying 11 units), A2 financial and professional services (14 units), and A3, A4 and A5 food and drink uses (eight units). Accordingly, given the different uses accommodated in the centre, there is significant opportunity for visitors to link trips to different operators as part of the same journey.

5.75 Cockerton district centre serves the adjacent residential areas of Cockerton and Branksome and parts of Mowden and Pierremont. The centre is close to the boundary of Zones 1 and 4 and, whilst it attracts significant trade from both of these zones, its market penetration does not extend further afield. Both Co-op Food stores and the Heron unit attract main and top up food shopping from both of these two zones.

5.76 Whilst the centre appears to be generally performing well and there are no vacancies in the main precinct, the part of the centre which lies to the north of Cockerton Green appears more peripheral and benefits from a lesser footfall. Similarly, the centre extends a reasonable distance up West Auckland Road and this area is interspersed with residential properties and generally has a more secondary feel. The four vacant premises recorded at the time of our January 2014 survey are located in these more peripheral parts of the centre. Notwithstanding this, Cockerton district centre is clearly well used and performs an important shopping role to serve the needs of residents of the town's north western suburbs.

**Table 5.4: Cockerton District Centre Diversity of Use Figures**

	Convenience		Comparison		A1 Services		A2		A3/A4/A5		Vacant	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Nov 2012	12	22.6%	14	26.4%	11	20.8%	5	9.4%	7	13.2%	4	7.5%
Jan 2014	11	21.6%	14	27.5%	11	21.6%	3	5.9%	8	15.7%	4	7.8%

Source: Darlington Council database and WYG site visit of January 2014

**Table 5.5: Cockerton District Centre Floorspace Figures**

	Convenience	Comparison	A1 Services	A2	A3/A4/A5	Vacant
	sq.m	sq.m	sq.m	sq.m	sq.m	sq.m
Nov 2012	2,440	1,014	865	560	547	341
Jan 2014	2,320	1,109	865	380	679	284

Source: Darlington Council database and WYG site visit of January 2014

Note: The Council's database does not record the relevant floorspace figures for several types of units, including banks, restaurants and public houses and therefore it should be recognised that the data in the above table omits these types of business



### North Road District Centre

- 5.77 North Road district centre is the second largest centre in Darlington in terms of floorspace and is located about 1 kilometre north of the town centre around the junction of the A167 and Whessoe Road. The centre is located directly to the north of North Road railway station, but given the role and offer of the centre few shopping trips will be undertaken by train.
- 5.78 The centre is focused around the large Morrisons superstore which has a gross floorspace of 7,350 sq.m and, in addition to carrying a substantial comparison goods range, the Morrisons development also incorporates a number of concessions and facilities including a cafe, Co-operative Travel, a hairdressers and Darlington Indoor Bowling Club. The store has a very large car park to the rear which also serves the Bowling Club and the adjacent Bargain Tiles and Second Handtique units.
- 5.79 The second largest unit in the centre is the B&Q store (3,911 sq,m gross floorspace) which is located on Whessoe Road and which benefits from its own car park. Both the Morrisons and B&Q stores have significant penetration throughout the Study Area. The Morrisons store attracts trade from eight of the nine Study Area zones (Zone 9 being the single exception) and secures more than a fifth of the main food shopping expenditure generated by residents of three zones (Zones 1, 3 and 4). In Zone 4, it secures an exceptionally high 61.1% of all main food shopping expenditure. As a consequence, the household survey and our subsequent quantitative need assessment suggest that the North Road Morrisons has the single highest turnover of any foodstore in the Borough, taking an estimated £46.5m at 2014, which is a significantly better performance than would be anticipated through reference to Morrisons' company average 'benchmark' performance.
- 5.80 Whilst the B&Q store does not command the greatest turnover of all of Darlington's DIY outlets (with the larger and more modern B&Q store at Morton Park securing a higher market share), it is clearly an important facility, attracting trade from seven of the nine zones (Zones 1 to 7). It claims more than one in every four pounds of expenditure on DIY goods in Zone 1 and Zone 4.
- 5.81 Clearly, North Road's central location is of great assistance in securing access from all five Greater Darlington zones by car and its facilities therefore have substantial penetration across all five Greater Darlington zones.
- 5.82 A number of smaller shops and takeaway outlets meeting day to day needs are located on North Road itself. Whilst these shops are occasionally of a slightly tired appearance, they are in close enough proximity to Morrisons and its car park to benefit from some 'spin off' linked trips. A number of niche



independent retailers (including a picture framer, computing shop and fireplace retailer) are located along Whessoe Road, further adding to the centre’s diverse offer.

5.83 Whilst we noted seven vacant properties in the centre at the time of survey, these account for a very limited proportion of floorspace (4.2%) and, although it would clearly be advantageous to return these properties to an active use, the vacancy rate is not considered to cause particular alarm.

**Table 5.6: North Road District Centre Diversity of Use Figures**

	Convenience		Comparison		A1 Services		A2		A3/A4/A5		Vacant	
	No.	%	No.	%	No.	%	No	%	No.	%	No.	%
Nov 2012	5	9.6%	19	36.5%	15	28.8%	3	5.8%	2	3.8%	8	15.4%
Jan 2014	5	9.6%	20	38.5%	15	28.8%	3	5.8%	2	3.8%	7	13.5%

Source: Darlington Council database and WYG site visit of January 2014

**Table 5.7: North Road District Centre Floorspace Figures**

	Convenience	Comparison	A1 Services	A2	A3/A4/A5	Vacant
	sq.m	sq.m	sq.m	sq.m	sq.m	sq.m
Nov 2012	7,740	5,481	895	433	350	742
Jan 2014	7,740	5,531	945	466	350	667

Source: Darlington Council database and WYG site visit of January 2014

Note: The Council’s database does not record the relevant floorspace figures for several types of units, including banks, restaurants and public houses and therefore it should be recognised that the data in the above table omits these types of business

### Middleton St George Local Centre

5.84 Middleton St George local centre is the most distant of all Darlington’s network of centres from the town centre itself. It is located approximately 5.5 kilometres to the east of Darlington town centre and is effectively slightly separate from the main Darlington conurbation. The centre is focused around The Square which is formed at the junction of three roads – Middleton Lane, Station Road and Yarm Road. The centre benefits from limited passing traffic and has formed to serve the village of Middleton St George’s residents.

5.85 Middleton St George local centre accommodates a single modest convenience store (operated by Londis and providing 137 sq.m gross floorspace), a pharmacy, a pets accessories shop, a bookmakers, a veterinary practice, four food and drink operators, and – somewhat surprisingly for a centre of this size – three separate hairdressers. The facilities lack a dedicated off-street car park, but are located a short walk from many local residents. The household survey suggests that, in respect of food retailing, the centre attracts top up expenditure from Zone 5 only, within which it sits. This is to be expected given the day to day nature of most of Middleton St George’s facilities and the fact that the centre is geographically separate from Darlington.



**Table 5.8: Middleton St George Local Centre Diversity of Use Figures**

	Convenience		Comparison		A1 Services		A2		A3/A4/A5		Vacant	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Nov 2012	1	9.1%	3	27.3%	2	18.2%	1	9.1%	4	36.4%	0	0.0%
Jan 2014	1	9.1%	2	18.2%	3	27.3%	1	9.1%	4	36.4%	0	0.0%

Source: Darlington Council database and WYG site visit of January 2014

**Table 5.9: Middleton St George Local Centre Floorspace Figures**

	Convenience	Comparison	A1 Services	A2	A3/A4/A5	Vacant
	sq.m	sq.m	sq.m	sq.m	sq.m	sq.m
Nov 2012	137	368	185	30	50	0
Jan 2014	137	230	323	30	50	0

Source: Darlington Council database and WYG site visit of January 2014

Note: The Council's database does not record the relevant floorspace figures for several types of units, including banks, restaurants and public houses and therefore it should be recognised that the data in the above table omits these types of business

Mowden Local Centre

- 5.86 Mowden local centre is located around 2.5 kilometres to the west of Darlington town centre and is in the form of a linear 1960s shopping precinct. The centre provides a range of day to day convenience and comparison retailers and services to meet the day to day needs of the surrounding residential area. The centre is considered to be particularly well located to serve residents of the south west part of Darlington, which is relatively less well provided for than other parts of the town. The centre is neat and tidy and is of a relatively attractive design, and it appeared to be well used at the time of our visit. Indeed, as a consequence of this, almost all of the parking spaces provided to the front of the centre were occupied during our survey.
- 5.87 The centre is anchored by the Co-operative Food store (410 sq.m gross floorspace) which occupies an extended unit at the south of the precinct, with other uses including a Post Office, fish and chip shop, bakery, nail bar, butchers and a carpet shop. The household survey recorded that the centre attracts some top up food expenditure (from Zone 1 only, within which the centre is accommodated) and some furniture expenditure, which can be attributed to the Norman Foster Carpet Specialists shop.
- 5.88 The single vacant unit present at the time of the Council's previous survey in 2012 has been reoccupied and the centre appears to provide a balanced offer comprising three convenience goods units, two comparison goods units, two A1 service units and two food and drink units.



**Table 5.10: Mowden Local Centre Diversity of Use Figures**

	Convenience		Comparison		A1 Services		A2		A3/A4/A5		Vacant	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Nov 2012	2	22.2%	2	22.2%	2	22.2%	0	0.0%	2	22.2%	1	11.1%
Jan 2014	3	33.3%	2	22.2%	2	22.2%	0	0.0%	2	22.2%	0	0.0%

Source: Darlington Council database and WYG site visit of January 2014

**Table 5.11: Mowden Local Centre Floorspace Figures**

	Convenience	Comparison	A1 Services	A2	A3/A4/A5	Vacant
	sq.m	sq.m	sq.m	sq.m	sq.m	sq.m
Nov 2012	140	287	140	0	140	410
Jan 2014	550	287	140	0	140	0

Source: Darlington Council database and WYG site visit of January 2014

Note: The Council's database does not record the relevant floorspace figures for several types of units, including banks, restaurants and public houses and therefore it should be recognised that the data in the above table omits these types of business

### Neasham Road Local Centre

- 5.89 Neasham Road local centre is located just over a kilometre to the south east of the town centre and is located directly adjacent to the East Coast Main Line railway line which runs behind it. The centre is essentially of a retail park appearance, served by very plentiful car parking off Neasham Road, which also appears to help support additional small scale businesses on Neasham Road itself.
- 5.90 The largest unit in the centre is the Matalan (4,181 sq.m gross floorspace), which was occupied by Co-operative Food at the time of the centre's construction in 1992, but which had changed representation to Matalan at the time of the 2008 Retail Study. The Matalan appears to attract trade from a relatively wide area, with comparison goods expenditure from each of the Greater Darlington Zones 1 to 5 being spent at the centre.
- 5.91 Other than the Matalan and a Brantano Footwear store, food shopping is a particular focus, with the centre also accommodating a Farmfoods (446 sq.m gross floorspace) and an Asda Supermarket (946 sq.m gross floorspace). As would be expected, the household survey indicates that the Farmfoods fulfils a top up role (albeit in this role it attracts some trade from Zones 1 and 5, as well as Zone 2 in which it is located), whilst Asda is used for both main and top up food shopping. The Asda draws the vast majority of its trade locally from Zone 2, but also attracts some expenditure from Zones 4 and 5. Accordingly, it is evident that whilst the centre would appear to be able to successfully serve local shopping needs, its offer is such that it also attracts custom from further afield (as one may expect given the format of the centre and its national multiple retailer occupants).



5.92 The fifth unit of the centre is located at the north east corner of the centre and is occupied by Ladbrokes bookmakers. Accordingly, at the time of survey there were no vacancies at Neasham Road local centre.

**Table 5.12: Neasham Road Local Centre Diversity of Use Figures**

	Convenience		Comparison		A1 Services		A2		A3/A4/A5		Vacant	
	No.	%	No.	%	No.	%	No	%	No.	%	No.	%
Nov 2012	2	40.0%	1	20.0%	0	0.0%	1	20.0%	0	0.0%	1	20.0%
Jan 2014	2	40.0%	2	40.0%	0	0.0%	1	20.0%	0	0.0%	0	0.0%

Source: Darlington Council database and WYG site visit of January 2014

**Table 5.13: Neasham Road Local Centre Floorspace Figures**

	Convenience	Comparison	A1 Services	A2	A3/A4/A5	Vacant
	sq.m	sq.m	sq.m	sq.m	sq.m	sq.m
Nov 2012	1,392	4,181	0	186	0	403
Jan 2014	1,392	4,584	0	186	0	0

Source: Darlington Council database and WYG site visit of January 2014

Note: The Council's database does not record the relevant floorspace figures for several types of units, including banks, restaurants and public houses and therefore it should be recognised that the data in the above table omits these types of business

West Park Local Centre

5.93 West Park local centre is located approximately 3.5 kilometres to the north west of the town centre and forms part of the new West Park residential 'village', which continues to be built out to the west of the A68. The 2008 Retail Study noted that centre has limited prominence and, given its distance from the main road, is likely to benefit from limited passing traffic. Accordingly, it was identified by the 2008 Study that the centre would be very much dependent on the new community for trade.

5.94 In this regard, we note that the Making and Growing Places Preferred Options Development Plan Document states that, at May 2013, around 500 new dwellings, a new hospital, primary school, day nursery and public house have been built out at West Park, but that another 400 dwellings are still to be brought forward. In this context, West Park local centre already appears to be 'bedding in' and performing relatively well.

5.95 The centre is focused around Tillage Green and is anchored by a small Co-operative Food store (360 sq.m gross floorspace) and also contains a Rowlands Pharmacy, William Hill bookmakers, cafe, dental practice and hairdressers. There is no Post Office, but there is an ATM at the side of the foodstore. The composition of the centre is unchanged from that recorded at the time of survey in 2012 and





there are no vacant units. It is evident that the centre's role is to meet local needs and that it will further benefit from the additional housing which is to be completed in the wider area.

- 5.96 The household survey recognises the Co-operative Food store as a top up food shopping destination, but the centre is too small to attract significant comparison goods expenditure. This limited penetration is as we would expect given the limited number of units at West Park and their modest scale.

**Table 5.14: West Park Local Centre Diversity of Use Figures**

	Convenience		Comparison		A1 Services		A2		A3/A4/A5		Vacant	
	No.	%	No.	%	No.	%	No	%	No.	%	No.	%
Nov 2012	1	20.0%	1	20.0%	1	20.0%	1	20.0%	1	20.0%	0	0.0%
Jan 2014	1	20.0%	1	20.0%	1	20.0%	1	20.0%	1	20.0%	0	0.0%

Source: Darlington Council database and WYG site visit of January 2014

**Table 5.15: West Park Local Centre Floorspace Figures**

	Convenience	Comparison	A1 Services	A2	A3/A4/A5	Vacant
	sq.m	sq.m	sq.m	sq.m	sq.m	sq.m
Nov 2012	360	126	183	158	183	0
Jan 2014	360	126	183	158	183	0

Source: Darlington Council database and WYG site visit of January 2014

Note: The Council's database does not record the relevant floorspace figures for several types of units, including banks, restaurants and public houses and therefore it should be recognised that the data in the above table omits these types of business

### Whinfield Local Centre

- 5.97 Whinfield local centre is located around 3 kilometres to the north east of the town centre and its format is slightly atypical, comprising the large Asda superstore and adjacent petrol filling station together with three other units, namely TJ's hairdressers, the Shuttle and Loom public house and the former Finlay's newsagent unit (which was vacant at the time of survey). Accordingly, Asda is the single retailer operating from the centre and the conclusion reached by the previous 2008 Study that the centre is effectively little more than a freestanding large supermarket is equally applicable today.
- 5.98 Our quantitative need assessment suggest that the Asda superstore is the fourth most popular food shopping destination in the town, turning over an estimated £21.6m at 2014. By way of comparison, the Morrisons at North Road district centre turns over an estimated £46.5m, the Morrisons at Morton Park an estimated £41.8m and the Sainsbury's at Victoria Road turns an estimated £37.4m. It is also relevant to note that the Asda store at Whinfield local centre performs slightly less well than its anticipated benchmark turnover, which may, at least in part, be explained by the fact that the Asda is an older format store which appears somewhat dated in comparison to more modern foodstores.



5.99 The Asda store (5,141 sq.m gross floorspace) secures a very high market share of both main and top up food shopping expenditure (29.3% and 44.4% respectively) which originates in the zone in which it is located (Zone 3). Indeed, the level of top up food shopping which is attracted to the Asda is remarkably high – it is by some distance the single most popular top up food shopping destination in Darlington – which is attributable to the fact that there is relatively limited food retail competition in Zone 3 and because the store is very accessible to the surrounding residential population.

**Table 5.16: Whinfield Local Centre Diversity of Use Figures**

	Convenience		Comparison		A1 Services		A2		A3/A4/A5		Vacant	
	No.	%	No.	%	No.	%	No	%	No.	%	No.	%
Nov 2012	2	40.0%	0	0.0%	2	40.0%	0	0.0%	1	20.0%	0	0.0%
Jan 2014	1	20.0%	0	0.0%	2	40.0%	0	0.0%	1	20.0%	1	20.0%

Source: Darlington Council database and WYG site visit of January 2014

**Table 5.17: Whinfield Local Centre Floorspace Figures**

	Convenience	Comparison	A1 Services	A2	A3/A4/A5	Vacant
	sq.m	sq.m	sq.m	sq.m	sq.m	sq.m
Nov 2012	5,321	0	110	0	-	0
Jan 2014	5,141	0	110	0	-	180

Source: Darlington Council database and WYG site visit of January 2014

Note: The Council's database does not record the relevant floorspace figures for several types of units, including banks, restaurants and public houses and therefore it should be recognised that the data in the above table omits these types of business

### Yarm Road Local Centre

5.100 Yarm Road local centre is located approximately 2 kilometres to the east of the town centre and comprises a purpose built 1960s parade which has been supplemented by more recent foodstore development which has resulted in Aldi, Iceland and Lidl occupying adjacent premises. The centre comprises a total of nine units which also accommodate a bakers, bookmakers, pharmacy, sandwich shop, veterinary practice, dental practice and two takeaways.

5.101 The Aldi (1,416 sq.m gross floorspace), Iceland (830 sq.m gross floorspace) and Lidl (1,606 gross floorspace) units are by far the largest and are set back from Yarm Road with car parking to the front. Our household survey indicates that, of these three stores, the Aldi performs exceptionally strongly, attracting main and top up food shopping from all five Greater Darlington zones. Whilst this in part is a result of the relatively central location of Yarm Road local centre, it is also symptomatic of the increasing popularity of discount foodstore operators and, in particular, Aldi. The survey suggests that the Aldi is the fifth most popular foodstore in Darlington, attracting 14.8% of main food and 16.9% of shopping trips originating in Zone 2 within which it sits. We estimate that the Aldi has an estimated



turnover of around £18.3m, which is very significant in excess of its expected benchmark turnover. Whilst the focus of the centre is therefore clearly on food shopping – which is reflected in the fact that 4,127 sq.m of its 4,417 sq.m gross floor area is dedicated to convenience goods retailers – other businesses appear able to benefit from the footfall attracted to the centre which is evidenced in the fact that there were no vacant units at the time of our survey.

**Table 5.18: Yarm Road Local Centre Diversity of Use Figures**

	Convenience		Comparison		A1 Services		A2		A3/A4/A5		Vacant	
	No.	%	No.	%	No.	%	No	%	No.	%	No.	%
Nov 2012	5	55.6%	1	11.1%	0	0.0%	1	11.1%	2	22.2%	0	0.0%
Jan 2014	5	55.6%	1	11.1%	0	0.0%	1	11.1%	2	22.2%	0	0.0%

Source: Darlington Council database and WYG site visit of January 2014

**Table 5.19: Yarm Road Local Centre Floorspace Figures**

	Convenience	Comparison	A1 Services	A2	A3/A4/A5	Vacant
	sq.m	sq.m	sq.m	sq.m	sq.m	sq.m
Nov 2012	4,127	90	0	-	180	0
Jan 2014	4,127	90	0	-	180	0

Source: Darlington Council database and WYG site visit of January 2014

Note: The Council's database does not record the relevant floorspace figures for several types of units, including banks, restaurants and public houses and therefore it should be recognised that the data in the above table omits these types of business

### Summary

- 5.102 Darlington's district and local centres appear are distributed in a reasonably equitable manner throughout the town and, as a consequence, appear generally to be well used. Whilst certain centres have a very focused convenience and service offer, others – such as North Road district centre – accommodate more varied and often niche retailers, for whom town centre premises may not be a viable option. The relative good health of Darlington's centres is evidenced by the exceptionally low vacancy rate, with the eight centres together having a total of 12 vacant units at the time of survey in January 2014. Indeed, the majority of local centres do not have a single vacancy.
- 5.103 We do consider that three centres differ somewhat from the typical format of a defined 'centre'.
- 5.104 Neasham Road local centre's format is effectively akin to that of a small 'retail park' with a limited small number of units (including the large comparison goods Matalan unit) being served by a large car park. However, the Asda and Farmfood units do successfully meet day to day convenience shopping needs and there is the ability to link trips between operators which are complementary in nature.



5.105 West Park local centre currently provides just five very modestly sized units of which two are occupied by retailers selling goods – the Co-operative Food convenience store and Rowlands pharmacy. West Park visually resembles a 'local parade' format of a type which often benefits from no formal designation or planning policy protection. However, the mix of operators is again complementary and the centre is well served by a small car park which encourages its use. We also note that Draft Policy MGP 15 provides for the future extension of West Park local centre.

5.106 As was identified by the 2008 Retail Study, Whinfield local centre is effectively formed by the Asda store, two adjoining 'concession' units, the Asda petrol filling station and a nearby public house. In this case, we consider that such a grouping clearly departs from the mix of facilities which is ordinarily expected at a designated centre.



## 6.0 Population and Expenditure

6.01 This section of the report assesses the current population and available expenditure (for both convenience and comparison goods) within the Study Area.

### Study Area Population

6.02 The population within each postal code sector and each zone at 2014 has been calculated using Experian Micromarketer G3 data (2012 estimate, which was issued in February 2014). The baseline Experian population data is derived from the recent 2011 Census release.

6.03 Two different population growth scenarios have been utilised in modelling the potential future need for additional retail provision within the Study Area. Population growth Scenario 1 is relatively straightforward and utilises Experian's own estimate of future population growth in the period to 2026 (which is reflective of growth rates which take into account Office for National Statistics population projections and current age and gender estimates).

6.04 Population growth Scenario 2 seeks to reflect the planned housing growth set out by the Council in the Making and Growing Places Revised Preferred Option for Housing of April 2014. Clearly, this document relates to the Darlington administrative area only, which broadly conforms to Zones 1 to 5 of the Study Area (which we have referred to as the Greater Darlington area). Whilst parts of Zone 5 actually lie outside Darlington Borough, it is considered that such rural areas will not be a focus for future housing or population growth. Accordingly, under Scenario 2 it is considered robust to assume that the housing and population growth achieved over the plan period in the Darlington administrative area will correspond to that achieved across Zones 1 to 5 as a whole.

6.05 The Making and Growing Places Revised Preferred Option document sets out the Council's target to deliver about 5,800 dwellings in the Borough between 2011 and 2026. On a pro rata basis and taking into consideration the proposed phasing of residential development set out in paragraphs 1.2 and 1.3 and Table 1.1 of the Making and Growing Places Revised Preferred Option for Housing, we have assumed that the requirement between 2014 and 2026 will be 5,013 dwellings.

6.06 In order to consider the distribution of this housing growth across Darlington Borough, we have reviewed and noted the location of each housing commitment identified in the Making and Growing Places Preferred Option for Housing document. Each commitment has been attributed to the Study Area zone in which it is located. Taken together, the commitments seek to bring forward an



estimated 4,631 dwellings across the Study Area, distributed in the manner set out below at Table 6.1.

**Table 6.1: Distribution of Housing Commitments Identified in the Making and Growing Places Preferred Options**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Total
Number of Dwellings	254	1,593	1,168	947	669	4,631
Proportion of Dwellings	5.5%	34.4%	25.2%	20.4%	14.4%	100.0%

6.07 The housing to be implemented at committed sites is below the Council’s overall housing requirement, with the difference being bridged by unallocated ‘windfall’ sites. Accordingly, we have assumed that the estimated 5,013 dwellings to be delivered across Darlington Borough in the period 2014 to 2026 will be distributed in accordance with the ratios identified above for each zone. We have also assumed that residential development will be implemented in accordance with the staged delivery targets set out by Table 1.1 of the Making and Growing Places Preferred Option for Housing document.

6.08 On this basis, Table 6.2 sets out below our assumptions in respect of where and when the planned 5,013 dwellings will be delivered.

**Table 6.2: Number of Houses to be Delivered in Each Darlington Zone**

Timeframe	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Total
2014 to 2016	28	176	129	105	74	513
2016 to 2021	115	722	530	429	303	2,100
2021 to 2026	132	826	605	491	347	2,400
<b>Total</b>	<b>275</b>	<b>1,724</b>	<b>1,264</b>	<b>1,025</b>	<b>724</b>	<b>5,013</b>

6.09 Experian Micromarketer G3 data indicates that the population of Darlington Borough at 2014 is 106,228 persons and that there are 46,977 dwellings. On this basis, the average number of occupants per dwellings is calculated to be 2.26. We consider this figure to be an appropriate approximation of the likely number of occupants of each future dwelling.

6.10 Using the assumed occupancy rate, Table 6.3 converts the assumed dwelling completion numbers provided at Table 6.2 into estimated increases in population across each zone and timeframe.



**Table 6.3: Future Population Increase Across Each Darlington Zone**

Timeframe	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Total
2014 to 2016	64	399	292	237	167	1,159
2016 to 2019	104	653	479	388	274	1,899
2019 to 2021	156	980	719	583	412	2,171
2021 to 2026	298	1,867	1,369	1,110	784	5,427
<b>Total</b>	<b>622</b>	<b>3,899</b>	<b>2,859</b>	<b>2,318</b>	<b>1,637</b>	<b>11,335</b>

6.11 Zone 8 and the more built up parts of Zone 6 are located within the Durham County Council administrative area. Zone 6 contains the settlements of Chilton, Ferryhill, Newton Aycliffe and Shildon. Zone 8 contains Bishop Auckland. We consider that these settlements will be the focus for any future population growth within Zones 6 and 8.

6.12 Accordingly, we have reviewed the future housing requirement identified by Table 5 of the Submission Draft of the County Durham Plan (April 2014). We provide an extract from Table 5 below as our Table 6.4, which identifies the following housing requirements to be delivered in settlements in Zone 6 and 8 between 2011 and 2030.

**Table 6.4: Distribution of Housing Commitments Identified in the Submission Draft of the County Durham Plan**

Zone	Settlement	Housing Requirement 2011 to 2031	Housing Requirement 2011 to 2026
6	Chilton	270	171
	Ferryhill	610	385
	Newton Aycliffe	2,030	1,282
	Shildon	590	373
8	Bishop Auckland	2,350	1,484

6.13 Experian Micromarketer G3 data indicates that the combined population of Zones 6 and 8 at 2014 is 93,261 persons and that there are 40,156 dwellings. On this basis, the average number of occupants per dwelling is calculated to be 2.32. We consider this figure to be an appropriate approximation of the likely number of occupants of each future dwelling that comes forward in these zones.

6.14 Applying this occupancy rate and assuming that the identified housing requirement is delivered in an proportionate manner across the 12 years to 2026, Table 6.5 converts the assumed dwelling numbers provided at Table 6.4 into estimated increases in population across each zone and timeframe.



**Table 6.5: Future Population Increase Across Darlington Zones 6 and 8**

Timeframe	Zone 6	Zone 8
2014 to 2016	856	574
2016 to 2019	1,284	861
2019 to 2021	856	574
2021 to 2026	2,141	1,435
<b>Total</b>	<b>5,138</b>	<b>3,443</b>

- 6.15 Zones 7 and 9 are not the subject of significant additional housing growth and we have therefore assumed under population growth Scenario 2 that Experian’s population growth projections are appropriate.
- 6.16 By applying the methodology set out above, Tables 6.6 and 6.7 set out our estimate of future population growth across the Study Area under Scenarios 1 and 2.

**Table 6.6: Population Growth Scenario 1 – Study Area Population by Survey Zone (2014 to 2026)**

Zone	2014	2016	2019	2021	2026
1	21,380	21,604	21,933	22,158	22,638
2	26,183	26,439	26,805	27,057	27,568
3	20,826	21,030	21,324	21,525	21,939
4	23,196	23,431	23,765	23,999	24,472
5	17,219	17,397	17,660	17,835	18,213
6	56,572	57,275	58,274	58,906	60,290
7	75,520	75,994	76,713	77,215	78,341
8	37,867	38,332	38,999	39,415	40,341
9	21,346	21,688	22,172	22,480	23,145
<b>Total</b>	<b>300,109</b>	<b>303,190</b>	<b>307,645</b>	<b>310,590</b>	<b>316,947</b>

Source: Experian Micromarketer G3 2014 data release





**Table 6.7: High Population Growth Scenario 2 – Study Area Population by Survey Zone (2014 to 2026)**

Zone	2014	2016	2019	2021	2026
1	21,380	21,444	21,548	21,704	22,002
2	26,183	26,582	27,235	28,215	30,082
3	20,826	21,118	21,597	22,316	23,685
4	23,196	23,433	23,821	24,404	25,514
5	17,219	17,386	17,661	18,072	18,856
6	56,572	57,428	58,713	59,569	61,710
7	75,520	75,994	76,713	77,215	78,341
8	37,867	38,441	39,302	39,876	41,310
9	21,346	21,688	22,172	22,480	23,145
<b>Total</b>	<b>300,109</b>	<b>303,514</b>	<b>308,762</b>	<b>313,851</b>	<b>324,645</b>

Source: Experian Micromarketer G3 2014 data release and WYG's modelling of the future housing growth as set out in the Darlington Making and Growing Places Preferred Option for Housing (April 2014) and the Submission Draft of the County Durham Plan (April 2014)

6.17 Under population growth Scenario 1, we forecast that the Study Area population will increase from 300,109 at 2014 to 316,947 at 2026, equating to an increase in population of 16,838 persons. Under population growth Scenario 2, the Study Area population increases from 300,109 to 324,645 over the same time period, equating to an increase of 24,536 persons.

### Retail Expenditure

6.18 In order to calculate per capita convenience and comparison goods expenditure, we have again utilised Experian Micromarketer G3 data which provides detailed information on local consumer expenditure which takes into consideration the socio-economic characteristics of the local population. Experian is a widely accepted source of expenditure and population data and is regularly used by WYG in calculating retail capacity.

6.19 The base year for the Experian expenditure data is 2011. Per capita growth forecasts have been derived from Experian Retail Planner Briefing Note 11, which was published in October 2013. For the purposes of this Study, the following annual growth forecasts set out below by Table 6.6 have been applied.



**Table 6.6: Expenditure Growth Forecasts**

Year	Convenience (%)	Comparison (%)
2013	-0.6	3.2
2014	-0.3	2.3
2015	0.1	2.8
2016	0.6	2.9
2017	0.9	2.9
2018	0.8	3.1
2019	0.9	3.1
2020	0.9	3.0
2021	0.9	3.0
2022	0.9	2.9
2023	0.9	2.9
2024	0.9	2.9
2025	0.8	2.9
2026	0.7	2.8

Source: Figure 1a, Retail Planner Briefing Note 11 (October 2013)

- 6.20 The latest growth forecasts suggest that the current downturn in the economy will continue to impact upon future convenience goods expenditure, at least in the short term. However, over the medium to long term it is expected that the forecast levels of growth will increase as the economy recovers. For convenience goods, Experian forecasts negative growth to 2014, before identifying a modest forecast increase of +0.1% at 2015. Experian identifies an estimated convenience goods increase of +0.9% at 2017 and, although some deviation in the rate is forecast thereafter, the rate of annual convenience goods growth forecast to 2030 does not fall below +0.7%.
- 6.21 By contrast Experian identifies an immediate and relatively strong annual comparison growth rate of +3.2% at 2013. Whilst a drop in the rate of growth is anticipated at 2014 (to +2.3%), growth rates thereafter are forecast to be relatively stable, ranging from +2.8% to +3.1%.
- 6.22 Growth in expenditure forecast in the longer term (beyond the next ten years) should be treated with caution given the inherent uncertainties in predicting the economy's performance over time. Assessments of this nature should therefore be reviewed on a regular basis in order to ensure that forecasts over the medium and long are reflective of any changes to relevant available data.
- 6.23 Experian Retail Planner Briefing Note 11 also provides a forecast as to the proportion of expenditure which will be committed through special forms of trading (comprising 'non-store retailing', such as internet sales, TV shopping and so on) over the reporting period. We have 'stripped out' any



expenditure which survey respondents indicated was committed via special forms of trading and instead have made an allowance derived from Experian’s recommendation.

6.24 In considering special forms of trading, it should be noted that many products which are ordered online are actually sourced from a physical store’s shelves or stockroom (particularly in the case of convenience goods). Accordingly, expenditure committed in this manner acts to support stores and should be considered ‘available’ to tangible retail destinations.

6.25 Accordingly, in order not to overstate the influence of expenditure committed via special forms of trading, we adopt Experian’s ‘adjusted’ figure (provided at Appendix 3 of its Briefing Note) which makes an allowance for internet sales which are sourced from stores. The proportion of expenditure committed through special forms of trading cited below at Table 6.7 is ‘stripped out’ of the identified expenditure as it is not available to stores within the Study Area.

**Table 6.7: Special Forms of Trading Forecasts**

Year	Convenience	Comparison
2014	2.7%	11.6%
2016	3.2%	13.0%
2019	4.0%	15.1%
2021	4.6%	15.7%
2026	5.1%	15.9%

Source: Appendix 3, Experian Retail Planner Briefing Note 11 (October 2013)

6.26 Using the above growth rates and special forms of trading allowances, it is possible to produce expenditure estimates for each survey zone under each population growth scenario at 2014, 2016, 2019, 2021 and 2026. In doing so, our assessment takes into account both per capita retail expenditure growth and population change.

### Convenience Goods Expenditure

6.27 Taking into consideration the above increases in population and per capita expenditure, it is estimated that, at 2014, the resident population of the Study Area generates some £530.3m of convenience goods expenditure<sup>29</sup>. Under population growth Scenario 1, available convenience goods expenditure is then forecast to increase to £599.5m at 2026, which represents an increase of £69.2m (or 13.0%)

<sup>29</sup> Expressed in 2012 prices, as is every subsequent monetary value



between 2014 and 2026. Under growth Scenario 2, expenditure increases to £613.6m at 2026 (which represents an increase of £83.4m or 15.7%).

**Table 6.8: Total Available Study Area Expenditure Under Two Population Scenarios – Convenience Goods (£m)**

Scenario	2014 (£m)	2016 (£m)	2019 (£m)	2021 (£m)	2026 (£m)	Growth 2014-2016 (£m)	Growth 2014-2019 (£m)	Growth 2014-2021 (£m)	Growth 2014-2026 (£m)
1	530.3	536.7	554.4	566.3	599.5	6.5	24.1	36.0	69.2
2	530.3	537.3	556.2	572.0	613.6	7.0	25.9	41.7	83.4

Source: Table 2a, Appendices 6 and 7  
In 2012 prices

### Main Food and 'Top-Up' Shopping

6.28 The proportion of convenience goods expenditure which is committed through main food shopping trips and through 'top-up' shopping trips has been estimated with reference to respondents' answers to Question 5 and Question 15 of the household survey, which ask respondents to estimate their weekly main food shopping expenditure and weekly top-up shopping expenditure respectively. We have analysed responses to these questions to derive an estimate of the split between main and top-up expenditure on a zonal basis. Across the whole of the Study Area, we calculate (by adding together our estimates of the monetary split between main and top up shopping expenditure within each zone) that the proportion of convenience goods expenditure directed to respondents' main food shopping destination equates to 79.6% of their overall convenience shopping expenditure. The remaining 20.4% of expenditure (which will typically be spent on regular purchases such as milk, bread and so on) is therefore attributed to the respondents' top-up convenience shopping destination. Our estimate of the split between these two types of expenditure on a zonal basis is provided below at Table 6.9.

**Table 6.9: Assumed Split of Convenience Goods Expenditure Between Main and Top-Up Shopping**

Zone	Main Food	Top-Up
1	80.9%	19.1%
2	78.5%	21.5%
3	76.9%	23.1%
4	79.4%	20.6%
5	80.9%	19.1%
6	81.9%	18.1%
7	77.7%	22.3%
8	80.7%	19.3%
9	80.0%	20.0%

Source: Derived from Table 2B, Appendix 6 and 7



6.29 By applying these estimates to the identified resident population of the Study Area, convenience goods expenditure at 2014 committed through 'main food' shopping trips is estimated to be £422.2m and through 'top up' shopping trips is estimated to be £108.0m (under both population growth scenarios).

### Comparison Goods Expenditure

6.30 For comparison goods, Table 6.10 indicates that, at 2014, we estimate that the resident population of the Study Area generates some £785.0m of comparison goods expenditure. Under population growth Scenario 1, available comparison goods expenditure is then forecast to increase to £1,116.6m at 2026, which represents an increase of £331.6m (or 42.2%) between 2014 and 2026. Under growth Scenario 2, expenditure increases to £1,142.0m at 2026, which represents an increase of £356.9m (or 45.5%).

6.31 Whilst the identified expenditure increase is significant under both growth scenarios, the rate of growth is more modest than that previously achieved due to the more circumspect level of comparison goods growth which is forecast over the short and medium term (and due to the expectation that an ever increasing proportion of comparison goods expenditure will be committed through internet shopping). As a consequence, the comparison goods expenditure growth of £40.7m within the Study Area between 2014 and 2016 identified under Scenario 1 represents a relatively modest 5.2% increase.

**Table 6.10: Total Available Study Area Expenditure Under Two Population Scenarios – Comparison Goods (£m)**

Scenario	2014 (£m)	2016 (£m)	2019 (£m)	2021 (£m)	2026 (£m)	Growth 2014-2016 (£m)	Growth 2014-2019 (£m)	Growth 2014-2021 (£m)	Growth 2014-2026 (£m)
1	785.0	825.7	894.5	951.4	1,116.6	40.7	68.8	166.4	331.6
2	785.0	826.4	897.2	960.5	1,142.0	41.4	70.8	175.5	356.9

Source: Table 8, Appendices 6 and 7  
In 2012 prices

6.32 For the purposes of this Study, comparison goods expenditure has been divided into nine sub-categories: 'DIY' 'Electrical' and 'Furniture' (these three categories collectively being referred to as bulky goods) and, 'Clothing & Footwear', 'CDs, DVDs and Books', 'Health and Beauty/Chemist Goods', 'Small Household Goods' and 'Toys, Games, Bicycles and Recreational Goods' (collectively referred to as non-bulky goods). The proportion of expenditure directed to each sub-category is estimated by Experian on a zonal basis.



6.33 In considering the above, it should be noted that if an excess of expenditure manifests itself within the Study Area, this does not necessarily translate directly into a requirement for additional floorspace. In assessing quantitative need, it is also necessary to take account of:

- Existing development proposals;
- Expected changes in shopping patterns; and
- The future efficiency of retail floorspace.



## 7.0 Retail Capacity in Darlington Borough

7.01 We have examined the need for new convenience and comparison goods floorspace over the five year reporting periods specified in the Making and Growing Places Preferred Options Development Plan Document (i.e at 2016, 2021 and 2026), supplemented by a further reporting year five years from now (i.e. at 2019). At the outset, it is important to note that an assessment in the long term should be viewed with caution, due to the obvious difficulties inherent in predicting the performance of the economy and shopping habits over time. In any event, any identified capacity should not necessarily be viewed as justification of new retail floorspace outside of centres as this could prejudice the implementation of any emerging town centre redevelopment strategies and the development of more central sites which may be currently available or which could become available over time.

7.02 A complete series of quantitative capacity tables are provided for each population growth scenario at Appendices 6 and 7 to provide further detail in terms of the step-by-step application of our Study methodology.

### Capacity Formula

7.03 For all types of capacity assessment, the conceptual approach is identical, although the data sources and assumptions may differ. The key relationship is Expenditure (£m) (allowing for population change and retail growth) *less* Turnover (£m) (allowing for improved 'productivity') *equals* Surplus or Deficit (£m).

7.04 **Expenditure (£m)** – The expenditure element of the above equation is calculated by taking the population within the defined catchment and then multiplying this figure by the average annual expenditure levels for various forms of retail spending per annum. The expenditure is estimated with reference to a number of factors, namely:

- Growth in population;
- Growth in expenditure per person per annum; and
- Special Forms of Trading (e.g. catalogue shopping / internet).

7.05 **Turnover (£m)** – The turnover figure relates to the annual turnover generated by existing retail facilities within the Study Area. The turnover of existing facilities is calculated using Mintel Retail Rankings and Verdict UK Grocery Retailers reports – independent analysis which lists the sales density for all major multiple retailers.



- 7.06 **Surplus / Deficit (£m)** – This represents the difference between the expenditure and turnover figures outlined above. Clearly, a surplus figure will represent an under provision of retail facilities within the Study Area (which, all things being equal, would suggest that additional floorspace is required), whereas a deficit would suggest a quantitative overprovision of retail facilities.
  
- 7.07 Although a surplus figure is presented in monetary terms, it is possible to convert this figure to provide an indication of the quantum of floorspace which may be required. The level of floorspace will vary dependent on the type of retailer proposed and the type of goods traded. For example, in the case of comparison goods, electrical retailers such as Currys (which is considered a bulky goods retailer) have a much higher sales density than other bulky goods retailers such as B&Q, and clothing and footwear (non-bulky goods) operators generally have a higher sales density than bulky goods retailers.

### Capacity for Future Convenience Goods Floorspace

- 7.08 In order to ascertain the likely need for additional convenience goods floorspace in Darlington, it is first necessary to consider the performance of the current provision. Given the geography of the Borough and its reasonably strong retention of convenience goods expenditure, it is assumed that the future convenience goods expenditure available to Darlington will be commensurate with its current market share.
  
- 7.09 Tables 7.1 and 7.2 set out the current convenience goods trading position compared against the 'benchmark' (or anticipated) turnover of existing convenience goods floorspace and projects this forward to 2026 under each population growth scenario assuming that the identified market share remains constant. The 'benchmark' turnover differs for each operator based on its average turnover per square metre throughout the country. Although robust up-to-date information is available in terms of the convenience goods floorspace provided by large foodstores, it can be more difficult to quantify the extent of local convenience provision as there is no single comprehensive database to rely upon. Where we have been unable to verify the exact quantum of floorspace provided by existing smaller-scale convenience stores, we have assumed that stores are trading 'at equilibrium' (i.e. the survey-derived turnover equates to the expected level of turnover).
  
- 7.10 For each convenience goods retail destination, consideration has been given as to whether any of its turnover is likely to be derived as 'inflow' from outside the Study Area. However, the Study Area is very extensive in its scope and we consider it unlikely that residents of areas further afield (such as Middlesbrough, Spennymoor, Kirkby Stephen and Bedale) will travel to Darlington in very significant





numbers to undertake food shopping. Notwithstanding this, we consider that convenience goods retailers in the town centre and food superstores within the Darlington administrative area will benefit from some trade which results from visitors and commuters from outside the area. Accordingly, we have estimated that these convenience goods shopping destinations will benefit from an additional 3% of their turnover being derived from outside of the Study Area.

- 7.11 Our assessment is based upon a 'goods based' approach, which disaggregates expenditure by category type, and it is important to recognise that major foodstore operators generally sell an element of non-food goods such as books, compact discs, clothing and household goods. To account for this, the typical ratio between convenience/comparison goods provision for each operator<sup>30</sup> has been applied to the estimated net floorspace of each foodstore<sup>31</sup>. This provides an indication of the likely sales area dedicated to the sale of convenience goods at each store.
- 7.12 Whilst survey results are commonly accepted as a means by which to identify existing shopping patterns, their findings should be treated with a 'note of caution' as they tend to have a bias towards larger stores and can understate the role of smaller stores and independent retailers.
- 7.13 Our assessment identifies that taking all convenience goods retail facilities in Darlington Borough together, the expected turnover of provision is £228.0m per annum at 2014, which is slightly greater than the identified survey-derived turnover of £218.2m. This suggests that, taken cumulatively, existing convenience goods turnover is marginally 'undertrading' when compared to its expected turnover. Whilst this difference is limited and suggests that existing provision is broadly appropriate to meet the existing quantitative need, there are instances where specific facilities trade very strongly or relatively poorly. For example, the Aldi store at Yarm Road local centre in Zone 2 has an estimated convenience goods benchmark turnover of £7.2m, but actually turns over an estimated £18.3m of convenience goods expenditure. The Morrisons store at North Road District Centre in Zone 3 has an estimated convenience goods benchmark turnover of £36.9m, but turns over an estimated £47.9m of convenience goods turnover. By way of contrast, the actual convenience goods turnover of the Asda stores at Neasham Road and Haughton Road are £7.9m and £7.8 less than their respective benchmark turnovers of £12.1m and £11.5m.

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<sup>30</sup> Derived from Verdict UK Food & Grocery 2013 Company Briefing Reports. Where Verdict data is not available or is considered not to appropriately reflect how a store trades in practice, we have applied professional judgement in the manner set out in the notes to Table 5 of Appendices 6 and 7

<sup>31</sup> Net sales areas have been sourced from Institute of Grocery Distribution data where available. Where such data is not available, we have applied professional judgement in the manner set out in the notes to Table 5 of Appendices 6 and 7



7.14 The individual performance of each of the main convenience goods facilities is identified at Table 5 of Appendix 6.

7.15 In order to appraise the need for additional convenience goods retail floorspace, it is necessary to consider how the performance of stores will be affected by future growth in expenditure. Accordingly, the next set of tables set out the anticipated increases in expenditure which will be available to the Borough's convenience goods retail facilities under each population growth scenario, assuming that the current market share is maintained. It is also assumed that the turnover of existing floorspace will improve through improvements in floorspace efficiency as set out in Experian Retail Planner Briefing Note 11. Following this exercise, we then consider the effect extant planning commitments will have in addressing any identified convenience goods shopping needs under each of the growth scenarios.

Convenience Goods Quantitative Need in Darlington – Population Growth Scenario 1

7.16 Table 7.1, relating to population growth Scenario 1, indicates that, after taking into consideration future increase in both population and expenditure, an effective convenience goods expenditure deficit of -£9.8m is identified at 2014. By 2016, after increases in population and expenditure are considered against increases in floorspace productivity<sup>32</sup>, we estimate that there will still be an expenditure deficit of -£5.5m at 2016 (based on the retention of Darlington Borough's existing Study Area market share of 40.2%). By 2019, we estimate that there will be a small expenditure surplus of £1.7m, increasing thereafter to £6.4m at 2021 and then to £18.9m at 2026.

**Table 7.1: Quantitative Need for Convenience Goods Floorspace in Darlington Borough Under Population Growth Scenario 1**

Year	Benchmark Turnover (£m) <sup>1</sup>	Available Expenditure (£m) <sup>2</sup>	Surplus Expenditure (£m)
2014	228.0	218.2	-9.8
2016	226.4	220.8	-5.5
2019	226.4	228.1	1.7
2021	226.6	233.0	6.4
2026	227.7	246.7	18.9

Source: Table 6A of Appendix 6

<sup>1</sup> Benchmark turnover to increase in line with improvements in turnover efficiency set out in Table 4a of Experian Retail Planner 11 (October 2013)

<sup>2</sup> Assumes constant market share of Study Area expenditure (40.2%) claimed by facilities across whole of Study Area 2012 Prices

<sup>32</sup> Account has been made for the turnover efficiency of existing convenience goods floorspace to change (on the basis that operators have historically been able to make their existing floorspace more productive over time) in accordance with the projections set out in Table 4a of Experian Retail Planner Briefing Note 11 (these being -1.2% at 2014, -0.7% at 2015, +0.0% per annum between 2016 and 2020, and +0.1% between 2021 and 2028)



7.17 We estimate that extant retail planning permissions<sup>33</sup> would, if implemented, provide an estimated 1,618 sq.m of convenience goods sales floorspace across the Borough. As set out at Table 7.2, we estimate that these commitments will have a combined benchmark turnover of £14.1m if all were operational at base year 2014. Notable food retail development is proposed as part of mixed-use development at Central Park and at Lingfield Point, albeit the scale of these developments is such that they will primarily meet local needs only. It should be noted that only commitments providing a total gross retail floorspace of greater than 200 sq.m have been included in our assessment as it is not considered that proposals of a lesser scale will have a tangible effect on shopping patterns.

**Table 7.2: Extant Convenience Commitments within the Study Area**

Zone	Location	Planning Application Reference	Proposal	Net Conv Sales (sq.m)	Conv Sales Density (£ per sq.m)	Estimate Turnover at 2013 (£m)	Status
2.	Central Park	12/00391/FUL	Hybrid application for mixed-use development including up to 180 residential units and up to 1,700 sq.m of Use Classes A1 (retail), A3 (hot food) and A4 (drinking establishments)	840	8,909	7.5	Extant planning permission
2.	Neasham Road Local Centre	10/00358/FUL	Additional retail units at existing retail park	78	5,000	0.4	Extant planning permission
2.	Lingfield Point	08/00638/OUT	Mixed-use regeneration scheme including local retail facilities	700	8,909	6.2	Extant planning permission
<b>Total</b>				<b>1,618</b>		<b>14.1</b>	

Source: Table 6d of Appendices 6 and 7  
2012 Prices

7.18 Full details of the assumptions made in estimating the turnover of commitments are provided in the notes which accompany Table 6d of Appendices 6 and 7. The estimated £14.1m convenience goods turnover of commitments effectively extinguishes any quantitative need for additional convenience goods floorspace within the Borough in the period to 2021 under population growth Scenario 1. At 2026, a residual of £8.5m is identified, which we estimate will support between 700 sq.m and 1,600 sq.m of convenience goods sales floorspace. This requirement is set out below at Table 7.3.

<sup>33</sup> As reported in the Darlington Annual Monitoring Report and subsequent retail monitoring data provided by the Council



**Table 7.3: Quantitative Need for Convenience Goods Floorspace in Darlington Borough Under Population Growth Scenario 1 After Account is Made for Commitments**

Year	Convenience Goods				
	£m			Floorspace Requirement (sq.m net)	
	Surplus (£m)	Commitments (£m)	Residual (£m)	Min <sup>1*</sup>	Max <sup>2*</sup>
2014	-9.8	14.1	-23.9	-1,900	-4,500
2016	-5.5	14.0	-19.5	-1,600	-3,700
2019	1.7	14.0	-12.3	-1,000	-2,300
2021	6.4	14.0	-7.6	-600	-1,400
2026	18.9	14.1	4.8	400	900

Source: Table 6c of Appendix 6

<sup>1</sup> Average sales density assumed to be £12,524 per sq.m at 2014 (based on the average sales density of the leading four supermarket operators as identified by Verdict 2013)

<sup>2</sup> Average sales density assumed to be £5,294 per sq.m at 2014 (based on the average sales density of discount food retailers as identified by Verdict 2013)  
2012 Prices

Convenience Goods Quantitative Need in Darlington – Population Growth Scenario 2

7.19 Tables 7.4 and 7.5 set out below repeat the above exercise for population growth Scenario 2. Table 7.4 indicates that, with a higher population at 2016 and every subsequent reporting year there is an increase in the identified surplus in the long term (albeit the surplus is still relatively limited). Under Scenario 2, we estimate that there will be an expenditure deficit of -£5.3m at 2016 (based, once again, on the retention of Darlington Borough’s existing Study Area market share of 40.2%). By 2019, we estimate that there will be an expenditure surplus of £2.5m, increasing to £8.8m at 2021 and to £24.8m at 2026. Clearly, in respect of convenience goods expenditure, the difference between the two scenarios is relatively limited and is only really apparent in the longer term.

**Table 7.4: Quantitative Need for Convenience Goods Floorspace in Darlington Borough Under Population Growth Scenario 2**

Year	Benchmark Turnover (£m) <sup>1</sup>	Available Expenditure (£m) <sup>2</sup>	Surplus Expenditure (£m)
2014	228.0	218.2	-9.8
2016	226.4	221.1	-5.3
2019	226.4	228.9	2.5
2021	226.6	235.4	8.8
2026	227.7	252.5	24.8

Source: Table 6A of Appendix 7

<sup>1</sup> Benchmark turnover to increase in line with improvements in turnover efficiency set out in Table 4a of Experian Retail Planner 11 (October 2013)

<sup>2</sup> Assumes constant market share of Study Area expenditure (40.2%) claimed by facilities across whole of Study Area  
2012 Prices



7.20 After taking account of the same commitments, we again find that there is no further need for additional convenience goods facilities in the short to medium term, but that there is a slight increase in the floorspace requirement at 2026. At 2026, the identified residual of £10.7m will support between 900 sq.m and 2,000 sq.m of convenience goods sales floorspace.

**Table 7.5: Quantitative Need for Convenience Goods Floorspace in Darlington Borough Under Population Growth Scenario 2 After Account is Made for Commitments**

Year	Convenience Goods				
	£m			Floorspace Requirement (sq.m net)	
	Surplus (£m)	Commitments (£m)	Residual (£m)	Min <sup>1*</sup>	Max <sup>2*</sup>
2014	-9.8	14.1	-23.9	-1,900	-4,500
2016	-5.3	14.0	-19.3	-1,600	-3,700
2019	2.5	14.0	-11.5	-900	-2,200
2021	8.8	14.0	-5.3	-400	-1,000
2026	24.8	14.1	10.7	900	2,000

Source: Table 6c of Appendix 7

<sup>1</sup> Average sales density assumed to be £12,524 per sq.m at 2014 (based on the average sales density of the leading four supermarket operators as identified by Verdict 2013)

<sup>2</sup> Average sales density assumed to be £5,294 per sq.m at 2014 (based on the average sales density of discount food retailers as identified by Verdict 2013)  
2012 Prices

### Capacity for Future Comparison Goods Floorspace

7.21 Turning to comparison goods capacity, it is first important to note that our methodology deviates from that which has been deployed in respect of convenience goods for two principal reasons. Firstly, it can be extremely difficult to attribute an appropriate benchmark turnover to existing comparison goods provision. Secondly, there tends to be greater disparity between the trading performance of apparently similar comparison goods provision depending on its location, the character of the area and the nature of the catchment. As a consequence, we adopt the approach with comparison goods floorspace that it is trading 'at equilibrium' (i.e. our survey derived turnover estimate effectively acts as benchmark) at 2014.

7.22 We assume that there is therefore a nil quantitative need for any additional floorspace across the District at 2014. Once again, it has generally been assumed that the future performance of Darlington's facilities will be commensurate with its current market share. However, we do consider that Darlington town centre, its retail parks and its standalone large format retail units will attract some custom from outside the Study Area. Accordingly, we have assumed that such facilities attract an additional 10% of their turnover from outside of the Study Area. No inflow allowance has been attributed to smaller comparison goods retailers located in district and local centres as such retailers



will generally cater for a localised need. The inflow allowance has the net effect of increasing Darlington Borough’s identified survey derived turnover from £352.8m to £384.4m at 2014 (inflow therefore representing 8.2% of total turnover).

7.23 The £352.8m of comparison goods expenditure claimed from inside the Study Area at 2014 equates to a market share of 44.9% of all comparison goods expenditure generated by residents of the Study Area. Our assessment ‘rolls forward’ this market share to examine the likely level of comparison goods floorspace required to maintain the role and function of Darlington’s retail facilities under the two population growth scenarios.

Comparison Goods Quantitative Need in Darlington – Population Growth Scenario 1

7.24 By ‘rolling forward’ this market share and making provision for inflow from neighbouring authority areas, we estimate that facilities in Darlington Borough under population growth Scenario 1 will attract £404.4m of comparison goods expenditure at 2016, increasing to £438.0m at 2019, to £465.9m at 2021 and to £546.8m at 2026 based on a continuation of Darlington’s current Study Area market share.

**Table 7.6: Quantitative Need for Comparison Goods Floorspace in Darlington Borough Under Population Growth Scenario 1**

Year	Benchmark Turnover (£m) <sup>1</sup>	Available Expenditure (£m) <sup>2</sup>	Surplus Expenditure (£m)
2014	384.4	384.4	0.0
2016	401.1	404.4	3.2
2019	426.9	438.0	11.1
2021	444.6	465.9	21.3
2026	490.9	546.8	55.9

Source: Table 26A of Appendix 6

<sup>1</sup> Turnover of existing stores to increase in line with improvements in turnover efficiency set out in Table 4b of Experian Retail Planner 11 (September 2013)

<sup>2</sup> Assumes constant market share (44.9%) claimed by facilities within the Study Area  
2012 Prices

7.25 Given the forecast increases in comparison goods expenditure and population and allowing for year on year increases in the productivity of existing floorspace, we estimate that by 2016 there will be a relatively limited expenditure surplus of £3.2m to support additional comparison goods floorspace within the Study Area. As set out in Table 7.6, this surplus is forecast to increase to £11.1m at 2019, to £21.3m at 2021 and then sharply to £55.9m at 2026. Account has been made for the turnover



efficiency of existing comparison goods floorspace to increase (on the basis that operators are generally able to make their existing floorspace more productive over time)<sup>34</sup>.

- 7.26 Once again, this initial analysis does not take into account existing commitments, which we set out in Table 7.7 and which we estimate will have a combined benchmark turnover of £24.6m at 2012 prices, if it were to be assumed that each was operational at 2014. The proposed Oval development at Commercial Street has stalled in the current economic climate and is not a current retail commitment. The single largest commitment is the planned change of use of the Northern Echo office building adjacent to Cornmill Shopping Centre which could accommodate nearly 4,000 sq.m of comparison goods retail floorspace and has previously attracted some interest from department store operators. We estimate that this commitment alone could turn over in the order of £19.6m if operational at 2014.
- 7.27 The estimated £24.6m turnover of comparison goods commitments is substantial and extinguishes any quantitative need for additional floorspace across the Borough over the medium term. Accordingly, Table 7.8 indicates a negative residual in the four reporting periods to 2021. A positive residual of £24.5m is identified at 2026 which would support between 3,800 sq.m and 6,400 sq.m of additional comparison goods sales floorspace. The minimum figure is based on the identified need being met through the delivery of high street floorspace and the maximum figure relates to need being met by bulky goods retailers or in smaller town centres (which both generally accommodate operators which achieve lesser sales densities).

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<sup>34</sup> Such increases have been derived from the projections set out in Table 4b of Experian Retail Planner Briefing Note 11 (these being +1.9% at 2014, +2.2% at 2015, +2.1% per annum between 2016 and 2020, and +2.0% between 2021 and 2028)



**Table 7.7: Extant Comparison Commitments within the Study Area**

Zone	Location	Planning Application Reference	Proposal	Net Comp Sales (sq.m)	Comp Sales Density (£ per sq.m)	Estimate Turnover at 2013 (£m)	Status
2.	Central Park	12/00391/FUL	Hybrid application for mixed-use development including up to 180 residential units and up to 1,700 sq.m of Use Classes A1 (retail), A3 (hot food) and A4 (drinking establishments)	175	3,000	0.5	Extant planning permission
2.	Grange House, 53 Grange Road	13/00376/FUL	Change of use to Class A1 shop	280	3,000	0.8	Extant planning permission
2.	31 Post House Wynd	13/00314/CU	Change of use to treating rooms and Class A1 shop	140	3,000	0.4	Extant planning permission
2.	Neasham Road Local Centre	10/00358/FUL	Additional retail units at existing retail park	78	3,000	0.2	Extant planning permission
2.	Northern Echo Building, Priestgate	11/00656/FUL	Change of use from Northern Echo offices to form extension to shopping centre	3,920	5,000	19.6	Extant permission
2.	Lingfield Point	08/00638/OUT	Mixed-use regeneration scheme including local retail facilities	700	3,000	2.1	Extant permission
4.	Meynall Road/Wessoe Road	13/00225/FUL	Bulky goods retail unit	438	2,000	0.9	Extant permission
<b>Total</b>				<b>5,731</b>		<b>24.6</b>	

Source: Table 26 of Appendices 6 and 7  
2012 Prices

**Table 7.8: Quantitative Need for Comparison Goods Floorspace in Darlington Borough Under Population Growth Scenario 1 After Account is Made for Commitments**

Year	Comparison Goods				
	£m			Floorspace Requirement (sq.m net)	
	Surplus	Extant	Residual	Min <sup>1*</sup>	Max <sup>2*</sup>
2014	0.0	24.6	-24.6	-4,900	-8,200
2016	3.2	25.7	-22.4	-4,300	-7,200
2019	11.1	27.3	-16.2	-2,900	-4,900
2021	21.3	28.4	-7.2	-1,200	-2,100
2026	55.9	31.4	24.5	3,800	6,400

Source: Table 26c of Appendix 6

<sup>1</sup> Average sales density assumed to be £5,000 per sq.m at 2013

<sup>2</sup> Average sales density assumed to be £3,000 per sq.m at 2013  
2012 Prices





Comparison Goods Quantitative Need in Darlington – Population Growth Scenario 2

7.28 Tables 7.9 and 7.10 repeat the above exercise for population growth Scenario 2. Table 7.9 identifies that, with a higher population at 2016 and every subsequent reporting period, there is one again an estimated expenditure surplus of £3.6m at 2016, increasing to 12.4m at 2019, to £25.8m at 2021 and to £68.3m at 2026 (based once again on the retention of the existing 44.9% market share and making allowance for inflow from outside the Study Area in the same manner specified at paragraph 7.22 of our report).

**Table 7.9: Quantitative Need for Comparison Goods Floorspace in Darlington Borough Under Population Growth Scenario 2**

Year	Benchmark Turnover (£m) <sup>1</sup>	Available Expenditure (£m) <sup>2</sup>	Surplus Expenditure (£m)
2014	384.4	384.4	0.0
2016	401.1	404.7	3.6
2019	426.9	439.3	12.4
2021	444.6	470.4	25.8
2026	490.9	559.2	68.3

Source: Table 26A of Appendix 7

<sup>1</sup> Turnover of existing stores to increase in line with improvements in turnover efficiency set out in Table 4b of Experian Retail Planner 11 (September 2013)

<sup>2</sup> Assumes constant market share (44.9%) claimed by facilities within the Study Area  
2012 Prices

7.29 As would be expected, after taking account of the same commitments, there is an increased requirement for additional comparison goods retail floorspace within Darlington Borough under population growth Scenario 2. However, as the difference between the population scenarios is relatively limited, particularly during the early part of the Making and Growing Places plan period, the additional floorspace requirement is modest and a positive expenditure residual becomes apparent over the last reporting period only.

7.30 At 2026, a positive residual of £36.9m is identified which equates to a comparison goods sales floorspace requirement of between 5,800 sq.m and 9,600 sq.m (2,000 sq.m to 3,200 sq.m more than that identified under population growth Scenario 1).



**Table 7.8: Quantitative Need for Comparison Goods Floorspace in Darlington Borough Under Population Growth Scenario 2 After Account is Made for Commitments**

Year	Comparison Goods				
	£m			Floorspace Requirement (sq.m net)	
	Surplus	Extant	Residual	Min <sup>1*</sup>	Max <sup>2*</sup>
2014	0.0	24.6	-24.6	-4,900	-8,200
2016	3.6	25.7	-22.4	-4,200	-7,100
2019	12.4	27.3	-14.9	-2,700	-4,500
2021	25.8	28.4	-2.7	-500	-800
2026	68.3	31.4	36.9	5,800	9,600

Source: Table 26c of Appendix 7

<sup>1</sup> Average sales density assumed to be £5,000 per sq.m at 2013

<sup>2</sup> Average sales density assumed to be £3,000 per sq.m at 2013

2012 Prices

## Qualitative Need and the Potential for Darlington to Increase its Comparison Goods Market Share

- 7.31 As we set out at paragraph 7.13 of this section, convenience goods retail facilities turn over £218.2m at 2014, which is slightly less than their expected benchmark turnover of £228.0m. In examining the performance of specific stores, it is evident that the majority of food superstores in the town are trading around their anticipated benchmark level (or slightly below). The exception to this is the Morrisons store at North Road District Centre in Zone 3, which has an estimated convenience goods benchmark turnover of £36.9m and an estimated survey derived turnover of £47.9m.
- 7.32 Table 7.9 below provides an overview of the current performance of existing foodstores (which provide a net convenience goods sales density of 1,000 sq.m or more) with reference to their expected trading performance. Of the six foodstores, three perform better than their anticipated benchmark performance. The Morrisons at Morton Park turns over an estimated £5.2m more than its expected convenience goods benchmark turnover of £37.8m and the Morrisons at North Road turns over an estimated £11.0m more than its convenience goods benchmark turnover of £36.9m. Neither of these two performances are considered particularly problematic as foodstores' performance can vary greatly and it is not uncommon for household surveys to identify stores which have a turnover which is 50% (or more) better than anticipated.
- 7.33 In this context, the performance of the two Morrisons stores is not considered excessive and not necessarily at a level which is likely to contribute to particular issues resulting from effective 'overcrowding' (queues at tills, problems accessing the car park and so on). Main food shopping provision is therefore considered to generally be appropriate and there is no quantitative need for a



further superstore of the format preferred by the 'main four' operators (Asda, Morrisons, Sainsbury's and Tesco). We do note, however, that main foodstore provision in Darlington is located centrally or to the east of the town centre. There are no large food supermarkets or superstores in either Zone 1 or Zone 4 and it is therefore accepted that, subject to the acceptability of the impacts which would arise from such development, that there may be qualitative benefits associated with improved main food retail provision in the eastern part of Darlington. Such benefits could derive from a reduced need to travel to access supermarket facilities and an improvement in the ability to meet all the needs of the community.

7.34 We also note that the Aldi store at Yarm Road has an estimated convenience goods survey derived turnover of £18.3m, which compares to an anticipated benchmark turnover of £7.2m. Whilst Aldi is currently performing strongly throughout the UK, this performance (with the survey derived turnover being 253.9% greater than the anticipated benchmark) is particularly notable and, notwithstanding the moderate performance of the Lidl store, suggests that the discount food sector may be underprovided for in Darlington.

**Table 7.9: Performance of Convenience Goods Floorspace of Principal Foodstores in Darlington at 2014**

Zone	Store	Gross Floorspace	Estimated Net Convenience Floorspace	Sales Density (£ per sq.m)	Benchmark Turnover (£m)	Survey Derived Turnover (£m)	Overtrading (£m)
2.	Aldi, Yarm Road	1,420	1,089	6,616	7.2	18.3	11.1
2.	Lidl, Yarm Road	1,610	1,089	3,972	4.3	3.3	-1.0
2.	Morrisons, Morton Park	8,148	3,156	11,993	37.8	43.0	5.2
2.	Sainsbury's, Victoria Road	11,117	3,385	13,123	44.4	38.5	-5.9
3.	Asda, Whinfield Centre	4,827	1,772	14,467	25.6	22.3	-3.3
2.	Morrisons, North Road	7,358	3,078	11,993	36.9	47.9	11.0

Source: Table 5 of Appendices 6 and 7  
2012 Prices

7.35 Accordingly, our assessment suggests that a further discount store could well be supported in Darlington and this accords with a recent press report<sup>35</sup> which indicates that a discount foodstore is to form part of the proposal to bring forward land at the junction of Albert Road and North Road (near North Road district centre) for retail development. Whilst such a proposal must be judged against relevant planning policy at the time of its submission, an additional discount foodstore would provide additional customer choice and help meet an existing qualitative deficiency. Notwithstanding this, it

<sup>35</sup> Northern Echo article of 18 March 2014 headlined 'Plans Unveiled for New Multi-Million Pound Retail Park in Darlington'



should be noted that all foodstores fall within the same use class and the grant of planning permission would not ordinarily relate specifically to a particular operator.

- 7.36 Turning to comparison goods provision, whilst our household survey methodology differed slightly from that used in undertaking the 2008 Study, it is evident that Darlington's market share in particular comparison goods categories has declined as a result of increased competition (including the emergence of a more comprehensive comparison goods retail offer at Teesside Shopping Park in recent years). Accordingly, we consider that there may be scope to secure an increase in the retention of particular types of comparison goods expenditure originating in the Primary Study Area as some residents are currently travelling further afield to source certain types of good.
- 7.37 The most notable reduction in Darlington's market share has occurred in the clothing and footwear sector, where facilities in Darlington Borough claim 54.2% of such expenditure originating within the Primary Study Area, which compares to the 68.1% market share identified by the 2008 survey. In addition, the market share of Primary Study Area expenditure claimed by those retailing books, CDs and DVDs in Darlington Borough has fallen from 63.3% in 2008 to 59.0%, and the market share of such expenditure claimed by those retailing household goods in Darlington Borough has fallen from 53.4% to 51.0%.
- 7.38 Whilst Darlington town centre does accommodate a very large proportion of the top 27 national multiple retailers identified by Experian Goad (including Next, Primark and Topshop), we believe that at least some of these operators would consider alternative larger premises should such accommodation become available in the town. We also note that EGi has identified that an increasing number of retailers (39 at the time of reporting) are seeking representation in the town. There would appear to be a relative shortfall in the supply of larger, modern units (of between approximately 300 sq.m to 600 sq.m) to accommodate high street multiple retailers.
- 7.39 Accordingly, subject to its viability and its ability to secure key anchor tenants, we consider that the Commercial Street site still has the potential to meet an identified qualitative deficiency in Darlington town centre. The Commercial Street site remains the single opportunity to accommodate additional floorspace which has the potential to form part of the town centre's existing retail circuit and is the sequentially preferable site for additional retail development in the town.
- 7.40 We consider that significant new development of this type in Darlington town centre, providing a substantial quantum of additional comparison goods floorspace, would have the potential to arrest the identified decline in market share and act to 'claw back' expenditure which leaks to retail destinations



further afield. This would particularly be the case for the three comparison goods sectors identified in paragraph 7.37, which are, to a substantial degree, sourced on the high street.

7.41 Given the market share which was secured in 2008 for the three goods sectors, we consider that a significant town centre redevelopment providing modern, attractive accommodation for national multiple retailers may have the potential to:

- increase Darlington Borough's market share of clothing and footwear expenditure which originates within the Primary Study Area from 54.2% to circa 70.0%;
- increase Darlington Borough's market share of books, CDs and DVDs expenditure which originates within the Primary Study Area from 59.0% to circa 65.0%; and
- increase Darlington Borough's market share of household goods expenditure which originates within the Primary Study Area from 51.0% to circa 60.0%.

7.42 Clearly, the uplift which is secured in practice will be dependent on the scale and format of the scheme that is delivered. The above increases in market share are considered to represent the upper end of what could likely be achieved with a scheme of a very significant scale and such an uplift would, in our view, likely require department store and additional large format fashion retailer representation in order to occur in practice.

7.43 We have modelled the effect of such increases in market share on the turnover of Darlington Borough as whole. Table 7.10 sets out our estimated increases in each category as a result of such an improvement in provision. For ease of presentation, we have modelled the improvements in expenditure retention at 2014, although this is not possible in practice, given that the type of development which would result in a 'step change' in shopping behaviour would take a number of years to come forward.



**Table 7.10: Darlington Borough’s Comparison Goods Expenditure Originating from within the Study Area at 2014 as a Result of Forecast Increases in Market Share**

Category	2014 Survey Derived (£m)	2014 with Identified Uplift in Market Share (£m)
Books, CDs and DVDs	23.9	26.1
Chemist	9.3	9.3
Clothing and Footwear	111.4	141.0
DIY	20.1	20.1
Electrical	43.6	43.6
Furniture	47.2	47.2
Household Goods	64.3	75.1
Recreation	33.1	33.1
<b>Total</b>	<b>352.8</b>	<b>395.5</b>

Source: WYG manual calculation and Tables 10, 12, 14, 16, 18, 20, 22 and 24 of Appendices 6 and 7 2012 Prices

7.44 Table 7.10 indicates that the uplift in market share results in an estimated £395.5m of comparison goods expenditure that originates within the Study Area being claimed by facilities in Darlington Borough, as opposed to the £352.8m which we have currently identified. As we set out at paragraph 7.23, the £352.8m of comparison goods expenditure that is currently claimed from inside the Study Area equates to a market share for Darlington Borough of 44.9% of all comparison goods expenditure generated by Study Area residents. The proposed uplift as a result of significant new development equates to an improved market share of 50.4%.

7.45 The uplift which could be secured in practice will also be influenced by the scale and format of retail development which is brought forward in neighbouring authority areas and in this regard we note that a planning application (reference 14/00687/FULL) has been submitted to provide for the development of a designer outlet village at Scotch Corner. The Scotch Corner site is situated in the Richmondshire authority area, approximately 14 kilometres to the south west of Darlington town centre, and would provide a gross floorspace of circa 23,000 sq.m. Whilst we have not undertaken a detailed appraisal of the application as part of this Study, such development has the potential to impact on Darlington’s future market share.

7.46 As stated above, the modelled increase in market share could only be secured after the implementation of development and therefore in modelling the needs which arise from an increase in market share, it is necessary to assume that the position at base year 2014 will be as existing. Accordingly, Table 7.11 identifies that there will only be an increased expenditure surplus from 2016 onwards, which equates to £52.2m at 2016, increasing to £65.6m at 2019, to £82.7m at 2021 and to



£136.0m at 2026 (making allowance for inflow from outside the Study Area in the manner previously specified). We have used population growth Scenario 2 as the basis for our additional analysis.

**Table 7.11: Quantitative Need for Comparison Goods Floorspace in Darlington Borough Under Population Growth Scenario 2 with Uplift in Market Share**

Year	Benchmark Turnover (£m) <sup>1</sup>	Available Expenditure (£m) <sup>2</sup>	Surplus Expenditure (£m)
2014	384.4	384.4	0.0
2016	401.1	453.6	52.5
2019	426.9	492.5	65.6
2021	444.6	527.3	82.7
2026	490.9	626.9	136.0

Source: Table 26A of Appendix 7 (subject to manual adjustment to account for Darlington Borough market share being increased to 50.4% from 2016)

<sup>1</sup> Turnover of existing stores to increase in line with improvements in turnover efficiency set out in Table 4b of Experian Retail Planner 11 (September 2013)

<sup>2</sup> Assumes increased market share (50.4%) claimed by facilities within the Study Area 2012 Prices

7.47 As would be expected, even after taking account one more of existing commitments, there is a substantially increased requirement for additional comparison goods retail floorspace within Darlington Borough resulting from the assumed improvement in market share. Table 7.12 identifies a positive residual of £26.9m at 2016, increasing to £38.2m at 2019, to £54.2m at 2021 and to £104.6m at 2026

7.48 At 2026, we estimate that such a surplus could support an additional 16,400 sq.m to 27,300 sq.m of comparison goods sales floorspace, with the lesser figure being of greater relevance as it is representative of high street comparison goods accommodation.

**Table 7.12: Quantitative Need for Comparison Goods Floorspace in Darlington Borough Under Population Growth Scenario 2 with Uplift in Market Share After Account is Made for Commitments**

Year	Comparison Goods				
	£m			Floorspace Requirement (sq.m net)	
	Surplus	Extant	Residual	Min <sup>1*</sup>	Max <sup>2*</sup>
2014	0.0	24.6	-24.6	-4,900	8,200
2016	52.2	25.7	26.9	5,100	8,600
2019	65.6	27.3	38.2	6,900	11,500
2021	82.7	28.4	54.2	9,400	15,600
2026	136.0	31.4	104.6	16,400	27,300

Source: Table 26c of Appendix 6

<sup>1</sup> Average sales density assumed to be £5,000 per sq.m at 2013

<sup>2</sup> Average sales density assumed to be £3,000 per sq.m at 2013 2012 Prices



## 8.0 Commercial Leisure

- 8.01 Our approach to the assessment of quantitative need in the leisure market necessarily departs from our retail methodology for a number of reasons, including the fragmentation of the market and the limited availability of accurate data. However, the household survey undertaken to inform the Study asked respondents questions about their use of commercial leisure facilities and, through reference to market share, we are therefore able to form a view as how Darlington currently meets the needs of its population in relation to the bingo, cinema and ten-pin bowling sectors. We also use national statistics in respect of the typical level of provision of specific types of facilities to assist our judgement in respect of the likely future need for additional facilities in the Borough.
- 8.02 Given the nature of our approach, which refers to broad benchmark average figures, we do not consider that there will likely be any difference in requirement between population growth Scenarios 1 and 2, and the analysis which follows is based on the more limited growth Scenario 1.

### Bingo

- 8.03 Whilst the results of the household survey suggest that there are two bingo halls in Darlington – the Gala Bingo hall at Skinnergate and the Top Ten Bingo hall at Eldon Street – the Top Ten actually closed in 2013. Accordingly, Darlington currently just has a single bingo hall at Skinnergate within the town centre. The hall is in the former Arcade cinema which opened in 1912. Whilst the premises are somewhat dated, as Table 8.1 below indicates, the hall attracts almost two-thirds (64.8%) of bingo trips which originate in the five central Greater Darlington zones. This is at least in part due to there being a need to travel to access the competition.

**Table 8.1: Primary Study Area Market Share for Bingo Halls**

Zone	Bingo Facility	GD 2013	NA 2013	DA 2013	PSA 2013
1.	Gala Bingo, Skinnergate	64.8%	0.0%	26.0%	44.1%
4.	Top Ten Bingo, Eldon Street	5.5%	0.0%	0.0%	3.1%
6.	Ferryhill	0.0%	20.5%	0.0%	3.0%
6.	Newton Aycliffe	5.2%	0.0%	0.0%	3.0%
7.	Barnard Castle	0.0%	0.0%	12.5%	3.6%
7.	Catterick Garrison	0.0%	0.0%	9.7%	2.8%
7.	Richmond	0.0%	0.0%	10.6%	3.0%
Outside SA	Mecca Bingo, Stockton-on-Tees	21.1%	35.2%	41.2%	28.9%
Outside SA	Other	3.5%	44.3%	0.0%	8.5%
<b>Total</b>		<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Source: Question 43 of Household Survey, Appendix 1





- 8.04 The second most popular bingo facility for residents of Greater Darlington and the wider Primary Study Area is the Mecca Bingo at Stockton-on-Tees, which is a more modern facility and which benefits from its own car parking. The Mecca Bingo attracts 28.9% of trips to the bingo across the Primary Study Area. Other locations for bingo are not specifically named by respondents and are assumed to be occasional venues within the particular town mentioned.
- 8.05 The five zones which comprise the Greater Darlington area have a total estimated population of 108,804 at 2014, increasing to 114,830 at 2026 under population growth Scenario 1. Research<sup>36</sup> indicates that bingo halls are typically supported by a catchment of 60,000 persons or thereabouts. Accordingly, we estimate that Darlington could be expected to support 1.8 bingo halls at 2014, increasing to 1.9 bingo halls at 2026.
- 8.06 Given that the bingo market has been affected by the 2007 ban on smoking in enclosed public places, an increase in the proliferation of fixed odd gaming machines and an increase in online gambling, we do not consider it likely that there will be any change to the town’s current provision in the foreseeable future. Accordingly, we do not consider it necessary for the Council to plan for additional provision over the timeframe of the Making and Growing Places Preferred Options Development Plan Document, but instead recommend that, should any proposals for such development be forthcoming, they are judged on their own merit in accordance with relevant town centre planning policy at the time of an application’s submission.

**Table 8.2: Bingo Hall Requirement in Greater Darlington Area**

Year	Greater Darlington Population	Typical Catchment Required to Support Hall	Potential No. of Clubs Supported by Greater Darlington Area
2014	108,804	60,000	1.8
2016	109,901	60,000	1.8
2019	111,487	60,000	1.9
2021	112,574	60,000	1.9
2026	114,830	60,000	1.9

Note: Typical catchment required to support a bingo hall derived from Business in Sport and Leisure research

## Cinema

- 8.07 Darlington currently benefits from a three-screen Odeon cinema on Northgate, just to the north of the town centre. The cinema dates from 1938 and originally opened as the Regal. The cinema is of art

<sup>36</sup> Undertaken by Business in Sport and Leisure



deco appearance and, whilst it is of some historical interest, the interior and overall experience will be less attractive to some filmgoers than that provided by modern multiplexes. Elsewhere in the Study Area, there is a small two-screen cinema at Richmond Station and another small single screen cinema at Witham Hall in Barnard Castle. The nearest modern multiplex cinema is the 14 screen Showcase cinema at Teesside Leisure Park, approximately 24 kilometres to the east of Darlington.

8.08 As a consequence of the rather dated facilities, many of Darlington’s cinema goers chose to travel to Teesside Leisure Park in order to watch films. As set out in Table 8.3 below, just 28.3% of Greater Darlington residents visit the Darlington Odeon and approaching double – 50.9% – choose to travel to Teesside.

**Table 8.3: Primary Study Area Market Share for Cinemas**

Zone	Cinema	GD 2013	NA 2013	DA 2013	PSA 2013
1.	Odeon, Darlington	28.3%	11.3%	8.0%	16.1%
7.	Witham Hall Cinema, Barnard Castle	0.0%	0.0%	0.9%	0.4%
7.	Station Cinema, Richmond	4.9%	0.0%	54.4%	22.6%
Outside SA	Odeon, Metro Centre	1.8%	20.8%	2.6%	7.1%
Outside SA	Cineworld, Middlesbrough Leisure Park	12.1%	11.1%	6.0%	9.5%
Outside SA	Showcase Cinema, Teeside	50.9%	45.5%	26.6%	40.1%
Outside SA	Other	2.0%	11.3%	1.5%	4.3%
<b>Total</b>		<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Source: Question 39 of Household Survey, Appendix 1

8.09 The qualitative deficiency in Darlington’s cinema offer is widely recognised and will be addressed by the Feethams leisure development which is to provide a nine-screen Vue cinema together with a Premier Inn and food and drink outlets. The cinema is scheduled to open in 2016.

8.10 Once again, we estimate that the five zones which comprise the Greater Darlington area have a total estimated population of 108,804 at 2014, increasing to 114,830 at 2026 under population growth Scenario 1. The Mintel Cinema Market report of May 2011 estimates that the UK population on average visits a cinema 2.7 times per annum and that each cinema screen attracts around 45,228 separate admissions.

8.11 Applying these benchmark averages to the Greater Darlington area, we estimate that there will be 293,770 cinema admissions arising from the Greater Darlington population at 2014, increasing to 310,041 admissions at 2026. Based on the assumed number of visits per screen, we calculate that



around 6.5 screens are supported at 2014, increasing slightly to 6.9 screens at 2026. Our calculations are set out below at Table 8.2.

**Table 8.4: Cinema Screen Requirement in Greater Darlington Area**

Year	Greater Darlington Population	Number of Cinema Visits Per Person	Attendance	Number of Admission Required to Support Screen	Screens Supported
2014	108,804	2.7	293,770	45,228	6.5
2016	109,901	2.7	296,732	45,228	6.6
2019	111,487	2.7	301,014	45,228	6.6
2021	112,574	2.7	303,949	45,228	6.7
2026	114,830	2.7	310,041	45,228	6.9

Note: Number of cinema trips per person and number of admission per screen derived from Mintel Cinema Market report of May 2011

8.12 Clearly, there will be some users from inside Greater Darlington who still choose to use facilities elsewhere, but there will also be some additional inflow of cinema visits from Study Area Zones 6 to 9, and from outside the Study Area. It should also be noted that the proposed cinema is situated in a highly accessible location and should therefore be an attractive and popular provision. Accordingly, cinema attendance in Darlington may well exceed national average figures subsequent to the implementation of the Vue Cinema at Feethams (therefore resulting in a cinema requirement in excess of that identified above).

8.13 Notwithstanding this, due to its current relatively poor performance, we believe that the future viability of the existing Darlington Odeon is likely to be challenged subsequent to the opening of the Vue cinema. However, it is evident from the above that, even should the Odeon close, Darlington would still have a nine-screen cinema which is considered to appropriately meet identified needs over the period to 2026.

### Ten Pin Bowling

8.14 There is not currently any ten pin bowling provision within the five central Greater Darlington zones, with the nearest ten pin bowling facilities being at Planet Leisure in Newton Aycliffe in Zone 6, at the White Rose Club at Catterick Garrison in Zone 7 and at Hollywood Bowl at Teeside Leisure Centre outside of the Study Area. Both of the facilities located within the Study Area are somewhat smaller than most modern ten pin facilities, with Planet Leisure providing a total of 12 lanes and the White Rose Club just four lanes. Planet Leisure is situated approximately 10 kilometres directly to the north



of Darlington town centre and the White Rose Club is located approximately 26 kilometres to the south west of the centre.

8.15 The White Rose Club fails to attract any ten pin bowling trips which originate inside the Primary Shopping Area and Planet Leisure claims 20.7% of all such trips. By far the most popular destination to undertake ten pin bowling is the Hollywood Bowl at Teeside Leisure Park, which has 26 lanes together with pool, a cafe and a bar. The Hollywood Bowl accounts for 76.1% of all ten pin bowling trips which originate from within the central Greater Darlington zones and 68.8% of all trips which originate across the Primary Study Area as whole.

**Table 8.5: Primary Study Area Market Share for Ten Pin Bowling Alleys**

Zone	Cinema	GD 2013	NA 2013	DA 2013	PSA 2013
6.	Planet Leisure, Newton Aycliffe	20.7%	55.3%	12.6%	28.0%
7.	Catterick Garrison	0.0%	0.0%	3.8%	1.2%
Outside SA	Hollywood Bowl, Teeside Leisure Park	76.1%	42.1%	83.7%	68.8%
Outside SA	Other	3.2%	2.6%	0.0%	2.0%
<b>Total</b>		<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Source: Question 42 of Household Survey, Appendix 1

8.16 Whilst there is therefore a deficiency in terms of the lack of ten pin bowling facilities in the town, it should be noted that the Mintel Tenpin Bowling report of July 2010 identified that there were 5,822 bowling lanes across the UK in 2010. Given that the UK population at 2010 was approximately 62.7 million<sup>37</sup>, this equates to one lane for every 10,769 persons.

8.17 We again estimate that the Greater Darlington area has a population of 108,804 at 2014, increasing to 114,830 at 2026 under population growth Scenario 1. Based on the assumed benchmark identified above, we calculate that around 10.1 ten pin bowling lanes are supported at 2014, increasing to 10.7 lanes at 2026.

8.18 In our experience, modern ten pin bowling facilities generally have a minimum of 16 lanes and can sometimes provide double that number. Accordingly, in light of the relatively recent opening of the Planet Leisure facility in 2011 and the general downturn in the ten pin bowling sector over the past decade, we consider it unlikely that operators are likely to consider opening additional facilities in Darlington in the near future. We would again suggest that, should any planning application proposal

<sup>37</sup> As identified by the Office for National Statistics' Revised Annual Mid-Year Population Estimates 2001 to 2010, December 2013



for such a use be forthcoming, it should be judged on its own merits in accordance with relevant town centre planning policy at the time of an application's submission.

**Table 8.6: Ten Pin Bowling Requirement in Greater Darlington Area**

Year	Greater Darlington Population	Typical No. of Persons Required to Support One Ten Pin Bowling Lane	Potential No. of Lanes Supported by Greater Darlington Area
2014	108,804	10,769	10.1
2016	109,901	10,769	10.2
2019	111,487	10,769	10.4
2021	112,574	10,769	10.5
2026	114,830	10,769	10.7

Note: Typical number of persons required to support a bowling lane derived from Mintel Tenpin Bowling report of July 2010



## 9.0 Future Retail Strategy and Recommendations

9.01 Paragraph 23 of the NPPF requires local planning authorities to promote competitive town centres by, *inter alia*:

- recognising town centres as the heart of their communities and by pursuing policies to support their vitality and viability;
- defining a network and hierarchy of centres that is resilient to anticipated future economic changes;
- promoting 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, ensuring that markets remain attractive and competitive; and
- allocate a range of sites to meet identified needs.

9.02 Each of the above requirements is considered below in relation to Darlington Borough in the context provided by this Study. In order to provide recommendations on the Council’s future retail and town centre strategy, we first summarise the key tenets of the strategy as outlined in the Darlington Making and Growing Places Preferred Options Development Plan Document. A more detailed summary of the document (insofar as it is relevant to this Study) is provided in Section 3 of our report.

### The Council’s Proposed Retail and Town Centre Strategy

9.03 The Making and Growing Places Preferred Options Development Plan Document clearly identifies the Commercial Street opportunity site as the principal opportunity for delivering major non-food retail development in Darlington town centre. Whilst planning permission has previously been secured on the site for a large scale multi-unit comparison goods development, paragraph 3.1.13 of the Preferred Options document acknowledges that the permitted scheme is unlikely to be viable under current economic conditions and that other ways of delivering appropriate development on the site are being explored. To this end, the Commercial Street site forms draft allocation TC1, with future development to be focused around the provision of larger footprint comparison goods units.

9.04 The other key town centre proposal identified in the Preferred Options document is draft allocation TC2 which provides for the development of land at Feethams for office and leisure purposes. This allocation is now in the process of being built out.



- 9.05 Whilst the Preferred Options document indicates that Council does not consider there to be any available site within the town centre which could accommodate a foodstore, draft Policy MGP 3 indicates that the delivery of a site on the edge of the town centre, capable of accommodating a 4,000 sq.m foodstore, should be facilitated, subject to a need for such a store being demonstrated. Draft Policy MGP 3 also indicates that the defined Town Centre Fringe areas will be suitable for a range of different development, including local shops of up to 400 sq.m to meet local needs
- 9.06 Other key policies which effectively form part of the Council’s strategy comprise:
- draft Policy MGP 12, which states that proposals that include more than 500 sq.m gross of new or additional floorspace for main town centre uses in out of centre locations should demonstrate compliance with the sequential and impact tests, and that the proposed site is accessible by modes of transport other than the car;
  - draft Policy MGP 13, which resists the loss of ground floor Class A1 units within primary shopping frontages;
  - draft Policy MGP 14, states that within the defined Fringe Shopping Areas, the Council will permit small new shops of 100 sq.m gross floorspace and other appropriate uses, provided that the proposal accords with other development plan policies; and
  - draft Policy MGP 15 identified two district centres (Cockerton and North Road) and six local centres (Mowden, Neasham Road, Whinfield, Yarm Road, West Park and Middleton St George) to meet residents’ needs.

### Development Priorities

- 9.07 Since the undertaking of the previous Retail Study in 2008, the retail landscape has changed and future expenditure growth forecasts are more modest than they previously have been. At the same time, the increasing popularity of special forms of trading (specifically online sales) has also significantly impacted on the expenditure which is available to town centres. Whilst Darlington has generally been reasonably resilient to such pressures, this Study has identified that the centre secures a reduced market share for certain types of comparison goods (most obviously for clothing and footwear) since the undertaking of the previous Study. Furthermore, whilst the current level of vacant units in the town centre is not such that it gives rise to particular concern, it is evident that Zone A rents in the town have depreciated from around £100 per sq.ft in 2008 to around £75 per sq.ft in 2013.



- 9.08 It is in the above context that aspirations to bring forward the key regeneration opportunity at Commercial Street should be considered. Given market circumstances and the current identified Zone A rental level, we are unsurprised that the opportunity has, for the moment, stalled.
  
- 9.09 However, it is evident that, in the absence of additional modern retail facilities being provided in the town in recent years, other retail destinations have benefitted from an increased share of expenditure which is generated in the Darlington area.
  
- 9.10 The quantitative need assessment undertaken at Section 7 of this report identifies a need for at least an additional 5,800 sq.m of comparison goods net retail floorspace at 2026 under population growth Scenario 2 (after taking account of existing commitments). Should the retail offer of Darlington town centre substantially improve such that a critical mass of additional comparison goods retailers operate from the town, we believe that there is potential for Darlington Borough's market share of comparison goods expenditure originating from within the Study Area to increase from around 44.9% to around 50.4%. It should be noted that the uplift which could occur in practice will be dependent on not only the type and format of development which comes forward at Commercial Street, but will also be influenced by improvements neighbouring towns make in terms of their retail provision. Notwithstanding this, the uplift which has been modelled is considered feasible. The uplift in market share provides for a minimum 16,400 sq.m of additional comparison goods net floorspace.
  
- 9.11 Accordingly, subject to the Council's ongoing discussions and confirmation that a viable form of development can be achieved at Commercial Street, we consider that a very substantial quantum of additional comparison goods floorspace could be supported by the additional expenditure which may be available to support the town centre in the longer term.
  
- 9.12 In our view, Commercial Street remains the sequentially preferable location to accommodate retail development within the town and, accordingly, in light of our findings, recommend that the Council continues its efforts to bring forward this important regeneration opportunity. It will be for the market to determine the form of development that can be supported in practice and comparison goods retail space may form one element of the scheme. Consideration may also need to be given to the site's potential in respect of convenience goods, leisure and food and drink operators in order to secure a viable and appropriate form of development.
  
- 9.13 We do not consider there to be any need to allocate any other additional site to meet comparison goods retail needs and any future proposal for such development should be assessed with appropriate





consideration given to its potential to have a prejudicial impact on the implementation of the Commercial Street opportunity.

- 9.14 With regard to convenience goods retailing, Section 7 of this Study identified a need for at least between 1,200 sq.m and 2,900 sq.m of convenience goods retail floorspace at 2026 under population growth Scenario 2 (after taking account of existing commitments). However, we also note that there appears to be a qualitative deficiency in respect of the provision of discount foodstores and that there is also limited food retail provision in the western part of the town. We are aware that the Council has been approached by interested developers and operators who are preparing proposals which could address any such qualitative shortfalls. Whilst such proposals may have some beneficial impact, if the proposed sites fall outside of a designated centre, appropriate consideration will need to be given to the requirements of the retail policy tests and the potential for the proposal to be accommodated in a sequentially superior location.
- 9.15 In this regard, consideration should be given to the ability of either the Commercial Street site or any edge of centre site (such as land at Garden Street, to the north of Darlington town centre) to accommodate additional food retail development. In assessing the potential offered by such sites, appropriate weight should be given to the ability for additional food retailing in proximity to the town centre to link with existing facilities and help safeguard the centre's overall vitality and viability.
- 9.16 Whilst Darlington does not currently benefit from any ten pin bowling facility, we are unaware of any strong operator interest in this regard and we do not believe that there is any pressing need for any other commercial leisure development once the Feethams Vue cinema scheme has been developed. The Feethams scheme and the consented multi-storey car park should have a very clear beneficial effect in 'anchoring' the southern part of the centre, and we anticipate that this part of the centre may well become more attractive to operators as a result. In particular, there are likely to be opportunities for food and drink operators to be supported by 'spin off' trade derived from visitors to the Vue cinema.

### Impact Test Threshold

- 9.17 In accordance with the requirements of paragraph 26 of the NPPF, it is considered appropriate to identify thresholds for the scale of edge of centre and out of centre retail, leisure and office development which should be the subject of an impact assessment. In this regard, we note that the Making and Growing Places draft Policy MGP 12 states that proposals that include more than 500 sq.m gross of new or additional floorspace for main town centre uses in out of centre locations should



demonstrate compliance with the sequential and impact tests. The draft policy is effectively silent on the requirements for planning applications for development below the threshold.

- 9.18 In our view, any such threshold policy should, in order to accord with the requirements of national planning policy, only apply to the impact test. All main town centre proposals should be the subject of the sequential test (though it is accepted that, in practice, there will be occasions where a particular need can only be met at a particular location).
- 9.19 We also have concerns that the 500 sq.m threshold adopted is relatively high and effectively provides for the smaller store formats of national food retailers without the need to satisfy important national town centre policy tests. Whilst the identified threshold may be appropriate in proximity to Darlington town centre (where development of a modest scale is unlikely to result in any impact of such a magnitude that it would merit the application's refusal), proposals providing less than 500 sq.m gross could be unacceptable close to smaller centres. A 280 sq.m convenience store (which could be operated by Tesco Express, Sainsbury's Local, M Local or similar) will likely have a greater impact on a small centre than a similar facility would on Darlington. In our experience, the turnover of such stores can be such that it can impact on the viability of protected centres. Therefore, in developing an appropriate policy relating to the assessment of impacts, it may be necessary to have a range of thresholds, depending upon which centre the development applies to.
- 9.20 We consider that an appropriate 'tiered' impact threshold policy would ensure that development proposals providing greater than 500 sq.m gross floorspace for retail, leisure or office uses in an edge or out of centre location should be the subject of an impact assessment. It is considered appropriate to reduce the threshold around Small Town Centres and District Centres to 300 sq.m gross and around Local and Neighbourhood Centres to 200 sq.m gross. In our experience, it will only generally be development of a scale greater than these thresholds which could lead to a 'significant adverse' impact, which could merit the refusal of an application for town centre uses in accordance with the provisions of paragraph 27 of the NPPF.

### **Non-Retail Uses Within Primary Shopping Area**

- 9.21 Draft Policy MGP 13 of the Preferred Options document indicates that proposals which would involve the loss of ground floor Class A1 shops within primary frontages will generally be resisted. Within secondary shopping frontages, proposals for non-retail uses will be considered on their own merits and proposals will be supported where it can be demonstrated that the proposal would not, *inter alia*,



lead to an over-concentration of non-retail uses where the cumulative impact would lead to a negative impact on the retail character of the frontage.

9.22 In our view, the above policy provides appropriate flexibility in respect of secondary shopping frontages. However, we are concerned that the draft policy is somewhat prescriptive in respect to the primary shopping area. Whilst we note that there are generally very few vacancies in the defined primary shopping area (the single exception to this being Queen Street Shopping Centre), we consider that some variation in use, even in the traditional retail core, can improve the overall attractiveness of town centres and encourage visitors to stay for longer. In this regard, we note that modern retail developments tend to cater for around 20% of units being in food and drink use in order to assist in providing a vital and viable destination.

9.23 Notwithstanding this, given the relative lack of well located, modern stock in Darlington, we recognise that it is important for retail to remain the principal focus of the primary shopping area. However, in order to add to the balance of uses, to lessen the potential for less attractive units to be vacant for periods of time, and to help provide a modern shopping experience, we believe that consideration should be given to a less prescriptive policy which would better provide a limited range of appropriate uses to co-exist alongside retailers.

### Fringe Shopping Areas

9.24 Draft Policy MGP 14, indicates that within the defined Fringe Shopping Areas, the Council will permit small new shops of 100 sq.m gross floorspace and other appropriate (main town centre) uses, provided that the proposal accords with other development plan policies.

9.25 From our interpretation of the Preferred Options document, it would appear that the Fringe Shopping Areas do not comprise designated centres. Consequently, they do not benefit from any policy protection in respect of the key retail impact and sequential tests. Whilst draft Policy MGP 14 seeks to recognise the contribution Fringe Shopping Areas make in providing accommodation for retailers and service providers which may not be viable propositions in Darlington town centre, we have some concerns about the status of these areas and, in this regard, how draft Policy MGP 14 conforms to national planning policy.

9.26 Firstly, we believe that consideration should be given as to whether – given that the areas principally comprise retail and service uses (and are also considered by the Council to represent suitable locations for a range of main town centre uses) – they should benefit from formal designation as a



'centre'. Whilst we do not consider that any of the Fringe Shopping Areas form part of Darlington town centre, they may merit designation as separate district or local centres.

9.27 Secondly, draft Policy MGP 14 as currently worded could be interpreted as introducing a test of 'scale', whereby new development above 100 sq.m might be resisted. No such test now exists in national planning policy and we are uncertain as to the justification for this aspect of the policy (particular as such proposals should, at the very least, be the subject of the sequential test).

### Retail Hierarchy

9.28 Draft Policy MGP 15 of the Preferred Options document effectively sets out the remainder of Darlington's retail hierarchy through the identification of two district centres (Cockerton and North Road) and six local centres (Mowden, Neasham Road, Whinfield, Yarm Road, West Park and Middleton St George). As we have set out at paragraph 5.103 of this report, we consider that three of the above centres depart from what would be expected of a typical defined 'centre'.

9.29 In this regard, in the absence of any definition to rely on in the NPPF and the associated Ensuring the Vitality of Town Centres National Planning Practice Guidance, the definition provided by the now superseded Planning Policy Statement 4: Planning for Sustainable Economic Growth (PPS4) remains of some relevance. In respect of the definition of town centre, district centres and local centres, PPS4 states the following.

**'Town centres will usually be the second level of centres after city centres and, in many cases, they will be the principal centre or centres in a local authority's area. In rural areas they are likely to be market towns and other centres of similar size and role which function as important service centres, providing a range of facilities and services for extensive rural catchment areas. In planning the future of town centres, local planning authorities should consider the function of different parts of the centre and how these contribute to its overall vitality and viability. In London the 'major' and many of the 'district' centres identified in the Mayor's Spatial Development Strategy typically perform the role of town centres.**

**District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library.**

**Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post**



**office and a pharmacy. Other facilities could include a hot-food takeaway and launderette. In rural areas, large villages may perform the role of a local centre.**

**Small parades of shops of purely neighbourhood significance are not regarded as centres for the purposes of this policy statement.**

- 9.30 Whilst we consider that Neasham Road and West Park depart, to some degree, from the above local centre definition, each serves an important local role, which is underlined by the fact that neither centre has any vacant units. Both Neasham Road and West Park also contain a small supermarket or convenience store which helps anchor the centre and creates 'spin off' trade which benefits other centres. Accordingly, whilst neither centre exactly meets all of the criteria set out in the above definition, each fulfils an important local role, which we consider merits protection through continued designation as a centre.
- 9.31 However, Whinfield local centre is effectively formed by the Asda store, two adjoining 'concession' units, the Asda petrol filling station and a nearby public house. One of the concession units was empty at the time of survey (but which we believe has been re-let at the time of our reporting). The other unit is a hairdresser which is subsumed within the Asda superstore. We consider that the character of Whinfield is predominantly that of a food superstore with limited and sometimes incidental businesses in proximity. Accordingly, we do not consider that Whinfield Road precisely accords with the requirement for a local centre to provide a **'range of small shops of a local nature, serving a small catchment.'**
- 9.32 Notwithstanding this, we are aware that the Council considers that Whinfield local centre performs an important local role in practice and we are also aware that a large GPs' Medical Practice and a pharmacy are located directly adjacent to the west of the centre. Accordingly, if the centre is to retain its formal designation, consideration should be given to the extent of its future boundary.

### Town Centre Boundary

- 9.33 In considering the Council's future strategy for Darlington, we have also reviewed the town centre boundary and, in particular, the inclusion of Duke Street and Woodland Road within an extended boundary to the west. We have visited both of these areas on numerous occasions in undertaking this Study and consider that both accommodate a range of main town centre uses and are contiguous with the remainder of the centre. The inner ring road (comprising St Augustines Way, St Cuthbert's Way and Victoria Road) forms a logical boundary to define the town centre to the north, east and south.



9.34 Accordingly, we consider the town centre boundary as proposed by the Making and Growing Places Development Plan Document to be appropriate.



## Glossary of Terms

**Capacity** Retail capacity in terms of this report refers to surplus/deficit of expenditure (£m) which represents the difference between the expenditure and turnover of the identified facilities.

**Comparison Goods** Comparison goods relate to items not obtained on a frequent basis, these include clothing, footwear, household and recreational goods. A more detailed breakdown of comparison goods categories is provided below.

*Furniture Goods* *Includes all consumer expenditure on furniture, floor coverings and household textiles such as beds, sofas, tables, cupboards, bed linen, curtains, towels, lamps, mirrors, and so on.*

*DIY Goods* *Includes all consumer expenditure on hardware, DIY, decorators' supplies and garden centre type goods. This category includes products such as hammers, saw, screwdrivers, wallpaper, plumbing items, floorboards, ceramic tiles, plants, pots, turf for lawns, and so on.*

*Electrical Goods* *All consumer retail expenditure on domestic electrical and gas appliances, such as washing machines, dryers, dishwashers, ironing and press machines, cookers, freezers and fridge-freezers, coffee makers, radios, televisions, DVD players, and so on.*

*Clothing & Footwear* *All consumer retail expenditure on shoes and other footwear, garments for men, women, children and infants either ready-to-wear or made-to-measure, underwear, ties, handkerchiefs, scarves, and so on.*

*Household Goods* *Includes household textiles and soft furnishings, china, glassware, jewellery and other miscellaneous goods such as greeting cards, notebooks, pens, pencils, and so on.*

*Recreational Goods* *All consumer retail expenditure on bicycles and tricycles (excluding toy bicycles), musical instruments, sports equipment, camping equipment, toys of all kinds including dolls, soft toys, and so on.*



<i>Chemist Goods</i>	<i>All consumer retail expenditure on prescription and non-prescription drugs, adhesive and non-adhesive bandages, first-aid kits, hot-water bottles, toilet shops, sponges, and so on.</i>
<b>Convenience Goods</b>	Convenience goods relate to everyday essential items including confectionary, food, drinks, newspapers and magazines.
<b>District Centre</b>	District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library.
<b>Expenditure Per Capita</b>	The average spend of each person within the defined Study Area on a variety of retail goods.
<b>Expenditure</b>	Expenditure is calculated by taking the population within a defined area and then multiplying this figure by average annual expenditure levels for various forms of goods.
<b>Expenditure Forecasts</b>	This assessment has been undertaken using the 'goods based' approach as prescribed in the Planning for Town Centres Practice Guidance. Retail expenditure forecasts have been derived from Experian Retail Planner Briefing Note 11 (October 2013).
<b>Experian (MMG3)</b>	The database used to identify population, expenditure and socio-economic breakdown of the Study Area population.
<b>Gross Floorspace</b>	Represents the level of total floorspace or footprint of a specific development (i.e. sales area, storage, checkouts, café, display, and so on).
<b>GOAD Plans</b>	Provide accurate information on the composition of town centres, shopping areas, out-of-town retail parks and outlet villages in the UK. Identifies the fascia name, retail category, floorspace, and exact location of all retail outlets and vacant premises.





<b>GOAD Reports</b>	Provide a snap-shot of the retail status or demographic make-up of Goad surveyed town centres. Provides a comprehensive breakdown of floorspace and outlet count for all individual trade types in the Convenience, Comparison, Retail Service, Leisure, Financial/Business Services and Vacancy sectors.
<b>Local Centre</b>	Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette. In rural areas, large villages may perform the role of a local centre.
<b>Net Floorspace</b>	Represents the level of internal area devoted to the sale of goods.
<b>Market Share</b>	Market shares derived from the household survey results, which are based on either the proportion of shopping trips or the proportion of expenditure attracted to a particular centre/facility.
<b>National Multiple</b>	This is a retail or service operator which is or part of a network of nine or more outlets.
<b>Price Base</b>	The price base for the Study is 210; all prices are or have been adjusted to 2010 in order to be consistent.
<b>Rates of Productivity</b>	This takes into account the potential for existing retail floorspace to improve their turnover productivity (e.g. smaller goods could be sold from a smaller area for more money, increased opening hours, etc.).
<b>Sales Density</b>	Retail capacity figures are expressed in term of floorspace, relying on the application of assumed sales density figures to the surplus expenditure identified. This is based on the typical turnover of a store by square metre/foot.



<b>Special Forms of Trading</b>	Defined by Experian as expenditure not directed to traditional floorspace such as the internet, mail order, party plan and vending machines and other non-store activity such as market and road-side stalls.
<b>Study Area</b>	This represents the household survey area, which is based on postal sectors.
<b>Trade Draw</b>	This refers to the level of trade attracted to a particular facility/centre.
<b>Turnover</b>	The turnover figure relates to the annual turnover generated by existing retail facilities.
<b>Town Centre</b>	A town centre will usually be the second level of centres after city centres and, in many cases, they will be the principal centre of centres in a local authority's area. In rural areas they are likely to be market towns and other centres of similar size and role which function as important service centres, providing a range of facilities and services for extensive rural catchment areas. In planning the future of town centres, local planning authorities should consider the function of different parts of the centre and how these contribute to its overall vitality and viability.

