Middlesbrough Town Centres and Retail/Leisure Study

Stage 1: Need Assessment

Middlesbrough Borough Council

September 2020

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1.0 Introduction

Scope of Report

1.1 This report has been prepared by Lichfields on behalf of Middlesbrough Borough Council. It forms part of a suite of three documents which, together, comprise the Middlesbrough Retail and Town Centre Uses Study. The purpose of the study is to:

- support and inform the development of local planning policy;
- support the Council in the determination of individual planning applications and, where necessary, planning appeals; and
- inform the development of other strategies within the Council, including those relating to transport/infrastructure, the university and other investment within Middlesbrough Town Centre.

1.2 This element of the study comprises an assessment of the need for retail and other town centre uses, taking into account the most up to date information in relation to population and expenditure, as well as new household telephone surveys undertaken by NEMS Market Research. It includes a review of current convenience and comparison shopping and leisure visitation patterns across the borough, including any changes since the findings of previous studies. It also includes an assessment of the future quantitative and qualitative need for additional retail and leisure floor space in Middlesbrough, having regard to planned new/committed developments, and the level and type of new development which would be appropriate, including where any identified need should be directed.

1.3 Along with the other two volumes mentioned above, this report was commissioned by Middlesbrough Borough Council in July 2019. As such, notwithstanding the date of publication, the research which underpins the various recommendations set out therein was undertaken prior to the COVID-19 pandemic as well as recent changes to the Use Classes Order.

Report Structure

1.4 The Report is structured as follows:

- Section 2.0 includes a summary of national and local planning policy relevant to this study;
- Section 3.0 provides an overview of current trends in retail and leisure, and their implications for existing centres;
- Section 4.0 provides an analysis of the results of the household telephone surveys undertaken as part of this study;
- Section 5.0 assesses the quantitative and qualitative need for new retail floorspace in the Borough;
- Section 6.0 assesses the need for other town centre uses in the Borough; and
- Section 7.0 provides a summary of all of the above.

2.0 Planning Policy Context

National Planning Policy Framework

2.1 A revised version of the National Planning Policy Framework (NPPF) was published in July 2018, with updates in February 2019, and replaces the previous version, which was published in March 2012. The document sets out the Government's economic, environmental and social planning policies for England.

2.2 At the heart of the Framework is a presumption in favour of sustainable development. The revised NPPF confirms that significant weight should be placed on the need to support economic growth and productivity, taking into account both local needs and wider opportunities for development (paragraph 80).

2.3 Paragraph 85 of the NPPF states the following:

"Planning policies and decisions should support the role that town centres play at the heart of local communities, by taking a positive approach to their growth, management and adaptation. Planning policies should:

a) define a network and hierarchy of town centres and promote their long-term vitality and viability – by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries, allows a suitable mix of uses (including housing) and reflects their distinctive characters;

b) define the extent of town centres and primary shopping areas, and make clear the range of uses permitted in such locations, as part of a positive strategy for the future of each centre;

c) retain and enhance existing markets and, where appropriate, re-introduce or create new ones;

d) allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead. Meeting anticipated needs for retail, leisure, office and other main town centre uses over this period should not be compromised by limited site availability, so town centre boundaries should be kept under review where necessary;

e) where suitable and viable town centre sites are not available for main town centre uses, allocate appropriate edge of centre sites that are well connected to the town centre. If sufficient edge of centre sites cannot be identified, policies should explain how identified needs can be met in other accessible locations that are well connected to the town centre; and

f) recognise that residential development often plays an important role in ensuring the vitality of centres and encourage residential development on appropriate sites."

2.4 Paragraph 86 states that planning applications for main town centre uses which are not in a defined centre and don't accord with an up-to-date development plan should be subject to a sequential test. Such uses should be located in town centres, followed by edge-of-centre locations and, only if suitable sites are not available (or expected to become available within a reasonable period), should out-of-centre sites be considered. Proposals for new retail and leisure development in such locations should be subject to an impact assessment if above 2,500 sqm (where no locally set threshold exists).

2.5 When considering edge of centre and out of centre proposals, preference should be given to accessible sites which are well connected to the town centre. Applicants and local planning authorities should demonstrate flexibility on issues such as format and scale, so that opportunities to utilise suitable town centre or edge of centre sites are fully explored (paragraph 87).

2.6 Proposals for retail and leisure development outside of town centres, which are not in accordance with the Local Plan, should be subject to an impact assessment where the development is over a proportionate, locally set floorspace threshold (or over 2,500 sqm, where there is no such threshold) (paragraph 89). The impact assessment should consider:

- the impact of the proposal on existing, committed and planned public and private investment in centres in the catchment area of the proposal; and
- the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and wider retail catchment (as applicable to the scale and nature of the scheme).

Planning Practice Guidance

2.7 The Planning Practice Guidance (PPG) supports the NPPF and provides guidance on a range of issues including, inter alia, how to ensure the vitality of town centres.

2.8 The PPG states that town centres, as defined in the NPPF, comprise a range of locations where main town uses are concentrated, including city and town centres, district and local centres. It confirms that local planning authorities can take a leading role in bringing together stakeholders, supporting sustainable economic and employment growth. It also notes that authorities need to consider structural changes in the economy, in particular changes in shopping and leisure patterns and formats, the impact these are likely to have on individual centres, and how planning can support adaptation and change.

2.9 The PPG sets out a wide range of complementary uses that can, if suitably located, support the vitality of town centres. These uses include residential, employment, commercial, office, leisure/entertainment, healthcare and educational development. It also notes that the key way to set out a vision and strategy for town centres is through the development plan and (if needed) Supplementary Planning Documents (SPDs). Planning policies are expected to define the extent of primary shopping areas and may, where appropriate, also define primary and secondary retail frontages, where their use can support the vitality and viability of particular centres. In addition, a range of other planning tools can help to support town centres to adapt and thrive and promoting a positive vision for the range of locations – including Local Development Orders (LDOs), Neighbourhood Development Orders (NDOs), brownfield registers and compulsory purchase powers.

2.10 The PPG notes that it may not be possible for future development needs to be accommodated in the town centre, and that there may be physical or other constraints which make it inappropriate. In such circumstances, planning authorities should plan positively to identify the most appropriate alternative strategy for meeting the identified need for these main town centre uses, having regard to the sequential and impact tests. This should ensure that any proposed main town centre uses are in the best locations to support the vitality and vibrancy of town centres, and that no likely significant adverse impacts on existing town centres arise.

2.11 In relation to the sequential approach, the PPG requires local authorities to consider whether the identified need for main town centre uses can be accommodated on town centre sites, taking into account their suitability, availability and viability, as well as the nature of the need that is to be addressed. It also states that the use of the sequential test should recognise that certain main town centre uses have particular market and locational requirements, which mean that they may only be accommodated in specific locations. It also recognises that, as promoting new development in town centre locations can be more expensive and complicated than elsewhere, local planning authorities need to be realistic and flexible in terms of their expectations.

2.12 In relation to the application of the impact test, the PPG sets out a number of steps which should be taken. Where wider town centre developments or investments are in progress, the PPG recognises that it will be appropriate to assess the impact of applications on that investment. The NPPG also states that, if setting a locally appropriate threshold, it is important to consider:

- the scale of proposals relative to town centres;
- the existing viability and vitality of town centres;
- cumulative effects of recent developments;
- whether local town centres are vulnerable;
- likely effects of development on any town centre strategy; and
- the impact on any other planned investment.

Adopted Development Plan

Middlesbrough Local Plan

2.13 The development plan for Middlesbrough comprises the Core Strategy (adopted 2008), the Regeneration DPD (adopted 2009), the Housing Local Plan (adopted 2014), saved policies within the Middlesbrough Local Plan (1999) and the Tees Valley Joint Minerals and Waste DPDs (2011). Relevant policies within the first two of these documents are summarised below.

Core Strategy DPD (2008)

2.14 The Middlesbrough Core Strategy was adopted in February 2008 and sets out the principal elements of the planning framework for Middlesbrough. Policy CS13 seeks to protect and enhance the hierarchy of vital and viable town, district, local and neighbourhood centres in Middlesbrough. The various centres included as part of this policy, in addition to Middlesbrough Town Centre, are illustrated in Table 2.1.

Table 2.1 District and Local Centres

District Centre	Medium-Scale Local Centre	Small-Scale Local Centre	Neighbourhood Centre
Berwick Hills	Acklam Road/Cambridge Road	Beresford Buildings, Thorntree	Cargo Fleet Lane/Fulbeck Road
Coulby Newham	Acklam Road/Mandale Road	Broughton Avenue, Easterside	Hall Drive
	Belle Vue, Marton Road	Marshall Avenue, Brambles Farm	Hollowfield, Coulby Newham
	Eastbourne Road	Ormesby High Street	Vaughan Centre
	Lealholme Crescent	Penrith Road	Westerdale Road
	Linthorpe Village	Roman Road	Whitfield Buildings
	Longlands/Marton Road	Saltersgill Avenue	
	Marton Road/Gypsy Lane	Shelton Court, Thorntree	
	North Ormesby	The Avenue, Nunthorpe	
	Parliament Road	Trimdon Avenue	

District Centre	Medium-Scale Local Centre	Small-Scale Local Centre	Neighbourhood Centre
	Viewley Centre, Hemlington		

2.15 Policy CS13 also sets out a range of means by which the above will be protected and enhanced. These include developing and expanding the town centre, encouraging retail, commercial, leisure and cultural development, safeguarding the retail character and function of centres, encouraging convenient and accessible, district, local and neighbourhood shopping facilities and, where appropriate, consolidating retail and other uses into a more sustainable, compact and viable centre core.

2.16 Policy CS14 explains that the Council will work with partner organisations to ensure the provision of a wide and accessible choice of leisure facilities for the community and which reinforce Middlesbrough's role at the heart of the Tees Valley city region. This will be achieved by the promotion of the town centre as a sub-regional leisure destination, promotion of the Green Blue Heart, Middlehaven and Prissick Base for major sport and/or leisure development, and promotion of leisure development within district centres.

2.17 Policy CS15 states that the Council will work to attract a large casino and associated uses within Middlesbrough to reinforce the role of the town within the Tees Valley city region, and to facilitate wider regeneration. The policy states that suitable locations for such development would be within the town centre and Greater Middlehaven and sets out several criteria for such development, including design, linkages and regeneration benefits.

Regeneration DPD (2009)

2.18 The Regeneration DPD was adopted in February 2009 and forms part of the Middlesbrough Local Development Framework. It contains a number of policies specifically in relation to Middlesbrough Town Centre (and different areas contained therein), as well as other defined centres in the Borough.

2.19 Policy REG20 identifies a number of Principal Use Sectors within the town centre, to which appropriate uses will be directed, as follows:

- Retail Sector: primary retail area, including an opportunity for a new convenience superstore, contains the primary shopping frontage;
- Cannon Park Sector: town centre growth area for retail warehousing and employment uses;
- Central Sector: location for leisure, culture and the evening economy, and also a location for offices;
- Middlehaven Sector: town centre growth area for the digital economy, strategic leisure, office, and residential;
- Southern Sector: (University of Teesside and Linthorpe Road) town centre growth area for retail and university uses (complementary to those in the retail sector, particularly specialist retail uses); and
- East Sector: mixed residential and business uses.

2.20 Policy REG21 identifies the Primary Shopping Frontage (PSF) within Middlesbrough Town Centre, within which Class A1 retail uses will be appropriate. It sets criteria against which proposals for other uses may be acceptable, including those which relate to the function and character of the shopping area and the vitality and viability of the town centre. It also states that the proportion of non-A1 uses within the PSF should not exceed 15% and that concentrations of non-A1 uses within particular blocks should also be avoided.

2.21 Policies REG22, REG23, REG24, REG25, REG26 and REG27 set out the uses considered appropriate as part of new development within the Cannon Park Sector, Middlehaven Sector, Southern Sector, Centre Square East, the Gurney Street Triangle and Middlesbrough Leisure Park. In addition, Policies REG28-30 address district, local and neighbourhood centres, as follows:

- Policy REG28 explains that, at Berwick Hills and Coulby Newham, the predominant use will be retail of an appropriate scale, with other complementary uses being permitted, provided that they add to the vitality and viability of the centre, do not harm the shopping function and do not have a detrimental impact on the character and amenity of the surrounding area;
- Policy REG29 explains that planning permission will be granted for Class A1 uses within Local Centres, provided that they satisfy various criteria – including those relating to scale and catchment area, design and materials, and the vitality and viability of the town or district centres. Other complementary uses will be permitted, subject criteria relating to the vitality and viability of the centre and the character and amenity of the surrounding area; and
- Policy REG30 states that, within Neighbourhood Centres, permission will be granted for small scale retail and service uses, community uses, and employment uses within Class B1 (where they support the vitality and viability of the centre or contribute to the successful regeneration of the local area).

2.22 Finally, Policy REG31 identifies an area at Prissick Base for a range of sport and leisure uses, including a skate park/plaza, changing facilities/pavilion, velodrome and multi-use games area. Policy REG31 sets out several criteria that need to be satisfied by any proposed development including those relating to pedestrian and cycle links, car parking, design and amenity.

Other Strategies

The Middlesbrough City Centre Strategy 2019-2023

2.23 The Middlesbrough City Centre Strategy 2019-2023 sets out the strategic framework for Middlesbrough's ambition to fulfil its potential as the City Centre of Tees Valley. The strategy identifies priorities to help deliver city-scale ambitions, including two key elements, which comprise building business confidence, and attracting additional users and visitors. The following priorities and their objectives are outlined in the strategy:

Priority 1: A Quality Place

- Getting the basics right – including maintaining a clean and attractive environment, and improving the appearance and longevity of city assets;
- Ensuring that the visitor experience on key routes from transport hubs, car parks and high footfall areas, feel safe and secure at any time of day;
- Continuing to set the highest standards in the built environment;
- Making it easy to navigate in and around Middlesbrough city centre and between key areas; and
- Keeping public spaces light, bright and de-cluttered.

Priority 2: Attract and Enhance

- Driving additional footfall into the city centre, by improving the daytime and evening offer;
- Increasing spend per visit, by having a broader appeal to our catchment;

- Changing how people use the city centre, by engaging with missing high street brands which people expect within a vibrant city;
- Communicating positive messages and marketing with a broad reach, through Middlesbrough's place brand; and
- Increasing the number of people living and working in the city centre.

Priority 3: Animate and Inspire

- Better exploiting public spaces and city centres assets to host cultural, and family-friendly events;
- Encouraging everyone using the city centre to have multiple interactions – maximising the impact of the 'Middlesbrough Pound';
- Making Middlesbrough a place where people 'want' to be as well as 'need' to be through enhanced experiences;
- Ensuring that the city centre can capitalise on visitor numbers generated by cultural attractions; and
- Giving people more reasons to visit Middlesbrough.

Priority 4: Opportunity and Investment

- Providing a supportive environment for new retail, leisure, commercial and residential investment;
- Providing new and additional employment opportunities, creating the circumstances for extra employees to live and work within the city centre;
- Improving the quality and breadth of leisure;
- Stimulating city centre living and building conversion; and
- Increasing the availability of culture and leisure attractions to diversify visitor experience.

Priority 5: Connect

- Improving connectivity, to allow seamless travel and integration between various transport modes;
- Enhancing the railway station;
- Enhancing bus facilities (interchanges and operational fleet), including prioritisation and reverse patronage decline;
- Providing city centre Wi-Fi, to increase convenience for workers and visitors;
- Improving pedestrian links across the city centre, as well as investing in public spaces to enhance the arrival in Middlesbrough; and
- Improving security and road safety for all road users, in particular pedestrians.

Middlesbrough Town Centre Economic Assessment

2.24 The Middlesbrough Town Centre Economic Assessment was published in December 2018, having been prepared by CMS on behalf of the Council. It provided a review of the economic vitality of the town centre and set out recommendations and an action plan for the local authority and key stakeholders.

2.25 These recommendations included creating a shared vision, increasing business engagement, developing a strong place brand, agreeing upon places of special interest and developing a marketing and communications plan. They also included more specific objectives, such as re-evaluating the leisure offer, establishing a unique offer for the four shopping centres, reducing crime/anti-social behaviour, encouraging use of public transport, reducing the number of vacant shops and generating alternative uses for retail space, and developing a signage strategy. In relation to the catchment of the centre, they sought to target a younger audience, better penetrate the secondary catchment, and tap into future potential with the University.

City Centre Living in Middlesbrough

2.26 This report, which was prepared to underpin a future strategy to help diversify the housing offer within the centre of Middlesbrough and identify the components which could help support this. It notes the importance of significant commercial investment in the centre and wider infrastructure improvements. The report also identifies the potential to use the university as a driver for student accommodation and provide new residential development around the railway station area.

2.27 Whilst it notes the lack of development sites within the centre which could accommodate a step-change and demonstrate the advantages of city centre living, it notes that this could change with the contraction of the retail sector and refers to the scope to convert suitable office buildings for residential use. It also suggests that smaller sites could be identified for residential development and also that the Council consider the potential for an area for accommodation which meets the needs of older age groups.

Other Documents

2.28 A number of other recent strategies relevant to the future of Middlesbrough Town Centre, and development therein, have been produced. These include the following:

- the **Albert Road Vision Brochure,** which encourages investment in Albert Road, focusing on the growing development of the digital cluster of the Boho Zone, benefiting from well-connected public transport network and road links;
- the **Middlesbrough Integrate Transport Strategy 2018-2028,** which states that the town requires a well-planned, efficient, attractive and fully integrated transport network, and aims to achieve active travel through walking and cycling, and increase the use of public transport (improving service reliability and frequency);
- the **Middlesbrough Station Action Plan**, published in December 2017, which sets out a vision for the station to be a Sub-Regional Hub, a Distinctive Gateway, a Destination Station, and a Connected Place;
- the **Middlesbrough Car Parking Strategy,** produced in April 2018, seeks to address the future demands of the town centre, confirming that there is no obvious need for additional off-street provision in the short to medium term, but also suggesting that the Council consider more off-street long stay parking in the south east quadrant, introduces technology and a reviews tariffs across the centre;
- the **Albert Road and Snow Centre Approach Design Guide** details the principles for public realm development within these areas. For Albert Road the principles are for pedestrian priority, creating a united corridor, utilising and celebrating the views and the treatment of future buildings, and for Snow Centre Approach, they relate to creating a definitive spine, enhancing views, prioritising pedestrians and creating a safe environment;
- the vision of the **Cultural Strategy for Middlesbrough** is to make the town internationally renowned for a citizen-centred approach to culture, where creative practitioners and communities are agents of change. The vision is underpinned by

innovation, infrastructure and inclusion, and it is envisaged that this will be established by securing investment and funding.

Summary

2.29 Local planning authorities are required to assess the need for new retail and other main town centre uses over the plan period. When planning for growth in their town centres, local planning authorities should allocate a range of suitable sites to meet the scale and type of retail development needed. It is important that the needs for retail and other main town centre uses are met in full and not compromised by limited site availability.

2.30 The overarching objectives are supported by adopted and emerging planning policy which emphasises the need to adopt a sequential approach in line with the requirements set out in the National Planning Policy Framework. In addition to the town centre, the adopted Local Plan defines a hierarchy of district, local and neighbourhood centres across Middlesbrough. It also defines Primary Shopping Frontages, and the uses considered appropriate within a number of different areas in the town centre, including the Canon Park Sector, Middlehaven Sector, The Southern Sector, Centre Square East, Gurney Street Triangle and Middlesbrough Leisure Park. The Publication draft replacement plan proposed a similar hierarchy of centres in the Borough, although with the addition of a large local centre tier, and the removal of the neighbourhood centres.

2.31 There are also a number of other strategies which have been produced which are relevant to Middlesbrough Town Centre and retail/leisure development more generally in the Borough. Amongst these are the Middlesbrough City Centre Strategy, which sets out the ambition to fulfil its potential as the city centre of the Tees Valley. They also include the Middlesbrough Town Centre Economic Assessment and the City Centre Living in Middlesbrough report, as well as a number of documents which relate to specific elements of the centre – including the area along Albert Road, the railway station, car parking, transport more generally, and a cultural strategy.

3.0 Review of Trends in Town Centres and Retail/Leisure

3.1 This section provides an overview of changes in the town centres and retail/leisure sector nationally and how they could relate to Middlesbrough.

Retail Trends

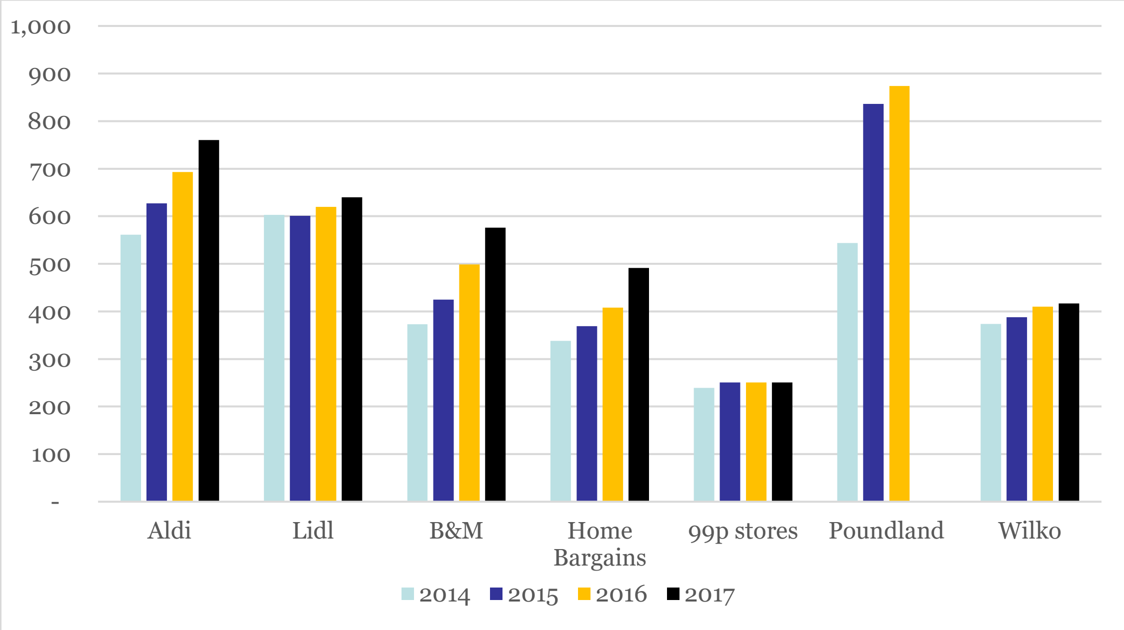
3.2 The changing economic climate over the last ten to twelve years has had a significant impact on the retail and leisure sectors, and continuing uncertainties are still having an effect. Many national operators failed over this period – including Austin Reed, BHS, Comet, HMV, JJB Sports, Jessops, Maplin, Woolworths, MFI, Toys R Us, Land of Leather, Borders, La Senza, Barratts and Habitat.

3.3 Market conditions are still challenging, with retailers being squeezed by rental levels and business rates. In this context, a large number of operators have entered administration or Company Voluntary Agreements (CVAs) more recently, and/or are currently experiencing difficulties. Such operators include House of Fraser, Debenhams, Mothercare, New Look, Bon Marche, Clintons, Carpetright, Prezzo, Byron, Patisserie Valerie, Marks & Spencer, Poundworld, and Jamie Oliver.

3.4 These difficulties have left major voids within centres and have created a challenge for local authorities and other stakeholders to attract new operators/uses to anchor their centres. Many previously planned town centre development schemes have been delayed, which has affected the ability of centres to meet the needs of their catchments and compete with other, stronger centres.

3.5 Notwithstanding this, whilst the large foodstore operators have been reducing their floorspace, the discount sector is thriving. Indeed, as illustrated in Figure 3.1, Aldi and Lidl significantly expanded their store estate in over the period from 2014-2017. Both of these operators are represented in multiple locations in Middlesbrough, although it is possible that one or both may seek further opportunities in areas where they are not currently represented.

Figure 3.1 Retailer Representation: Discount Operators (by Store Numbers)



Source: Global Data (2019)

3.6 Retail operators have responded to changes in customers' requirements, changing their trading formats to include smaller stores capable of being accommodated within town and local centres. Such formats include Tesco Express/Metro, Sainsbury's Local, Little Waitrose and Marks & Spencer's Simply Food stores/Foodhalls. The numbers of these smaller format stores have all increased significantly during the last decade, and many of them are found within Middlesbrough Town Centre.

3.7 Comparison retailers have also responded to market conditions, with non-food discounters such as B&M, Home Bargains and Poundland also increasing their store numbers nationally – and indeed all of these operators are now represented in Middlesbrough Town Centre. However, many traditional high street retailers, including M&S, Next and TK Maxx, have increasingly sought new or expanded representation in out-of-centre locations. In this context, whilst there are no significant retail warehouse destinations in Middlesbrough, both Teesside Park (in Stockton) and Cleveland Retail Park (in Redcar and Cleveland), have grown in both size and popularity, with the former, in particular, attracting shoppers from across the sub-region.

3.8 The demand for premises within the bulky goods sector, i.e. furniture, carpets, electrical and DIY goods, has been weak in recent years, and this sector has rationalised, resulting in mergers/failures and scaled down store sizes. This has led to voids on retail warehouse parks and proposals to extend the range of goods sold to non-bulky goods which can, in turn, lead to the relocation of retailers, creating more vacant units in town centres.

3.9 Operator demand for space within town centres has decreased since the last recession. There has also been an increasing polarisation of activity into the larger national, regional and sub-regional centres, particularly in terms of national multiples. Much of the occupier demand in smaller centres is now coming from the discount and charity sectors, or non-retail services, rather than higher order comparison goods shopping.

3.10 Over the last few decades, new investment has been concentrated in a number of key locations, with smaller centres struggling to attract new development and weakening in relative terms. The charity shop sector has also grown steadily over the past 20 years, with such uses occupying shop premises vacated by other operators. In some cases, charity shops can afford higher rents than small independent occupiers because of business rate discounts. The continuation of these trends will influence future operator requirements in Middlesbrough, with smaller vacant being more attractive to independent traders and non-retail services, where demand for such uses exists.

Expenditure Growth

3.11 Future expenditure levels forecast within this study needs to take into account the likely speed of the economic recovery, particularly in the short and medium term. Careful consideration is needed to establish the appropriate level of expenditure growth to be adopted over the plan period. This study takes a long-term view for the plan period, recognising the cyclical nature of expenditure growth and the need to plan positively, as required by the National Planning Policy Framework (NPPF). Trends in population growth, home shopping/internet sales and growth in turnover efficiency also need to be considered and a balanced approach taken.

3.12 In the past, expenditure growth fuelled growth in retail floorspace, including major out-of-centre development, particularly in the 1980s and 1990s. The speed of recovery from the last economic downturn has been slow, however. The high pre-recession growth rates are unlikely to be achieved in the short term, where growth is expected to be slow, but the underlying trend over the medium and long term is expected to lead to a need for further modern retail floorspace, even allowing for continued growth in internet shopping and turnover efficiencies.

3.13 For convenience goods, Experian's forecasts (December 2018) anticipate only a small amount of growth in spending per capita (0.1% per annum) for the next fifteen years or so. For comparison goods, higher levels of growth are expected in the future (3.3% per annum from 2021-2025, and 3.2% thereafter), although still at a much lower rate than previous pre-recession trends (8% per annum between 1997 and 2007). Historically comparison goods expenditure has grown significantly more than convenience goods expenditure, and Experian's latest national growth rate recommendations are consistent with these past trends.

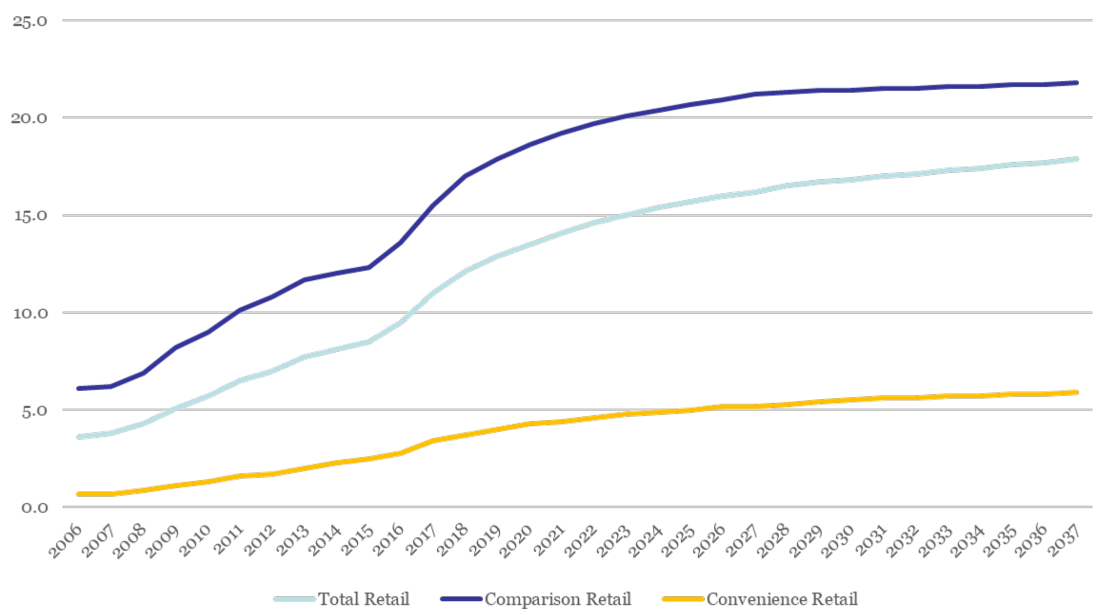
3.14 Experian's expenditure projections consider the implications of Brexit, indicating this has created major uncertainties regarding the long-term outlook for the UK economy. Experian's baseline forecasts reflect a downgrade in the UK's long-term projections for trade, investment and GDP. The revisions to the consumer spending forecast indicate that long term growth is expected to be around 1.7% per annum, which is a 0.3% downgrade from the previous year's projection, reflecting weaker population and productivity growth.

3.15 The study will need to take a long-term view for the plan period, which recognises the cyclical nature of growth and the need to plan positively, as required by the National Planning Policy Framework (NPPF). Population and expenditure forecasts, as well as current and projected participation rates for a range of uses, including retail and commercial leisure, will all need to be considered. This is not least given that assumptions on such forecasts can lead to wide variations in the end results in terms of future needs.

Internet Shopping

3.16 Internet shopping has increased significantly, driven, in particular, by the use of smart-phones. Click and collect / click and return shopping has also become more popular. The future growth of multi-channel retailing will continue to influence the high street and impact upon the number, nature and scale of traditional stores held by operators. National trends within this sector will have implications for retailing within Middlesbrough, because they will affect the amount of expenditure growth that will be potentially available to support development and the strength of operator demand for new floorspace.

Figure 3.2 Market Share of Non-Store Retail Sales (%)



Source: Experian Retail Planner Briefing Note 16 (December 2018)

3.17 As illustrated in Figure 3.2, above, online shopping has accelerated over the last ten years in particular and now represents almost 20% of total spend on retail goods. Indeed, on the basis of information in Experian's latest Retail Planner Briefing Note (December 2018), the total quantum of money spent via Special Forms of Trading (SFT) – which is primarily internet shopping, but also includes mail order, stalls/markets, door to door and telephone sales - increased to around £78bn in 2018.

3.18 The impact of multi-channel, and e-tailing in particular, will therefore be carefully addressed as part of this study, taking into account the latest information on its market share and how this is likely to affect the demand for new space in future. Though some internet shopping (e.g. through large foodstores, such as Asda and Tesco) still uses existing retail stores as a means of transferring goods to customers, others do not have such stores. Whilst it is possible that online shopping will plateau eventually – and there will ultimately be a limit to the proportion of goods people are willing to purchase over the internet as opposed to physical stores - this will not be without further growth.

3.19 Shopping behaviour will continue to change, and the high street will need to continue to respond. All centres will need to focus on their advantages over other forms of multi-channel shopping, for example using the internet as an extended shop window, click and collect facilities and providing a combined retail and leisure experience.

Leisure and Cultural Uses

3.20 Town centres are constantly evolving, and the leisure industry is a dynamic sector. The way we experience leisure is also changing, in line with wider socio-economic trends. It is important to examine these trends (and the underlying factors and their implications) in assessing the need for new other town centre uses in Middlesbrough, particularly given the recent fluctuating fortunes of the retail sector.

3.21 Given the strong competition town centres have faced from both online shopping and out-of-centre destinations, it is clear that centres need to offer something more than just shops in order to secure their future. The vitality and viability of town centres must be underpinned by a broad mix of uses, including not only retail, but leisure/entertainment, arts/cultural, offices, residential and community facilities. Indeed, the evening economy can be as important in some centres as the day time economy.

3.22 Whilst the market has approached saturation in some areas, the food and beverage sector has experienced significant growth over the last ten years or so, both in terms of the range of operators and numbers of outlets. It is also constantly evolving, with new concepts emerging. The recent increase in eating out is down to a variety of reasons, including:

- changing lifestyles;
- increased choice - through a variety of formats meeting a range of different tastes;
- increased emphasis upon healthy lifestyles; and
- convenience.

3.23 The cinema sector has also had a resurgence, with new technologies helping to increase admission numbers and box office revenues. Other leisure formats are evolving and new ones emerging, and there has been a significant increase in the number of trampoline centres, climbing centres and indoor golf facilities. Class-based health and fitness facilities - which promote group exercises, combined with nutritional advice, as a means of helping people improve their fitness and general wellbeing, have also become more popular. Along with more established sectors, including indoor adventure playgrounds/soft play areas, such uses have helped broaden the overall range of leisure pursuits available to families.

3.24 It may not be possible to accommodate all of the different types of leisure activities within existing centres. Notwithstanding this, however, subject to the extent and nature of occupier demand, the leisure sector offers significant potential to support the vitality and viability of existing town centres in a number of ways. These include:

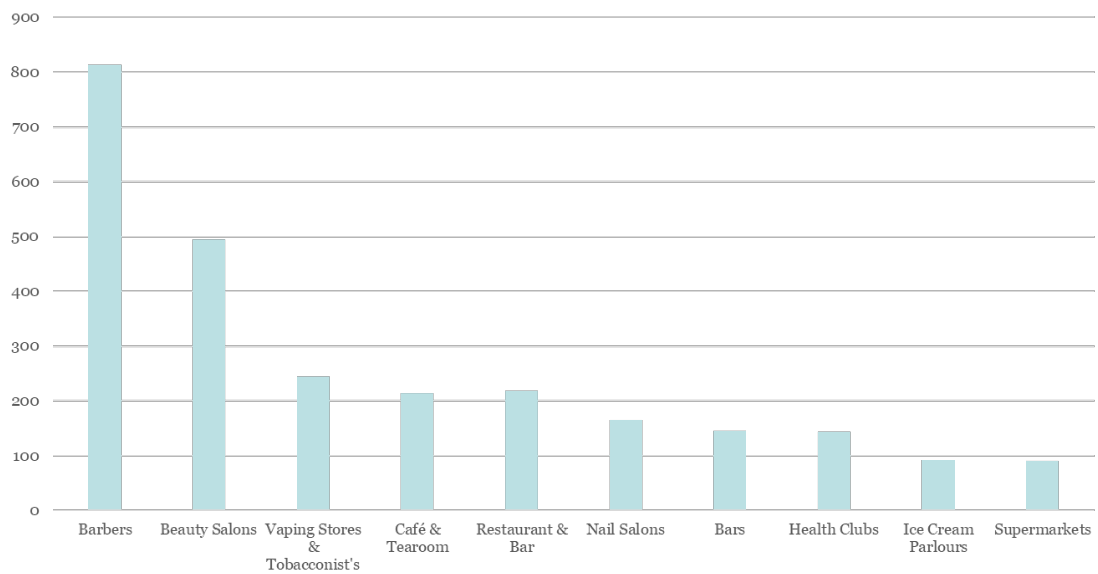
- the ability of such uses to extend dwell-time in centres, complementing the wider retail offer;
- the increase in the number of leisure-led schemes coming forward (including the use of cinemas as anchors);
- the changing role of shopping centres, including the use of food courts as anchors and the return of leisure uses within such centres (such as gyms and cinemas); and
- investment in new arts and cultural facilities, such as museums, art galleries and performing arts venues (which can assist in the promotion of individual towns and cities as a visitor destination).

3.25 It is important that any future planning strategy for Middlesbrough Town Centre grasps these opportunities, seeking to provide additional reasons for people to visit, to extend dwell time and to find operators for property previously occupied by retail uses.

3.26 The Middlesbrough Institute of Modern Art (MIMA) opened in 2007 and, along with other arts/cultural facilities, such as Middlesbrough Empire live music venue, helps to attract visitors to the centre. The centre has also benefited from the growth in the hotel sector, with new/refurbished Holiday Inn Express, Premier Inn and Jurys Inn facilities opening in recent years. However, whilst there are a range of food and beverage operators located along Linthorpe Road, these are primarily independent facilities. Although there is a Nando’s restaurant adjacent to Cineworld at Marton Road, and Turtle Bay and Bistro Pierre facilities on Albert Road, the choice of national chains in Middlesbrough Town Centre, overall, is relatively limited.

3.27 Although some service uses have declined nationally in recent years, including banks/building societies and estate agents, others – including hair and beauty salons – have seen significant increases. The growth of money lending/pay day loan shops, betting shops and hot food takeaways has raised concerns amongst many local planning authorities and has resulted in a change to permitted development rights to control the growth of these uses in town centres.

Figure 3.3 Increase in Store Numbers in 2018



Source: Retail and Leisure Market Analysis Full Year 2018 (Local Data Company 2019)

3.28 Recent changes to the GPDO have also allowed for greater flexibility for changes of use from Class A1 retail to other uses (both commercial uses and others, such as residential). Although these measures can lead to a change in the composition of town centres (e.g. a reduction in the amount of Class A1 space), they may also lead to a reduction in vacant shop premises, particularly in peripheral frontages.

Retail and Leisure Hierarchy in Middlesbrough

3.29 As set out in Section 2.0 of this report, Policy CS13 of the Middlesbrough Core Strategy defines the existing hierarchy of centres in the Borough. This includes Middlesbrough Town Centre, two District Centres, both Medium and Small-Scale Local Centres, as well as a number of Neighbourhood Centres.

3.30 Middlesbrough Town Centre is the main retail and commercial centre in the Borough. Although it serves a wide (sub-regional) catchment area, extending across the Tees Valley and beyond, its role has changed over time. This is a result of a range of factors, although including the growth of out-of-centre destinations such as Teesside Retail Park and Cleveland Retail Park, in Stockton on Tees and Redcar and Cleveland Boroughs respectively.

3.31 The town centre is supported by Berwick Hills and Coulby Newham District Centres. Coulby Newham is the second largest centre in the Borough and, whilst it primarily serves the southern parts of the Borough, it also contains a significant quantum of convenience and comparison retail floorspace (including a Tesco Extra superstore and various other national multiple retailers). Although smaller, Berwick Hills District Centre, which is anchored by a Morrisons superstore, also provides a range of other commercial and community uses, which meets the needs of its residents on the eastern side of Middlesbrough. There are also 21 Local Centres identified in the adopted Core Strategy, which help meet the more day to day needs of their immediate surrounding catchment areas.

3.32 A summary of existing levels of convenience and comparison retail floorspace in each of the main centres in the Borough is also provided in Table 3.1 below.

Table 3.1 Summary of Units and Retail Floorspace by Centre

Centre	Total Number of Convenience and Comparison Retail Uses	Convenience Goods Floorspace (sqm net)	Comparison Goods Floorspace (sqm net)	Total Retail Floorspace (sqm net)
Middlesbrough	236	10178	75902	86080
Coulby Newham	27	5055	9258	14313
Berwick Hills	11	3377	1923	5300
Total	**274**	**18610**	**87083**	**105693**

Source: MBC Data and Lichfields Site Visits

3.33 The above table helps to illustrate the significant difference between the quantum of retail floorspace provided in Middlesbrough Town Centre and that within the two district centres. Coulby Newham has the second highest quantum of retail floorspace in the Borough, primarily as a result of the range of comparison operators it contains, in addition to the Tesco Extra superstore, although it is still significantly smaller than the town centre.

3.34 Javelin's Venuescore database ranks the UK's top 2,500 plus retail destinations, including town centres, malls, retail warehouse parks and factory outlet centres. Each destination is given a weighted score on the basis of the number of multiple retailers present, and the score attached to each retailer is weighted depending on their overall impact on shopping patterns. The scores achieved by existing centres within the Borough, as well as other centres in the surrounding areas, are shown in Table 3.2.

Table 3.2 Venuescore Rankings of Main Centres in Middlesbrough and Surrounding Area

Centre	UK Rank (2016)	Venuescore	Location Grade
Leeds	3	659	Major City
Newcastle upon Tyne	11	450	Major City
York	20	338	Major Regional
Metrocentre	49	247	Major Regional
Darlington	58	228	Regional
Middlesbrough	**61**	**225**	**Regional**
Sunderland	86	195	Regional
Scarborough	124	170	Regional
Durham	154	146	Regional
Stockton-on-Tees	188	128	Sub-Regional
Hartlepool	250	101	Sub-Regional
Redcar	236	106	Sub-Regional
Northallerton	350	79	Sub-Regional
Cleveland Retail Park	847	37	District
Guisborough	847	37	District
Coulby Newham	**879**	**26**	**District**
Whitby	968	33	District
Berwick Hills	**2566**	**12**	**District**

Source: Javelin Venuescore Rankings (2016/2017)

3.35 Table 3.2 indicates that Middlesbrough Town Centre is classed as a Regional Centre by Venuescore. It is ranked above most other Regional and Sub-Regional Centres in the Tees Valley, including Stockton-on-Tees, Redcar and Hartlepool, although below Darlington, which is surprising, given the smaller catchment area of the latter. Coulby Newham and Berwick Hills are ranked as District Centres, reflecting the more localised catchment areas that these centres, in comparison to other, larger centres.

4.0 Household Survey Analysis

4.1 NEMS Market Research were instructed to undertake a total of approximately 1,050 household telephone surveys across eight separate zones, within and immediately beyond Middlesbrough, and these surveys were completed in November 2019. The number of surveys undertaken in each of these zones (which are also illustrated in the plan attached at **Appendix 1**) were as follows:

- Zone 1 (Middlesbrough Central) (209);
- Zone 2 (Middlesbrough East) (147);
- Zone 3 (Middlesbrough South) (150);
- Zone 4 (Eston) (148);
- Zone 5 (Redcar and East Cleveland) (100);
- Zone 6 (Thornaby and Yarm) (100);
- Zone 7 (Stockton and Billingham) (100); and
- Zone 8 (Stokesley) (100).

4.2 For the purpose of this report, Middlesbrough Central, Middlesbrough East and Middlesbrough South (Zones 1 – 3) have been analysed below in order to inform the development of policy for Middlesbrough Town Centre and the immediate surrounding area. The results of the surveys in respect of both these and the other zones forming part of the wider Study Area helped to establish existing shopping and leisure patterns across this area.

Food Shopping

4.3 **Question's 1 and 8**, the results of which are set out in Table 4.1 below, sought to establish where respondents last undertook their main food and top up food shopping.

Table 4.1 Main Food and Top up Food Shopping Patterns

Zone	Main Food Shop	Top-up Food Shop
1	Tesco Extra, Coulby Newham (13%) Aldi, Newport Road (11%) Morrisons, Teesside Park (10%) Iceland, Cleveland Centre (8%) Asda, Portrack Lane (8%) Aldi, Dalby Way (6%) Asda, Thornaby (6%) Sainsbury's, Wilson Street (6%) Aldi, Marton Road (5%)	Aldi, Coulby Newham (6%) Tesco Express, Roman Road (5%) Aldi, Marton Road (5%) Tesco Express, Linthorpe Road (4%)
2	Morrisons, Berwick Hills (51%) Tesco Extra, Low Grange (10%) Asda, South Bank (6%) Asda, Ormesby Road (6%) Aldi, Marton Road (4%)	Morrisons, Berwick Hills, (34%) Asda, Ormesby Road (13%) Lidl, Cargo Fleet Lane (6%) Aldi, Marton Road (5%) Sainsbury's, Vaughan Centre (5%)
3	Tesco Extra, Coulby Newham (48%) Aldi, Coulby Newham (20%) Morrisons, Newmarket Avenue (5%)	Tesco Extra, Coulby Newham (34%) Aldi, Coulby Newham (14%) Tesco Express, Marton (9%)

Zone	Main Food Shop	Top-up Food Shop
	Asda, Portrack Lane (4%)	Other Stores, Stokesley Road, Marton (6%) Other Stores, Viewley Centre (5%) Iceland, Coulby Newham (4%)

4.4 As shown in Table 4.1, the Morrisons and Tesco Extra stores in Berwick Hills and Coulby Newham have by far the most significant influence over the main food shopping of households in Zones 2 and 3. Whilst shopping patterns are much more dispersed in Zone 1, Tesco at Coulby Newham is also the most popular store in this area as well, with Aldi at Newport Road being mentioned by the second highest proportion of respondents.

4.5 The results of this question highlight the importance of the role played by discount foodstores across the town, including the Aldi stores at Newport Road, Coulby Newham and Marton Road. They also show that a proportion of residents in all zones are travelling to stores outside of the Middlesbrough Council area, including Morrisons at Teesside Park, Tesco at Low Grange and the Asda superstores at Portrack Lane, Thornaby and South Bank.

4.6 Although one of the largest stores in Middlesbrough, the Sainsbury's store at Wilson Street was used for their last main food shop by just 4% of respondents in Zone 1 (only 1% in Zone 2 and no-one surveyed in Zone 3). This is likely to reflect a range of factors, including the extent to which the latter store has lost trade to the discounters, particularly the Aldi and Lidl stores on Newport Road. It could also reflect the age of this store, relative to other competing provision, its relatively tired appearance and the lack of investment which has been made in it, as well as the demographic profile of its immediate catchment area, which is likely to be a better fit with the above discount facilities.

4.7 The results of **Question 8** show that, across the households surveyed, a combination of stores of varying sizes are used to undertake top-up food shopping – including large superstores, discount facilities and smaller/convenience stores (including many of those mentioned above). Interestingly, however, whilst patterns are more dispersed in Zone 1 (as with main food shopping), the most popular stores for top-up shopping in Zones 2 and 3 – by some distance – comprise the Morrisons and Tesco Extra superstores mentioned above.

4.8 Table 4.2 below displays the results of **Question 3**, which asked people the main reason why they chose to use a particular store for their main food shopping.

Table 4.2 Key Reasons for Choice of Store (Zones 1-3 Combined)

Key Reasons	% of Respondents in Zones 1-3
Near to home	43%
Lower prices / value for money	26%
Habit / always use it / preference for retailer	11%
Good choice of food goods	6%

4.9 In relation to Zones 1-3 (i.e. Middlesbrough), in particular, the most important reasons for the choice of main food shopping destination are the store's proximity to home (43%) and the lower prices on offer/value for money (26%). This perhaps reflects why the Morrisons and Tesco superstores are more popular than Sainsbury's at Wilson Street (which is located within a predominantly commercial area, on the edge of the town centre). The other main reasons for using a particular store included preference for particular retailers and the choice of food goods available.

4.10 Those who mentioned a specific foodstore in response to Question 1 were also asked **(Question 4)** how they travelled to that store. The vast majority of respondents (69%) of respondents indicated that they travelled in a car/van as a driver or passenger, whilst around 21% said they walked and around 6% said they travelled via bus or coach. There is some variation across zones with a more significant proportion (83%) of respondents in Zone 3 travelling by car, and a larger proportion in Zones 1 and 2 walking to their choice of main foodstore (15% and 22% respectively).

Non-Food Shopping

4.11 **Question 11** of the survey asked households where they buy most of their non-food shopping, when considered in overall terms, and the results of this question are illustrated in Table 4.3 below.

Table 4.3 Non-Food Shopping Destinations

Zone	Non-Food Shopping Destination
1	Middlesbrough Town Centre (59%) Teesside Park, Stockton (19%) Internet (6%)
2	Middlesbrough Town Centre (53%) Cleveland Retail Park (17%) Teesside Park (9%) Internet (9%)
3	Middlesbrough Town Centre (27%) Teesside Park (26%) Internet (18%) Parkway Shopping Centre, Coulby Newham (13%)

4.12 Across Zones 1-3, Middlesbrough Town Centre is the most popular destination for non-food shopping, although the proportions of respondents mentioning the centre varies significantly, from 59% and 53% in Zones 1 and 2, to just 27% in Zone 3. This would suggest that Middlesbrough Town Centre is significantly less attractive for non-food shopping to residents living in south Middlesbrough – and indeed that Teesside Park is used almost as much as the town centre for residents in that area.

4.13 Teesside Retail Park (in Stockton on Tees Borough) is also popular in Zones 1 and 2, reflecting the significant scale of retail floorspace (c. 56,000 sqm net) and extensive choice of bulky and non-bulky operators there, which draw trade from across the Tees Valley and beyond. Furthermore, Cleveland Retail Park – which is located in Redcar and Cleveland but immediately adjacent to its border with Middlesbrough – also attracts a significant proportion of residents from the eastern side of the town (Zone 2). In addition, it is notable that more than twice the proportion of residents in Zones 1 and 2 indicated that they buy most of their non-food shopping over the internet in Zone 3.

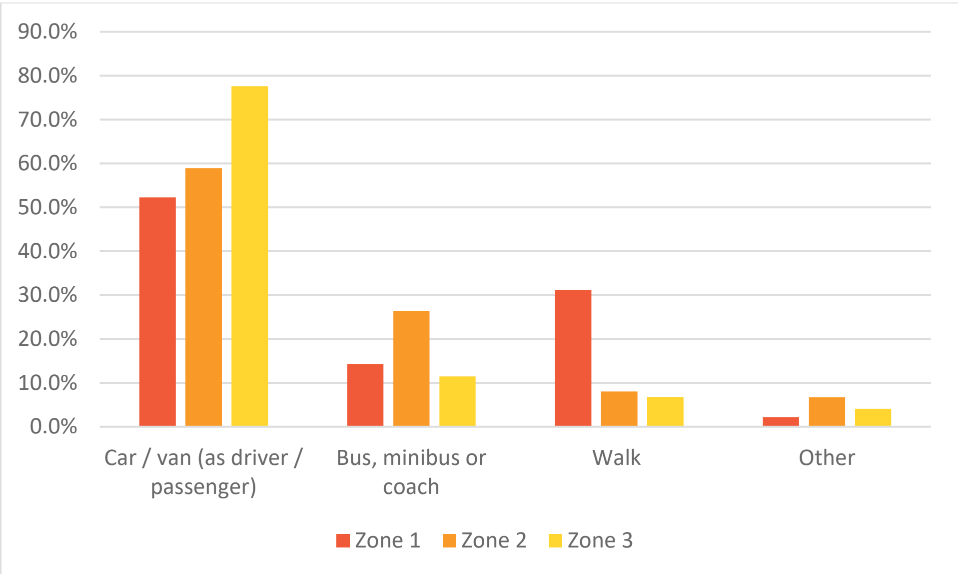
4.14 Related to the above, **Question 12** asked why those who did not say Middlesbrough Town Centre in response to Question 11 why this was the case. Across the study area as a whole, aside from it being too far away (mentioned predominantly by those outside of Middlesbrough itself) the most popular answer related to the quality and price of parking (around 13%/14%), as well as a preference to go elsewhere (12%). Interestingly, a more significant proportion of those in Zone 3 (24%) felt that parking was too expensive, as compared to Zones 1 and 2 (15%/11%) – perhaps reflecting the availability of free parking at Coulby Newham District Centre and Teesside Park.

4.15 **Question 13** asked households what the main reason was for their choice of non-food shopping destination. Overall, the most frequent responses were because it was near to home (34%) and a good choice of non-food shops (19%), along with the car parking being easy/free and there being a good layout (all around 10%/11%). The popularity of the first answer would explain the results of Question 11, which suggests that residents in Zones 1 -3 are not travelling significant distances to undertake non-food shopping.

4.16 There are some differences between the three zones in Middlesbrough, with higher proportions of those in Zones 1 and 2 (39%/30%) citing proximity to home as being their main reason than Zone 3 (23%). Conversely, more people in Zones 2 and 3 (26%/27%) cited the good choice of main food shops than Zone 1 (13%). This reflects the relative proximity of the various zones to the town centre, as well as the importance of the offer provided at the various destinations mentioned, in terms of attracting people (and particularly those living further away).

4.17 **Question 14** asked respondents how they usually travelled to the destination mentioned in Question 11. The responses show that the vast majority (around 60%) of households in the Study Area as a whole travel to undertake their non-food shopping in car/van to carry out their non-food shopping, with 18% using bus/coach and 9% walking. When considering Middlesbrough in isolation, however, the proportion who indicated they walked is significantly higher for Zone 1 (31%) than for Zones 2 and 3 (8% and 7% respectively), reflecting its closer proximity to the town centre. Furthermore, a much higher proportion from Zone 3 were driving (78%) than for the other two zones (52% and 49% respectively), with the highest proportion using the bus being from Zone 2 (26%).

Figure 4.1 Mode of Travel for Non-Food Shopping



4.18 Table 4.4, below, illustrates the results of **Question 15-22**, which asked respondents where they last bought different types of non-food goods.

Table 4.4 Results of Questions on Types of Non-Food Shopping

Types of Non-Food Shopping	**Zone 1**	**Zone 2**	**Zone 3**
Clothing and Footwear	Middlesbrough Town Centre (62%) Teesside Retail Park, Stockton (15%) Internet (8%)	Middlesbrough Town Centre (55%) Cleveland Retail Park, Skippers Lane (16%) Internet (7%)	Teesside Retail Park, Stockton (28%) Middlesbrough Town Centre (24%) Internet (21%)
Furniture, Soft Furnishings and Floor Coverings	Portrack Lane, Stockton (13%) Middlesbrough Town Centre (11%)	Middlesbrough Town Centre (15%)	Portrack Lane, Stockton (21%) Teesside Retail Park (21%)
Domestic Electric Appliance (e.g. fridges and kitchen items)	Teesside Retail Park (28%) Internet (15%)	Cleveland Retail Park (29%) Internet (19%)	Teesside Retail Park (43.5%) Internet (30%)
Other Electrical Goods (e.g. TVs, Hi-Fis and computers)	Teesside Retail Park (30%) Internet (16%)	Cleveland Retail Park (30%) Teesside Retail Park (15%)	Teesside Retail Park (46%) Internet (20.5%)
DIY and Hardware	B&Q Cheltenham Road, Portrack Lane (21%) B&Q Cleveland Retail Park, Skippers Lane (10%)	B&Q Cleveland Retail Park, Skippers Lane (47%) Cleveland Retail Park (8%)	B&Q Cheltenham Road, Portrack Lane (31%) B&Q Cleveland Retail Park, Skippers Lane (16%)
Garden Items	B&Q Cheltenham Road, Portrack Lane (11%) B&Q Cleveland Retail Park (7%)	B&Q Cleveland Retail Park (33%) Cleveland Retail Park (6%)	B&M Parkway Centre, Hamsterley Way (17%) B&Q Cheltenham Road, Portrack Lane (14%)
Health, Beauty and Chemist Items	Middlesbrough Town Centre (48%) Teesside Retail Park (5%)	Middlesbrough Town Centre (33%) Morrisons Berwick Hills Centre (11%) Cleveland Retail Park (10%)	Teesside Retail Park (17%) Parkway Shopping Centre, Coulby Newham (17%) Tesco Extra Parkway Centre, Coulby Newham (14%)
Other Non-Food Items (e.g. books, CD, toys and gifts)	Middlesbrough Town Centre (36%) Internet (21%)	Middlesbrough Town Centre (21%) Internet (17%)	Internet (37%) Middlesbrough Town Centre (9%)

4.19 The above results can be summarised as follows:

- the most popular destination for clothing and footwear for Zones 1 and 2 was Middlesbrough Town Centre with Teesside Retail Park being the most popular for Zone 3. The internet has an influence across all three zones as a whole, although particularly Zone 3, where 21% of respondents indicated that they last shopped online for clothing and footwear;
- retail warehousing at Portrack Lane (Stockton) was the most popular destination for furniture, soft furnishings and floor covering in Zones 1 and 3, with Middlesbrough Town Centre being more popular in Zone 2, and Teesside Park also attracting a significant proportion of trips from Zone 3;
- Teesside Park attracts the most significant proportion of shopping trips for both domestic electrical appliances and other electrical goods from Zones 1 and 3, although Cleveland Retail Park is more popular for residents in Zone 2. The internet also attracts a significant proportion of spending in these categories from all zones (between 15% and 30%);
- the two most popular destinations for DIY and hardware products in Middlesbrough are the B&Q stores at Portrack Lane (specifically for Zones 1 and 3) and Cleveland Retail Park, Skippers Lane (Zone 2);
- for garden items, the B&Q stores at Portrack Lane and Cleveland Retail Park, are the most popular destinations within Zones 1 and 2, with B&M at the Parkway Centre in Coulby Newham being the most popular for Zone 3;
- Middlesbrough Town Centre dominates shopping patterns for health/beauty products in Zones 1 and 2, with Teesside Retail Park and Parkway Shopping Centre at Coulby Newham being most popular in Zone 3; and
- the most popular means of purchasing other non-food items for residents in Zones 1 and 2 is in Middlesbrough Town Centre, with the internet being most popular in Zone 3 (and the second highest percentage in Zones 1 and 2).

4.20 In addition to the above, **Question 23X** enquired as to where residents shop online for non-food goods. Within Middlesbrough, households from Zone 3 (74%) were most likely to shop online for such goods, followed by Zone 1 (62%) and Zone 2 (60%).

Leisure Activities

4.21 **Question 33** asked respondents which leisure activities they or their families partake in, and the results are illustrated in Table 4.5 below.

Table 4.5 Leisure Activity by Zone

Leisure Activity	Zone 1	Zone 2	Zone 3
Cinema	46%	31%	58%
Pubs or Bars	52%	42%	64%
Restaurants	63%	62%	76.5%
Bingo	10%	19%	7%
Health and Fitness Club	24%	15%	33%
Tenpin Bowling	16%	10%	27%

4.22 The findings indicate that, across Zones 1-3, by far the most popular leisure activities are visiting restaurants (66%), public houses and bars (52%) and the cinema (45%). Relatively small proportions of respondents indicated that they use bingo halls, tenpin bowling or health and fitness clubs.

Cinemas

4.23 Table 4.6 below illustrates the results of the **Question 34**, which asked those respondents which indicated that they/their family visited the cinema which facility they last used, in respect of Zones 1-3.

Table 4.6 Cinema Destinations

Zone	Cinema Destinations
1	Cineworld, Middlesbrough Leisure Park (63%) Showcase, Teesside Park, Stockton (33%)
2	Cineworld, Middlesbrough Town Centre (84%) Showcase, Teesside Park, Stockton (10%)
3	Showcase, Teesside Park, Stockton (55%) Cineworld, Middlesbrough Leisure Park (43%)

4.24 The Cineworld facility in Middlesbrough is by far the most popular cinema destination across Zones 1 and 2 (mentioned by 63% and 84% of respondents respectively). For Zone 3, the Showcase Cinema at Teesside Park is the most popular attracting 55% of trips. It is slightly surprising that the Showcase facility is more popular with residents in Zone 3 than Zone 1 (given the closer proximity of most of the latter area to Teesside Park), although this may reflect the lower proportion of those living in Zone 3 who visit Middlesbrough Town Centre – within which Cineworld is located) - for other purposes.

Pubs/Bars and Restaurants

4.25 **Questions 35 and 36** sought to establish the locations where respondents last visited a public house/bar or restaurant.

Table 4.7 Public House/Bar and Restaurant Destinations

Zone	Public House/Bar Destinations	Restaurant Destinations
1	Middlesbrough Town Centre (59%) Acklam Road Local Centre (9%)	Middlesbrough Town Centre (55%) Linthorpe Road (6%) Yarm (5%)
2	Middlesbrough Town Centre (44%) North Ormesby Local Centre (6%) Normanby Local Centre (6%)	Middlesbrough Town Centre (46%) Stockton Town Centre (5%)
3	Middlesbrough Town Centre (36%) Coulby Newham District Centre (14%) Yarm Town Centre (9%)	Middlesbrough Town Centre (36%) Teesside Park (9%) Yarm (9%)

4.26 The above table illustrates that the town centre is the most popular destination for both pubs/bars and restaurants across all three zones in Middlesbrough. This reflects the wider choice of such facilities available in the centre as compared with those found elsewhere. It does, however, attract a smaller proportion of visitors originating from within Zone 3 – who are also using facilities in Coulby Newham District Centre, Yarm and at Teesside Park – again, likely to be due to their further distance from the town centre and more limited extent to which people are using it for other purposes.

Bingo

4.27 Question 37 relates to the bingo hall last visited by respondents. Although only a small proportion of those surveyed in Middlesbrough partake in this activity (between 7% - 19% across the three zones in Middlesbrough), of those that do, the majority in Zones 1 and 2 visit the Buzz Bingo facility at Longlands Road (56% and 52% respectively). The second-most popular facility is Mecca Bingo at Chandlers Wharf, in Stockton (ranging from 30% in Zone 1 to 53% in Zone 3).

Health and Fitness

4.28 **Question 38** asked which health clubs/gym destinations were last used by respondents and their families, the results are illustrated in the table below.

Table 4.8 Health and Fitness Club Destinations

Zone	Health and Fitness Club Destination
1	Rainbow Leisure Centre, Parkway Centre, Coulby Newham (18%) DW Fitness, Middlesbrough Retail Park (16%) Sports Village, Alan Peacock Way (12%) Lifestyle Fitness, Newport South Business Park (9%)
2	Neptune Leisure Centre, Ormesby Road, Berwick Hills (53%)
3	Rainbow Leisure Centre, Parkway Centre, Coulby Newham (45%)

4.29 Within Zones 1 -3, the Rainbow Leisure Centre within Coulby Newham District Centre was the most popular facility, with the Neptune Leisure Centre at Berwick Hills District Centre being the most popular in Zone 2. Aside from these facilities, although a proportion of respondents in Zone 1 also indicated that they used DW Fitness (which was located within the wider town centre boundary, adjacent to Cineworld, but closed in December 2019), patterns of leisure activity within the health activity are relatively dispersed.

Tenpin Bowling

4.30 **Question 39** sought to establish which locations respondents visit to go ten-pin bowling. Although the majority of respondents within Zones 1 to 3 indicated that they didn’t undertake this activity, of those that did, the Hollywood Bowl facility was mentioned by between 82% and 93% of persons, with only small proportions of people travelling to facilities elsewhere.

5.0 Retail Need

Study Area

5.1 The quantitative assessment of the need for additional retail floorspace is based on a defined Study Area comprising eight separate zones, both within and immediately beyond Middlesbrough Borough. The extent of these zones takes into account local spending patterns and the distribution of existing centres and residential population in Middlesbrough. They allow a finer-grained assessment of these areas, where shopping patterns are likely to be broadly similar. As explained in Section 4.0, around 1,050 household surveys were undertaken by NEMS across these zones, in order to help to establish existing shopping and leisure patterns across the area.

5.2 It is important to recognise that there will be retail expenditure leakage from these zones to stores and centres located outside the study area and, conversely, expenditure inflow from surrounding areas. Both of these factors have been taken into account in the assessment which follows. The inclusion of Zones 4 to 8, in particular, has helped to establish the level of spending which is flowing to stores and centres within the Borough from areas outside of Middlesbrough.

Quantitative Need

Population and Expenditure

5.3 The population of the Borough and the wider Study Area between 2011 and 2037 is set out in Table 1 in **Appendices 2 and 3**. This table illustrates that the population of the Borough itself is projected to grow significantly, from 143,064 in 2019 to 159,343 in 2037 – growth of around 16,300 persons or 11%.

5.4 The estimation of the population of the Study Zones in 2011 has been based on information obtained from Experian, which is in turn based on the 2011 Census. Going forwards, the population within Middlesbrough (i.e. Zones 1-3) has been projected forward using an assumption taken from the Council's most recent SHMAA, which assumes that – under the most optimistic jobs scenario - population within the Borough will increase from 140,351 in 2016 to 156,630 in 2034. In doing so, it has also been assumed that population will grow at the same rate in between these years, and onwards to 2037. Population within the other areas (Zones 4-8) has been projected forward based on Mid-Year Estimates and 2016-based Sub-National Population Projections (SNPP) provided by the Office of National Statistics (ONS).

5.5 Table 2 in Appendices 2 and 3 sets out the forecast growth in spending per head for convenience and comparison goods within each zone in the study area up to 2037. This is based upon estimated spending per capita in 2017 provided by Experian, as well as the forecast growth rates set out in their Briefing Note 16 (December 2018). In line with the above Briefing Note, a proportion of the available expenditure per capita in each year has been deducted to reflect expenditure via Special Forms of Trading (SFT - e.g. catalogue shopping, vending machines sales, internet purchases etc.) – making an allowance for those internet sales which still go through physical retail stores.

5.6 Total expenditure in these categories is illustrated in Table 3. Convenience goods spending within the Borough is forecast to increase by around 11% between 2019 and 2037, from £259m to £288m. Comparison goods spending in Middlesbrough is forecast to increase more significantly between 2019 and 2037 (by around 87%/£309m), from £354m in 2019 to £663m in 2037 (all in 2019 prices).

5.7 These figures relate to real growth and exclude the effects of inflation (i.e. they are in a constant price base). It should be noted that comparison goods spending is forecast to increase more than convenience spending as the amount spent on food and drink does not increase proportionately with disposable income, whereas spending on non-food goods is more closely linked to income. Notwithstanding the above, expenditure forecasts should be treated with a degree of caution, particularly in the medium to long term. This is not least given that different assumptions on growth, as well as those in relation to SFT, can lead to wide variations in the end results in terms of future needs.

Current Shopping Patterns

Convenience Goods

5.8 The results of the household shopping survey relating to main and top-up food and grocery shopping have been weighted and combined to estimate existing convenience goods shopping patterns across the study area. The estimates of market share or penetration within each zone are shown in Table 4 in **Appendix 2,** based on a 70%/30% split between main and top up food shopping. A summary of the market shares achieved by the main stores across the Borough (by zone, in percentage terms) is also shown in Table 6.1 below.

Table 5.1 Convenience Goods Market Shares of Main Foodstores (%)

Store	Zone 1 Middlesbrough Central	Zone 2 Middlesbrough East	Zone 3 Middlesbrough South
Zone 1 - Middlesbrough Central			
Sainsburys, Wilson Street	4.2%	1.6%	0.5%
Marks & Spencer Foodhall, Linthorpe Road, Middlesbrough	0.6%	0.9%	0.4%
Lidl, Newport Road	2.1%	0.2%	0.2%
Aldi, Newport Road	8.2%	2.7%	0.0%
Aldi, Marton Road	5.4%	4.8%	0.8%
Zone 2 - Middlesbrough East			
Morrisons, Berwick Hills	4.4%	38.4%	1.9%
Lidl, Cargo Fleet	0.3%	6.3%	0.0%
Asda, Ormesby Road, Park End, Middlesbrough	0.5%	8.9%	0.2%
Zone 3 - Middlesbrough South			
Tesco Extra, Coulby Newham District Centre	9.9%	0.5%	41.2%
Aldi, Dalby Way, Coulby Newham, Middlesbrough	5.1%	1.3%	21.2%

5.9 The above table illustrates that, within Zones 2 and 3, the large Morrisons and Tesco Extra stores at Berwick Hills and Coulby Newham District Centres attract the most significant proportions (between 38%-41%) of convenience goods expenditure from Zones 2 and 3 respectively. The Asda store at Ormesby Road, along with the Lidl and Aldi facilities at Cargo Fleet and Marton Road, attracts a smaller proportion of trade from within Zone 2 (less than 10%), with the Aldi at Coulby Newham (21%) attracting the next highest proportion of spending within Zone 3. Convenience goods spending patterns in Zone 1 are more dispersed, with the highest market shares being achieved by Tesco at Coulby Newham (actually located within Zone 3) and Aldi at Newport Road (around 8%-10%), and the Sainsbury's store at Wilson Street achieving a market share of just 4%.

5.10 Table 4 (Appendix 2) indicates the proportion of convenience goods expenditure which is retained within the Borough ranges from around 71% (in Zone 1), to 77% in Zone 2 and 83% in Zone 3. Whilst these retention levels are relatively high, there remains a significant proportion of spending generated within the Borough which is flowing to facilities outside of Middlesbrough. Such facilities include the Asda stores at Portrack Lane (Stockton) and Thornaby, and Morrisons at Teesside Park (all in Stockton in Tees), as well as Asda at South Bank and Tesco at Low Grange (both in Redcar and Cleveland). It is not surprising that this leakage is occurring, given the close inter-relationship between these areas, and the proximity of these stores to existing residential population in the eastern and western parts of Middlesbrough, although it would be desirable to 'claw-back' some of this expenditure to facilities in Middlesbrough.

5.11 The level of convenience goods expenditure attracted to shops/stores in the Borough in 2019 is estimated to be around £250m, as shown in Table 5, Appendix 2. This includes estimates of inflow of expenditure from beyond both the Borough and the wider Study Area (around £55m in total). This figure reflects the relative accessibility of some stores and centres (for example, Tesco Extra and Aldi at Coulby Newham, and Morrisons at Berwick Hills) from adjoining local authority areas.

5.12 The total benchmark (i.e. expected/company average) turnover of identified existing convenience sales floorspace within Middlesbrough is estimated to be around £255m (Table 9, Appendix 2). This suggests that convenience goods retail sales floorspace in the Borough is collectively trading at a level which is slightly below average, by around £5m (2%).

Table 5.2 Performance of Main Foodstores

Store	Performance Relative to Benchmark	
	(£m)	(%)
Zone 1 - Middlesbrough Central		
Sainsburys, Wilson Street	-17.5	-66%
Marks & Spencer Foodhall, Linthorpe Road, Middlesbrough	-4.0	-54%
Lidl, Newport Road	-1.6	-21%
Aldi, Newport Road	5.5	56%
Aldi, Marton Road	5.3	65%
Zone 2 - Middlesbrough East		
Morrisons, Berwick Hills	-2.5	-7%
Lidl, Cargo Fleet	-1.1	-15%
Asda, Ormesby Road, Park End, Middlesbrough	-1.5	-19%
Zone 3 - Middlesbrough South		
Tesco Extra, Coulby Newham District Centre	-5.9	-10%
Aldi, Dalby Way, Coulby Newham, Middlesbrough	21.6	243%

5.13 As illustrated in Table 5.2, above, the performance of the main existing foodstores, when comparing survey-based turnovers with their benchmark turnovers, vary significantly across the Borough. The existing Aldi stores at Newport Road, Marton Road and Dalby Way are all performing significantly above their company averages, with the latter being more than twice this average. However, the Lidl facilities at Newport Road and Cargo Fleet are performing slightly below their company average, as are the Morrisons and Tesco Extra stores at Berwick Hills and Coulby Newham. This reflects the national trends towards both the fragmentation of main food shopping trips – with a significant proportion of people either substituting or supplementing their first-choice store – the increase in popularity of the discount operators and, in particular, the modern nature of the new Aldi facilities at Newport Road and Coulby Newham, in contrast to those elsewhere.

Comparison Goods

5.14 A summary of existing comparison-goods shopping patterns is provided in Table 6.3. These are again based on the results of the household telephone shopping surveys in respect of the different types of non-food goods, which have been weighted on the basis of the national average spending levels and then combined.

Table 5.3 Comparison Goods Expenditure Flows (%)

Centre/Facility	Zone 1 Middlesbrough Central	Zone 2 Middlesbrough East	Zone 3 Middlesbrough South
Middlesbrough Town Centre	52.9%	43.6%	19.4%
Coulby Newham District Centre	4.4%	2.1%	23.7%
Berwick Hills District Centre	1.0%	5.8%	0.1%
Other Local Centres	2.2%	5.2%	2.9%
Other Stores	0.3%	0.5%	0.4%
Borough Total	60.8%	57.2%	46.5%
Portrack Lane, Stockton	9.1%	3.7%	7.8%
Teesside Park, Stockton	18.4%	6.6%	33.1%
Cleveland Retail Park, Redcar and Cleveland	4.0%	21.9%	2.5%
Other Leakage	7.6%	10.6%	10.2%
Outside Borough	39.2%	42.8%	53.5%
TOTAL	100.0%	100.0%	100.0%

5.15 Table 4 (Appendix 3) indicates the proportion of comparison goods expenditure within each zone that is spent within the Borough ranges from around 47% (Middlesbrough South) to 61% (Middlesbrough Central). This is lower than for convenience goods, reflecting the propensity of customers to do food and grocery shopping locally, as opposed to non-food shopping - where customers are more likely to shop around and/or travel longer distances to visit larger centres that have more choice. This also reflects the proximity of parts of the Borough to other destinations, such as Teesside Park and Portrack Lane (in Stockton) and Cleveland Retail Park (in Redcar and Cleveland) which, as set out above, all attract a significant proportion of spending from across Middlesbrough.

5.16 The estimated comparison goods expenditure currently attracted by shopping facilities within the Borough is approximately £479m in 2019, as shown in Table 5. This includes a significant amount of spending which is flowing into Middlesbrough from other areas, both within the Study Area and beyond, which are estimated to be around £280m. This level of inflow reflects, in particular, the sub-regional role that Middlesbrough Town Centre performs in meeting comparison goods retail needs, and its popularity with households across the Tees Valley, as well as parts of County Durham and North Yorkshire.

5.17 On the basis of the household survey responses, Middlesbrough Town Centre is currently estimated to be achieving a comparison goods turnover of c. £406m. On this basis and taking into account the total quantum of comparison goods retail floorspace in the centre (c. 71,000 sqm net), it is currently achieving a turnover to floorspace ratio of around £5,700 per sqm. Whilst average sales densities for comparison floorspace can vary significantly, those above

£6,000 per sqm are usually only achieved by large regional shopping centres. Given the size of the centre, and the scale and nature of its catchment area, the estimated turnover being achieved by Middlesbrough Town Centre is considered to be reasonably good.

5.18 The proportion of spending the centre attracts from each of the different zones varies significantly, however, ranging from 53% in the Middlesbrough Central zone to just 19% in the Middlesbrough South zone. When considered in terms of the Borough as a whole, the centre attracts around 42% of all available comparison goods expenditure. It is clear, however, that there is scope to increase its market share of available expenditure across the Borough, and particularly from within Zone 3.

5.19 Coulby Newham District Centre – which is performing strongly given its scale and nature (at around £5,500 per sqm) - attracts around 10% of spending from across the Borough as a whole, although 24% from within Zone 3 in particular. Around 44% of non-food spending generated in Middlesbrough is currently leaking-out to facilities beyond the Borough, particularly the retail parks in neighbouring Stockton and Redcar and Cleveland.

5.20 The above analysis is sensitive to assumptions made in relation to the quantum of floorspace provided by these centres, as well as their benchmark (i.e. expected/company average) level of turnover and should therefore be treated with a degree of caution. However, it provides a helpful indication as to the relative performance of existing facilities in the Borough.

Convenience Goods Capacity

5.21 Based on current market shares of available expenditure being maintained, the level of convenience goods expenditure available to existing stores and centres at 2024, 2029, 2034 and 2037 is shown at Tables 6-9 in Appendix 2. It is then summarised and compared to the benchmark turnover of existing stores/centres in Table 10. Convenience expenditure available to shopping facilities in the Borough is expected to increase from around £250m in 2019 to £273m in 2037, as compared to the expected or total benchmark turnover of existing facilities, which is estimated to be around £255m.

5.22 Commitments in the area summarised in Table 10 and are forecast to have a total convenience goods retail turnover potential of around £13m, taking into account information provided by the Council and the respective applicants. These commitments comprise re-configured floorspace within the vacant superstore previously constructed at Middlehaven (£9m in total), the extension of the Parkway Centre at Coulby Newham (£3m) and the redevelopment of the former Kwiksave site at Berwick Hills (estimated to have a convenience goods turnover of c. £1m). The latter scheme has recently been implemented, and a number of units occupied, although it wasn't complete at the time of the household surveys, and therefore needs to be factored-in as a commitment.

5.23 As set out in Table 12 at Appendix 2, which allows for the turnover of both existing and committed floorspace - and also makes an allowance for growth in turnover efficiency based on information within Experian's latest (2018) Briefing Note (see further below) - there is not forecast to be any residual convenience goods expenditure capacity in the Borough over the Plan period. This assumes that the current market shares of available expenditure being achieved by facilities within each of the survey zones within the Borough – and therefore existing levels of expenditure leakage to stores/centres beyond the Borough - will be maintained.

5.24 However, whilst the existing retention rate in Zone 1 (Middlesbrough Central), in particular, is relatively low, this reflects the close inter-relationship between this area and parts of Stockton immediately to the west. Although it may be possible to increase this rate slightly, it is unlikely that this would help to generate significant expenditure capacity to support further new development – over and above existing commitments - either within this zone, or across the Borough as a whole.

5.25 This assessment assumes that all of the commitments set out above will come forward. Should some of the above commitments not come forward, then it is possible that some capacity may emerge in the medium to long term. Similar, if any existing stores within the Borough close, then this could help to create expenditure capacity to support new convenience goods retail floorspace over the plan period. However, in considering whether or not to bring forward new replacement new convenience retail floorspace, the Council will need to carefully consider whether this would benefit existing centres, and particularly Middlesbrough Town Centre.

Comparison Goods Capacity

5.26 The household survey indicates that Borough's retention of comparison goods expenditure is £199m (56%) overall. This reflects the fact that, whilst there is a good range of provision located within Middlesbrough Town Centre, there are also a number of destinations located just out with the Borough – including Teesside Park, Portrack Lane and Cleveland Retail Park - which contain a range of non-food retail uses and attract significant spending from the area. Based on the household surveys, Teesside Park, in particular, is estimated attract around 18% and 33% of comparison goods spending from within Zones 1 and 3 respectively.

5.27 Based on the baseline population projections, available comparison goods expenditure has been projected forward to 2024, 2029, 2034 and 2037 in Tables 6-9 in Appendix 3. As summarised in Table 11, comparison goods expenditure available to facilities within the Borough is expected to increase from around £479m in 2019, £554m in 2024, £652m in 2029, £772m in 2034 and £855m.

5.28 Comparison goods retail commitments are summarised in Table 10 of Appendix 3 and total £41.0m in turnover. These developments are similar to those included in the convenience goods section and include floorspace within the vacant superstore previously constructed at Middlehaven (around £25m in total), retail floorspace within an approved new Snow Centre, also at Middlehaven (£7m), the extension of the Parkway Centre at Coulby Newham (£8m) and the redevelopment of the former Kwiksave site at Berwick Hills (£1m).

5.29 Along with existing floorspace, it is assumed that the turnover of these commitments will increase in real terms in the future, based on growth rates recommended by Experian set out in their latest (2018) Briefing Note (based in turn on their own analysis of future trends). This is a function of spending growing at faster rates than new floorspace provision and retailers' ability to absorb real increases in their costs by increasing their turnover to floorspace ratio. Making an allowance for growth in turnover efficiency is standard convention in assessments of this nature.

5.30 Table 11 in Appendix 3 (which is summarised below) illustrates forecast comparison goods expenditure capacity between 2019 and 2037, after taking into growth in comparison goods expenditure, and allowing for growth in turnover efficiency as set out above. Assuming no increase in market share, it is forecast that there will be no capacity emerging until the period up to 2029, with any significant expenditure capacity only emerging beyond then, equating to £44m in 2034 and £75m in 2037. Table 12 illustrates that such capacity could potentially support new floorspace of around 12,100 sqm net/17,300 sqm gross by 2037 (over and above existing commitments).

Table 5.4 Summary of Comparison Goods Expenditure Capacity (£m) (2017 Prices)

Area	2024	2029	2034	2037
Middlesbrough Town Centre	13.3	39.3	79.2	107.3
Coulby Newham District Centre	-6.5	-3.8	0.7	4.0

Area	2024	2029	2034	2037
Berwick Hills District Centre	-0.5	-0.1	0.5	1.0
Local Centres	0.6	1.6	3.1	4.2
Other Stores	-31.7	-35.4	-39.3	-41.9
Total	-24.9	1.6	44.3	74.5

5.31 As explained above, forecasts of expenditure capacity and the levels of floorspace which this capacity could support should be treated with a degree of caution. This is not least given that different assumptions on population spending forecasts, as well as those in relation to SFT, can lead to wide variations in the end results in terms of future needs. Nevertheless, the study will need to have regard to the capacity figures set out above in taking a long-term view for the plan period, recognising the cyclical nature of growth and the need to plan positively, as required by the NPPF.

5.32 As explained earlier, these expenditure capacity forecasts are based on the assumption that existing retail floorspace within the Borough maintains its existing market share of available comparison goods expenditure. In this context, it should be an aspiration to increase the share of spending achieved by Middlesbrough Town Centre from across the Borough, though particularly within Zone 3, where it is currently only 19%.

5.33 The extent to which this can be achieved will be influenced by a range of factors – including both the strength of competing destinations and the extent to which the town centre can be made a more attractive proposition to residents of this zone. However, should it be possible to increase the market share in Zone 3 to, for example, 30%, then the level of capacity forecast would support a slightly higher level of floorspace than set out above (around 12,800 sqm net/18,300 sqm net in 2037). Although this is only a slight increase in potential new floorspace, as explained in the qualitative need section, it is nevertheless important to seek to maintain and, if possible, increase the market share of the town centre, by enhancing the range and quality of its retail and wider commercial/leisure offer.

Qualitative Retail Need

5.34 Qualitative need can be assessed through consideration of the following factors:

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

5.35 All of these factors are taken into account in the qualitative need assessment of existing facilities in Middlesbrough set out below.

Convenience Retail

5.36 The household survey results indicate that most residents in the study area (and between 76% and 81% across the three zones in Middlesbrough) undertake both a main shopping trip and top-up shopping trips. Main shopping trips are generally made once a week or less often and, whilst it varies across the three zones, the household survey identified that around 74% of respondents in Middlesbrough travel to do their main food shopping by car (either as a driver or passenger). The household survey results also indicated that the key reasons for people’s choice of main/weekly food shopping destinations were the proximity of stores to home and prices/value for money. The availability of a wide range of products and free car parking are also important requirements for such trips.

5.37 Whilst large supermarkets or superstores are the usual destination for these types of shopping trip, shopping habits have changed significantly in recent years. Against this background, research by NEMS Market Research has indicated that the expansion of consumer choice has led to over half of households using more than one store for their main food and grocery shopping. It also indicates that, of these households, around 77% supplemented their principal main food shopping destination with additional trips to other stores, with around 33% substituting it for another store (and 9% doing both). This trend is reflected in Middlesbrough, although particularly in Zone 1, where main food shopping trips are dispersed across a range of store of different sizes.

5.38 Against this background, and as shown on Drg. No. GIS\LF\60724\01-04 at **Appendix 4**, there are three large foodstores, comprising over 2,500 sqm net sales area in the Borough. These include:

- Tesco Extra, at Coulby Newham District Centre, comprising around 7,600 sqm net sales area;
- Morrisons, at Berwick Hills District Centre, which comprises c. 4,600 sqm net floorspace; and
- Sainsbury's at Wilson Street, Middlesbrough Town Centre, which comprises around 3,500 sqm net.

5.39 There are also a number of other supermarkets which help to meet both main and top-up food shopping needs. These include:

- Aldi at Newport Road, Middlesbrough Town Centre, which comprises 1,060 sqm net sales area;
- Aldi at Dalby Way, on the edge of Coulby Newham District Centre, which comprises 966 sqm net sales;
- Lidl at Newport Road, which comprises 925 sqm net floorspace;
- Lidl at Cargo Fleet, North Ormesby, comprising 900 sqm net; and
- Aldi at Marton Road, comprising 879 sqm net.

5.40 There is also a Co-op store of 1,038 sqm net area, in Linthorpe Village Local Centre, an Asda at Leaholme Crescent Local Centre (Ormesby Road), which comprises 675 sqm net, as well as M&S foodhalls within their department store on Linthorpe Road (c. 880 sqm net) and at James Cook Hospital, off Marton Road. These larger and medium sized stores are supported by a range of smaller supermarkets and convenience stores within the Borough, including Tesco Express, Sainsbury's Local, Heron, Iceland and Farmfoods stores.

5.41 Overall, the Borough benefits from a good range and choice of foodstore provision, with all of the main operators represented (Waitrose excepted). Furthermore, the wider Middlesbrough Town Centre boundary includes Sainsbury's and Aldi stores, with Morrisons anchoring Berwick Hills District Centre, and Tesco Extra and Aldi stores within/on the edge of Coulby Newham District Centre. The town centre also includes a number of smaller supermarkets, including an Iceland, Heron, Tesco Express and Sainsbury's Local, as well as the above M&S Foodhall.

5.42 As set out earlier in this section, based on the new household surveys undertaken to inform this study, the existing Sainsbury's store at Wilson Street is achieving a level of convenience goods turnover which is around a third of Sainsbury's company average. In this context, whilst planning permission was originally granted by the Council for the construction of a replacement, new superstore and two non-food retail units at Middlehaven, to the north of the A66 (comprising c. 11,500 sqm gross floorspace in total), this store has never been occupied. More recently, permission has been granted for the reconfiguration of this store to include a number of retail units, including a new Food Warehouse (Iceland) store.

5.43 As explained earlier in this section, on the basis that existing spending patterns are maintained, there is not forecast to be any capacity to support new convenience (food) retail floorspace across the Borough over the period to 2037. However, given the low market share of expenditure achieved by Sainsbury's at Wilson Street, one option the Council could pursue would be the provision of a new food retail anchor which supports the vitality and viability of the wider centre.

5.44 This could, in turn, help to increase the town centre's market share for convenience goods across the Borough, including from Zones 2 and 3. Given the difficulties experienced by comparison retailers nationally, and the need to attract new anchors which help to shore-up town centres more generally, this would help to consolidate the role of Middlesbrough as the focal point of the Borough for retail and service provision. In this respect, it would be important to ensure that any such store is of a scale, nature and location which is both sufficiently attractive to consumers and located so as to be of genuine benefit to the town centre, in terms of the potential for linked pedestrian trips.

5.45 In addition, there could be benefits in qualitative terms in bring forward new provision which:

- enhance the range and choice of provision in the southern and western parts of the Middlesbrough Central zone, which is currently limited to facilities meeting day to day/top up needs; and/or
- provides additional competition for the existing Tesco Extra and Aldi stores in Coulby Newham District Centre, and/or other locations which provide additional choice for residents living within Zone 3 more generally.

5.46 Changes in shopping patterns in Middlesbrough – which reflect wider national trends – have seen an increase in popularity in the discount foodstore sector, and the strong performance of existing Aldi facilities in particular. Subject to the identification of suitable sites, therefore, there could be scope for additional store development in the discount sector, which would help to meet any qualitative needs identified.

5.47 However, it will be important to ensure that, in planning for any such new provision, it is directed to the most sequentially preferable locations, and the potential impact upon existing centres is considered (including the ability to attract new investment to Middlesbrough Town Centre in particular). Such provision should be brought forward as part of a planned approach, (i.e. through the new development plan) and integrated as far as possible with existing centres, in order to help minimise any potential impact on these and other centres. It will also be important to take into account the extent to which planned new housing development on the southern side of Middlesbrough would be served by facilities which meet new residents' day to day needs and/or whether there is a need to direct any new facilities to locations which can effectively serve these new developments.

Comparison Retail

5.48 Higher order comparison goods tend to be higher value items bought occasionally, where customers window shop and compare prices and goods. Lower order comparison goods are items bought on a more regular basis, where customers are less likely to shop around or travel long distances to shop. Healthy town centres usually have a good mix of higher and lower order comparison goods uses.

5.49 Middlesbrough Town Centre is the largest centre in the Borough and is a focal point within the local community for a range of retail, service and other commercial and community uses. Based on the latest available information from the Council, as updated through site visits in August 2019, it contains approximately 71,000 sqm net comparison goods retail floorspace. It accommodates a wide range of non-food operators, including a number of department/variety stores – such as M&S, Debenhams and House of Fraser – various other national multiples, and smaller/independent and/or specialist retailers. The majority of these multiples are found within either on Linthorpe Road or within the Hill Street, Cleveland or Captain Cook Square Shopping Centres, whilst the Dundas Mall generally comprises smaller, independent or discount operators.

5.50 As explained above, the proportion of comparison goods spending the town centre attracts from each of the different zones within the Borough varies significantly, ranging from 53% in the Middlesbrough Central zone to just 19% in the Middlesbrough South zone. There is, therefore, an important qualitative need to enhance the existing range of provision within the centre, to ensure that it is more attractive to residents across the Borough, including in Zone 3. This will, in turn, help to increase the overall market share of the centre and its wider vitality and viability.

5.51 Based on the analysis of these uses contained within the separate Middlesbrough Town Centre Report, there is scope to improve the offer in certain sectors – including shops selling gifts, chemists and opticians, toys and sports/hobby goods – subject to operator demand. Alongside this, it will be important to identify retail operators which are not currently represented in the centre, which could reasonably be attracted to Middlesbrough, as well as the extent to which existing retail accommodation there is able to meet their business model requirements. Such retailers would have the potential to increase the market share achieved by the centre, both within and outside of the Borough, and allow it to compete more effectively with – and claw-back trade from - other destinations, such as Teesside Park.

5.52 The Council should also consider the potential impact upon the wider offer of the centre which could arise from the closure of existing anchor stores. For example, the future of both the Debenhams and House of Fraser stores, which are situated at the junction of Linthorpe Road with Corporation Road, is currently unclear, following recent periods in administration. As well as a large void at the heart of the centre, the closure of either would result in as significant reduction in the total quantum of comparison retail floorspace. Although it may be difficult to attract a replacement department/variety store, it will nevertheless be important to work to attract replacement retail and leisure operators which would re-occupy this space and consolidate, or indeed enhance, the existing offer in the centre.

5.53 In relation to the other main centres in the Borough:

- Coulby Newham District Centre contains a purpose-built shopping centre, which includes a range of national multiple retailers (such as Home Bargains, Peacocks, Shoe zone, Superdrug and The Works), as well as freestanding stores such as Halfords, Pets at Home and B&M. In this context, taking into account its intended role and function, and the need to ensure that Middlesbrough Town Centre does not experience any significant adverse impact from further new provision, there is not considered to be any pressing need to enhance the range of comparison retailing there; and
- aside from the Morrisons superstore, Berwick Hills District Centre primarily comprises smaller scale retail and service uses (including those within the new development on the former Kwiksave site). Although it would benefit from a broader range of comparison

retailing, any new provision should be appropriate in scale and nature to that of the existing centre, and its role and function in meeting needs on the eastern side of Middlesbrough.

5.54 There are no out-of-centre destinations of any significance in Middlesbrough and, as mentioned above, a significant proportion of comparison goods/non-food spending currently leaks out of the Borough to locations such as Teesside Park, Portrack Lane (both in Stockton on Tees) and Cleveland Retail Park (Redcar and Cleveland). Whilst it should be an aspiration to maintain and, if possible, increase the existing market share of facilities within Middlesbrough, any new comparison retail development which does come forward should be focused upon the town centre as far as possible. Out-of-centre locations should only be considered where a clear need has been identified for new provision and there no opportunities which are suitable and available, located within/on the edge of the town centre.

Summary

5.55 Based on up to date surveys of household shopping patterns, and assuming that existing facilities maintain their current market share of available spending, no expenditure capacity has been demonstrated to support new convenience goods retail floorspace in Middlesbrough. Again, based on existing market shares, there is also not forecast to be any expenditure capacity to support new comparison retail floorspace in the short to medium term, allowing for commitments, although significant capacity does emerge over the longer period to 2037 – when around 12,100 sqm net/17,300 sqm gross new floorspace could be supported.

5.56 In qualitative terms, there is a need to enhance the existing range of convenience and comparison goods retail provision within Middlesbrough Town Centre, in order to increase its attractiveness to residents from across the Borough, including Zones 2 and 3. In relation to convenience retailing in particular, given the low market share achieved by Sainsbury's at Wilson Street, it should be aspiration to provide a new food retail anchor, which supports the vitality and viability of the wider centre.

5.57 In terms of comparison retailing, there is scope to improve the centre's offer in certain sectors – including shops selling gifts, chemists and opticians, toys and sports/hobby goods. Alongside this, it will be important to identify retail operators which are not currently represented in the centre, which could reasonably be attracted to Middlesbrough. This will help to claw-back spending currently leaking out to other destinations, such as Teesside Park.

5.58 Elsewhere within the Borough, there could be scope to enhance the range and choice of convenience retail provision in the southern and western parts of the Middlesbrough Central zone. There is also scope to provide additional choice in Zone 3, including competition for the existing Tesco Extra and Aldi stores in Coulby Newham District Centre.

6.0 Need for Other Town Centre Uses

6.1 This section of the study report provides an assessment of the need for new commercial leisure uses in the Borough, drawing on both local and national data/trends in each sector. In doing so, it takes into account the proximity of major leisure facilities in surrounding local authorities, which have the potential to limit the scope for major new facilities.

6.2 Based on Lichfields' experience, and household surveys from across the country, commercial leisure facilities usually draw the main part of their trade from residents up to a 20 minutes travel time. Major leisure facilities, such as multiplex cinemas, ten-pin bowling centres and family entertainment centres require a large catchment population, and often benefit from locating together or on large edge of centre or out of centre leisure parks. These factors and the other likely requirements of commercial operators have been taken into account in the analysis that follows.

Cinemas

6.3 Cinema admissions in the UK declined steadily during the 1950s, 1960s and 1970s, a period when the ownership of televisions increased significantly. They continued to decline in the early 1980s but then increased steadily after 1984 up to 2002. UK cinema admissions in 2002 equated to 175.9 million and, whilst they fell in the intervening period, they increased again to around 168.3 million in 2016 and 177.0 million in 2018 (Source: British Film Institute and UK Cinema Association).

6.4 Based on information from Digital Cinema Media, approximately 80% of the UK population are cinema-goers, having increased from 64% in 2008, with box office revenue equating to around £1.28m in 2017. The four largest UK operators comprise Cineworld, ODEON & UCI, Vue Entertainment and Natl Amusements (who own the Showcase chain). In addition, however, a number of smaller/independent cinema operators have opened new facilities, primarily within town centres. Examples include Everman, who are located in Newcastle City Centre and are also planning a new cinema in Durham City Centre, as well as Reel who, whilst not represented in the north-east, have a network of cinemas across other parts of the country.

6.5 The national average visitation rate is 2.7 trips per person per annum, and there are, on average, about 40,000 cinema trips per screen per annum or 210 trips per seat per annum. The existing cinema provision in Middlesbrough comprises Cineworld on Marton Road in the town centre and Showcase at Teesside Park (within the Middlesbrough local authority area) which, together, provide 25 screens and around 5,800 seats in total.

Table 6.1 Cinema Market Shares

Zones	Cineworld, Marton Road, Middlesbrough	Showcase, Teesside Leisure Park	Other Destinations
1 – Middlesbrough Central	62.9%	32.6%	4.5%
2 – Middlesbrough East	84.1%	10.0%	5.9%
3 – Middlesbrough South	43.2%	54.6%	2.2%
4 – Eston	56.0%	43.5%	1.5%
5 – Redcar and East Cleveland	47.1%	42.3%	10.6%
6 – Thornaby and Yarm	27.2%	65.1%	7.7%
7 – Stockton and Billingham	21.3%	55%	23.7%
8 - Stokesley	21.6%	73.1%	5.3%

6.6 As shown in the above table, the Cineworld facility attracts between 43% and 84% of visits from Zones 1-3. Although Showcase attracts 33% and 55% of households who visit cinemas in Zones 1 and 3, it draws just 10% from Zone 2, reflecting the more significant distance of Teesside Park from these residents. However, whilst Cineworld is more popular with residents in Middlesbrough itself, Showcase attracts a more significant number of households from the other survey zones, due in part to its location, adjacent to A19. Only a small proportion of respondents in Middlesbrough use other facilities in the surrounding area, for example, the Vue Cinema, at Marina Way in Hartlepool.

6.7 **Appendix 5** to this report includes a quantitative assessment of the capacity to support additional cinema provision in Middlesbrough. The national average visitation rate (2.7 trips per annum) has been applied to Middlesbrough's estimated population in order to forecast the total number of cinema trips generated. As set out in Table 2 **of Appendix 5**, it is forecast that Middlesbrough's population will generate around 386,000 cinema trips in 2019, increasing slightly to around 430,000 trips in 2037.

6.8 The household survey results suggest that c. 370,000 cinema trips in 2019 from Zones 1-3 will be attracted to the Cineworld and Showcase facilities, equating to around 96% of all trips. As set out above, only a smaller proportion (around 4%) of such trips are being made to facilities out with the Borough. Allowing for visits to these cinemas from the other survey zones, as well as 10% inflow from beyond the Study Area, these facilities are estimated to attract an overall total of around 1.3 million trips in 2019.

6.9 Based on the national average population per cinema screen (40,000 people per screen) and per cinema seat (210 per seat), the trips made to facilities in Middlesbrough (i.e. Cineworld and Showcase) equate to around 33 screens or up to c. 6,500 seats by 2037. Taking into account the number of existing screens in the Borough, there is therefore forecast to be theoretical capacity to support up to nine additional cinema screens or 700 extra seats by 2037 (Tables 8 and 9).

6.10 Whilst capacity for more cinema development is relatively limited, particularly when looking at the numbers of seats, there may be scope – subject to operator demand - to claw-back visits from Showcase at Teesside Park, through the development of further cinema provision. In this context, planning permission was granted in May 2019 for an extension to Cineworld on Marton Road, which would provide one additional screen (or 440 seats). However, whilst this extension, if implemented, would help to consolidate the role of Middlesbrough Town Centre in meeting leisure needs, the development of a separate new facility elsewhere within the centre could potentially result in greater benefits - in terms of generating linked pedestrian trips with other uses in the heart of the centre.

Food and Beverage

6.11 Food and beverage is a fast moving and creative sector, with a steady flow of new concepts emerging. These types of food and drink operators (i.e. restaurants, bars and pubs) also support other major leisure uses, in particular cinema developments, generating linked trips and helping to extend dwell time in centres.

6.12 There has been a recent cooling of operator demand, and a number of mid-market operators have reduced their representation (or even entered administration), with the total number of licensed restaurants falling slightly between 2018 and 2019, from around 27,200 to c. 26,300 (based on information from Statista). Notwithstanding this, however, there has been a significant overall increase in the number of national multiple chains over the last ten years or so, and the number of food-led pubs has remained broadly static.

6.13 Demand amongst food and beverage uses within town centres has been manifested in a significant expansion in the number of coffee shops, such as Starbucks, Costa Coffee and Café Nero. National branded pub/restaurant chains have invested heavily, not exclusively in larger centres and themed restaurants have also expanded. The main categories for food and beverage offers are:

- impulse: characterised by their produce range that is typically highly visual and hand-held so that it can be eaten "on the go";
- speed eating/fast food: food that can be purchased and consumed quickly, therefore price is low and ambience is less important. This sector is dominated by traditional high-volume fast food offers, such as burgers and fried chicken;
- refuel and relax: a drink, snacks and/or a short break in a pleasant environment, rather than focusing on eating a main meal; and
- casual dining/leisure dining: incorporating a number of food styles, types and ethnic origins. The ambience and environment of casual dining is as important as the food, drink and service provided. The style is informal but is normally table service.

6.14 Although online delivery services have also increased in popularity, food and beverage establishments (Class A3, A4 and A5), including restaurants, bars and pubs, are important services within town, district and local centres, and also support other major leisure uses on leisure and retail parks. National information available from Experian Goad indicates that the proportion of non-retail uses within town centres across the country has increased significantly.

6.15 In order to provide an assessment of the scope for new food and beverage floorspace in Middlesbrough over the study period, Experian's latest (2019) local expenditure figures have been used, alongside the population projections used as part of the retail capacity forecasts. Forecasts of food and beverage expenditure per capita between 2019 and 2034 are shown in Table 2, **Appendix 5**, with total expenditure being shown in Table 3. These figures indicate that the expenditure in the Borough for food and beverages consumed away from the home (plus takeaways eaten at home) in the Borough is forecast to increase by around £53m (38%), from £142m in 2019 to £196m by 2037 (in 2017 prices).

6.16 Existing food and beverage expenditure patterns have been modelled based on the results of the questions within the household survey relating to respondents' usage of restaurants and pubs/bars in respect of the various study area zones. Base year (2019) penetration rates are shown in Table 4 and expenditure patterns are shown in Table 5. The estimated food and beverage expenditure currently attracted to facilities within Middlesbrough Town Centre (also allowing for inflow from beyond the Borough) is £157m in 2019 (forecast to increase to c. £252m in 2037).

6.17 Based on the household survey results, the rate of food and beverage expenditure retention in Middlesbrough as a whole is estimated to be around 70%, and it is recommended that the Council should, as a minimum, seek to maintain this market share. The capacity forecasts set out in Appendix 5 are based on this approach and make an allowance for existing facilities to increase their turnover by 1% per annum.

6.18 The level of food and beverage expenditure available to existing facilities has been projected forward to 2037 in Tables 5 to 9 and has then been compared with the projected turnover of existing facilities in Tables 10 (allowing for growth in turnover efficiency, as set out above). This table indicates that there is forecast to be capacity in the order of £6m in 2024, increasing to £13m in 2029, £20m in 2034 and £25m in 2037.

6.19 Surplus expenditure has then been converted into floorspace projections in Table 10, using an average sales density of £5,000 per sqm in 2024, again increasing by 1% per annum. This indicates that the above levels of capacity could support around 2,400 sqm gross new food and beverage floorspace in 2024, increasing to c. 7,300 sqm by 2037.

6.20 National food and beverage chains in Middlesbrough Town Centre include Nando's, Pizza Hut, JD Wetherspoons, Subway, Turtle Bay Cafe Nero and Costa. However, as set out earlier in this report, whilst there are also a range of independent facilities – many of which are located along Linthorpe Road - the choice of such chains is relatively limited for a sub-regional centre of Middlesbrough's size. Subject to operator demand, it should therefore be an aspiration to enhance this current range and choice, particularly in the restaurant sector, in order to help increase dwell time and the overall number of visitors to the centre.

6.21 In this context, based on information provided by CPNE, we are aware of requirements from a number of food and beverage operators for new provision in the Middlesbrough area. These operators include:

- Innkeepers Lodge;
- Miller and Carter Steakhouse;
- Ember Inns;
- Creams Café;
- The Chinese Buffet; and
- Dominos.

6.22 Whilst it will ultimately depend upon whether there are sufficient suitable and available sites – and some operators with known requirements (for example, Ember Inns or Innkeepers Lodge) may be more difficult to accommodate - the Council should seek to direct any proposed new food and beverage floorspace, as far as possible, to locations within/on the edge of existing centres, in Middlesbrough Town Centre.

6.23 It would also desirable, from a sustainability perspective, to seek to increase the proportion of food and beverage expenditure generated within the Borough which is currently spent in Middlesbrough Town Centre over time. Whilst this may be difficult to achieve – the Borough is already retaining 70% of food and beverage expenditure generated in Middlesbrough – there may be scope to do so through new provision. The extent to which this can be achieved, however, will depend upon the scale and nature of any new provision which comes forward, and whether this enhances the existing range of facilities in the Borough. Should it be possible to increase the proportion of food and beverage expenditure within the Borough, the levels of floorspace capacity identified would clearly be higher than set out above.

Bingo

6.24 Gala and Mecca are the main bingo operators, controlling over half of the UK market. Marketing of the bingo sector has been more proactive in recent years and Gala and Mecca have invested in premises, moving out of dated premises (i.e. converted cinemas) into purpose-built units. Bingo clubs have become increasingly sophisticated and have actively sought to attract all age groups. The bingo sector usually prefers central locations that are accessible by public transport and by foot.

6.25 The Gambling Commission indicates there are 650 bingo facilities in Great Britain (2018), which equates to approximately one bingo facility per 100,000 people. Based on this national average level of provision, the adult (over 18) population in Middlesbrough (Zones 1-3) at 2019 (estimated to be 108,962 people) could support one bingo facility.

6.26 The household survey results indicated that around 11% of households in Middlesbrough visit bingo facilities, which is above the national average bingo visitation rate of around 5%. Of the respondents who visit bingo facilities, 45% visited Buzz Bingo at Longlands Road, with 27% visiting Mecca Bingo, at Chandlers Wharf in Stockton. Buzz Bingo is the only bingo facility of any significance in Middlesbrough itself and, based on the national average rate of provision, is considered sufficient to meet the requirements of the existing and future population of Middlesbrough.

6.27 Although participation in bingo in Middlesbrough is higher than the national average (based on the household surveys) – which could indicate that there is scope to support some additional provision - the extent to which any such provision could be attracted to the Borough would depend upon the extent (or otherwise) of any commercial demand for new facilities. As such and given that we are not aware of any requirements from bingo operators, it is not recommended that the Council actively plan to bring forward new provision at the current time.

Health and Fitness

6.28 The 2017 State of the UK Fitness Industry Report reveals that the UK health and fitness industry is continuing to grow. There are now more than 9.7 million fitness members in the UK, and the penetration rate is now 14.9%. The sector has more clubs, more members and a greater market value than ever before. The 2017 report highlighted that the industry experienced growth over the twelve-month period to the end of March 2017, with an increase of 5.1% in the number of memberships and 4.6% growth in the number of facilities.

6.29 Around 24% of respondents to the household telephone survey from Zones 1-3 indicated that they (or their families) visit health/fitness clubs. The survey also indicates that 81% of trips made to health and fitness facilities by residents of Middlesbrough are to facilities within the Borough itself.

6.30 As shown in Table 6.2 below, Sport England/Active Places data indicates that there are 17 registered health and fitness suites in the Middlesbrough local authority area, with over 1,500 fitness stations. Six of these facilities are for private use/sports club/community association use only and provide 172 fitness stations in total. The remaining 11 registered facilities are open to the general public (including registered members) and have around 1,200 fitness stations in total. Such facilities include Bannantynes, as well as a range of independent operators.

Table 6.2 Middlesbrough Health and Fitness Suites

Name	Type	No. Fitness Stations
Bannantynes Health Club, Coulby Newham	Registered Membership Use	115
Juvenate Health Club, Fry Street	Registered Membership Use	21
KO Fit, Linthorpe Road	Registered Membership Use	300
Lifestyle Fitness, Victoria Street	Registered Membership Use	120
Live Well Centre, Dundas Arcade	Pay and Play	50
Macmillan Academy, Stockton Road	Private Use	7
Middlesbrough (Prissick) Sports Village, Alan Peacock Way	Registered Membership Use	100
Middlesbrough College, Dock Street	Registered Membership Use	40
Neptune Centre, Ormesby Road	Pay and Play	140
Outwood Academy Acklam, Hall Drive	Sports Club / Community Association	49

Name	Type	No. Fitness Stations
Rainbow Leisure Centre, Parkway Centre	Pay and Play	200
Steel City Gymnasium, Marton Road	Pay and Play	75
Teesside University, Borough Road	Private Use	35
The Escape Zone, Low Lane	Registered Membership Use	70
The King's Academy, Stainton Way	Sports Club / Community Association	27
Trinity Catholic College, Saltersgill Avenue	Sports Club / Community Association	26
Unity City Academy, Ormesby Road	Private Use	28
Total		**1,403**

6.31 The current population of Middlesbrough is estimated to be 141,509. This population estimate indicates that Middlesbrough currently has around 10 fitness stations per 1,000 people (1,403 stations in total). The North East has 349 Sport England registered health and fitness suites with 21,294 fitness stations (an average of 61 stations per facility). This existing provision equates to 8 fitness stations per 1,000 people in the North East, which is a lower level of provision (on average) then when considering Middlesbrough in isolation.

6.32 On this basis, there is no need to plan for new health and fitness provision in Middlesbrough in quantitative terms. However, there is considered to be a qualitative need to enhance the existing range and choice of provision in the Borough, including in terms of national chains (of which there are currently just two – comprising Bannantynes and Lifestyle Fitness – following the recent closure of the DW Sports facility adjacent to Cineworld). National chains generally provide more choice in terms of the types of facilities and classes provided and therefore offer the most potential benefits in bringing forward new provision. Depending on the extent of any commercial demand, and whether any suitable sites are available, any such new provision which is brought forward could help to enhance the role of the town centre in meeting leisure needs more generally.

Tenpin Bowling

6.33 There are two tenpin bowling facilities in Middlesbrough Local Authority area – comprising Hollywood Bowl (which has 26 lanes) at Teesside Park and Lane 7 (which has 5 lanes) in Middlesbrough Town Centre. The household survey results suggest that, of those who use tenpin bowling facilities, the vast majority of respondents (87%) in Zones 1 -3 last visited Hollywood Bowl.

6.34 The national average provision of tenpin bowling facilities equates to one lane per 12,000 people. On this basis, Middlesbrough's population (around 143,000 in 2019) could theoretically support around 12 lanes (increasing to 13 over the plan period). As there are currently 26 lanes located within the Middlesbrough local authority area, there is no quantitative need for additional provision based on population within the Borough itself, as existing provision should be sufficient to meet the current demand.

6.35 It is also relevant to take into account Middlesbrough's sub-regional catchment, and the extent to which any new provision would cater for some of the residents of surrounding areas, such as Redcar and Cleveland, Stockton-on-Tees and Hambleton. Having regard to the total population of the wider Study Area used for the household surveys underpinning this study (estimated to be in the region of 493,000 in 2019), and the average persons per lane, this additional population could theoretically support 41 lanes in total, increasing to 43 over the period to 2037.

6.36 This equates to an additional 10-12 lanes on top of the 31 already in Middlesbrough/the wider study area. However, although we are not aware of any other existing tenpin bowling facilities in the study area, it is possible that other, surrounding, local authorities, may plan to bring forward their own provision over time. Such provision would help to absorb any latent demand for new facilities.

6.37 We are aware from discussions with CPNE that Hollywood Bowl have a potential requirement for a new tenpin bowling facility in the area. It is understood that this requirement is likely to be for a replacement facility, such a suitable location be identified, rather than an additional destination. Notwithstanding this, however, it is recommended that the position be monitored as, given Middlesbrough's sub-regional catchment area, it is possible that this operator will want to remain within the Borough. Should it be possible to identify a suitable location within/on the edge of the town centre, then this would clearly help to deliver other benefits to the centre, in terms of additional footfall and also synergy with other existing/proposed leisure uses.

Hotels

6.38 The UK hotel market represents a significant part of the leisure economy. British residents alone spent £23.7 billion on overnight trips within Great Britain in 2017 (source: Visit England). This is an increase of £4.2 billion since 2012. The latest available data for Visit England's serviced accommodation audit (2016) shows that there were 33,374 serviced accommodation establishments registered with national tourist boards, which provide 1.8 million bed spaces. The serviced accommodation market is split with 32% of the market taken up by Bed & Breakfast accommodation, 36% Hotels and 21% Guesthouses.

6.39 The latest available data from Visit England on occupancy rates (October 2019) is 82% for room occupancy (up from 67% in July 2013) and 58% bed space occupancy (up from 51% in July 2013) in hotels in England. For city/large town locations, including hotels, guesthouses and B&Bs, the average room occupancy is 83%, compared to 77% in small towns, 73% in the countryside and 80% in seaside locations. Bed space occupancy in city/large town locations was 58% over the same period.

6.40 The Visit England data shows that occupancy rates have increased over the period from 2010, when room occupancy over a 12-month period in city/large town locations was 69%, 55% in small towns, 52% in the countryside and 54% in seaside locations. In the North East, room occupancy in 2019 was 76% compared with 77% in 2018. In relation to the Tees Valley, information from Visit England on the estimated total number of tourist trips made and nights spent in each of the five local authority areas (based on an average for the three years between 2016 and 2018) is illustrated in Table 6.3 below.

Table 6.3 Tees Valley Tourism Numbers/Spend (Average per Annum 2016-2018)

Local Authority	Trips	Nights
Middlesbrough	***124000***	***447000***
Darlington	143667	353667
Hartlepool	49667	143667
Redcar And Cleveland	67333	201667
Stockton-on-Tees	104667	306667
Total	**489,333**	**1,452,667**

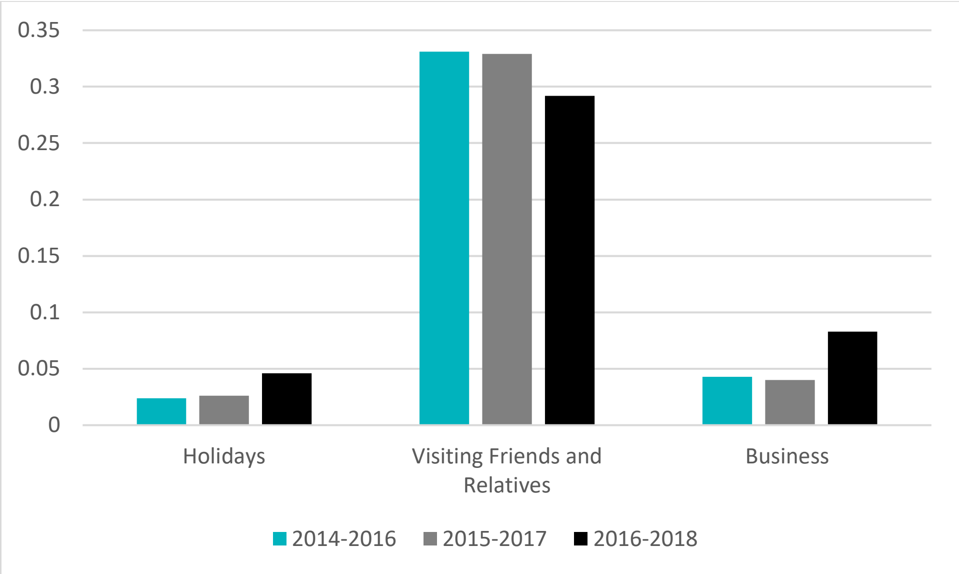
Source: Visit England

6.41 The table above indicates that more nights were spent by tourists in Middlesbrough (447,000) than any of the other four Boroughs, with the number of trips made second only to Darlington. The breakdown of these tourism trips also indicates that the proportion of the trips made (15%)

and nights stayed (10%) by those on holiday in the area are all lower than the average for the Tees Valley (22% and 19% respectively) – with the proportions of those in Middlesbrough visiting friends and relatives being higher than the Tees Valley average. The proportion of business trips to Middlesbrough is broadly in line with the average, with the proportion of nights spent for this purpose being slightly above.

6.42 Information from Visit England also allows a comparison of how the number of trips and nights spent by visitors has changed over the last few years (using the average of the years 2014-2016 and 2015-2017, alongside the above). This shows that both of these indicators have increased over this period, with the total number of visitor nights spent in the area increasing from around 402,000 to 447,000 (by around 45,000 or 11%). Although still significantly less than those for people visiting friends or relatives, the amount of nights spent in Middlesbrough by those both on holiday and on business have almost doubled, in percentage terms (albeit from a relatively low base).

Figure 6.1 Average Number of Visitors Nights per Annum (millions)



Source: Visit England

6.43 In this context, Table 6.4, below, summarises the hotel provision in the study area. It should be noted that this excludes Airbnb's, guest houses, bed and breakfasts and establishments with less than 10 bedrooms. Five of the 10 hotels are part of national chains, and Premier Inn has two hotels in the Borough, with Holiday Inn, Jury's Inn and Travelodge also being represented, although there are also a number of independent facilities. Overall, however, existing provision is focused on the middle and lower end of the market, with no 4 or 5-star hotels represented.

6.44 Whilst all hotels include a bar/restaurant, the Sporting Lodge Inn and Jury's Inn also both provide a range of other facilities for guests – including leisure facilities, such as a fitness centre, swimming pool and spa, and business suites/meeting rooms. With the exception of the Sport Lodge, all of these hotels are located within Zone 1 (Middlesbrough Central).

Table 6.4 Existing Hotel Provision in Middlesbrough

Name	Rooms	Facilities	Type of Hotel
Holiday Inn Express Middlesbrough - Centre Square	159	Restaurant / bar	Chain

Name	Rooms	Facilities	Type of Hotel
Sporting Lodge Inn Middlesbrough	140	Restaurant / bar / 2 business suites / fitness centre / spa / swimming pool	Independent
Jury's Inn Middlesbrough	132	Restaurant / bar / health and leisure club / 17 meeting rooms	Chain
Premier Inn Middlesbrough Town Centre	83	Restaurant / bar	Chain/ Budget
Premier Inn Middlesbrough Central (James Cook Hospital)	75	Restaurant / bar	Chain / Budget
Bluebell	60	Restaurant / bar	Independent
Travelodge Middlesbrough	55	Restaurant / bar	Chain / Budget
The Baltimore Hotel	30	Restaurant / bar	Independent
The Highfield Hotel	29	Restaurant / bar	Independent
Longlands Hotel	23	Restaurant / bar	Independent

Source: Lichfields research

6.45 Based on the above, there is a qualitative need to enhance the existing range of hotel accommodation in Middlesbrough and, in particular, additional higher quality hotels. Subject to commercial demand, the development of one or more new hotels would also help improve the town's visitor offer.

6.46 In arriving at the above conclusions, regard has also been had to the Middlesbrough Hotel Feasibility Study, prepared by GVA in November 2017, in order to assist the Council in developing one or two upper mid-scale or boutique hotels within the town. Although more up to date information on visitors to the Tees Valley have become available since it was published, it provides a helpful overview of the hotel market in Middlesbrough and the scope for the development of new facilities.

6.47 In particular, it noted that the Tees Valley hotel market performance had declined (in terms of both occupancy and average daily rate) since 2015, due to wider economic factors. It also noted that there would be a further impact from the opening of Premier Inn in Middlesbrough (in 2018), the new Hampton by Hilton in Stockton-on-Tees (in 2019) and any new hotel that comes forward within the former Vancouver House office building.

6.48 The report concluded that a branded, upper-tier, limited service hotel would be more appropriate for Middlesbrough, and that the Middlehaven area represents the best opportunity for this in the short term. This view reflected the ability of a new hotel there to reduce the disconnection between this area and the town centre, as well as the fact that the new Premier Inn and proposed new facility in Vancouver House would fulfil the immediate requirement for the centre itself (albeit the latter has not been implemented).

6.49 Along with new hotels which enhance the range of visitor accommodation more generally, new hotel provision would meet the need generated any further increases in the number of visitor nights spent in Middlesbrough by those both on holiday in the area and visiting for business purposes - assuming that the trends of the last few years (as shown in the above Visit England data) continue. It would also help to support the aspiration to develop Middlesbrough as the City Centre of the Tees Valley and complement the day and night time leisure offer more generally.

Offices

6.50 It is understood that the Council are currently inviting consultants to tender undertake an Employment Land Review (ELR) for Middlesbrough, which could include an assessment of the need/demand for office accommodation in the Borough. This study does not therefore include any such need/demand forecasts but includes a review of the relevant conclusions of the Middlesbrough Economic Development Needs Assessment (EDNA) - prepared for the Council in August 2017 - and commentary on issues related to existing and any proposed new office provision in the centre.

6.51 By way of context, information provided by the Valuation Office Agency (VOA) on the total quantum of floorspace within the office sector in Middlesbrough and the other local authority areas which form part of the Tees Valley is set out in the table below.

Table 6.5 Change in Office Floorspace in Tees Valley by Local Authority

Local Authority	Office Floorspace (2008/2009) (sqm)	Office Floorspace (2018/2019) (sqm)	Change (%)
Middlesbrough	197,000	167,000	-15.2%
Darlington	170,000	165,000	-2.9%
Hartlepool	55,000	56,000	+1.8%
Redcar and Cleveland	118,000	116,000	-1.7%
Stockton on Tees	266,000	273,000	+2.6%
Total	**806,000**	**777,000**	**-3.6%**

Source: VOA

6.52 The above shows that, whilst Middlesbrough performs an important role in meeting needs, with the second largest office market in the Tees Valley, it lags significantly behind Stockton-on-Tees, in terms of the total quantum of floorspace provided. It also illustrates that office floorspace in Middlesbrough has reduced significantly over the last ten years – from around 197,000 sqm gross in 2008/2009 to 167,000 sqm gross in 2018/2019 (a difference of around 30,000 sqm gross, or 15%). This is contrast to elsewhere in the Tees Valley, where levels of floorspace have remained relatively stable, or indeed increased slightly.

6.53 The 2017 EDNA identifies a number of different office sub-markets in Middlesbrough, of which the two most important are the town centre and Middlehaven. Analysis contained within the report indicated that, over the period 2005-2016, the most significant proportion of both office deals and floorspace transacted were within the town centre (112 deals/130,229 sqm), with much small proportions relating to Middlehaven, Riverside Park and other locations in the Borough.

6.54 The report recognises a number of strengths which could make both the town centre and Middlehaven attractive to new occupiers, including the wider retail and leisure office in the town centre, proximity to the university, and strategic road and rail access. In addition, however, it indicated that there was an over-supply of floorspace in the town centre in particular, caused in part by the age and poor quality of some of the existing office stock, which does not meet modern requirements. The extent of this over-supply impacts upon the overall attractiveness of Middlesbrough Town Centre as a destination for new officer occupiers.

6.55 Looking forward, the EDNA provided estimates of future demand for employment land in Middlesbrough within the different use classes based on different scenarios and, for Class B1 offices, forecast that 10.7 ha would be needed over the period from 2016 to 2034. The supply assessment also identified 5.8 ha of land suitable for office uses, including smaller infill sites within the town centre, as well as two sites on Shepherdson Way, as well as 43.4ha land suitable for mixed use development (including offices). At the time of the report, these sites were considered adequate to support the Borough's office land needs.

6.56 Taking into account the 2017 EDNA, there are a number of other important factors which need to be addressed, in order to support office development in Middlesbrough. These include the fact that:

- the office market should build on the strengths of the town centre and Middlehaven, including the retail and leisure offer, and transport links – recognising the importance of these factors to developing a Unique Selling Point (USP), when seeking to attract new occupiers;
- any office strategy should be closely aligned with the retail, leisure and regeneration strategies for these areas, reflecting the benefits of new office development for the health of the wider centre (and vice versa);
- office development is most likely to be delivered as part of mixed-use schemes (for example, including other active/commercial uses at ground floor level), with more limited potential for stand-alone office development;
- the redevelopment of large redundant office buildings in the town centres for alternative (non-employment) uses should be considered, in order to address the current over-supply and the perception of the market in Middlesbrough;
- new office space should focus on meeting the needs of the professional services, digital, technology and creative sectors – sectors with employees more likely to be attracted to a city/town centre environment - building on the success of the Boho development (at Middlehaven); and
- car parking is a key issue for occupiers, as well as improved connectivity (both between Middlehaven and the town centre, and between the town centre and other areas).

6.57 In addition, whilst the above study provides a helpful indication as to likely demand in Middlesbrough, it is also necessary to take into account the Council's wider aspirations to improve the office provision within the town centre. At the heart of this are recently constructed and planned new office buildings in the Centre Square area, including two new buildings comprising a total of around 9,940 sqm gross Grade A floorspace, as well as three others on adjacent sites which have yet to be built.

6.58 These developments seek to raise the profile of Middlesbrough as an office destination and will, when fully let, generate additional footfall within the town centre, along with spin-off trade for existing businesses in the retail and leisure sectors. Whilst it may not be possible to provide significant levels of on-site car parking in Middlesbrough Town Centre, the quality of office accommodation now provided at Centre Square will help to strengthen demand more generally and allow it to compete more effectively with other office locations.

6.59 In the context of recent developments and taking into account the recommendations of the 2017 EDNA, it will be necessary to plan for the redevelopment (or conversion to alternative uses) of vacant office buildings elsewhere in the town centre, addressing the current over-supply of accommodation identified above. As set out above, these buildings – which are considered in more detail in Stage 2 of this study - are not only unsuitable for modern requirements but could also impact upon the ability to let the new premises at Centre Square.

6.60 Given the need to ensure the success of these new developments, the Council will need to carefully consider the extent to which it needs to plan for further new office development in the town centre. However, subject to the conclusions of any further EDNA/ELR, there may be potential to build on the Centre Square developments by further expanding the office offer in the town centre, potentially using other sites in the surrounding area. Any such strategy could focus a rationalised office supply within a defined office quarter, which is well located as regards to the wider retail and leisure offer in the centre.

6.61 It would have significant benefits for the wider centre in both economic and regeneration terms, not least given the need to offset loss of footfall occurring through the leakage of retail and leisure spending to destinations outside of the local area. It would also help the centre to compete with office destinations elsewhere in the Tees Valley, including in Stockton, where there is a larger supply of modern premises with significant on-site parking provision.

7.0 Summary

7.1 This report has been prepared by Lichfields on behalf of Middlesbrough Borough Council and forms part of a suite of three documents which, together, comprise the Middlesbrough Retail and Town Centre Uses Study. This element of the study provides an assessment of the need for retail and other town centre uses, taking into account the most up to date information in relation to population and expenditure, as well as new household telephone surveys undertaken by NEMS Market Research.

7.2 The report has provided a summary of relevant national and local planning policy. Local planning authorities are required to assess the need for new retail and other main town centre uses over the plan period and should allocate a range of suitable sites to meet the scale and type of retail development needed. The adopted Local Plan contains a range of policies relating to new retail and other town centre uses and, in addition to the town centre, defines a hierarchy of district, local and neighbourhood centres across Middlesbrough. The Middlesbrough City Centre Strategy sets out the ambition to fulfil its potential as the city centre of the Tees Valley and there are also a number of documents which relate to specific elements or parts of the centre.

7.3 The report highlights a number of trends which have influenced the forecast need, and indeed scope, for new retail and other town centre uses in Middlesbrough. These include the fluctuating fortunes of the retail sector, changes in formats and the growth of discounters in particular, the continued march of internet shopping, and the role of leisure, arts/cultural and other community facilities in supporting the vitality and viability of town centres.

7.4 The household surveys were undertaken across eight zones, including three within Middlesbrough itself, and provided an up to date picture in relation to shopping and leisure patterns in Middlesbrough. In summary:

- whilst shopping patterns are much more dispersed in Zone 1 (Middlesbrough Central), the results of the surveys indicated that the Morrisons and Tesco Extra stores in Berwick Hills and Coulby Newham have the most significant influence over main food shopping patterns in Zones 2 and 3 (Middlesbrough East and Middlesbrough South) – and indeed the Tesco store also attracts a significant proportion of residents from Zone 1;
- the surveys also highlight the importance of discount foodstores across the town, including a number of Aldi and Lidl facilities, as well as the proportion of residents which are travelling to stores outside of Middlesbrough - including Morrisons at Teesside Park, Tesco at Low Grange and the Asda facilities at Portrack Lane, Thornaby and South Bank;
- although Middlesbrough Town Centre is the most popular destination for non-food shopping, this varies across the three zones, with significantly less households from Zone 3 indicating that they last visited the centre for such purposes. Although the centre attracts around 42% of comparison goods expenditure generated within Middlesbrough as a whole, this varies across the Borough, ranging from 53% in the Middlesbrough Central zone to just 19% in the Middlesbrough South zone;
- Teesside Park (in Stockton on Tees Borough) is also a popular non-food shopping destination across the three zones (albeit particularly in Zone 3), and Cleveland Retail Park (in Redcar and Cleveland) also attracts residents from the eastern side of the town, as does the retail warehousing at Portrack Lane (in Stockton), particularly for bulky items;
- Middlesbrough Town Centre is the most popular destination for vising both restaurants and pubs/bars across all three zones and, whilst Cineworld at Marton Road is the most popular cinema for residents in Zones 1 and 2, the Showcase facility at Teesside Park also attracts a significant proportion from across all three zones; and

- the two most popular bingo facilities are Buzz at Longlands Road and Mecca at Chandlers Wharf in Stockton, with the vast majority of those go tenpin bowling visiting the Hollywood Bowl facility at Teesside Park. Residents of Zone 1 visit a range of different health and fitness facilities, although the majority of those in Zones 2 and 3 use the Neptune and Rainbow Leisure Centres respectively.

7.5 Based on up to date surveys of household shopping patterns, and assuming that existing facilities maintain their current market share of available spending, no expenditure capacity has been demonstrated to support new convenience goods retail floorspace in Middlesbrough. Again, based on existing market shares, there is also not forecast to be any expenditure capacity to support new comparison retail floorspace in the short to medium term, allowing for commitments, although significant capacity does emerge over the longer period to 2037 – when around 12,100 sqm net/17,300 sqm gross new floorspace could be supported.

7.6 In qualitative terms, however, there is a need to enhance the existing range of convenience and comparison goods retail provision within Middlesbrough Town Centre, in order to increase its attractiveness to residents from across the Borough, including Zones 2 and 3.

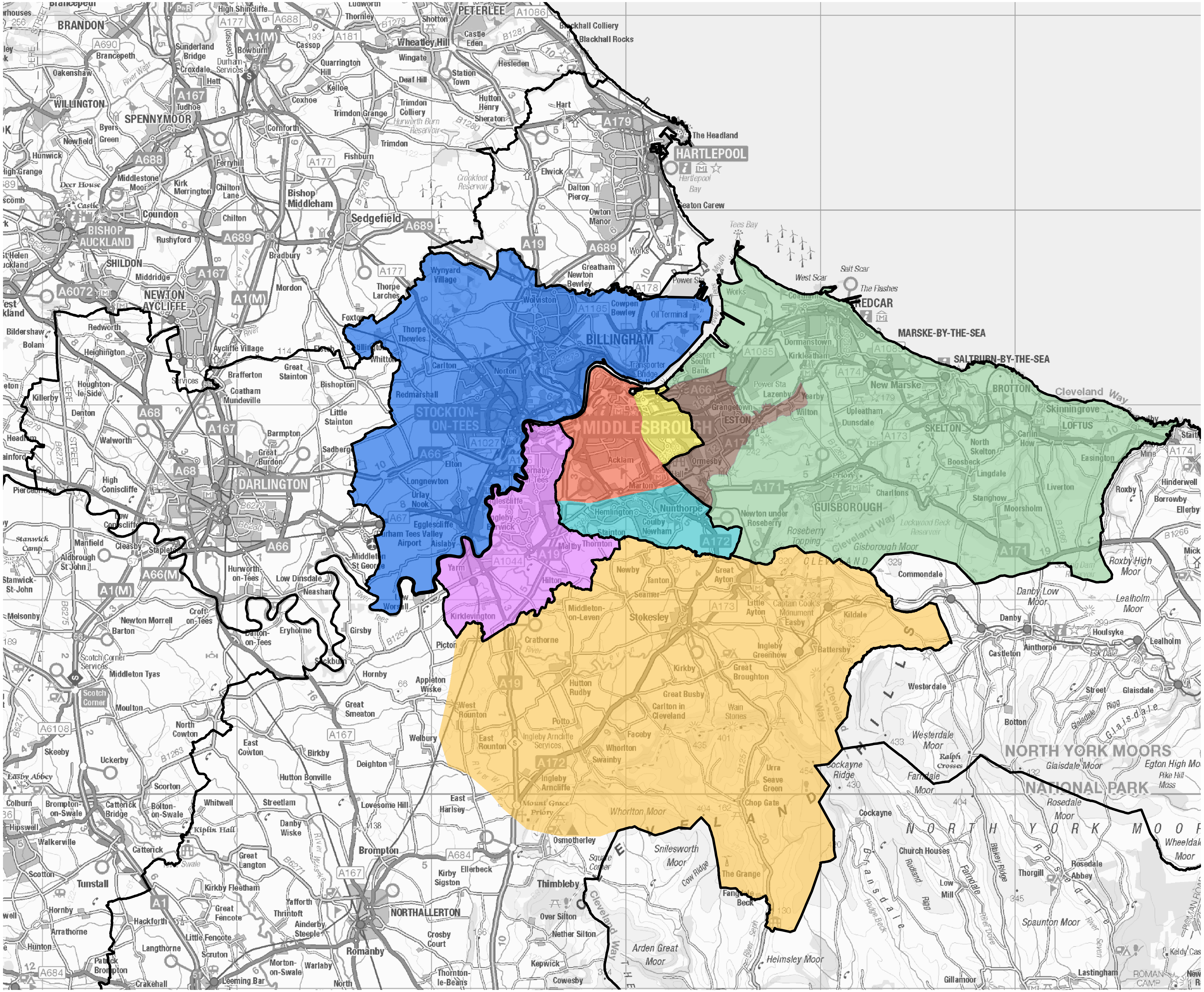
7.7 In relation to convenience retailing in particular, given the low market share achieved by Sainsbury's at Wilson Street, it should be an aspiration to provide a new food retail anchor, which supports the vitality and viability of the wider centre. In relation to comparison retailing, there is scope to improve the centre's offer in certain sectors – including shops selling gifts, chemists and opticians, toys and sports/hobby goods. Alongside this, it will be important to identify retail operators which are not currently represented in the centre, which could reasonably be attracted to Middlesbrough. This will help to claw-back spending currently leaking out to other destinations, such as Teesside Park.

7.8 Elsewhere within the Borough, there could be potential to enhance the range and choice of convenience retail provision in the southern and western parts of the Middlesbrough Central zone. There is also scope to provide additional choice in Zone 3, including competition for the existing Tesco Extra and Aldi stores in Coulby Newham District Centre. Any new provision should be brought forward in locations which are well related to existing centres or, potentially, as part of planned new centres which serve areas of new housing. It will also be important to ensure that such provision does not impact upon the ability to attract new investment to Middlesbrough Town Centre.

7.9 In relation to commercial leisure facilities, there is only limited capacity to support new cinema seats in Middlesbrough, and no clear need to plan for new bingo and/or tenpin bowling facilities. However, based on growth in spending, there may be scope to bring forward new food and beverage uses, which should ideally be located within Middlesbrough Town Centre, and new cinema provision in the centre could potentially be justified through claw-back of trips currently going to Teesside Park. There is also a qualitative need for new hotel facilities and health and fitness clubs which enhance the existing range and choice of hotels in Middlesbrough.

7.10 The most recent EDNA for Middlesbrough concluded that existing land already identified for office use, as well other mixed-use sites, would be adequate to support the Borough's office land needs. However, the recently built and planned new developments in the Centre Square have the potential to raise the profile of the town centre as an office destination and, subject to demand, there could be scope to capitalise upon this – and the wider locational advantages provided by Middlesbrough Town Centre - through further new development on nearby sites. Along with the redevelopment/conversion of more outdated office stock, this could result in wider economic and regeneration benefits for the town centre and help the centre to compete with office locations elsewhere in the Tees Valley.

Appendix 1 Household Survey Zones



Key

Local Authority Boundaries

Survey Zones

1. Middlesbrough Central
2. Middlesbrough East
3. Middlesbrough South
4. Eston
5. Redcar and East Cleveland
6. Thornaby and Yarm
7. Stockton and Billingham
8. Stokesley

0 1 2 3 4 5 km

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LICHFIELDS

Project	Middlesbrough Retail Study
Title	Household Survey Zones
Client	Middlesbrough Borough Council
Date	08.07.2019
Scale	1 : 180,000 @ A3
Drawn by	HB
Drg. No	GIS\LF\60724\01-01

N

GIS Reference: S:\LF60724 - Middlesbrough Retail Study\LF60724 - Middlesbrough Retail Study - Household Survey Zones - 08.07.2019.mxd

Appendix 2 Convenience Capacity

MIDDLESBROUGH TOWN CENTRES AND RETAIL/LEISURE STUDY

CONVENIENCE GOODS CAPACITY ASSESSMENT

Table 1: Study Area Population

Zone	2011	2019	2024	2029	2034	2037	Growth 2019-2024		Growth 2019-2037	
							Persons	%	Persons	%
Zone 1 - Middlesbrough Central	77,986	80,374	82,915	85,455	87,996	89,520	2,540	3.2%	9,146	11.4%
Zone 2 - Middlesbrough East	29,502	30,406	31,367	32,328	33,289	33,865	961	3.2%	3,460	11.4%
Zone 3 - Middlesbrough South	31,325	32,284	33,305	34,325	35,346	35,958	1,020	*3.2%*	3,674	11.4%
Borough (Sub-Total)	***138,813***	***143,064***	***147,586***	***152,108***	***156,630***	***159,343***	***4,522***	***3.2%***	***16,279***	***11.4%***
Zone 4 - Eston	37,481	37,598	37,598	37,460	37,238	37,127	0	0.0%	-471	-1.3%
Zone 5 - Redcar and East Cleveland	97,423	97,728	97,728	97,368	96,791	96,503	0	0.0%	-1,225	-1.3%
Zone 6 - Thornaby and Yarm	54,835	56,778	57,608	58,180	58,581	58,810	830	1.5%	2,032	3.6%
Zone 7 - Stockton and Billingham	135,928	140,745	142,802	144,221	145,214	145,782	2,057	1.5%	5,037	3.6%
Zone 8 - Stokesley	17,078	17,396	17,530	17,588	17,588	17,588	134	0.8%	192	1.1%
Total	**481,558**	**493,309**	**500,853**	**506,924**	**512,042**	**515,152**	**7,543**	**1.5%**	**21,843**	**4.4%**

Source: *Base estimates of population in 2011 for each zone soured from Experian*
Population within Middlesbrough zones projected forward using assumption within SHMAA that population within Borough will increase from 140,351 in 2016 to 156,630 in 2034 (assumes straight line growth in between)

Table 2: Convenience Goods Expenditure per Person (£) (2017 Prices)

Zone	2017	2019	2024	2029	2034	2037	Growth 2019-2024	Growth 2019-2037
Zone 1 - Middlesbrough Central	1,784	1,800	1,792	1,791	1,795	1,796	-0.4%	-0.2%
Zone 2 - Middlesbrough East	1,617	1,631	1,624	1,624	1,627	1,628	-0.4%	-0.2%
Zone 3 - Middlesbrough South	1,982	2,000	1,991	1,990	1,994	1,996	-0.5%	-0.2%
Zone 4 - Eston	1,937	1,954	1,945	1,945	1,948	1,950	-0.5%	-0.2%
Zone 5 - Redcar and East Cleveland	2,045	2,063	2,054	2,053	2,057	2,059	-0.4%	-0.2%
Zone 6 - Thornaby and Yarm	1,914	1,930	1,922	1,921	1,925	1,927	-0.4%	-0.2%
Zone 7 - Stockton and Billingham	1,892	1,909	1,901	1,900	1,903	1,905	-0.4%	-0.2%
Zone 8 - Stokesley	2,432	2,454	2,443	2,442	2,447	2,449	-0.4%	-0.2%

Source:

1. Base convenience goods expenditure per capita at 2017 sourced from Experian Software (in 2017 prices)

2. Deduction made to reflect Special Forms of Trading (SFT), increasing from 4.0% in 2019, to 5.9% in 2037 (Experian Briefing Note 16.0 December 2018)

3. Base expenditure projected forward on the Experian's forecast annual growth rates

Table 3: Total Convenience Goods Expenditure (£m) (2017 Prices)

Zone	2019	2024	2029	2034	2037	Growth 2019-2024		Growth 2019-2037	
						£m	%	£m	%
Zone 1 - Middlesbrough Central	144.674	148.583	153.050	157.952	160.778	3.910	2.7%	16.104	11.1%
Zone 2 - Middlesbrough East	49.591	50.939	52.500	54.161	55.133	1.348	2.7%	5.541	11.2%
Zone 3 - Middlesbrough South	64.569	66.310	68.307	70.479	71.772	1.741	2.7%	7.203	11.2%
Borough (Sub-Total)	***258.834***	***265.832***	***273.858***	***282.592***	***287.683***	***6.999***	***2.7%***	***28.849***	***11.1%***
Zone 4 - Eston	73.467	73.129	72.859	72.539	72.397	-0.338	-0.5%	-1.070	-1.5%
Zone 5 - Redcar and East Cleveland	201.613	200.733	199.895	199.099	198.699	-0.880	-0.4%	-2.914	-1.4%
Zone 6 - Thornaby and Yarm	109.582	110.723	111.765	112.769	113.327	1.141	1.0%	3.745	3.4%
Zone 7 - Stockton and Billingham	268.682	271.467	274.020	276.342	277.714	2.785	1.0%	9.032	3.4%
Zone 8 - Stokesley	42.690	42.826	42.949	43.037	43.072	0.136	0.3%	0.382	0.9%
Total	**954.867**	**964.710**	**975.345**	**986.378**	**992.892**	**9.843**	**1.0%**	**38.025**	**4.0%**

Source: *Total available expenditure is the product of applying population forecasts in Table 1 to expenditure per capita forecasts set out in Table 2*

Table 4: Convenience Goods Market Shares in Base Year of 2019 (%) (2019 Prices)

Centre/Facility	Zone 1 Middlesbrough Central	Zone 2 Middlesbrough East	Zone 3 Middlesbrough South	Zone 4 Eston	Zone 5 Redcar and East Cleveland	Zone 6 Thornaby and Yarm	Zone 7 Stockton and Billingham	Zone 8 Stokesley	% Inflow
Zone 1 - Middlesbrough Central									
Sainsburys, Wilson Street	4.2%	1.6%	0.5%	0.8%	0.0%	0.0%	0.0%	1.0%	10.0%
Marks & Spencer Foodhall, Linthorpe Road, Middlesbrough	0.6%	0.9%	0.4%	0.5%	0.4%	0.0%	0.0%	0.6%	10.0%
Other Stores, Middlesbrough Town Centre	12.6%	2.0%	0.0%	0.3%	0.0%	0.5%	1.2%	0.0%	10.0%
Middlesbrough Town Centre Sub-Total	***17.4%***	***4.5%***	***0.9%***	***1.6%***	***0.4%***	***0.5%***	***1.2%***	***1.6%***	
Lidl, Newport Road	2.1%	0.2%	0.2%	1.2%	0.0%	0.0%	0.5%	0.2%	5.0%
Aldi, Newport Road	8.2%	2.7%	0.0%	1.7%	0.0%	0.0%	0.0%	0.0%	5.0%
Aldi, Marton Road	5.4%	4.8%	0.8%	2.4%	0.0%	0.0%	0.0%	0.5%	5.0%
Local Centres Zone 1	13.8%	0.0%	3.8%	0.0%	0.0%	0.5%	0.0%	0.3%	5.0%
Other Stores/Centres	3.0%	0.6%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%
Middlesbrough Central Zone Total	**49.9%**	**12.8%**	**6.2%**	**6.9%**	**0.4%**	**1.0%**	**1.7%**	**2.6%**	
Zone 2 - Middlesbrough East									
Morrisons, Berwick Hills	4.4%	38.4%	1.9%	6.1%	0.5%	0.0%	0.0%	3.2%	5.0%
Other Stores, Berwick Hills District Centre	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%
Berwick Hills District Centre Sub-Total	***4.4%***	***39.8%***	***1.9%***	***6.1%***	***0.5%***	***0.0%***	***0.0%***	***3.2%***	
Lidl, Cargo Fleet	0.3%	6.3%	0.0%	1.8%	0.5%	0.0%	0.0%	0.0%	5.0%
North Ormesby	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	5.0%
Asda, Ormesby Road, Park End, Middlesbrough	0.5%	8.9%	0.2%	1.0%	0.0%	0.0%	0.0%	0.0%	5.0%
Local Centres Zone 2	0.4%	6.4%	0.0%	0.6%	0.0%	0.4%	0.0%	0.0%	5.0%
Other Stores/Centres	0.2%	0.0%	2.8%	0.0%	0.2%	0.0%	0.0%	0.0%	5.0%
Middlesbrough East Total	**5.8%**	**62.3%**	**4.9%**	**9.5%**	**1.2%**	**0.4%**	**0.4%**	**3.2%**	
Zone 3 - Middlesbrough South									
Tesco Extra, Couby Newham District Centre	9.9%	0.5%	41.2%	2.6%	0.0%	0.0%	0.0%	14.5%	5.0%
Aldi, Dalby Way, Coulby Newham, Middlesbrough	5.1%	1.3%	21.2%	3.1%	0.0%	0.0%	0.8%	6.7%	5.0%
Other Stores, Coulby Newham District Centre	0.4%	0.0%	4.1%	0.1%	0.0%	0.0%	0.0%	0.0%	5.0%
Coulby Newham District Centre Sub-Total	***15.4%***	***1.8%***	***66.5%***	***5.8%***	***0.0%***	***0.0%***	***0.8%***	***21.2%***	
Local Centres Zone 3	0.3%	0.5%	1.6%	0.2%	0.0%	0.0%	0.0%	0.0%	5.0%
Other Stores/Centres	0.0%	0.0%	3.4%	0.2%	0.0%	0.0%	0.0%	0.0%	5.0%
Middlesbrough South Zone Total	**15.7%**	**2.3%**	**71.5%**	**6.2%**	**0.0%**	**0.0%**	**0.8%**	**21.2%**	
Borough Total	**71.4%**	**77.4%**	**82.6%**	**22.6%**	**1.6%**	**1.4%**	**2.9%**	**27.0%**	
Outside Borough	**28.6%**	**22.6%**	**17.4%**	**77.4%**	**98.4%**	**98.6%**	**97.1%**	**73.0%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey July/November 2019

Table 5: Base Year 2019 Convenience Goods Expenditure (£m) (2017 Prices)

Centre/Facility	Zone 1 Middlesbrough Central	Zone 2 Middlesbrough East	Zone 3 Middlesbrough South	Sub-Total (Middlesbrough Borough)	Zone 4 Eston	Zone 5 Redcar and East Cleveland	Zone 6 Thornaby and Yarm	Zone 7 Stockton and Billingham	Zone 8 Stokesley	% Inflow	Total
	£m	£m	£m		£m	£m	£m	£m	£m	£m	£m
Expenditure 2019	**144.674**	**49.591**	**64.569**	**258.834**	**73.467**	**201.613**	**109.582**	**268.682**	**42.690**		
Zone 1 - Middlesbrough Central											
Sainsburys, Wilson Street	6.08	0.79	0.32	7.193	0.59	0.00	0.00	0.00	0.43	0.91	9.12
Marks & Spencer Foodhall, Linthorpe Road, Middlesbrough	0.87	0.45	0.26	1.573	0.37	0.81	0.00	0.00	0.26	0.33	3.34
Other Stores, Middlesbrough Town Centre	18.23	0.99	0.00	19.221	0.22	0.00	0.55	3.22	0.00	2.58	25.79
Middlesbrough Town Centre Sub-Total	***25.17***	***2.23***	***0.58***	**27.986**	***1.18***	***0.81***	***0.55***	***3.22***	***0.68***	***3.82***	***38.25***
Lidl, Newport Road	3.04	0.10	0.13	3.266	0.88	0.00	0.00	1.34	0.09	0.29	5.87
Aldi, Newport Road	11.86	1.34	0.00	13.202	1.25	0.00	0.00	0.00	0.00	0.76	15.21
Aldi, Marton Road	7.81	2.38	0.52	10.709	1.76	0.00	0.00	0.00	0.21	0.67	13.35
Local Centres Zone 1	19.96	0.00	2.45	22.419	0.00	0.00	0.55	0.00	0.13	1.22	24.31
Other Stores/Centres	4.34	0.30	0.32	4.961	0.00	0.00	0.00	0.00	0.00	0.26	5.22
Middlesbrough Central Zone Total	**72.19**	**6.35**	**4.00**	**82.543**	**5.07**	**0.81**	**1.10**	**4.57**	**1.11**	**7.02**	**102.22**
Zone 2 - Middlesbrough East											
Morrisons, Berwick Hills	6.37	19.04	1.23	26.636	4.48	1.01	0.00	0.00	1.37	1.76	35.25
Other Stores, Berwick Hills District Centre	0.00	0.69	0.00	0.694	0.00	0.00	0.00	0.00	0.00	0.04	0.73
Berwick Hills District Centre Sub-Total	***6.37***	***19.74***	***1.23***	**27.330**	***4.48***	***1.01***	***0.00***	***0.00***	***1.37***	**1.80**	**35.98**
Lidl, Cargo Fleet	0.43	3.12	0.00	3.558	1.32	1.01	0.00	0.00	0.00	0.31	6.20
North Ormesby	0.00	0.45	0.00	0.446	0.00	0.00	0.00	1.07	0.00	0.08	1.60
Asda, Ormesby Road, Park End, Middlesbrough	0.72	4.41	0.13	5.266	0.73	0.00	0.00	0.00	0.00	0.32	6.32
Local Centres Zone 2	0.58	3.17	0.00	3.753	0.44	0.00	0.44	0.00	0.00	0.24	4.88
Other Stores/Centres	0.29	0.00	1.81	2.097	0.00	0.40	0.00	0.00	0.00	0.13	2.63
Middlesbrough East Total	**8.39**	**30.90**	**3.16**	**42.450**	**6.98**	**2.42**	**0.44**	**1.07**	**1.37**	**2.88**	**57.61**
Zone 3 - Middlesbrough South											
Tesco Extra, Couby Newham District Centre	14.32	0.25	26.60	41.173	1.91	0.00	0.00	0.00	6.19	2.59	51.87
Aldi, Dalby Way, Coulby Newham, Middlesbrough	7.38	0.64	13.69	21.712	2.28	0.00	0.00	2.15	2.86	1.53	30.53
Other Stores, Coulby Newham District Centre	0.58	0.00	2.65	3.226	0.07	0.00	0.00	0.00	0.00	0.17	3.47
Coulby Newham District Centre Sub-Total	***22.28***	***0.89***	***42.94***	**66.111**	***4.26***	***0.00***	***0.00***	***2.15***	***9.05***	**4.29**	**85.86**
Local Centres Zone 3	0.43	0.25	1.03	1.715	0.15	0.00	0.00	0.00	0.00	0.10	1.96
Other Stores/Centres	0.00	0.00	2.20	2.195	0.15	0.00	0.00	0.00	0.00	0.12	2.47
Middlesbrough South Zone Total	**22.71**	**1.14**	**46.17**	**70.021**	**4.55**	**0.00**	**0.00**	**2.15**	**9.05**	**4.51**	**90.29**
Borough Total	**103.30**	**38.38**	**53.33**	**195.01**	**16.60**	**3.23**	**1.53**	**7.79**	**11.53**	**14.42**	**250.11**
Outside Borough	**41.38**	**11.21**	**11.23**	**63.819**	**56.86**	**198.39**	**108.05**	**260.89**	**31.16**		
TOTAL	**144.67**	**49.59**	**64.57**	**258.83**	**73.47**	**201.61**	**109.58**	**268.68**	**42.69**		

Source: Tables 3 and 4 (Please note some figures may not total precisely due to rounding)

Table 6: Convenience Goods Expenditure Flows in 2024 (£m) (2017 Prices)

Centre/Facility	Zone 1 Middlesbrough Central	Zone 2 Middlesbrough East	Zone 3 Middlesbrough South	Sub-Total (Middlesbrough Borough)	Zone 4 Eston	Zone 5 Redcar and East Cleveland	Zone 6 Thornaby and Yarm	Zone 7 Stockton and Billingham	Zone 8 Stokesley	% Inflow	Total
	£m	£m	£m		£m	£m	£m	£m	£m	£m	£m
Expenditure 2019	**148.583**	**50.939**	**66.310**	**265.832**	**73.129**	**200.733**	**110.723**	**271.467**	**42.826**		
Zone 1 - Middlesbrough Central											
Sainsburys, Wilson Street	6.24	0.82	0.33	7.387	0.59	0.00	0.00	0.00	0.43	0.93	9.33
Marks & Spencer Foodhall, Linthorpe Road, Middlesbrough	0.89	0.46	0.27	1.615	0.37	0.80	0.00	0.00	0.26	0.34	3.38
Other Stores, Middlesbrough Town Centre	18.72	1.02	0.00	19.740	0.22	0.00	0.55	3.26	0.00	2.64	26.41
Middlesbrough Town Centre Sub-Total	***25.85***	***2.29***	***0.60***	**28.743**	***1.17***	***0.80***	***0.55***	***3.26***	***0.69***	***3.91***	***39.12***
Lidl, Newport Road	3.12	0.10	0.13	3.355	0.88	0.00	0.00	1.36	0.09	0.30	5.97
Aldi, Newport Road	12.18	1.38	0.00	13.559	1.24	0.00	0.00	0.00	0.00	0.78	15.58
Aldi, Marton Road	8.02	2.45	0.53	10.999	1.76	0.00	0.00	0.00	0.21	0.68	13.65
Local Centres Zone 1	20.50	0.00	2.52	23.024	0.00	0.00	0.55	0.00	0.13	1.25	24.95
Other Stores/Centres	4.46	0.31	0.33	5.095	0.00	0.00	0.00	0.00	0.00	0.27	5.36
Middlesbrough Central Zone Total	**74.14**	**6.52**	**4.11**	**84.775**	**5.05**	**0.80**	**1.11**	**4.61**	**1.11**	**7.19**	**104.65**
Zone 2 - Middlesbrough East											
Morrisons, Berwick Hills	6.54	19.56	1.26	27.358	4.46	1.00	0.00	0.00	1.37	1.80	35.99
Other Stores, Berwick Hills District Centre	0.00	0.71	0.00	0.713	0.00	0.00	0.00	0.00	0.00	0.04	0.75
Berwick Hills District Centre Sub-Total	***6.54***	***20.27***	***1.26***	**28.071**	***4.46***	***1.00***	***0.00***	***0.00***	***1.37***	**1.84**	**36.74**
Lidl, Cargo Fleet	0.45	3.21	0.00	3.655	1.32	1.00	0.00	0.00	0.00	0.31	6.29
North Ormesby	0.00	0.46	0.00	0.458	0.00	0.00	0.00	1.09	0.00	0.08	1.63
Asda, Ormesby Road, Park End, Middlesbrough	0.74	4.53	0.13	5.409	0.73	0.00	0.00	0.00	0.00	0.32	6.46
Local Centres Zone 2	0.59	3.26	0.00	3.854	0.44	0.00	0.44	0.00	0.00	0.25	4.99
Other Stores/Centres	0.30	0.00	1.86	2.154	0.00	0.40	0.00	0.00	0.00	0.13	2.69
Middlesbrough East Total	**8.62**	**31.74**	**3.25**	**43.602**	**6.95**	**2.41**	**0.44**	**1.09**	**1.37**	**1.10**	**58.80**
Zone 3 - Middlesbrough South											
Tesco Extra, Couby Newham District Centre	14.71	0.25	27.32	42.284	1.90	0.00	0.00	0.00	6.21	2.65	53.05
Aldi, Dalby Way, Coulby Newham, Middlesbrough	7.58	0.66	14.06	22.298	2.27	0.00	0.00	2.17	2.87	1.56	31.16
Other Stores, Coulby Newham District Centre	0.59	0.00	2.72	3.313	0.07	0.00	0.00	0.00	0.00	0.18	3.56
Coulby Newham District Centre Sub-Total	***22.88***	***0.92***	***44.10***	**67.895**	***4.24***	***0.00***	***0.00***	***2.17***	***9.08***	**4.39**	**87.78**
Local Centres Zone 3	0.45	0.25	1.06	1.761	0.15	0.00	0.00	0.00	0.00	0.10	2.01
Other Stores/Centres	0.00	0.00	2.25	2.255	0.15	0.00	0.00	0.00	0.00	0.13	2.53
Middlesbrough South Zone Total	**23.33**	**1.17**	**47.41**	**71.911**	**4.53**	**0.00**	**0.00**	**2.17**	**9.08**	**0.23**	**92.31**
Borough Total	**106.09**	**39.43**	**54.77**	**200.29**	**16.53**	**3.21**	**1.55**	**7.87**	**11.56**	**8.52**	**255.76**
Outside Borough	**42.49**	**11.51**	**11.54**	**65.545**	**56.60**	**197.52**	**109.17**	**263.59**	**31.26**		
TOTAL	**148.58**	**50.94**	**66.31**	**265.83**	**73.13**	**200.73**	**110.72**	**271.47**	**42.83**		

Source: Tables 3 and 4 (Please note some figures may not total precisely due to rounding)

Table 7: Convenience Goods Expenditure Flows in 2029 (£m) (2017 Prices)

Centre/Facility	Zone 1 Middlesbrough Central	Zone 2 Middlesbrough East	Zone 3 Middlesbrough South	Sub-Total (Middlesbrough Borough)	Zone 4 Eston	Zone 5 Redcar and East Cleveland	Zone 6 Thornaby and Yarm	Zone 7 Stockton and Billingham	Zone 8 Stokesley	% Inflow	Total
	£m	£m	£m		£m	£m	£m	£m	£m	£m	£m
Expenditure 2019	**153.050**	**52.500**	**68.307**	**273.858**	**72.859**	**199.895**	**111.765**	**274.020**	**42.949**		
Zone 1 - Middlesbrough Central											
Sainsburys, Wilson Street	6.43	0.84	0.34	7.610	0.58	0.00	0.00	0.00	0.43	0.96	9.58
Marks & Spencer Foodhall, Linthorpe Road, Middlesbrough	0.92	0.47	0.27	1.664	0.36	0.80	0.00	0.00	0.26	0.34	3.43
Other Stores, Middlesbrough Town Centre	19.28	1.05	0.00	20.334	0.22	0.00	0.56	3.29	0.00	2.71	27.11
Middlesbrough Town Centre Sub-Total	***26.63***	***2.36***	***0.61***	**29.608**	***1.17***	***0.80***	***0.56***	***3.29***	***0.69***	***4.01***	***40.12***
Lidl, Newport Road	3.21	0.11	0.14	3.456	0.87	0.00	0.00	1.37	0.09	0.30	6.09
Aldi, Newport Road	12.55	1.42	0.00	13.968	1.24	0.00	0.00	0.00	0.00	0.80	16.01
Aldi, Marton Road	8.26	2.52	0.55	11.331	1.75	0.00	0.00	0.00	0.21	0.70	13.99
Local Centres Zone 1	21.12	0.00	2.60	23.717	0.00	0.00	0.56	0.00	0.13	1.28	25.69
Other Stores/Centres	4.59	0.32	0.34	5.248	0.00	0.00	0.00	0.00	0.00	0.28	5.52
Middlesbrough Central Zone Total	**76.37**	**6.72**	**4.24**	**87.327**	**5.03**	**0.80**	**1.12**	**4.66**	**1.12**	**7.38**	**107.42**
Zone 2 - Middlesbrough East											
Morrisons, Berwick Hills	6.73	20.16	1.30	28.192	4.44	1.00	0.00	0.00	1.37	1.84	36.85
Other Stores, Berwick Hills District Centre	0.00	0.74	0.00	0.735	0.00	0.00	0.00	0.00	0.00	0.04	0.77
Berwick Hills District Centre Sub-Total	***6.73***	***20.90***	***1.30***	**28.927**	***4.44***	***1.00***	***0.00***	***0.00***	***1.37***	**1.88**	**37.63**
Lidl, Cargo Fleet	0.46	3.31	0.00	3.767	1.31	1.00	0.00	0.00	0.00	0.32	6.40
North Ormesby	0.00	0.47	0.00	0.473	0.00	0.00	0.00	1.10	0.00	0.08	1.65
Asda, Ormesby Road, Park End, Middlesbrough	0.77	4.67	0.14	5.574	0.73	0.00	0.00	0.00	0.00	0.33	6.63
Local Centres Zone 2	0.61	3.36	0.00	3.972	0.44	0.00	0.45	0.00	0.00	0.26	5.11
Other Stores/Centres	0.31	0.00	1.91	2.219	0.00	0.40	0.00	0.00	0.00	0.14	2.76
Middlesbrough East Total	**8.88**	**32.71**	**3.35**	**44.931**	**6.92**	**2.40**	**0.45**	**1.10**	**1.37**	**1.13**	**60.18**
Zone 3 - Middlesbrough South											
Tesco Extra, Couby Newham District Centre	15.15	0.26	28.14	43.557	1.89	0.00	0.00	0.00	6.23	2.72	54.40
Aldi, Dalby Way, Coulby Newham, Middlesbrough	7.81	0.68	14.48	22.969	2.26	0.00	0.00	2.19	2.88	1.59	31.89
Other Stores, Coulby Newham District Centre	0.61	0.00	2.80	3.413	0.07	0.00	0.00	0.00	0.00	0.18	3.67
Coulby Newham District Centre Sub-Total	***23.57***	***0.95***	***45.42***	**69.939**	***4.23***	***0.00***	***0.00***	***2.19***	***9.11***	**4.50**	**89.96**
Local Centres Zone 3	0.46	0.26	1.09	1.815	0.15	0.00	0.00	0.00	0.00	0.10	2.06
Other Stores/Centres	0.00	0.00	2.32	2.322	0.15	0.00	0.00	0.00	0.00	0.13	2.60
Middlesbrough South Zone Total	**24.03**	**1.21**	**48.84**	**74.076**	**4.52**	**0.00**	**0.00**	**2.19**	**9.11**	**4.73**	**94.62**
Borough Total	**109.28**	**40.64**	**56.42**	**206.33**	**16.47**	**3.20**	**1.56**	**7.95**	**11.60**	**13.24**	**262.22**
Outside Borough	**43.77**	**11.87**	**11.89**	**67.523**	**56.39**	**196.70**	**110.20**	**266.07**	**31.35**		
TOTAL	**153.05**	**52.50**	**68.31**	**273.86**	**72.86**	**199.90**	**111.76**	**274.02**	**42.95**		

Source: Tables 3 and 4 (Please note some figures may not total precisely due to rounding)

Table 8: Convenience Goods Expenditure Flows in 2034 (£m) (2017 Prices)

Centre/Facility	Zone 1 Middlesbrough Central	Zone 2 Middlesbrough East	Zone 3 Middlesbrough South	Sub-Total (Middlesbrough Borough)	Zone 4 Eston	Zone 5 Redcar and East Cleveland	Zone 6 Thornaby and Yarm	Zone 7 Stockton and Billingham	Zone 8 Stokesley	% Inflow	Total
	£m	£m	£m		£m	£m	£m	£m	£m	£m	£m
Expenditure 2019	**157.952**	**54.161**	**70.479**	**282.592**	**72.539**	**199.099**	**112.769**	**276.342**	**43.037**		
Zone 1 - Middlesbrough Central											
Sainsburys, Wilson Street	6.63	0.87	0.35	7.853	0.58	0.00	0.00	0.00	0.43	0.98	9.85
Marks & Spencer Foodhall, Linthorpe Road, Middlesbrough	0.95	0.49	0.28	1.717	0.36	0.80	0.00	0.00	0.26	0.35	3.48
Other Stores, Middlesbrough Town Centre	19.90	1.08	0.00	20.985	0.22	0.00	0.56	3.32	0.00	2.79	27.87
Middlesbrough Town Centre Sub-Total	***27.48***	***2.44***	***0.63***	**30.555**	***1.16***	***0.80***	***0.56***	***3.32***	***0.69***	***4.12***	***41.20***
Lidl, Newport Road	3.32	0.11	0.14	3.566	0.87	0.00	0.00	1.38	0.09	0.31	6.22
Aldi, Newport Road	12.95	1.46	0.00	14.414	1.23	0.00	0.00	0.00	0.00	0.82	16.47
Aldi, Marton Road	8.53	2.60	0.56	11.693	1.74	0.00	0.00	0.00	0.22	0.72	14.37
Local Centres Zone 1	21.80	0.00	2.68	24.476	0.00	0.00	0.56	0.00	0.13	1.32	26.49
Other Stores/Centres	4.74	0.32	0.35	5.416	0.00	0.00	0.00	0.00	0.00	0.29	5.70
Middlesbrough Central Zone Total	**78.82**	**6.93**	**4.37**	**90.120**	**5.01**	**0.80**	**1.13**	**4.70**	**1.12**	**7.58**	**110.45**
Zone 2 - Middlesbrough East											
Morrisons, Berwick Hills	6.95	20.80	1.34	29.087	4.42	1.00	0.00	0.00	1.38	1.89	37.77
Other Stores, Berwick Hills District Centre	0.00	0.76	0.00	0.758	0.00	0.00	0.00	0.00	0.00	0.04	0.80
Berwick Hills District Centre Sub-Total	***6.95***	***21.56***	***1.34***	**29.845**	***4.42***	***1.00***	***0.00***	***0.00***	***1.38***	**1.93**	**38.57**
Lidl, Cargo Fleet	0.47	3.41	0.00	3.886	1.31	1.00	0.00	0.00	0.00	0.33	6.51
North Ormesby	0.00	0.49	0.00	0.487	0.00	0.00	0.00	1.11	0.00	0.08	1.68
Asda, Ormesby Road, Park End, Middlesbrough	0.79	4.82	0.14	5.751	0.73	0.00	0.00	0.00	0.00	0.34	6.82
Local Centres Zone 2	0.63	3.47	0.00	4.098	0.44	0.00	0.45	0.00	0.00	0.26	5.25
Other Stores/Centres	0.32	0.00	1.97	2.289	0.00	0.40	0.00	0.00	0.00	0.14	2.83
Middlesbrough East Total	**9.16**	**33.74**	**3.45**	**46.357**	**6.89**	**2.39**	**0.45**	**1.11**	**1.38**	**3.08**	**61.65**
Zone 3 - Middlesbrough South											
Tesco Extra, Couby Newham District Centre	15.64	0.27	29.04	44.946	1.89	0.00	0.00	0.00	6.24	2.79	55.87
Aldi, Dalby Way, Coulby Newham, Middlesbrough	8.06	0.70	14.94	23.701	2.25	0.00	0.00	2.21	2.88	1.63	32.68
Other Stores, Coulby Newham District Centre	0.63	0.00	2.89	3.521	0.07	0.00	0.00	0.00	0.00	0.19	3.78
Coulby Newham District Centre Sub-Total	***24.32***	***0.97***	***46.87***	**72.168**	***4.21***	***0.00***	***0.00***	***2.21***	***9.12***	**4.62**	**92.33**
Local Centres Zone 3	0.47	0.27	1.13	1.872	0.15	0.00	0.00	0.00	0.00	0.11	2.12
Other Stores/Centres	0.00	0.00	2.40	2.396	0.15	0.00	0.00	0.00	0.00	0.13	2.68
Middlesbrough South Zone Total	**24.80**	**1.25**	**50.39**	**76.437**	**4.50**	**0.00**	**0.00**	**2.21**	**9.12**	**4.86**	**97.13**
Borough Total	**112.78**	**41.92**	**58.22**	**212.91**	**16.39**	**3.19**	**1.58**	**8.01**	**11.62**	**15.52**	**269.23**
Outside Borough	**45.17**	**12.24**	**12.26**	**69.678**	**56.15**	**195.91**	**111.19**	**268.33**	**31.42**		
TOTAL	**157.95**	**54.16**	**70.48**	**282.59**	**72.54**	**199.10**	**112.77**	**276.34**	**43.04**		

Source: Tables 3 and 4 (Please note some figures may not total precisely due to rounding)

Table 9: Convenience Goods Expenditure Flows in 2037 (£m) (2017 Prices)

Centre/Facility	Zone 1 Middlesbrough Central	Zone 2 Middlesbrough East	Zone 3 Middlesbrough South	Sub-Total (Middlesbrough Borough)	Zone 4 Eston	Zone 5 Redcar and East Cleveland	Zone 6 Thornaby and Yarm	Zone 7 Stockton and Billingham	Zone 8 Stokesley	% Inflow	Total
	£m	£m	£m		£m	£m	£m	£m	£m	£m	£m
Expenditure 2019	**160.778**	**55.133**	**71.772**	**287.683**	**72.397**	**198.699**	**113.327**	**277.714**	**43.072**		
Zone 1 - Middlesbrough Central											
Sainsburys, Wilson Street	6.75	0.88	0.36	7.994	0.58	0.00	0.00	0.00	0.43	1.00	10.00
Marks & Spencer Foodhall, Linthorpe Road, Middlesbrough	0.96	0.50	0.29	1.748	0.36	0.79	0.00	0.00	0.26	0.35	3.51
Other Stores, Middlesbrough Town Centre	20.26	1.10	0.00	21.361	0.22	0.00	0.57	3.33	0.00	2.83	28.31
Middlesbrough Town Centre Sub-Total	***27.98***	***2.48***	***0.65***	**31.102**	***1.16***	***0.79***	***0.57***	***3.33***	***0.69***	***4.18***	***41.83***
Lidl, Newport Road	3.38	0.11	0.14	3.630	0.87	0.00	0.00	1.39	0.09	0.31	6.29
Aldi, Newport Road	13.18	1.49	0.00	14.672	1.23	0.00	0.00	0.00	0.00	0.84	16.74
Aldi, Marton Road	8.68	2.65	0.57	11.903	1.74	0.00	0.00	0.00	0.22	0.73	14.58
Local Centres Zone 1	22.19	0.00	2.73	24.915	0.00	0.00	0.57	0.00	0.13	1.35	26.96
Other Stores/Centres	4.82	0.33	0.36	5.513	0.00	0.00	0.00	0.00	0.00	0.29	5.80
Middlesbrough Central Zone Total	**80.23**	**7.06**	**4.45**	**91.735**	**5.00**	**0.79**	**1.13**	**4.72**	**1.12**	**7.70**	**112.20**
Zone 2 - Middlesbrough East											
Morrisons, Berwick Hills	7.07	21.17	1.36	29.609	4.42	0.99	0.00	0.00	1.38	1.92	38.31
Other Stores, Berwick Hills District Centre	0.00	0.77	0.00	0.772	0.00	0.00	0.00	0.00	0.00	0.04	0.81
Berwick Hills District Centre Sub-Total	***7.07***	***21.94***	***1.36***	**30.381**	***4.42***	***0.99***	***0.00***	***0.00***	***1.38***	**1.96**	**39.13**
Lidl, Cargo Fleet	0.48	3.47	0.00	3.956	1.30	0.99	0.00	0.00	0.00	0.33	6.58
North Ormesby	0.00	0.50	0.00	0.496	0.00	0.00	0.00	1.11	0.00	0.08	1.69
Asda, Ormesby Road, Park End, Middlesbrough	0.80	4.91	0.14	5.854	0.72	0.00	0.00	0.00	0.00	0.35	6.92
Local Centres Zone 2	0.64	3.53	0.00	4.172	0.43	0.00	0.45	0.00	0.00	0.27	5.33
Other Stores/Centres	0.32	0.00	2.01	2.331	0.00	0.40	0.00	0.00	0.00	0.14	2.87
Middlesbrough East Total	**9.33**	**34.35**	**3.52**	**47.190**	**6.88**	**2.38**	**0.45**	**1.11**	**1.38**	**3.13**	**62.52**
Zone 3 - Middlesbrough South											
Tesco Extra, Couby Newham District Centre	15.92	0.28	29.57	45.763	1.88	0.00	0.00	0.00	6.25	2.84	56.73
Aldi, Dalby Way, Coulby Newham, Middlesbrough	8.20	0.72	15.22	24.132	2.24	0.00	0.00	2.22	2.89	1.66	33.14
Other Stores, Coulby Newham District Centre	0.64	0.00	2.94	3.586	0.07	0.00	0.00	0.00	0.00	0.19	3.85
Coulby Newham District Centre Sub-Total	***24.76***	***0.99***	***47.73***	**73.481**	***4.20***	***0.00***	***0.00***	***2.22***	***9.13***	**4.69**	**93.72**
Local Centres Zone 3	0.48	0.28	1.15	1.906	0.14	0.00	0.00	0.00	0.00	0.11	2.16
Other Stores/Centres	0.00	0.00	2.44	2.440	0.14	0.00	0.00	0.00	0.00	0.14	2.72
Middlesbrough South Zone Total	**25.24**	**1.27**	**51.32**	**77.827**	**4.49**	**0.00**	**0.00**	**2.22**	**9.13**	**4.93**	**98.60**
Borough Total	**114.80**	**42.67**	**59.28**	**216.75**	**16.36**	**3.18**	**1.59**	**8.05**	**11.63**	**15.76**	**273.32**
Outside Borough	**45.98**	**12.46**	**12.49**	**70.931**	**56.04**	**195.52**	**111.74**	**269.66**	**31.44**		
TOTAL	**160.78**	**55.13**	**71.77**	**287.68**	**72.40**	**198.70**	**113.33**	**277.71**	**43.07**		

Source: Tables 3 and 4 (Please note some figures may not total precisely due to rounding)

Table 10: Convenience Goods Floorspace and Benchmark Turnovers in 2019 (£m) (2017 Prices)

Centre/Facility	Sales Floorspace	Convenience Goods Floorspace	Convenience Goods Floorspace	Benchmark Turnover	Total Turnover (Benchmark)	Total Turnover (Survey-Based)	Under/Over Trading	Under/Over Trading
	(sqm net)	(%)	(sqm net)	(£ per sqm)	(£m)	(£m)	(£m)	(%)
Zone 1 - Middlesbrough Central								
Sainsburys, Wilson Street	3501	65%	2276	11691	26.60	9.12	-17.49	-66%
Marks & Spencer Foodhall, Linthorpe Road, Middlesbrough	873	80%	698	10476	7.32	3.34	-3.98	-54%
Other Stores, Middlesbrough Town Centre	6176	100%	6176	4500	27.79	25.79	-2.00	-7%
Middlesbrough Town Centre Sub-Total	***10550***		***9150***		***61.71***	***38.25***	***-23.47***	***-38%***
Lidl, Newport Road	925	80%	740	10103	7.48	5.87	-1.61	-21%
Aldi, Newport Road	1060	85%	901	10827	9.76	15.21	5.46	56%
Aldi, Marton Road	879	85%	747	10827	8.09	13.35	5.26	65%
Local Centres Zone 1	5951	100%	5951	3500	20.83	24.31	3.48	17%
Other Stores/Centres					5.22	5.22	0.00	0%
Middlesbrough Central Zone Total	**19365**		**17489**		**113.08**	**102.22**	**-10.87**	**-10%**
Zone 2 - Middlesbrough East								
Morrisons, Berwick Hills	4595	65%	2987	12656	37.80	35.25	-2.55	-7%
Other Stores, Berwick Hills District Centre	274	100%	274	3500	0.96	0.73	-0.23	-24%
Berwick Hills District Centre Sub-Total	***4869***		***3261***		***38.76***	***35.98***	***-2.77***	***-7%***
Lidl, Cargo Fleet	900	80%	720	10103	7.27	6.20	-1.08	-15%
North Ormesby	423	100%	423	3250	1.37	1.60	0.23	16%
Asda, Ormesby Road, Park End, Middlesbrough	675	85%	574	13659	7.84	6.32	-1.52	-19%
Local Centres Zone 2	2129	100%	2129	3500	7.45	4.88	-2.58	-35%
Other Stores/Centres					2.63	2.63	0.00	0%
Middlesbrough East Total	**8996**		**7107**		**65.33**	**57.61**	**-7.72**	**-12%**
Zone 3 - Middlesbrough South								
Tesco Extra, Couby Newham District Centre	7617	55%	4189	13797	57.80	51.87	-5.93	-10%
Aldi, Dalby Way, Coulby Newham, Middlesbrough	966	85%	821	10827	8.89	30.53	21.63	243%
Other Stores, Coulby Newham District Centre	1351	100%	1351	4000	5.40	3.47	-1.93	-36%
Coulby Newham District Centre Sub-Total	***9934***		***6361***		***72.09***	***85.86***	***13.77***	***19%***
Local Centres Zone 3	672	100%	672	3500	2.35	1.96	-0.39	-17%
Other Stores/Centres					2.47	2.47	0.00	0%
Middlesbrough South Zone Total	**10606**		**7033**		**76.91**	**90.29**	**13.38**	**17%**
Borough Total	**38967**		**31629**		**255.32**	**250.11**	**-5.21**	**-2%**

Source:

1. Net sales floorspace sourced from ORC Storepoint database, supplemented by MBC and Lichfields surveys
2. Benchmark turnover to floorspace ratios based on information from Global Data (with allowance for VAT and convenience/comparison goods split), as well as the scale, nature and accessibiltiy of existing facilities
3. Total turnover (survey-based) sourced from Table 5

Table 11: Convenience Goods Turnover of Commitments (£m) (2017 Prices)

Store	Sales Floorspace (sqm net)	Convenience Goods Floorspace (%)	Convenience Goods Floorspace (sqm net)	Turnover (£ per sqm)	Total Turnover (£m)	Zone
Iceland, Middlehaven	1042	96%	1000	6962	6.96	2
B&M, Middlehaven	2625	26%	691	3528	2.44	2
Parkway Centre, Coulby Newham	2671	25%	668	4500	3.00	3
Former Kwik Save, Berwick Hills District Centre	739	25%	185	4500	0.83	2
Total	**7,077**		**2,543**		**13.24**	

Source:

1. Floorspace information obtained from Middlesbrough Borough Council and relevant planning application documentation

2. Turnover of committed floorspace based on relevant planning application documentation, as well as scale, nature and accessibility of proposed facilities

Table 12: Summary of Convenience Goods Expenditure 2019 to 2037 (2017 Prices)

Area	2024	2029	2034	2037
Available Expenditure in Borough (£m)				
Zone 1 - Middlesbrough Central	104.65	107.42	110.45	112.20
Zone 2 - Middlesbrough East	58.80	60.18	61.65	62.52
Zone 3 - Middlesbrough South	92.31	94.62	97.13	98.60
Total	**255.76**	**262.22**	**269.23**	**273.32**
Benchmark Turnover of Existing Facilities (£m)				
Zone 1 - Middlesbrough Central	115.02	115.25	115.25	115.25
Zone 2 - Middlesbrough East	76.68	76.83	76.83	76.83
Zone 3 - Middlesbrough South	81.23	81.39	81.39	81.39
Total	**272.93**	**273.47**	**273.47**	**273.47**
Surplus/Deficit Expenditure (£m)				
Zone 1 - Middlesbrough Central	-10.4	-7.8	-4.8	-3.0
Zone 2 - Middlesbrough East	-17.9	-16.7	-15.2	-14.3
Zone 3 - Middlesbrough South	11.1	13.2	15.7	17.2
Total	**-17.2**	**-11.3**	**-4.2**	**-0.2**

Source:

Available expenditure in Borough sourced from Tables 5 to 8
Commitments from Table 11 added to the turnover of existing Facilities for each zone in 2
Allows for growth in turnover efficiency based on rates set out in Experian Briefing Note 1

Table 13: Convenience Goods Floorspace Expenditure Capacity 2019 to 2034 (2019 Prices)

Area	2024	2029	2034	2035
Turnover Density New Floorspace (£ per sq.m)	£11,500	£11,523	£11,523	£11,523
Floorspace Requirement (sq.m net)				
Zone 1 - Middlesbrough Central	-902	-679	-417	-264
Zone 2 - Middlesbrough East	-1,555	-1,445	-1,317	-1,242
Zone 3 - Middlesbrough South	963	1,148	1,365	1,493
Total	**-1,493**	**-976**	**-369**	**-13**
Floorspace Requirement (sq.m gross)				
Zone 1 - Middlesbrough Central	-1,288	-970	-595	-378
Zone 2 - Middlesbrough East	-2,221	-2,065	-1,882	-1,774
Zone 3 - Middlesbrough South	1,376	1,640	1,950	2,133
Total	**-2,133**	**-1,395**	**-526**	**-19**

(Please note some figures may not total precisely due to rounding)

Appendix 3 Comparison Capacity

MIDDLESBROUGH TOWN CENTRES AND RETAIL/LEISURE STUDY

COMPARISON GOODS CAPACITY ASSESSMENT

Table 1: Study Area Population

Zone	2011	2019	2024	2029	2034	2037	Growth 2019-2024		Growth 2019-2037	
							Persons	%	Persons	%
Zone 1 - Middlesbrough Central	77,986	80,374	82,915	85,455	87,996	89,520	2,540	3.2%	9,146	11.4%
Zone 2 - Middlesbrough East	29,502	30,406	31,367	32,328	33,289	33,865	961	3.2%	3,460	11.4%
Zone 3 - Middlesbrough South	31,325	32,284	33,305	34,325	35,346	35,958	1,020	*3.2%*	3,674	11.4%
Borough (Sub-Total)	***138,813***	***143,064***	***147,586***	***152,108***	***156,630***	***159,343***	***4,522***	***3.2%***	***16,279***	***11.4%***
Zone 4 - Eston	37,481	37,598	37,598	37,460	37,238	37,127	0	0.0%	-471	-1.3%
Zone 5 - Redcar and East Cleveland	97,423	97,728	97,728	97,368	96,791	96,503	0	0.0%	-1,225	-1.3%
Zone 6 - Thornaby and Yarm	54,835	56,778	57,608	58,180	58,581	58,810	830	1.5%	2,032	3.6%
Zone 7 - Stockton and Billingham	135,928	140,745	142,802	144,221	145,214	145,782	2,057	1.5%	5,037	3.6%
Zone 8 - Stokesley	17,078	17,396	17,530	17,588	17,588	17,588	134	0.8%	192	1.1%
Total	**481,558**	**493,309**	**500,853**	**506,924**	**512,042**	**515,152**	**7,543**	**1.5%**	**21,843**	**4.4%**

Source: *Base estimates of population in 2011 for each zone soured from Experian*
Population within Middlesbrough zones projected forward using assumption within SHMAA that population within Borough will increase from 140,351 in 2016 to 156,630 in 2034 (assumes straight line growth in between)

Table 2: Comparison Goods Expenditure per Person (£) (2017 Prices)

Zone	2017	2019	2024	2029	2034	2037	Growth 2019-2024	Growth 2019-2037
Zone 1 - Middlesbrough Central	2,409	2,469	2,802	3,242	3,785	4,149	13.5%	68.0%
Zone 2 - Middlesbrough East	1,751	1,794	2,036	2,356	2,751	3,016	13.5%	68.1%
Zone 3 - Middlesbrough South	3,056	3,132	3,555	4,113	4,802	5,264	13.5%	68.1%
Zone 4 - Eston	2,454	2,515	2,854	3,302	3,855	4,227	13.5%	68.1%
Zone 5 - Redcar and East Cleveland	2,848	2,919	3,313	3,833	4,475	4,906	13.5%	68.1%
Zone 6 - Thornaby and Yarm	3,077	3,153	3,578	4,140	4,834	5,299	13.5%	68.1%
Zone 7 - Stockton and Billingham	2,639	2,704	3,069	3,551	4,146	4,545	13.5%	68.1%
Zone 8 - Stokesley	3,824	3,918	4,447	5,145	6,007	6,586	13.5%	68.1%

Source:

1. Base convenience goods expenditure per capita at 2017 sourced from Experian Software (in 2017 prices)

2. Deduction made to reflect Special Forms of Trading (SFT), increasing from 17.9% in 2019, to 21.8% in 2037 (Experian Briefing Note 16.0 December 2018)

3. Base expenditure projected forward on the Experian's forecast annual growth rates (Experian Briefing Note 16.0 December 2018)

Table 3: Total Comparison Goods Expenditure (£m) (2017 Prices)

Zone	2019	2024	2029	2034	2037	Growth 2019-2024		Growth 2019-2037	
						£m	%	£m	%
Zone 1 - Middlesbrough Central	198.444	232.327	277.046	333.064	371.418	33.883	17.1%	172.974	87.2%
Zone 2 - Middlesbrough East	54.547	63.862	76.164	91.577	102.138	9.315	17.1%	47.590	87.2%
Zone 3 - Middlesbrough South	101.115	118.398	141.180	169.730	189.282	17.284	17.1%	88.168	87.2%
Borough (Sub-Total)	***354.106***	***414.588***	***494.389***	***594.371***	***662.838***	***60.482***	***17.1%***	***308.732***	***87.2%***
Zone 4 - Eston	94.560	107.306	123.692	143.552	156.935	12.746	13.5%	62.376	66.0%
Zone 5 - Redcar and East Cleveland	285.268	323.772	373.210	433.139	473.442	38.505	13.5%	188.174	66.0%
Zone 6 - Thornaby and Yarm	179.022	206.122	240.867	283.181	311.634	27.100	15.1%	132.613	74.1%
Zone 7 - Stockton and Billingham	380.574	438.260	512.128	602.057	662.577	57.686	15.2%	282.003	74.1%
Zone 8 - Stokesley	68.158	77.957	90.488	105.649	115.832	9.799	14.4%	47.674	69.9%
Total	**1,361.687**	**1,568.004**	**1,834.774**	**2,161.949**	**2,383.260**	**206.317**	**15.2%**	**1,021.573**	**75.0%**

Source: *Total comparison goods expenditure obtained by applying population to expenditure per capita forecasts (from Tables 1 and 2 respectively)*

Table 4: Comparison Goods Market Shares in Base Year of 2019 (%) (2019 Prices)

Centre/Facility	Zone 1 Middlesbrough Central	Zone 2 Middlesbrough East	Zone 3 Middlesbrough South	Zone 4 Eston	Zone 5 Redcar and East Cleveland	Zone 6 Thornaby and Yarm	Zone 7 Stockton and Billingham	Zone 8 Stokesley	% Inflow
Middlesbrough Town Centre	52.9%	43.6%	19.4%	29.2%	18.9%	18.0%	19.3%	14.2%	15.0%
Coulby Newham District Centre	4.4%	2.1%	23.7%	1.7%	1.5%	0.4%	0.3%	9.6%	5.0%
Berwick Hills District Centre	1.0%	5.8%	0.1%	0.0%	0.0%	0.0%	0.0%	0.2%	5.0%
Other Local Centres	2.2%	5.2%	2.9%	0.7%	0.0%	0.0%	0.3%	0.0%	5.0%
Other Stores	0.3%	0.5%	0.4%	0.4%	0.2%	0.2%	0.3%	0.1%	5.0%
Borough Total	**60.8%**	**57.2%**	**46.5%**	**32.0%**	**20.6%**	**18.6%**	**20.2%**	**24.1%**	
Outside Borough	**39.2%**	**42.8%**	**53.5%**	**68.0%**	**79.4%**	**81.4%**	**79.8%**	**75.9%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: *NEMS Household Survey July/November 2019*

Table 5: Base Year 2019 Comparison Goods Expenditure (£m) (2017 Prices)

Centre/Facility	Zone 1 Middlesbrough Central	Zone 2 Middlesbrough East	Zone 3 Middlesbrough South	Sub-Total (Middlesbrough Borough)	Zone 4 Eston	Zone 5 Redcar and East Cleveland	Zone 6 Thornaby and Yarm	Zone 7 Stockton and Billingham	Zone 8 Stokesley	% Inflow	Total
	£m	£m	£m		£m	£m	£m	£m	£m	£m	£m
Expenditure 2019	**198.44**	**54.55**	**101.11**	**354.11**	**94.56**	**285.27**	**179.02**	**380.57**	**68.16**		
Middlesbrough Town Centre	104.98	23.78	19.62	148.376	27.61	53.92	32.22	73.45	9.68	60.93	406.18
Coulby Newham District Centre	8.73	1.15	23.96	33.841	1.61	4.28	0.72	1.14	6.54	2.53	50.66
Berwick Hills District Centre	1.98	3.16	0.10	5.249	0.00	0.00	0.00	0.00	0.14	0.28	5.67
Other Local Centres	4.37	2.84	2.93	10.135	0.66	0.00	0.00	1.14	0.00	0.63	12.57
Other Stores	0.60	0.27	0.40	1.273	0.38	0.57	0.36	1.14	0.07	0.20	3.99
Borough Total	**120.65**	**31.20**	**47.02**	**198.87**	**30.26**	**58.77**	**33.30**	**76.88**	**16.43**	**64.57**	**479.07**
Outside Borough	**77.79**	**23.35**	**54.10**	**155.233**	**64.30**	**226.50**	**145.72**	**303.70**	**51.73**		
TOTAL	**198.44**	**54.55**	**101.11**	**354.11**	**94.56**	**285.27**	**179.02**	**380.57**	**68.16**		

Source: *Tables 3 and 4 (Please note some figures may not total precisely due to rounding)*

Table 6: Comparison Goods Expenditure Flows in 2024 (£m) (2017 Prices)

Centre/Facility	Zone 1 Middlesbrough Central	Zone 2 Middlesbrough East	Zone 3 Middlesbrough South	Sub-Total (Middlesbrough Borough)	Zone 4 Eston	Zone 5 Redcar and East Cleveland	Zone 6 Thornaby and Yarm	Zone 7 Stockton and Billingham	Zone 8 Stokesley	% Inflow	Total
	£m	£m	£m		£m	£m	£m	£m	£m	£m	£m
Expenditure 2019	**232.327**	**63.862**	**118.398**	**414.588**	**107.306**	**323.772**	**206.122**	**438.260**	**77.957**		
Middlesbrough Town Centre	122.9	27.8	23.0	173.7	31.3	61.2	37.1	84.6	11.1	70.41	469.41
Coulby Newham District Centre	10.2	1.3	28.1	39.6	1.8	4.9	0.8	1.3	7.5	2.94	58.87
Berwick Hills District Centre	2.3	3.7	0.1	6.1	0.0	0.0	0.0	0.0	0.2	0.33	6.63
Other Local Centres	5.1	3.3	3.4	11.9	0.8	0.0	0.0	1.3	0.0	0.73	14.66
Other Stores	0.7	0.3	0.5	1.5	0.4	0.6	0.4	1.3	0.1	0.23	4.60
Borough Total	**141.25**	**36.53**	**55.06**	**232.84**	**34.34**	**66.70**	**38.34**	**88.53**	**18.79**	**74.65**	**554.18**
Outside Borough	**91.07**	**27.33**	**63.34**	**181.749**	**72.97**	**257.08**	**167.78**	**349.73**	**59.17**		
TOTAL	**232.33**	**63.86**	**118.40**	**414.59**	**107.31**	**323.77**	**206.12**	**438.26**	**77.96**		

Source: Tables 3 and 4 (Please note some figures may not total precisely due to rounding)

Table 7: Comparison Goods Expenditure Flows in 2029 (£m) (2017 Prices)

Centre/Facility	Zone 1 Middlesbrough Central	Zone 2 Middlesbrough East	Zone 3 Middlesbrough South	Sub-Total (Middlesbrough Borough)	Zone 4 Eston	Zone 5 Redcar and East Cleveland	Zone 6 Thornaby and Yarm	Zone 7 Stockton and Billingham	Zone 8 Stokesley	% Inflow	Total
	£m	£m	£m		£m	£m	£m	£m	£m	£m	£m
Expenditure 2019	**277.05**	**76.16**	**141.18**	**494.39**	**123.69**	**373.21**	**240.87**	**512.13**	**90.49**		
Middlesbrough Town Centre	146.56	33.21	27.39	207.15	36.12	70.54	43.36	98.84	12.85	82.74	551.59
Coulby Newham District Centre	12.19	1.60	33.46	47.25	2.10	5.60	0.96	1.54	8.69	3.48	69.62
Berwick Hills District Centre	2.77	4.42	0.14	7.33	0.00	0.00	0.00	0.00	0.18	0.40	7.91
Other Local Centres	6.10	3.96	4.09	14.15	0.87	0.00	0.00	1.54	0.00	0.87	17.42
Other Stores	0.83	0.38	0.56	1.78	0.49	0.75	0.48	1.54	0.09	0.27	5.40
Borough Total	**168.44**	**43.57**	**65.65**	**277.66**	**39.58**	**76.88**	**44.80**	**103.45**	**21.81**	**87.76**	**651.94**
Outside Borough	**108.60**	**32.60**	**75.53**	**216.73**	**84.11**	**296.33**	**196.07**	**408.68**	**68.68**		
TOTAL	**277.05**	**76.16**	**141.18**	**494.39**	**123.69**	**373.21**	**240.87**	**512.13**	**90.49**		

Source: Tables 3 and 4 (Please note some figures may not total precisely due to rounding)

Table 8: Comparison Goods Expenditure Flows in 2034 (£m) (2017 Prices)

Centre/Facility	Zone 1 Middlesbrough Central	Zone 2 Middlesbrough East	Zone 3 Middlesbrough South	Sub-Total (Middlesbrough Borough)	Zone 4 Eston	Zone 5 Redcar and East Cleveland	Zone 6 Thornaby and Yarm	Zone 7 Stockton and Billingham	Zone 8 Stokesley	% Inflow	Total
	£m	£m	£m		£m	£m	£m	£m	£m	£m	£m
Expenditure 2019	**333.06**	**91.58**	**169.73**	**594.37**	**143.55**	**433.14**	**283.18**	**602.06**	**105.65**		
Middlesbrough Town Centre	176.19	39.93	32.93	249.05	41.92	81.86	50.97	116.20	15.00	97.94	652.94
Coulby Newham District Centre	14.65	1.92	40.23	56.80	2.44	6.50	1.13	1.81	10.14	4.15	82.97
Berwick Hills District Centre	3.33	5.31	0.17	8.81	0.00	0.00	0.00	0.00	0.21	0.47	9.50
Other Local Centres	7.33	4.76	4.92	17.01	1.00	0.00	0.00	1.81	0.00	1.04	20.87
Other Stores	1.00	0.46	0.68	2.14	0.57	0.87	0.57	1.81	0.11	0.32	6.37
Borough Total	**202.50**	**52.38**	**78.92**	**333.81**	**45.94**	**89.23**	**52.67**	**121.62**	**25.46**	**103.93**	**772.65**
Outside Borough	**130.56**	**39.19**	**90.81**	**260.56**	**97.62**	**343.91**	**230.51**	**480.44**	**80.19**		
TOTAL	**333.06**	**91.58**	**169.73**	**594.37**	**143.55**	**433.14**	**283.18**	**602.06**	**105.65**		

Source: Tables 3 and 4 (Please note some figures may not total precisely due to rounding)

Table 9: Comparison Goods Expenditure Flows in 2037 (£m) (2017 Prices)

Centre/Facility	Zone 1 Middlesbrough Central	Zone 2 Middlesbrough East	Zone 3 Middlesbrough South	Sub-Total (Middlesbrough Borough)	Zone 4 Eston	Zone 5 Redcar and East Cleveland	Zone 6 Thornaby and Yarm	Zone 7 Stockton and Billingham	Zone 8 Stokesley	% Inflow	Total
	£m	£m	£m		£m	£m	£m	£m	£m	£m	£m
Expenditure 2019	**371.42**	**102.14**	**189.28**	**662.84**	**156.94**	**473.44**	**311.63**	**662.58**	**115.83**		
Middlesbrough Town Centre	196.48	44.53	36.72	277.73	45.83	89.48	56.09	127.88	16.45	108.26	721.72
Coulby Newham District Centre	16.34	2.14	44.86	63.35	2.67	7.10	1.25	1.99	11.12	4.60	92.07
Berwick Hills District Centre	3.71	5.92	0.19	9.83	0.00	0.00	0.00	0.00	0.23	0.53	10.59
Other Local Centres	8.17	5.31	5.49	18.97	1.10	0.00	0.00	1.99	0.00	1.16	23.22
Other Stores	1.11	0.51	0.76	2.38	0.63	0.95	0.62	1.99	0.12	0.35	7.04
Borough Total	**225.82**	**58.42**	**88.02**	**372.26**	**50.22**	**97.53**	**57.96**	**133.84**	**27.92**	**114.90**	**854.63**
Outside Borough	**145.60**	**43.71**	**101.27**	**290.58**	**106.72**	**375.91**	**253.67**	**528.74**	**87.92**		
TOTAL	**371.42**	**102.14**	**189.28**	**662.84**	**156.94**	**473.44**	**311.63**	**662.58**	**115.83**		

Source: Tables 3 and 4 (Please note some figures may not total precisely due to rounding)

Table 10: Comparison Goods Turnover of Commitments (£m) (2017 Prices)

Store	Sales Floorspace (sqm net)	Comparison Goods Floorspace (%)	Comparison Goods Floorspace (sqm net)	Turnover (£ per sqm)	Total Turnover (£m)	Zone
Iceland, Middlehaven	1042	4%	42	2717	0.11	2
B&M, Middlehaven	2625	74%	1934	3844	7.43	2
Argos, Middlehaven	372	100%	372	21415	7.97	2
Unit C, Bulky Comparison, Middlehaven	1456	100%	1456	3800	5.53	2
Unit D, Bulky Comparison, Middlehaven	1081	100%	1081	3800	4.11	2
Snow Centre, Middlehaven	3136	50%	1568	4250	6.66	2
Parkway Shopping Centre, Coulby Newham	2671	75%	2003	4250	8.51	3
Former Kwik Save, Berwick Hills District Centre	739	25%	185	4250	0.79	2
Total	**£13,121.70**		**£8,640.68**		**£41.12**	

Source: *Floorspace information obtained from Middlesbrough Borough Council and relevant planning application documentation*
Turnover of committed floorspace based on relevant planning application documentation,
as well as scale, nature and accessibility of proposed facilities

Table 11: Summary of Comparison Goods Expenditure 2019 to 2037 (2017 Prices)

Area	2024	2029	2034	2037
Available Expenditure in Borough (£m)				
Middlesbrough Town Centre	469.41	551.59	652.94	721.72
Coulby Newham District Centre	58.87	69.62	82.97	92.07
Berwick Hills District Centre	6.63	7.91	9.50	10.59
Local Centres	14.66	17.42	20.87	23.22
Other Stores	4.60	5.40	6.37	7.04
Total	**554.18**	**651.94**	**772.65**	**854.63**
Benchmark Turnover of Existing Facilities (£m)				
Middlesbrough Town Centre	456.14	512.25	573.72	614.45
Coulby Newham District Centre	65.41	73.45	82.26	88.11
Berwick Hills District Centre	7.15	8.03	9.00	9.63
Local Centres	14.11	15.85	17.75	19.01
Other Stores	36.30	40.76	45.65	48.90
Total	**579.11**	**650.34**	**728.38**	**780.10**
Surplus/Deficit Expenditure (£m)				
Middlesbrough Town Centre	13.3	39.3	79.2	107.3
Coulby Newham District Centre	-6.5	-3.8	0.7	4.0
Berwick Hills District Centre	-0.5	-0.1	0.5	1.0
Local Centres	0.6	1.6	3.1	4.2
Other Stores	-31.7	-35.4	-39.3	-41.9
Total	**-24.9**	**1.6**	**44.3**	**74.5**

Source: *Available expenditure in Borough sourced from Tables 5 to 8*
Commitments from Table 11 added to the turnover of existing Facilities for each zone
Allows for growth in turnover efficiency based on rates set out in Experian Briefing N

Table 12: Comparison Goods Floorspace Expenditure Capacity 2019 to 2034 (2019 Prices)

Area	2024	2029	2034	2037
Turnover Density New Floorspace (£ per sq.m)	£5,750	£6,457	£6,440	£6,158
Floorspace Requirement (sq.m net)				
Middlesbrough Town Centre	2,307	6,093	12,301	17,418
Coulby Newham District Centre	-1,136	-594	110	645
Berwick Hills District Centre	-90	-20	78	155
Local Centres	96	244	484	683
Other Stores	-5,513	-5,477	-6,100	-6,798
Total	**-4,336**	**247**	**6,873**	**12,103**
Floorspace Requirement (sq.m gross)				
Middlesbrough Town Centre	3,295	8,704	17,573	24,882
Coulby Newham District Centre	-1,623	-848	157	921
Berwick Hills District Centre	-129	-28	112	221
Local Centres	137	348	691	976
Other Stores	-7,875	-7,824	-8,714	-9,711
Total	**-6,195**	**352**	**9,819**	**17,290**

(Please note some figures may not total precisely due to rounding)

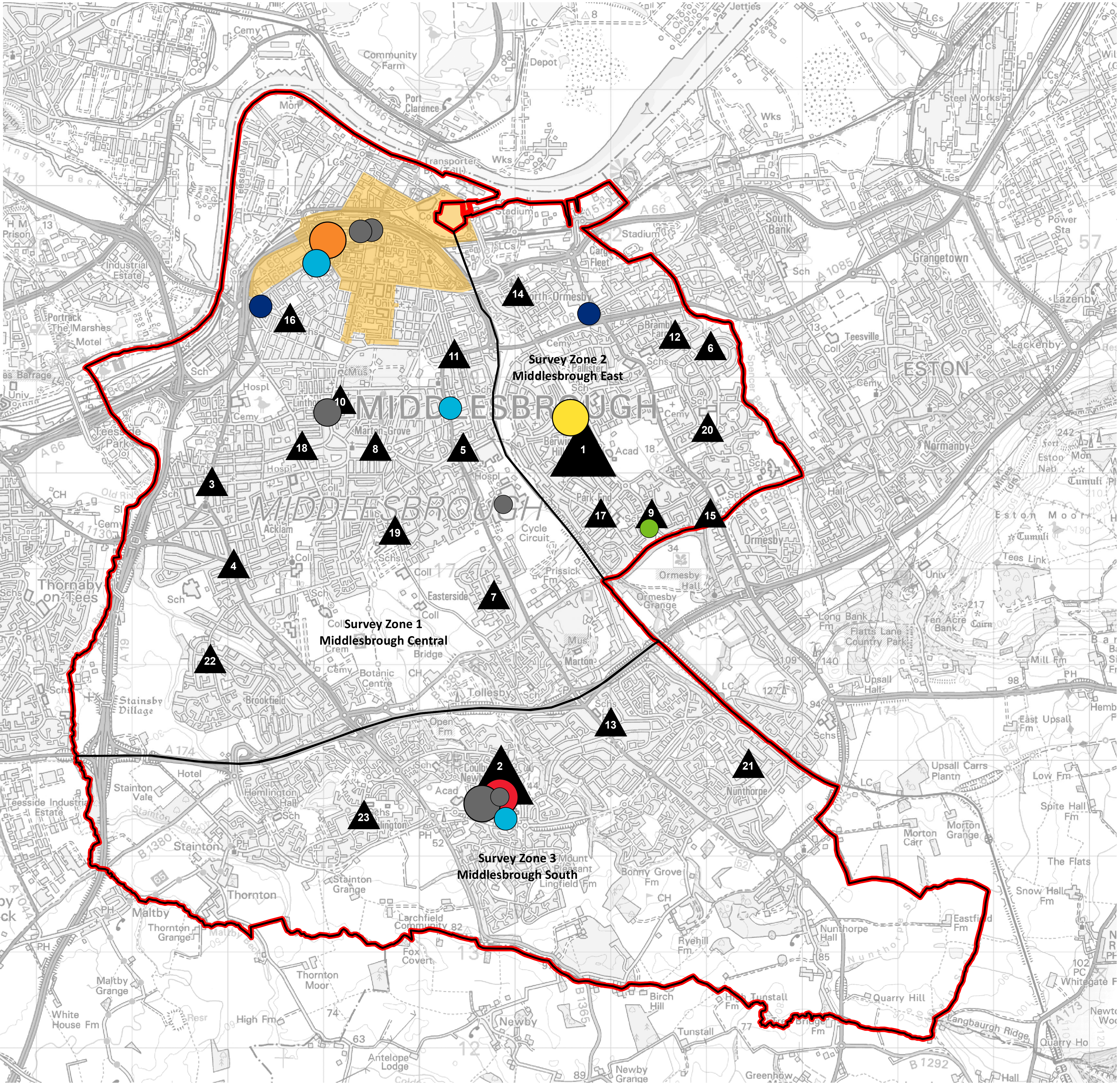
Appendix 4 Existing Centres and Retail Provision

District Centres

1 Berwick Hills
2 Coulby Newham

Local Centres

3 Acklam Road/Cambridge Road
4 Acklam Road/Mandale Road
5 Belle Vue, Marton Road
6 Beresford Buildings, Thorntree
7 Broughton Avenue, Easterside
8 Eastbourne Road
9 Lealholm Crescent
10 Linthorpe Village
11 Longlands/Marton Road
12 Marshall Avenue, Brambles Farm
13 Marton Road/Gypsy Lane
14 North Ormesby
15 Ormesby High Street
16 Parliament Road
17 Penrith Road
18 Roman Road
19 Saltersgill Avenue
20 Shelton Court, Thorntree
21 The Avenue, Nunthorpe
22 Trimdon Avenue
23 Viewly Centre, Hemlington



Key

Middlesbrough Local Authority Boundary
Survey Zone Boundary
Middlesbrough Town Centre

Existing Foodstores:

Operator: Asda, Morrisons, Sainsbury's, Tesco, Aldi, Lidl, Iceland, Other

Net Sales Area (SQM): >2,000; 1,501 - 2,000; 1,001 - 1,500; 751 - 1,000; 500 - 750

Source: ORC Storepoint Database

Centres:

District Centre
Local Centre

0 1 2 km

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LICHFIELDS

Project	Middlesbrough Retail Study
Title	Existing Centres and Retail Provision
Client	Middlesbrough Borough Council
Date	04.10.2019
Scale	1 : 40,000 @ A3
Drawn by	HB
Drg. No	GIS\LF\60724\01-04

GIS Reference: S:\LF60724 - Middlesbrough Retail Study\LF60724 - Middlesbrough Retail Study - Existing Centres and Retail Provision - 04.10.2019.mxd

Appendix 5 Cinema Capacity

MIDDLESBROUGH TOWN CENTRES AND RETAIL/LEISURE STUDY

CINEMA CAPACITY ASSESSMENT

Table 1: Study Area Population

Zone	2011	2019	2024	2029	2034	2037	Growth 2019-2024		Growth 2019-2037	
							Persons	%	Persons	%
Zone 1 - Middlesbrough Central	77,986	80,374	82,915	85,455	87,996	89,520	2,540	3.2%	9,146	11.4%
Zone 2 - Middlesbrough East	29,502	30,406	31,367	32,328	33,289	33,865	961	3.2%	3,460	11.4%
Zone 3 - Middlesbrough South	31,325	32,284	33,305	34,325	35,346	35,958	1,020	*3.2%*	3,674	11.4%
Borough (Sub-Total)	***138,813***	***143,064***	***147,586***	***152,108***	***156,630***	***159,343***	***4,522***	***3.2%***	***16,279***	***11.4%***
Zone 4 - Eston	37,481	37,598	37,598	37,460	37,238	37,127	0	0.0%	-471	-1.3%
Zone 5 - Redcar and East Cleveland	97,423	97,728	97,728	97,368	96,791	96,503	0	0.0%	-1,225	-1.3%
Zone 6 - Thornaby and Yarm	54,835	56,778	57,608	58,180	58,581	58,810	830	1.5%	2,032	3.6%
Zone 7 - Stockton and Billingham	135,928	140,745	142,802	144,221	145,214	145,782	2,057	1.5%	5,037	3.6%
Zone 8 - Stokesley	17,078	17,396	17,530	17,588	17,588	17,588	134	0.8%	192	1.1%
Total	**481,558**	**493,309**	**500,853**	**506,924**	**512,042**	**515,152**	**7,543**	**1.5%**	**21,843**	**4.4%**

Source: *Base estimates of population in 2011 for each zone soured from Experian*
Population within Middlesbrough zones projected forward using assumption within SHMAA that population within Borough will increase from 140,351 in 2016 to 156,630 in 2034 (assumes straight line growth in between)

Table 2: Total Number of Cinema Trips (per annum)

Zone	2019	2024	2029	2034	2037
Zone 1 - Middlesbrough Central	217011	223870	230729	237588	241704
Zone 2 - Middlesbrough East	82095	84690	87285	89879	91436
Zone 3 - Middlesbrough South	87168	89923	92678	95433	97086
Sub-Total	***386273***	***398483***	***410692***	***422901***	***430227***
Zone 4 - Eston	101515	101515	101141	100542	100243
Zone 5 - Redcar and East Cleveland	263865	263865	262892	261336	260557
Zone 6 - Thornaby and Yarm	153301	155542	157087	158169	158787
Zone 7 - Stockton and Billingham	380011	385566	389396	392078	393610
Zone 8 - Stokesley	46969	47331	47487	47487	47487
Total	**945662**	**953819**	**958003**	**959611**	**960684**

Source: *Table 1; 2.8 Trips per annum per person (NLP CineScope Model)*

Table 3: Base Year 2019 Cinema Market Shares (%)

Centre/Facility	Zone 1 Middlesbrough Central	Zone 2 Middlesbrough East	Zone 3 Middlesbrough South	Zone 4 Eston	Zone 5 Redcar and East Cleveland	Zone 6 Thornaby and Yarm	Zone 7 Stockton and Billingham	Zone 8 Stokesley	% Inflow
Cineworld, Marton Road, Middlesbrough	62.9%	84.1%	43.2%	56.0%	47.1%	27.2%	21.3%	21.6%	10.0%
Showcase, Teesside Leisure Park	32.6%	10.0%	54.6%	42.5%	42.3%	65.1%	55.0%	73.1%	10.0%
Sub-Total	***95.5%***	***94.1%***	***97.8%***	***98.5%***	***89.4%***	***92.3%***	***76.3%***	***94.7%***	
Other Destinations	4.5%	5.9%	2.2%	1.5%	10.6%	7.7%	23.7%	5.3%	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey 2019

Table 4: Base Year 2019 Total Cinema Trips per Annum

Centre/Facility	Zone 1 Middlesbrough Central	Zone 2 Middlesbrough East	Zone 3 Middlesbrough South	Sub Total	Zone 4 Eston	Zone 5 Redcar and East Cleveland	Zone 6 Thornaby and Yarm	Zone 7 Stockton and Billingham	Zone 8 Stokesley
Trips 2019	**217011**	**82095**	**87168**	**386273**	**101515**	**263865**	**153301**	**380011**	**46969**
Cineworld, Marton Road, Middlesbrough	136500	69042	37656	**243198**	56849	124281	41698	80942	10145
Showcase, Teessside Leisure Park	70745	8209	47594	**126549**	43144	111615	99799	209006	34335
Sub-total (Middlesbrough)	*207245*	*77251*	*85250*	***369746***	*99993*	*235896*	*141497*	*289948*	*44480*
Other Destinations	9765	4844	1918	**16527**	1523	27970	11804	90063	2489
TOTAL	**217011**	**82095**	**87168**	**386273**	**101515**	**263865**	**153301**	**380011**	**46969**

Source: Tables 2 and 3
(Please note some figures may not total precisely due to rounding)

Table 5: Total Cinema Trips per Annum in 2024

Centre/Facility	Zone 1 Middlesbrough Central	Zone 2 Middlesbrough East	Zone 3 Middlesbrough South	Sub Total	Zone 4 Eston	Zone 5 Redcar and East Cleveland	Zone 6 Thornaby and Yarm	Zone 7 Stockton and Billingham	Zone 8 Stokesley	Inflow	Total
Trips 2024	**223870**	**84690**	**87168**	**395727**	**101515**	**263865**	**155542**	**385566**	**47331**		
Cineworld, Marton Road, Middlesbrough	140814	71224	37656	**249695**	56849	124281	42307	82125	10224	62831	628311
Showcase, Teesside Leisure Park	72982	8469	47594	**129044**	43144	111615	101258	212061	34599	70191	701912
Sub-total (Middlesbrough)	*213796*	*79693*	*85250*	***378739***	*99993*	*235896*	*143565*	*294187*	*44823*	*133022*	*1330224*
Other Destinations	10074	4997	1918	**16989**	1523	27970	11977	91379	2509		
TOTAL	**223870**	**84690**	**87168**	**395727**	**101515**	**263865**	**155542**	**385566**	**47331**		

Source: Tables 2 and 3
(Please note some figures may not total precisely due to rounding)

Table 6: Total Cinema Trips per Annum in 2029

Centre/Facility	Zone 1 Middlesbrough Central	Zone 2 Middlesbrough East	Zone 3 Middlesbrough South	Sub Total	Zone 4 Eston	Zone 5 Redcar and East Cleveland	Zone 6 Thornaby and Yarm	Zone 7 Stockton and Billingham	Zone 8 Stokesley	Inflow	Total
Trips 2029	**230729**	**87285**	**92678**	**410692**	**101141**	**262892**	**155542**	**389396**	**47487**		
Cineworld, Marton Road, Middlesbrough	145129	73406	40037	**258572**	56639	123822	42307	82941	10257	63838	638377
Showcase, Teessside Leisure Park	75218	8728	50602	**134548**	42985	111203	101258	214168	34713	70986	709861
Sub-total (Middlesbrough)	*220346*	*82135*	*90639*	***393120***	*99624*	*235026*	*143565*	*297109*	*44970*	*134824*	*1348238*
Other Destinations	10383	5150	2039	**17572**	1517	27867	11977	92287	2517		
TOTAL	**230729**	**87285**	**92678**	**410692**	**101141**	**262892**	**155542**	**389396**	**47487**		

Source: Tables 2 and 3
(Please note some figures may not total precisely due to rounding)

Table 7: Total Cinema Trips per Annum in 2034

Centre/Facility	Zone 1 Middlesbrough Central	Zone 2 Middlesbrough East	Zone 3 Middlesbrough South	Sub Total	Zone 4 Eston	Zone 5 Redcar and East Cleveland	Zone 6 Thornaby and Yarm	Zone 7 Stockton and Billingham	Zone 8 Stokesley	Inflow	Total
Trips 2034	**237588**	**89879**	**95433**	**422901**	**100542**	**261336**	**158169**	**392078**	**47487**		
Cineworld, Marton Road, Middlesbrough	149443	75589	41227	**266259**	56304	123089	43022	83513	10257	64716	647159
Showcase, Teessside Leisure Park	77454	8988	52107	**138548**	42730	110545	102968	215643	34713	71683	716830
Sub-total (Middlesbrough)	*226897*	*84576*	*93334*	***404807***	*99034*	*233634*	*145990*	*299155*	*44970*	*136399*	*1363989*
Other Destinations	10691	5303	2100	**18094**	1508	27702	12179	92922	2517		
TOTAL	**237588**	**89879**	**95433**	**422901**	**100542**	**261336**	**158169**	**392078**	**47487**		

Source: Tables 2 and 3
(Please note some figures may not total precisely due to rounding)

Table 8: Total Cinema Trips per Annum in 2037

Centre/Facility	Zone 1 Middlesbrough Central	Zone 2 Middlesbrough East	Zone 3 Middlesbrough South	Sub Total	Zone 4 Eston	Zone 5 Redcar and East Cleveland	Zone 6 Thornaby and Yarm	Zone 7 Stockton and Billingham	Zone 8 Stokesley	Inflow	Total
Trips 2037	**241704**	**91436**	**97086**	**430227**	**100243**	**260557**	**158787**	**393610**	**47487**		
Cineworld, Marton Road, Middlesbrough	152032	76898	41941	**270871**	56136	122722	43190	83839	10257	65224	652239
Showcase, Teessside Leisure Park	78795	9144	53009	**140948**	42603	110216	103370	216486	34713	72037	720373
Sub-total (Middlesbrough)	*230827*	*86042*	*94950*	***411819***	*98739*	*232938*	*146561*	*300325*	*44970*	*137261*	*1372613*
Other Destinations	10877	5395	2136	**18407**	1504	27619	12227	93286	2517		
TOTAL	**241704**	**91436**	**97086**	**430227**	**100243**	**260557**	**158787**	**393610**	**47487**		

Source: Tables 2 and 3
(Please note some figures may not total precisely due to rounding)

Table 9: Cinema Screen Capacity 2019 to 2037

	2019	2024	2029	2034	2037
Total Cinema Trips attracted to Middlesbrough (per annum)	1,312,844	1,330,224	1,348,238	1,363,989	1,372,613
Number of Trips per Screen (per annum)	40,000	40,000	40,000	40,000	40,000
Cinema Screen Potential	32.8	33.3	33.7	34.1	34.3
Existing Screens in Middlesbrough	25	25	25	25	25
Borough Screen Capacity	7.8	8.3	8.7	9.1	9.3

Table 10: Cinema Seat Capacity 2019 to 2037

	2019	2024	2029	2034	2037
Total Cinema Trips attracted to Middlesbrough (per annum)	1,312,844	1,330,224	1,348,238	1,363,989	1,372,613
Number of Trips per Seat (per annum)	210	210	210	210	210
Cinema Seat Potential	6,252	6,334	6,420	6,495	6,536
Existing Seats in Middlesbrough	5,820	5,820	5,820	5,820	5,820
Borough Seat Capacity	432	514	600	675	716

Appendix 6 Food and Beverage Capacity

MIDDLESBROUGH TOWN CENTRES AND RETAIL/LEISURE STUDY

FOOD AND BEVERAGE CAPACITY ASSESSMENT

Table 1: Study Area Population

Zone	2011	2019	2024	2029	2034	2037	Growth 2019-2024		Growth 2019-2037	
							Persons	%	Persons	%
Zone 1 - Middlesbrough Central	77,986	80,374	82,915	85,455	87,996	89,520	2,540	3.2%	9,146	11.4%
Zone 2 - Middlesbrough East	29,502	30,406	31,367	32,328	33,289	33,865	961	3.2%	3,460	11.4%
Zone 3 - Middlesbrough South	31,325	32,284	33,305	34,325	35,346	35,958	1,020	*3.2%*	3,674	11.4%
Borough (Sub-Total)	***138,813***	***143,064***	***147,586***	***152,108***	***156,630***	***159,343***	***4,522***	***3.2%***	***16,279***	***11.4%***
Zone 4 - Eston	37,481	37,598	37,598	37,460	37,238	37,127	0	0.0%	-471	-1.3%
Zone 5 - Redcar and East Cleveland	97,423	97,728	97,728	97,368	96,791	96,503	0	0.0%	-1,225	-1.3%
Zone 6 - Thornaby and Yarm	54,835	56,778	57,608	58,180	58,581	58,810	830	1.5%	2,032	3.6%
Zone 7 - Stockton and Billingham	135,928	140,745	142,802	144,221	145,214	145,782	2,057	1.5%	5,037	3.6%
Zone 8 - Stokesley	17,078	17,396	17,530	17,588	17,588	17,588	134	0.8%	192	1.1%
Total	**481,558**	**493,309**	**500,853**	**506,924**	**512,042**	**515,152**	**7,543**	**1.5%**	**21,843**	**4.4%**

Source: *Base estimates of population in 2011 for each zone soured from Experian*
Population within Middlesbrough zones projected forward using assumption within SHMAA that population within Borough will increase from 140,351 in 2016 to 156,630 in 2034 (assumes straight line growth in between)

Table 2: Food and Beverage Expenditure per Person (£) (2017 Prices)

Zone	2017	2019	2024	2029	2034	2037	Growth 2019-2024	Growth 2019-2037
Zone 1 - Middlesbrough Central	1,008	1,021	1,082	1,148	1,219	1,263	6.0%	23.7%
Zone 2 - Middlesbrough East	674	683	723	768	815	845	5.9%	23.7%
Zone 3 - Middlesbrough South	1,200	1,216	1,288	1,367	1,451	1,504	5.9%	23.7%
Zone 4 - Eston	1,012	1,025	1,086	1,153	1,224	1,268	6.0%	23.7%
Zone 5 - Redcar and East Cleveland	1,164	1,179	1,248	1,326	1,407	1,459	5.9%	23.7%
Zone 6 - Thornaby and Yarm	1,193	1,209	1,280	1,359	1,442	1,495	5.9%	23.7%
Zone 7 - Stockton and Billingham	1,081	1,095	1,160	1,231	1,307	1,355	5.9%	23.7%
Zone 8 - Stokesley	1,483	1,502	1,591	1,689	1,793	1,858	5.9%	23.7%

Source:

1. Base food and beverage expenditure per capita at 2017 sourced from Experian Software (in 2017 prices)

2. Base expenditure projected forward on the Experian's forecast annual growth rates for leisure services (Experian Briefing Note 16.0 December 2018)

Table 3: Total Food and Beverage Expenditure (£m) (2017 Prices)

Zone	2019	2024	2029	2034	2037	Growth 2019-2024		Growth 2019-2037	
						£m	%	£m	%
Zone 1 - Middlesbrough Central	82.062	89.714	98.103	107.267	113.064	7.652	9.3%	31.002	37.8%
Zone 2 - Middlesbrough East	20.767	22.678	24.828	27.130	28.616	1.911	9.2%	7.849	37.8%
Zone 3 - Middlesbrough South	39.258	42.897	46.923	51.287	54.081	3.639	9.3%	14.823	37.8%
Borough (Sub-Total)	***142.087***	***155.288***	***169.853***	***185.684***	***195.761***	***13.201***	***9.3%***	***53.674***	***37.8%***
Zone 4 - Eston	38.538	40.832	43.191	45.579	47.077	2.293	6.0%	8.539	22.2%
Zone 5 - Redcar and East Cleveland	115.221	121.964	129.109	136.185	140.797	6.743	5.9%	25.576	22.2%
Zone 6 - Thornaby and Yarm	68.645	73.738	79.067	84.474	87.921	5.094	7.4%	19.276	28.1%
Zone 7 - Stockton and Billingham	154.116	165.650	177.536	189.795	197.534	11.535	7.5%	43.418	28.2%
Zone 8 - Stokesley	26.129	27.890	29.705	31.535	32.678	1.762	6.7%	6.549	25.1%
Total	**544.736**	**585.364**	**628.462**	**673.251**	**701.768**	**40.628**	**7.5%**	**157.032**	**28.8%**

Source: *Total food and beverage expenditure obtained by applying population to expenditure per capita forecasts (from Tables 1 c*

Table 4: Food and Beverage Market Shares in Base Year of 2019 (%) (2019 Prices)

Centre/Facility	Zone 1 Middlesbrough Central	Zone 2 Middlesbrough East	Zone 3 Middlesbrough South	Zone 4 Eston	Zone 5 Redcar and East Cleveland	Zone 6 Thornaby and Yarm	Zone 7 Stockton and Billingham	Zone 8 Stokesley	% Inflow
Middlesbrough Town Centre	58.7%	46.5%	37.7%	36.4%	10.6%	19.5%	12.1%	8.3%	15.0%
Coulby Newham District Centre	0.0%	0.6%	6.3%	0.8%	0.0%	1.4%	0.0%	0.5%	5.0%
Berwick Hills District Centre	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%
Other Destinations	17.4%	19.8%	13.0%	3.6%	0.8%	0.0%	1.0%	1.1%	5.0%
Borough Total	**76.1%**	**67.4%**	**57.0%**	**40.8%**	**11.4%**	**20.9%**	**13.1%**	**9.9%**	
Outside Borough	**23.9%**	**32.6%**	**43.0%**	**59.2%**	**88.6%**	**79.1%**	**86.9%**	**90.1%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: *NEMS Household Survey July/November 2019*

Table 5: Base Year 2019 Food and Beverage Goods Expenditure (£m) (2017 Prices)

Centre/Facility	Zone 1 Middlesbrough Central	Zone 2 Middlesbrough East	Zone 3 Middlesbrough South	Sub-Total (Middlesbrough Borough)	Zone 4 Eston	Zone 5 Redcar and East Cleveland	Zone 6 Thornaby and Yarm	Zone 7 Stockton and Billingham	Zone 8 Stokesley	% Inflow	Total
	£m	£m	£m		£m	£m	£m	£m	£m	£m	£m
Expenditure 2019	**82.06**	**20.77**	**39.26**	**142.09**	**38.54**	**115.22**	**68.64**	**154.12**	**26.13**		
Middlesbrough Town Centre	48.17	9.66	14.80	72.627	14.03	12.21	13.39	18.65	2.17	23.48	156.55
Coulby Newham District Centre	0.00	0.12	2.47	2.598	0.31	0.00	0.96	0.00	0.13	0.21	4.21
Berwick Hills District Centre	0.00	0.10	0.00	0.104	0.00	0.00	0.00	0.00	0.00	0.01	0.11
Other Destinations	14.28	4.11	5.10	23.494	1.39	0.92	0.00	1.54	0.29	1.45	29.09
Borough Total	**62.45**	**14.00**	**22.38**	**98.82**	**15.72**	**13.14**	**14.35**	**20.19**	**2.59**	**25.15**	**189.96**
Outside Borough	**19.61**	**6.77**	**16.88**	**43.264**	**22.81**	**102.09**	**54.30**	**133.93**	**23.54**		
TOTAL	**82.06**	**20.77**	**39.26**	**142.09**	**38.54**	**115.22**	**68.64**	**154.12**	**26.13**		

Source: *Tables 3 and 4 (Please note some figures may not total precisely due to rounding)*

Table 6: Food and Beverage Expenditure Flows in 2024 (£m) (2017 Prices)

Centre/Facility	Zone 1 Middlesbrough Central	Zone 2 Middlesbrough East	Zone 3 Middlesbrough South	Sub-Total (Middlesbrough Borough)	Zone 4 Eston	Zone 5 Redcar and East Cleveland	Zone 6 Thornaby and Yarm	Zone 7 Stockton and Billingham	Zone 8 Stokesley	% Inflow	Total
	£m	£m	£m		£m	£m	£m	£m	£m	£m	£m
Expenditure 2019	**89.714**	**22.678**	**42.897**	**155.288**	**40.832**	**121.964**	**73.738**	**165.650**	**27.890**		
Middlesbrough Town Centre	52.7	10.5	16.2	79.4	14.9	12.9	14.4	20.0	2.3	25.40	169.30
Coulby Newham District Centre	0.0	0.1	2.7	2.8	0.3	0.0	1.0	0.0	0.1	0.23	4.57
Berwick Hills District Centre	0.0	0.1	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.01	0.12
Other Destinations	15.6	4.5	5.6	25.7	1.5	1.0	0.0	1.7	0.3	1.58	31.67
Borough Total	**68.27**	**15.28**	**24.45**	**108.01**	**16.66**	**13.90**	**15.41**	**21.70**	**2.76**	**27.21**	**205.66**
Outside Borough	**21.44**	**7.39**	**18.45**	**47.280**	**24.17**	**108.06**	**58.33**	**143.95**	**25.13**		
TOTAL	**89.71**	**22.68**	**42.90**	**155.29**	**40.83**	**121.96**	**73.74**	**165.65**	**27.89**		

Source: Tables 3 and 4 (Please note some figures may not total precisely due to rounding)

Table 7: Food and Beverage Expenditure Flows in 2029 (£m) (2017 Prices)

Centre/Facility	Zone 1 Middlesbrough Central	Zone 2 Middlesbrough East	Zone 3 Middlesbrough South	Sub-Total (Middlesbrough Borough)	Zone 4 Eston	Zone 5 Redcar and East Cleveland	Zone 6 Thornaby and Yarm	Zone 7 Stockton and Billingham	Zone 8 Stokesley	% Inflow	Total
	£m	£m	£m		£m	£m	£m	£m	£m	£m	£m
Expenditure 2019	**98.10**	**24.83**	**46.92**	**169.85**	**43.19**	**129.11**	**79.07**	**177.54**	**29.71**		
Middlesbrough Town Centre	57.59	11.54	17.69	86.82	15.72	13.69	15.42	21.48	2.47	27.46	183.05
Coulby Newham District Centre	0.00	0.15	2.96	3.11	0.35	0.00	1.11	0.00	0.15	0.25	4.95
Berwick Hills District Centre	0.00	0.12	0.00	0.12	0.00	0.00	0.00	0.00	0.00	0.01	0.13
Other Destinations	17.07	4.92	6.10	28.09	1.55	1.03	0.00	1.78	0.33	1.73	34.50
Borough Total	**74.66**	**16.73**	**26.75**	**118.14**	**17.62**	**14.72**	**16.53**	**23.26**	**2.94**	**29.44**	**222.64**
Outside Borough	**23.45**	**8.09**	**20.18**	**51.72**	**25.57**	**114.39**	**62.54**	**154.28**	**26.76**		
TOTAL	**98.10**	**24.83**	**46.92**	**169.85**	**43.19**	**129.11**	**79.07**	**177.54**	**29.71**		

Source: Tables 3 and 4 (Please note some figures may not total precisely due to rounding)

Table 8: Food and Beverage Expenditure Flows in 2034 (£m) (2017 Prices)

Centre/Facility	Zone 1 Middlesbrough Central	Zone 2 Middlesbrough East	Zone 3 Middlesbrough South	Sub-Total (Middlesbrough Borough)	Zone 4 Eston	Zone 5 Redcar and East Cleveland	Zone 6 Thornaby and Yarm	Zone 7 Stockton and Billingham	Zone 8 Stokesley	% Inflow	Total
	£m	£m	£m		£m	£m	£m	£m	£m	£m	£m
Expenditure 2019	**107.27**	**27.13**	**51.29**	**185.68**	**45.58**	**136.18**	**84.47**	**189.79**	**31.53**		
Middlesbrough Town Centre	62.97	12.62	19.34	94.92	16.59	14.44	16.47	22.97	2.62	29.65	197.64
Coulby Newham District Centre	0.00	0.16	3.23	3.39	0.36	0.00	1.18	0.00	0.16	0.27	5.37
Berwick Hills District Centre	0.00	0.14	0.00	0.14	0.00	0.00	0.00	0.00	0.00	0.01	0.14
Other Destinations	18.66	5.37	6.67	30.70	1.64	1.09	0.00	1.90	0.35	1.88	37.56
Borough Total	**81.63**	**18.29**	**29.23**	**129.15**	**18.60**	**15.53**	**17.66**	**24.86**	**3.12**	**31.80**	**240.71**
Outside Borough	**25.64**	**8.84**	**22.05**	**56.53**	**26.98**	**120.66**	**66.82**	**164.93**	**28.41**		
TOTAL	**107.27**	**27.13**	**51.29**	**185.68**	**45.58**	**136.18**	**84.47**	**189.79**	**31.53**		

Source: Tables 3 and 4 (Please note some figures may not total precisely due to rounding)

Table 9: Food and Beverage Expenditure Flows in 2037 (£m) (2017 Prices)

Centre/Facility	Zone 1 Middlesbrough Central	Zone 2 Middlesbrough East	Zone 3 Middlesbrough South	Sub-Total (Middlesbrough Borough)	Zone 4 Eston	Zone 5 Redcar and East Cleveland	Zone 6 Thornaby and Yarm	Zone 7 Stockton and Billingham	Zone 8 Stokesley	% Inflow	Total
	£m	£m	£m		£m	£m	£m	£m	£m	£m	£m
Expenditure 2019	**113.06**	**28.62**	**54.08**	**195.76**	**47.08**	**140.80**	**87.92**	**197.53**	**32.68**		
Middlesbrough Town Centre	66.37	13.31	20.39	100.06	17.14	14.92	17.14	23.90	2.71	31.04	206.92
Coulby Newham District Centre	0.00	0.17	3.41	3.58	0.38	0.00	1.23	0.00	0.16	0.28	5.63
Berwick Hills District Centre	0.00	0.14	0.00	0.14	0.00	0.00	0.00	0.00	0.00	0.01	0.15
Other Destinations	19.67	5.67	7.03	32.37	1.69	1.13	0.00	1.98	0.36	1.98	39.50
Borough Total	**86.04**	**19.29**	**30.83**	**136.15**	**19.21**	**16.05**	**18.38**	**25.88**	**3.24**	**33.30**	**252.20**
Outside Borough	**27.02**	**9.33**	**23.25**	**59.61**	**27.87**	**124.75**	**69.55**	**171.66**	**29.44**		
TOTAL	**113.06**	**28.62**	**54.08**	**195.76**	**47.08**	**140.80**	**87.92**	**197.53**	**32.68**		

Source: Tables 3 and 4 (Please note some figures may not total precisely due to rounding)

Table 10: Summary of Food and Beverage Expenditure 2019 to 2034 (2017 Prices)

Area	2024	2029	2034	2037
Available Expenditure in Borough (£m)				
Middlesbrough Town Centre	169.30	183.05	197.64	206.92
Coulby Newham District Centre	4.57	4.95	5.37	5.63
Berwick Hills District Centre	0.12	0.13	0.14	0.15
Other Destinations	31.67	34.50	37.56	39.50
Total	**205.66**	**222.64**	**240.71**	**252.20**
Benchmark Turnover of Existing Facilities (£m)				
Middlesbrough Town Centre	164.54	172.93	181.75	187.26
Coulby Newham District Centre	4.42	4.65	4.89	5.03
Berwick Hills District Centre	0.11	0.12	0.13	0.13
Other Destinations	30.57	32.13	33.77	34.79
Total	**199.65**	**209.83**	**220.54**	**227.22**
Surplus/Deficit Expenditure (£m)				
Middlesbrough Town Centre	4.8	10.1	15.9	19.7
Coulby Newham District Centre	0.1	0.3	0.5	0.6
Berwick Hills District Centre	0.0	0.0	0.0	0.0
Local Centres	1.1	2.4	3.8	4.7
Total	**6.0**	**12.8**	**20.2**	**25.0**

Source: *Available expenditure in Borough sourced from Tables 5 to 8*
Allows for growth in turnover efficiency based on 1% per annum

Table 11: Food and Beverage Floorspace Expenditure Capacity 2019 to 2034 (2019 Prices)

Area	2024	2029	2034
Turnover Density New Floorspace (£ per sq.m)	£5,000	£5,255	£5,523
Floorspace Requirement (sq.m gross)			
Middlesbrough Town Centre	953	1,925	2,877
Coulby Newham District Centre	28	58	87
Berwick Hills District Centre	1	2	3
Local Centres	220	451	686
Other Stores	1,202	2,437	3,653
Total	**2,404**	**4,873**	**7,306**

(Please note some figures may not total precisely due to rounding)

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