Proposed Foodstore, Fowler Street, South Shields Town Centre

Retail Assessment

July 2015

Turley

Contents

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Client

Muse Developments

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Definitions

1. **Proposed Development –** development within South Shields town centre for which planning permission is sought through the 'outline planning application' and 'full planning application'

2. **Proposed Foodstore Development** – foodstore element of the 'Proposed Development', namely a 6,039 sq.m (65,000 sq.ft) gross foodstore building and associated car parking, servicing arrangements and petrol filling station.

3. **Outline planning application -** planning application seeking outline planning permission for the following development within South Shields town centre:

   "Demolition of properties on King Street, Barrington Street, Coronation Street, Fowler Street, Thomas Street, Franklin Street, Charlotte Street, Mount Terrace, St Hilda Street and Crossgate and existing bus stands on Chapter Row. Erection of A1 retail uses (7,390sq m), A3 restaurants and cafés (2,060sq m), D2 cinema (2,745sq m) and an A1 foodstore (6,039sq m) with multi-storey and surface car parking".

4. **Full planning application** - full planning application submitted to South Tyneside Council for the following development:

   "Demolition of existing Metro station on King Street, Keppel Street Post Office, 3, 5 and 7 Keppel Street and properties on William Street, Burrow Street and Albermarle Street. Erection of a new Transport Interchange, comprising new interchange building, Metro station, bus station, retail unit and passenger drop-off area and separate retail unit with office accommodation at first and second floors. Construction of a new transport interchange, including the erection of a new bus station, relocation of Metro station and erection of a retail / office unit.

5. **Foodstore site** – extent of the proposed foodstore and associated car parking, petrol filling station and servicing arrangements.

6. **Outline application site** – extent of site subject to 'outline application' as shown on Harris Partnership drawing ref. 12569M_1005 rev B submitted with the outline application.

7. **Full application site** - site subject to 'full application' as shown on Harris Partnership drawing ref. 12569B_014 submitted with the full application

8. **GVA retail study** - South Tyneside Retail, Health and Capacity Study (October 2012) prepared by GVA on behalf of South Tyneside Council in October 2012

9. **The Council** – South Tyneside Council

10. **Primary shopping area (PSA**) – the defined Primary Shopping Area of South Shields town centre as designated on the South Shields Town Centre and Waterfront AAP Proposals Map, adopted in November 2008

1. Introduction

1.1 This Retail Assessment has been prepared by Turley on behalf of Muse Developments ('Muse'). It accompanies an outline planning application for mixed use retail and leisure development in South Shields town centre.

1.2 The scope of the retail assessment undertaken has been discussed and agreed with Planning Officers at South Tyneside Council (STC) at pre-application stage. A copy of the agreed scoping note is contained at Appendix 1.

1.3 The report is structured as follows:

- **Section 2**: introduces the proposed development and the rationale for the foodstore element of the development;
- **Section 3**: reviews the policy context against which the retail element of the proposal should be assessed, including NPPF, South Tyneside Core Strategy and South Tyneside AAP;
- **Section 4**: reviews the retail context and considers the current retail characteristics and performance of defined centres drawing on a review of 'health check' indicators;
- **Section 5**: sets out an assessment of potential, sequentially preferable sites, focussing on South Shields Town Centre;
- **Section 6**: presents a retail economic assessment (quantitative impact) drawing on local expenditure and economic data; and
- **Section 7**: assesses the proposals in relation to policy and sets out our conclusions.

1.4 The assessment is supported by the following appendices:

- Appendix 1: Retail Assessment Scoping;
- Appendix 2: Study Area Plan;
- Appendix 3: Town Centre Healthchecks;
- Appendix 4: Sequential Assessment;
- Appendix 5: Economic Assessment Methodology; and
- Appendix 6: Economic Assessment.

2. Proposed Development

Application Proposals

2.1 The current planning application seeks outline planning permission for the following development within South Shields town centre:

"Demolition of properties on King Street, Barrington Street, Coronation Street, Fowler Street, Thomas Street, Franklin Street, Charlotte Street, Mount Terrace, St Hilda Street and Crossgate and existing bus stands on Chapter Row. Erection of A1 retail uses (7,390sq m), A3 restaurants and cafés (2,060sq m), D2 cinema (2,745sq m) and an A1 foodstore (6,039sq m) with multi-storey and surface car parking."

2.2 This outline planning application forms part of wider town centre regeneration proposals being brought forward by South Tyneside Council in partnership with Muse Developments. Simultaneously to the outline planning application, a separate full planning application is also submitted to South Tyneside Council for the construction of a new transport interchange, including the erection of a new bus station, relocation of Metro station and erection of a retail / office unit.

2.3 With the exception of the foodstore element of the development ('proposed foodstore development'), the proposed retail and leisure uses are to be developed in 'in-centre' locations in town centre policy terms. In relation to the retail uses, this comprises the defined Primary Shopping Area (PSA) and for the leisure uses this comprises the defined South Shields town centre boundary. As such it is not necessary to assess these elements of the outline planning application proposals against the NPPF 'town centre uses' policy tests of impact and the sequential approach.

2.4 The foodstore application site is located within South Shields Town Centre, as defined on the South Shields and Waterfront Area Action Plan (AAP) Proposals Map. The south eastern corner of the site is located within the defined Primary Shopping Area (PSA), whilst the remainder of the site abuts the PSA. As such, given the majority of the site lies outside of the defined PSA it is currently considered edge-of-centre in retail policy terms. In accordance with NPPF policy it is therefore necessary to provide an assessment of the foodstore element of the development against the retail impact and sequential tests. This retail statement, therefore, focuses on the foodstore element of the proposed development.

2.5 An assessment of the development as a whole against development plan policy is provided within the Planning Statement which accompanies the planning application submission.

Proposed Foodstore

2.6 The proposal comprises a 6,039 sq.m (65,000 sq.ft) gross foodstore. The operator of the foodstore is currently unconfirmed. However given the scale and nature of the proposed store it is expected to be operated by one of the main foodstore operators – either Morrisons, Sainsbury's, Tesco or Waitrose. Given that Asda currently operates a comparably sized store within the town centre, it is assumed that Asda would not operate the proposed store.

2.7 As the operator is currently unconfirmed, for the purposes of the retail assessment it is assumed the foodstore would have a net to gross ratio of circa 70%. This results in net floorspace of 3,716 sq.m (40,000 sq.ft), of which around 65% (4,415 sq.m) would be expected to comprise convenience goods. The remaining 35% (1,301 sq.m) would be used for the sale of comparison goods.

Rationale for Development

2.8 As set out later in this statement, the October 2012 South Tyneside Retail, Health and Capacity Study identifies a requirement for the Council to plan to accommodate within South Shields town centre a foodstore of a comparable scale to the existing Asda store. The study identifies that whilst the replacement Asda store at Coronation Street has addressed the qualitative constraints experienced by the previous Asda store on Ocean Road, it has not facilitated a significant increase in South Shield town centre's market share. There is a need to provide increased choice for residents within the town centre in order to divert them from facilities further afield. This new foodstore would reduce the levels of convenience goods expenditure leaking to facilities outwith South Shields and bring more people into South Shields town centre to undertake their food shopping. The study identifies that any store needs to be centrally located within the town centre in order to generate the same benefits as the existing Asda store in terms of linked trips, generating footfall and shared car parking.

2.9 The foodstore forms an integral part of the wider development proposals for the town centre. The new leisure and retail uses proposed around Barrington Street, King Street and Queen Street, along with the new Transport Interchange, are intended to improve the profile, attractiveness and draw of South Shields town centre. This is a need identified in the Council's retail study and is expected to deliver increased footfall and spending across the town centre, and more generally improved public perception and commercial confidence.

2.10 The site of the proposed foodstore development is located within the defined South Shields town centre boundary (as defined on the South Shields and Waterfront AAP Proposals Map) so meets the requirement to be centrally located within South Shields. It is recognised that whilst a small portion of the application falls within the defined PSA, the majority of the site does fall outside of this area, so therefore as a whole the site is considered to currently be edge-of-centre in retail policy terms. However, once developed, the store is intended to function as an in-centre store, forming an anchor to the southern end of the centre and generating footfall within this end of the town centre. The application proposals incorporate strong pedestrian and visual connectivity between the foodstore site and existing town centre uses on Fowler Street and through the pedestrian tunnel under the Metro line to Garden Lane and facilities at Waterloo Square. This will ensure the store functions as an in-centre store and provide a mirror anchor function to the Asda store, as identified as required in the 2012 Retail Study.

2.11 As demonstrated in section 5 of this statement, there are no suitable, available and viable opportunities within the defined PSA of South Shields town centre in which to develop such a store. As set out in the National Planning Policy Framework (NPPF), edge-of-centre sites are the next preferred locations in which to locate such a town centre use. As such, working in partnership with South Tyneside Council, Muse Developments has identified the subject site as the most appropriate location in which to develop a foodstore to meet the need identified within the Retail Study.

2.12 In addition, as identified in the Retail Study, the Fowler Street area of South Shields town centre experiences much lower footfall than the King Street / Waterloo Square areas of the town centre. Our studies have also identified an absence of anchor retailers in this part of the PSA. The proposed foodstore would provide an anchor retailer to mirror the Asda store at Coronation Street. It would increase footfall to this end of the centre and ensure the south eastern end of the centre complements the more modern retail floorspace at the western end of the town, and provide shoppers with more genuine choice of retail destinations.

Site and Surroundings

2.13 The site of the proposed foodstore ('foodstore application site') extends to 3.2ha and currently comprises a mix of uses, including:

- Charlotte Street North and South public car parks
- Commercial units
- Vacant land, cleared for development
- Retail unit currently occupied by ScS and an Esso petrol filling station

2.14 The site is surrounded by the following land uses:

- to the north of the site by a public car park and a number of commercial uses, including the Royal Mail delivery office, commercial premises and a cleared development site;
- to the east by terraced properties comprising a mix of retail, service and commercial uses at ground and first floor level fronting onto Fowler Street.
- to the south by Crossgate, beyond which is an office building
- to the west by Garden Lane, beyond which is lifestyle fitness gym, single terrace of residential properties and small scale commercial units. The Metro railway line runs along the north western boundary of the site. A pedestrian underpass runs underneath the Metro line connecting the site to Garden Lane and the western end of the town centre.

2.15 The foodstore application site is located within South Shields Town Centre, as defined on the South Shields and Waterfront Area Action Plan (AAP) Proposals Map. The south eastern corner of the site is located within the defined PSA, whilst the remainder of the site abuts the PSA. As such, the site is currently considered edge-of-centre in retail policy terms.

2.16 South Tyneside Council is in discussions with the all landowners with the application site and is confident that the required land assembly will be achieved, to enable deliver of the proposed foodstore within the intended timescales.

3. Planning Policy Review

Policy Overview

3.1 National planning policy encourages local authorities to plan positively to meet the needs for town centre uses, having regard to the impact and sequential approach. The adopted development plan identifies limited scope for further convenience retail provision in South Shields town centre; however, this is over 6 years old and is considered largely out-of-date. The conclusions of the retail study, prepared to support the future Local Plan, are considered to supersede the retail requirements set out in Core Strategy Policy SC2 and AAP Policy SS7.

3.2 The retail study identifies the need for additional foodstore of comparable scale to Asda in order to compete effectively with the existing store and reduce levels of expenditure leakage from the area. The study also recommends the delivery of proposals for enhanced leisure provision within South Shields town centre, including a new cinema.

3.3 The current outline planning application, of which the foodstore element forms part, is the result of partnership between Muse and South Tyneside Council. This will deliver the vision for the town centre, as set out in the 365 Vision, and meet the identified need for a town centre foodstore.

National Retail Planning Policy

National Planning Policy Framework (March 2012)

3.4 The National Planning Policy Framework (NPPF) came into force on 27 March 2012 and sets out the Government's planning policies for England and how these are expected to be applied.

3.5 Paragraph 13 states that the NPPF: "…*constitutes guidance for local planning authorities and decision takers both in drawing up plans and as a material consideration in determining applications*."

3.6 Paragraph 23 identifies that planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period.

3.7 The NPPF includes, at paragraphs 24, 26 and 27 what amount to the development management tests in determining applications for retail development. Applicants are required to satisfy the sequential test (paragraph 24) and then prepare an impact assessment (paragraph 26) for main town centre uses that are not in an existing centre and not in accordance with an up-to-date Local Plan subject to floorspace thresholds (see paragraph 3.7 below).

3.8 In applying the sequential approach the NPPF (paragraph 24) states that local planning authorities should require applications to be:

"…located in town centres, then in edge of centre locations and only if suitable sites are not available should out of centre sites be considered."

3.9 When considering edge of centre and out of centre proposals, the NPPF states that preference should be given to accessible sites that are 'well connected' to the town centre. Applicants and local planning authorities should also demonstrate flexibility on issues such as format and scale.

3.10 Paragraph 26 indicates that local planning authorities should require an impact assessment if the development is over a proportionate, locally set threshold. If there is no locally set threshold, the default threshold is identified to be 2,500 sq.m m. In assessing impact, the NPPF highlights that this should focus on a two pronged approach (paragraph 26) that includes an assessment of:

- The impact of the proposal on existing, committed and planned public and private investment in a centre or 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 area, up to five years from the time the application is made. For major schemes where the full impact will not be realised in five years, the impact should also be assessed up to ten years from the time the application is made.

Planning Practice Guidance (March 2014)

3.11 The Planning Practice Guidance (PPG) was published by the Government in March 2014 and provides supplementary guidance to the NPPF.

3.12 Paragraph 5 identifies the relevant indicators in assessing the health of town centres. These include, *inter alia*, diversity of uses, proportion of vacant street level property, retailer representation, pedestrian flows, commercial rents and yields, accessibility and environmental quality.

3.13 Paragraph 6 acknowledges that it may not be possible to accommodate all forecast needs in a town centre. In those circumstances, planning authorities should plan positively to identify the most appropriate alternative strategy for meeting the 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 which are not in an existing town centre are in the best locations to support the vitality and vibrancy of town centres.

3.14 In respect of the sequential test, paragraph 10 makes clear that the application should be proportionate and appropriate for the given proposal. Due regard should be given to flexibility and in considering edge-of-centre sites, preference should be given to accessible sites that are well connected to the town centre. It should also be recognised that certain town centre uses have particular market and locational requirements which mean that they may only be accommodated in specific locations.

3.15 Paragraph 12 recognises that promoting new development in town centre locations can be more expensive and complicated than building elsewhere and local authorities need to be realistic and flexible in terms of their expectations.

3.16 In respect of the impact test, PPG advises that the impact test should be undertaken in a proportionate and locally appropriate way, drawing on existing information where possible. Ideally, applicants and local planning authorities should seek to agree the scope, key impacts for assessment, and level of detail required in advance of applications being submitted (paragraph 15)

3.17 The guidance states that as a guiding principle impact should be assessed on a like-for-like basis in respect of that particular sector as retail uses tend to compete with their most comparable competitive facilities.

3.18 When considering the impact upon investment within centres, paragraph 16 identifies the key considerations to include:

- the policy status of the investment
- the progress made towards securing the investment
- the extent to which an application is likely to undermine planned developments or investments based on the effects on current/ forecast turnovers, operator demand and investor confidence

3.19 Paragraph 17 and 18 provide a checklist for applying the impact test.

Development Plan

3.20 Section 38(6) of the Planning and Compulsory Purchase Act (2004), states that regard is to be had to the Development Plan for the purpose of any determination to be made under the Planning Acts, the determination must be made in accordance with the plan unless material considerations indicate otherwise.

Development Plan Policy

3.21 The adopted development plan for the application site comprises:

- South Tyneside Core Strategy (2007);
- South Shields Town Centre and Waterfront Area Action Plan (2008); and
- Development Management Policies DPD (2011).

South Tyneside Core Strategy

3.22 The South Tyneside Core Strategy was adopted in June 2007 and sets out the overall direction for the Local Development Framework. The following policies are of relevance to the proposed development.

3.23 **Policy ST1** sets out the spatial strategy for South Tyneside, this includes supporting development that reflects the scale and functions of the main towns including South Shields, Jarrow and Hebburn and maximising the re-use of previously developed land in built up areas.

3.24 **Policy SC1** details how the Council will deliver sustainable urban areas. In doing so, development proposals will be focused and promoted within the built up areas, in accordance with the spatial strategy for South Tyneside and sequential approach where they revitalise town centres and other main shopping centres.

3.25 **Policy SC2** details planning policy for reviving South Tyneside town centres and other shopping centres. Retail development proposals will be focused and promoted within the three town centres of South Shields, Jarrow and Hebburn where they:

- Protect and enhance the retail character and function of ground floor premises within the defined primary shopping areas,
- Encourage retail growth and an appropriate mix of uses within the secondary shopping streets,
- Encourage the controlled and well-managed growth, diversification and promotion, particularly in South Shields town centre.

South Shields Town Centre and Waterfront Area Action Plan

3.26 The South Shields Town Centre and Waterfront AAP ('South Shields APP') was adopted in November 2008 and sets out the detailed strategy, policies and site-specific allocations for South Shields town centre, riverside and foreshore.

3.27 As defined by the AAP Proposals Map, the site is located within the South Shields town centre boundary, and lies partly within and partially outside of the defined Primary Shopping Area (PSA).

3.28 **Policy SS1** states the spatial strategy for South Shields town centre is to strengthen, revive and promote the growth of the centre as the principal centre for shopping, entertainment and leisure, culture and administration, making it a popular and attractive market town.

3.29 **Policy SS2** identifies opportunities for mixed use development within South Shields. This includes identification of the foodstore application site for development within Use Classes A1 (bulky goods comparison), A2, B1, B2, C3, and / or D2.

3.30 **Policy SS7** details how South Shields town centre will maintain and enhance the primary retail and commercial centre of South Tyneside. The Council seek to manage the growth and distribution of shopping facilities by:

- concentrating retail development within the designated primary shopping area, bringing vacant sites into viable use;
- allocating site for new retail-based developments to provide a maximum 500 sq.m convenience shopping floor space.

Development Management Policies DPD

3.31 The Development Management Policies DPD was adopted in December 2011 and sets out locally distinctive issues that are not covered elsewhere by national policy or other LDF documents.

3.32 There are no policies within the DPD directly relevant to the foodstore element of the proposed development. Full assessment of the proposed development against development plan policy is provided within the Planning Statement accompanying the application.

Emerging Development Plan

3.33 The Core Strategy and AAP were adopted over 6 years ago. This was prior to the publication of the NPPF, and the documents were prepared during time of economic recession. In the intervening period, there have been significant changes in the retail market and the UK economy is in a period of recovery. The adopted Core Strategy and AAP policies, in particular in relation to retail and commercial floorspace requirements, are not based upon the most up-to-date evidence and this should be reflected in the weight attached to these policies in the determination of the current planning application. South Tyneside Council is currently in the process of preparing replacement development plan policies in the form of a Local Plan. A suite of evidence base documents, including a new Retail Study, have been prepared to support the preparation of the Local Plan.

3.34 In relation to the Local Plan, consultation on the Issues and Options document took place in Spring 2013, and further consultation on strategic growth scenarios and spatial options taking place in June – July 2015.

Other Relevant Documents

South Tyneside Retail, Health and Capacity Study (October 2012)

3.35 This study was prepared by GVA on behalf of South Tyneside Council in October 2012. It was prepared to support the preparation of the emerging Local Plan and provide a comprehensive picture of current local shopping and leisure patterns, and identifies the potential requirements for new floorspace within the borough.

3.36 The study states that the convenience retail provision within South Shields town centre is below the national GOAD average for both outlet numbers and overall floorspace.

3.37 The household survey indicates that existing convenience provision in South Shields town centre retains 69% of main food expenditure arising from the South Shields survey zone (Zone 1). In relation to top-up expenditure, South Shields secures 63% of expenditure arising from the same zone. The surveys also identified that South Shields' facilities draw a significant level of trade from the Harton survey zone (Zone 2), drawing 41% of main food expenditure and 33% of top-up expenditure. A plan indicating the extent of household survey Zones 1 and 2 is contained at Appendix 2.

3.38 In relation to individual facilities, the surveys identify the Asda store at Coronation Street to be trading very strongly, some £13m (37%) above benchmark level. The Morrisons at Ocean Road was estimated to be trading £5m (20%) below its benchmark level; however, the study considers this to be a result of the surveys not accurately recording all top-up based shopping in the store by visitors / workers in the town and the constrained nature of the store. Since the study was prepared the M&S store at King Street has closed. Given the comparable location of the Morrisons store to the M&S, with frontage onto the pedestrianised King Street it is likely the Morrisons store has captured some of the £2m turnover generated by this store, particularly the turnover generated from visitors arriving in the town centre by public transport or workers within the town centre.

3.39 In terms of South Shields, the study concludes that existing foodstore commitments are unlikely to reduce the dominant trading position of the existing full-range Asda store in the town centre and there is presently a lack of effective choice for local residents. Through appropriate main food market share improvements allied to re-assignment of the Asda overtrading surplus and baseline growth in expenditure the study forecasts, there is capacity for an additional 1,900–2,250 sq.m net convenience floorspace in 2018 increasing to 1,975 -2,350 sq.m by 2021.

3.40 The retail study identifies a need for the Council to plan to accommodate a foodstore of comparable scale to the existing Asda. Taking account of the potential non-food retail offer within a foodstore allied to circulation space and customer facilities, it is likely that a foodstore of c. 6,500 to 7,000 sq.m gross would be realistic. Any new development will however need to be centrally located within the town centre so as not to lose the existing benefits that Asda delivers in terms of its anchor function (generating footfall, linked trips, shared car park etc.). Any new provision which comes forward outside of the town centre would negatively impact on town centre vitality and viability going forward.

3.41 The study also highlights that the capacity figures should not be treated as an absolute ceiling. The study notes that there is potential additional quantitative support arising from top-up shopping inflows from outside the borough given the tourism role of the wider town centre.

3.42 In reviewing the conclusions of the retail study, it should be noted that it was prepared in 2012, as the UK economy was reaching the end of the economic recession, and the economic forecasts at that time continued to forecast constrained growth in household expenditure. The UK economy over the intervening period has experienced sustained growth, and as such the expenditure capacity forecasts should be considered to be cautious, or potentially under-estimation, of likely expenditure capacity within the South Shields area over the plan period.

3.43 The retail study identifies the continued importance of internet or ‘e-tailing’. Whilst the pace of growth in online shopping is set to slow down it will continue to provide competition to high streets and shopping centres. The study advises that town centres will need to provide a shopping ‘experience’ that the internet is unable to match.

3.44 In relation to leisure uses, the study identifies that the leisure offer within the three main town centres primarily comprises traditional pubs and clubs. The main destination for leisure trips in the borough is the edge-of-centre Cineworld at Boldon. Whilst there is an independent cinema facility at Customs House in South Shields, the regeneration aspiration to provide a new cinema multiplex in South Shields town centre should be maintained. Any new cinema provision should be complemented by an appropriate restaurant offer to increase dwell time and general activity in the centre.

South Shields 365 Town Centre Vision

3.45 The South Shields 365 Town Centre Vision ('365 Vision') document was published in January 2013 by South Tyneside Council.

3.46 The 365 Vision includes an indicative Masterplan for the town centre, which includes a range of uses including a new transport interchange, enhanced public realm, new foodstore and retail park, cinema and leisure uses.

3.47 The Masterplan identifies a development opportunity on land to the west of Fowler Street, which extends to 5.2ha and comprises a mix of car parks, commercial units and some derelict/vacant sites and buildings. The vision document states that this area is in need of comprehensive redevelopment if it is to make a contribution to the South Shields offer.

3.48 In relation to the foodstore element, the Masterplan indicates that this could be located on the northern half of the Fowler Street site, adjacent to the bus station, with a 60,000 sq.ft retail park on the southern half of the site. The document makes clear that the Masterplan is not intended to be prescriptive, but instead should be a starting point and guide which maps out the sites. The Council will work in partnership with a selected partner to deliver the regeneration set out in the vision document. Justification for the proposed siting of the foodstore element on the southern part of the Fowler Street site is provided in Section 6 of this statement.

3.49 Muse was selected in 2013 as the preferred development partner of South Tyneside Council. Building upon the guidelines contained in the vision document, Muse has prepared a Masterplan document which represents a deliverable and viable development for the town centre and includes:

- 'The Word' (formerly referred to as New Central Library and Digital Media Centre);
- Enhanced market offer;
- New central consolidated travel interchange;
- Improved retail and leisure offer in the town; and
- New supermarket.

4. Retail Context

4.1 This section of the report presents an overview of the shopping hierarchy within the defined Catchment Area.

4.2 The health and performance of centres is material when assessing the significance of trade diversion/impact associated with new retail floorspace. Below is a full assessment of the vitality and viability of major centres based on NPPF / PPG indicators.

Catchment Area

4.3 The starting point for this retail assessment and to consider the retail context is to define the Catchment Area. A plan showing the extent of the Catchment Area is contained at **Appendix 2**.

4.4 Given the main objective of the proposed foodstore is to meet the identified need for an additional foodstore in South Shields, this centre is the focus of the Catchment Area. The household surveys identify that existing convenience provision in South Shields town centre retains 69% of main food expenditure arising from the South Shields survey zone (Zone 1). In relation to top-up expenditure, South Shields secures 63% of expenditure arising from the same zone. The surveys also identified that South Shields' facilities draw a significant level of trade from the Harton survey zone (Zone 2), drawing 41% of main food expenditure and 33% of top up expenditure.

4.5 As such, zones 1 (South Shields) and 2 (Harton) of the retail study have been adopted as the catchment area for the proposed foodstore development. This is in line with the findings of the retail study which identifies the convenience goods catchment area for South Shields to comprise these two zones.

4.6 Whilst the majority of the foodstore's turnover will be generated from within the defined Catchment Area, given the function of South Shields as the main town centre within the South Tyneside area, it will draw visitors from outside the catchment area. As such allowance is made in the assessment for trade drawn from outside of the catchment area.

Town Centre Healthchecks

4.7 Site visits were undertaken to all the centres identified below in October 2014. An assessment has been undertaken against key performance indicators taking into account those identified in the PPG, including diversity of uses, physical environment, vacancy rate, retailer representation and accessibility. These indicators provide an indication of the vitality and viability of the centre and a basis on which to assess the likely impact of the development proposals.

4.8 We include as **Appendix 3** town centre 'health check' analysis, presenting data for the centres for each of the PPG indicators. This information is summarised below.

South Shields Town Centre

4.9 South Shields town centre is the principal centre in the South Tyneside local authority area. It attracts visitors primarily from South Shields and Harton areas, but also draws trade from across the borough and a significant proportion of tourism / visitor spending. The centre is highly accessible by virtue of a Metro station and bus stations within the town centre, however this does also have the effect of competing retail centres, such as Newcastle and Sunderland city centres, being within easy access.

4.10 The town centre provides a variety of retail, service and community uses and in some areas is displaying good levels of vitality and viability. King Street remains the primary commercial street within the town centre, linking together the various elements of the centre and is the arrival point for those travelling to the centre by Metro or arriving at the current bus interchange. It is home to the majority of national multiple retailers in the centre, as well as a significant number of listed buildings. These along with good elements of public realm provide a reasonably attractive physical environment and focal point to the centre.

4.11 The Asda and Waterloo Square developments provide modern, high quality floorspace at the western end of the town and provide a strong and successful anchor at this end of the centre, particularly given the attraction of key fashion national multiples to the development. The Asda store anchors convenience provision within the centre, and is identified from both the household surveys and our visit to the centre to be trading strongly. The Morrisons store on Ocean Road supplements the Asda store, but it is a constrained unit and is unable to compete effectively and provide genuine choice to the Asda store.

4.12 There are, however, areas of weakness, particularly towards the southern and eastern peripheries, with higher vacancy rates, lower pedestrian footfall and weaker retailer representation. The closure of the Marks & Spencer store in early 2014 is likely to have impacted negatively on commercial confidence within the centre. As identified in the 365 Vision document, the town centre as a whole would benefit from the delivery of a range of development proposals in order to enhance the range of uses in the centre, improve the southern end of the centre around Fowler Street, and generally increase commercial confidence. In addition, the proposed new Transport Interchange and associated improvements to visitors' arrival into the town centre will enhance the perception of the town centre to shoppers and visitors alike.

District and Local Centres

4.13 In relation to the district and local centres, these are summarised as follows:

- **Dean Road district centre –** This traditional centre, located in the southern part of South Shields, is in reasonable health and generally appears to performing effectively in meet the service and immediate retail needs of those in the adjoining residential areas. Convenience provision is limited to a Co-op convenience store which meets the immediate and top-up shopping needs of local residents.

- **Frederick Street district centre –** This centre is in a prominent location, visible from the A194. It provides a good range of convenience floorspace, including a Lidl foodstore and Heron frozen foods; however, it does not provide any uses of the scale proposed in the current application. The centre is located within a regeneration area, and the delivery of the Trinity South scheme will significantly improve the physical environment at the southern end of the centre, and bring additional population to the area to utilise local shops and services.

- **Westoe Bridges district centre -** The centre immediately adjoins South Shields town centre. It contains a number of specialist comparison uses with limited representation by national multiples, and as such could reasonably be considered to comprise secondary shopping frontages for the town centre. The district centre is located less than 300m from the foodstore application site so is likely to benefit from increased footfall at the southern end of the town centre generated by the application proposal.

- **Harton Nook district centre -** Harton Nook, located within the Harton residential areas of South Tyneside, is considered to be a strongly performing district centre. Convenience uses targeting 'top up' or specialist shopping are well represented with a good level of choice and competition for local resident. The low vacancy rate, strong levels of pedestrian footfall and good quality physical environment are clear indicators of the centre's strength and vitality.

- **Boldon Lane district centre –** This centre is located at the western edge of South Shields. It primarily services the West Harton residential area and, through the anchor Lidl store and good mix of the top up retail and service uses, is considered to be performing satisfactorily. The centre is located on a main vehicular route connecting South Shields residential areas, so is likely to benefit from a reasonable proportion of 'pass by' trade.

- **Westoe Road local centre –** this traditional shopping street extends from the southern end of Westoe Bridges district centre. It is performing well as a local centre, providing a reasonable range of uses that would be expected in a centre of this scale and nature. It does not contain any convenience uses of any significance and is unlikely to exert a significant influence on expenditure patterns outside of the immediately surrounding area.

4.14 Generally the district and local centres in the catchment area perform an important role in meeting the immediate and 'top-up' convenience shopping needs of residents within the immediate vicinity. None of the centres include a foodstore of a scale or nature that is providing an effective main food shopping facility, and as such are unlikely to be at risk of significant adverse impact from the proposed foodstore. These centres all include a range of non-retail uses, such as public houses, bookmakers, community centres and, as such, will continue to be the focus for day to day and local community activities.

Committed Development

4.15 No committed developments have been identified with the defined catchment area. This has been agreed with Officers during pre-application discussions.

5. Sequential Assessment

5.1 This section of report presents the findings of our sequential assessment. This focuses primarily on South Shields town centre, given the location of the application site within the town centre boundary. However, for robustness, consideration has also been given to any opportunities within defined district centres within the catchment area.

5.2 We have considered the potential of alternative sites to accommodate the proposed foodstore (6,000 sqm gross retail floorspace and associated car parking and servicing area). This is the only element of the development proposals which constitutes a 'town centre use' and is in an 'edge-of-centre' location for the purposes of the sequential test. The parameters for the assessment are described below. Full details of the sites assessed are provided in **Appendix 4**.

Context

5.3 As set out previously, the majority of the 'town centre uses' proposed in the current outline planning application fall within either the defined South Shields town centre boundary (for leisure uses) or within the defined PSA (for retail uses). Applying national planning policy as contained in the NPPF it is not necessary to undertake the 'sequential test' in respect of these uses.

5.4 The proposed foodstore site is primarily located beyond the defined PSA, and so for retail planning purposes is considered 'edge-of-centre'. This has been agreed with STC Planning Officers at pre-application stage.

5.5 Paragraph 24 of the NPPF requires development proposals in edge-of-town centre locations (along with those in out-of-centre locations) to demonstrate that more central options have been thoroughly assessed, and are not suitable, available or viable to accommodate the proposed foodstore development.

5.6 The foodstore as proposed reflects the recommendations of the South Tyneside Retail Study to provide an additional foodstore facility with South Shields. This is in order to provide effective choice and competition with the Asda store, and reduce the need for residents to travel outside of the area to undertake main food shopping.

Search Parameters

5.7 In order to undertake a sequential assessment, the parameters of the search must be defined. It is reasonable that any assessment must seek to identify and assess sites that can accommodate the development proposed, and fall within the area where a need has been identified.

5.8 As set out in the South Tyneside Retail Study, there is a need for an additional foodstore in South Shields in order to reduce overtrading in existing facilities and reduce leakage out of the area. The proposed foodstore would meet this identified need. Should the foodstore be located outside of South Shields town centre then it would not reduce leakage out of the area, or be able to function as an effective alternative to existing provision in the town centre.

5.9 Furthermore, it has been identified from the South Tyneside Retail Study and our healthcheck of the town centre that the southern end of the town centre around Fowler Street is not performing as strongly as the remainder of the centre. The development proposed would provide an anchor foodstore at this end of the centre, encouraging higher levels of pedestrian footfall and commercial interest within this part of the centre, in line with the overall objectives of the 365 Vision.

5.10 The sequential analysis undertaken therefore primarily focuses on sites within or on the edge of the defined South Shields PSA. In considering edge-of-centre, it is necessary to assess whether these sites offer potential for better linkages and connectivity with the primary shopping area than the application site, in order to be sequentially preferable. For completeness, in association with the centre healthchecks, site visits were also undertaken to the designated district centres within the catchment area to identify any potential opportunities within these centres.

5.11 We have considered the potential of alternative sites to accommodate a convenience retail development of the scale and nature proposed on the application site at Fowler Street, with some allowance for flexibility (see below).

5.12 The following characteristics have therefore been identified:

- Minimum site size of 2.7ha, to accommodate the building and associated car parking and servicing;
- Ability to serve the South Shields catchment area through reducing levels of convenience goods expenditure leaking out of the area and overtrading within the existing town centre anchor foodstore (Asda); and
- Ability to serve the southern end of the town centre and strengthen the performance of this part of the town centre.

5.13 We have, however, approached this in a flexible manner as required by the NPPF.

Scope for Flexibility and Disaggregation

5.14 The NPPF requires developers to adopt a flexible approach to development when applying the sequential approach.

5.15 In relation to the proposed foodstore development, the South Shields Retail Study identifies a deficiency in foodstore provision within South Shields, which could be addressed through the provision of a new foodstore in South Shields town centre. To ensure that South Shields' residents utilise the foodstore, it is necessary to be of sufficient scale to provide an effective alternative to the existing Asda store within the town centre, as well as foodstores further afield, particularly in terms of product ranges available. A significantly smaller store would not be able to stock the range of products expected by residents and is unlikely to divert people from their existing shopping locations. This was result in the continuation of the current unsustainable shopping patterns and would not address the identified need to increase expenditure retention in South Shields. .

5.16 These issues are relevant and material considerations in planning terms, as evidenced by the outcome of the 'Dundee Case' (Tesco Stores Ltd v Dundee City Council [2012] UKSC 13). In this case, *inter alia*, the definition of 'suitability' in terms of assessing and identifying alternative sites was tested. The Supreme Court adjudged that 'suitability' means suitable for the development proposed by the applicant, provided that it has sufficient regard to the need for flexibility. Moreover, regard should also be had to the general statement by Lord Hope in respect of the sequential approach that the, *'criteria are designed for use in the real world in which the developers wish to operate, not some artificial world in which they have no interest in doing so'.*

5.17 Therefore, in light of the above, we consider that the application site is the most sequentially preferable location for the proposed foodstore development. It is large enough to accommodate a major foodstore of the scale proposed, which is the form of development proposed by the applicant. This scale of development i.e. a foodstore of c. 6,000 sq. m., is needed to enhance competition and choice within South Shields town centre and promote sustainable shopping patterns. As set out in the following text, there are no opportunities within the defined South Shields PSA ('in-centre opportunities'), or any edge-of-centre opportunities in a sequentially preferable location that could accommodate the proposed foodstore development.

Alternative Sites' Assessment

5.18 Full details of the sites identified are provided in **Appendix 4.**

Site 1: South Shields Bus Station, South Shields town centre

5.19 This 0.4ha site comprises the operational South Shields bus station, which is due to be replaced by a new transport interchange as part of the 365 Vision. The proposals for the new interchange, however, will incorporate part of this site so therefore it is considered unavailable to accommodate the proposed foodstore.

5.20 Furthermore, at just 0.4ha the site is of insufficient size to accommodate a foodstore of the scale and nature proposed in the current application. It is therefore not suitable nor viable.

Site 2: Land at Barrington Street, South Shields town centre

5.21 Consideration has been given to a 1ha site at Barrington Street. The site is located within the defined PSA and is considered to be in-centre in retail policy terms. Whilst the site is currently fully occupied by a range of uses, this site is identified within the 365 Vision for a mix of retail and leisure uses and the formation of a new public square. As such, the site is considered to be coming forward for alternative development and is not available to accommodate the application proposal.

5.22 In addition, the site comprises a Grade II listed building and a locally listed building which, although required to be incorporated within the proposed leisure scheme on the site, would need to be demolished in order to incorporate a large single floorspace retail unit, such as the foodstore proposed. Furthermore, this site is located adjacent to the Asda foodstore, currently the main foodstore anchor in the town centre. The application proposals seek to provide an additional anchor store at the southern end of the centre, to assist in strengthening that end of the centre. A foodstore on this site would be inappropriately located to meet that need.

5.23 In conclusion, this site is neither available, viable nor suitable to accommodate the proposed foodstore development.

Site 3: Former Marks & Spencer unit, King Street, South Shields town centre

5.24 This retail unit comprises c.1,300 sq.m retail floorspace and is vacant following the closure of the Marks & Spencer store in Spring 2014. It is not being actively marketed and so it is unclear whether it is available for reoccupation. However, providing just over 1,300 sqm the unit is of insufficient size to accommodate a foodstore of the scale and nature proposed in the current application. The site is also constrained by surrounding uses thereby limiting any redevelopment options.

5.25 The site is therefore not suitable nor viable and is discounted on this basis.

Site 4: Land at Albermarle Street, South Shields town centre

5.26 This 0.9ha site located on the north and south sides of Albermarle Street is within the town centre boundary, but only partially within the PSA. As such, it is considered partially 'in-centre' and partially edge-of-centre in retail policy terms. The site is identified within the 365 Vision. The western and south eastern parts of the site are to form part of the new transport interchange, and a new retail unit is proposed to be created on the north eastern portion of the site.

5.27 The proposed retail unit, on the junction of Keppel Street, will comprise less than 2,000 sq.m gross floorspace across 2 floors. It is therefore of insufficient size to accommodate a foodstore of the scale and nature proposed, even before account is taken of the associated petrol filling station, car parking and servicing areas required. Indeed, at less than 1ha, the site as a whole is of insufficient size to accommodate the scale of foodstore proposed, notwithstanding the fact that the majority of the site is identified for alternative development. The site is therefore not a sequentially preferable opportunity to the application site.

Site 5: Former Mecca Bingo, Dean Road district centre

5.28 This site in the Dean Road district centre has become vacant following the closure of the Mecca Bingo unit. However, the site extends to just 0.13ha and is constrained by occupied commercial and residential properties. There is not considered potential to amalgamate adjacent land to create a site of sufficient size. As such this site is neither viable nor suitable.

5.29 In any event, the site is located outside of South Shields town centre and would be unable to meet the same need as the application proposal in providing a further anchor foodstore and increasing choice in the town centre, in order to increase expenditure retention. The site is therefore discounted.

Conclusion

5.30 Consideration has been given to alternative sites within or on the edge of South Shields town centre. Defined district centres within the catchment area have also been included to ensure a robust and comprehensive assessment. Our assessment has considered the potential of alternative sites to accommodate a foodstore of the scale and nature proposed at Fowler Street within the current planning application.

5.31 None of the sites identified are considered to be suitable, available and viable to accommodate the foodstore development proposed. A number of these sites are either coming forward for alternative forms of development and/or are subject to other specific constraints, which mean that they are not suitable or viable to accommodate the development. Table 5.1 provides a summary of the assessment conclusions.

Site	Centre	Sequential status	Reason for discounting
South Shields Bus Station	South Shields town centre	In-centre	Not suitable, viable nor available
Barrington Street	South Shields town centre	In-centre	Not suitable, viable nor available
Former M&S, King Street	South Shields town centre	In-centre	Not suitable nor viable
Albermarle Street	South Shields town centre	In-centre / Edge of centre	Not available nor suitable
Former Mecca Bingo	Dean Road district centre	In-centre	Not suitable nor viable

Table 5.1: Sequential Site Summary

5.32 The foodstore proposals have been developed to meet an identified need for further provision within South Shields town centre, and form part of a wider package of measures to enhance the town centre. The subject site has been identified as the most appropriate location in which to deliver the foodstore element of the scheme, and enables the wider town centre regeneration proposals to be brought forward on alternative sites in the centre. The development of the proposed foodstore in an alternative location could not achieve the delivery of the wider town centre investment.

5.33 A sensible and logical interpretation and application of the 'sequential test' confirms that the proposal is compliant with the relevant locational provisions of the NPPF. Moreover, our assessment demonstrates that, even adopting a flexible approach, there are no premises or sites in sequentially preferred locations that are capable of accommodating the proposed foodstore element of the development. We conclude therefore that the proposal satisfies the sequential approach to site selection.

6. Impact Assessment

6.1 As set out in Section 3.0, the NPPF requires applications for retail uses over 2,500 sq.m m, outside of designated centres to be accompanied by an impact assessment which considers:

- the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area, up to five years from when the application is made (ten years for major schemes which will have a longer term impact); and

- the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal.

6.2 This first part of this section sets out our economic assessment of retail impacts associated with the foodstore development, drawing on the data and analysis outlined above, and appended to this report. The impact analysis is presented in full in **Appendix 6** and summarised below.

6.3 We have assessed the impact of the proposed foodstore development on existing centres on an individual/solus basis. In assessing the significance of impacts we have had regard to the current health and performance of key centres as presented in Section 4. The second part of the section then considers the potential impact of the proposed foodstore development upon planned investment in South Shields town centre.

6.4 Given that the leisure and other retail uses proposed within the current application are located within the designated centre, for the purposes of application of the NPPF retail tests, they are not subject to an economic impact assessment. They do, however, comprise planned investment within South Shields town centre so they are considered within that element of the assessment.

Methodology

6.5 The methodology is set out in our Pre-Application Scoping Document (**Appendix 1**). This approach has been discussed and agreed with STC.

6.6 We have adopted a conventional step-by-step approach. This methodology is widely applied in retail assessment work and is considered to be logical, robust and transparent.

6.7 The approach is based on an estimate of scheme turnover (and supporting Catchment Area expenditure) in the 'design year' (2019), and a series of judgements relating to the proportion of turnover estimated to be diverted from existing centres and retail facilities. These judgements reflect factors such as scale, nature of retail offer, location/distance, and extent of 'trading overlap' (or competition), underpinned by the principle of 'like competing with like'.

6.8 Proximate facilities with a similar catchment, and trading in the same market sector, will experience the greatest impacts adopting this approach. Conversely, distant facilities of a differing scale and nature (such as specialist retailers and corner shops) will be far less likely to experience diversion of trade.

Convenience Goods Economic Assessment

Expenditure Capacity

6.9 In order to inform the assessment of impact upon facilities within the Catchment Area, consideration has been given to levels of available convenience goods expenditure capacity forecast to be available.

Table 6.1: Catchment Area Convenience Goods Expenditure Capacity in 2019

	Existing Market Share (72%)	Increased Market Share (75%)	Increased Market Share (80%)
Available Expenditure	134.5	138.9	146.5
Benchmark Turnover of Existing Facilities	101.7	101.7	101.7
Expenditure Capacity	**32.7**	**37.3**	**44.8**

Source: Economic Assessment, Appendix 6

6.10 As set out in Appendix 6, based on the household survey information contained within the South Tyneside Retail Study, the defined Catchment Area retains 72% of convenience goods expenditure generated by residents living in the area (‘market share’). Table 6.1 identifies there is forecast to be over £32m expenditure capacity to support additional convenience retail development within the Catchment Area by 2019 if the existing market share is maintained. This increases to over £38m in 2024. A significant proportion of this capacity relates to the overtrading within the Asda store, as identified within the South Tyneside Retail Study.

Expenditure Retention

6.11 The South Tyneside Retail Study identifies there is a requirement and scope to increase the existing rate of retention in the Catchment Area, in order to South Shields town centre to retain a greater proportion of expenditure generated in the area. The existing market share reflects of the scale, nature and choice of existing convenience retail facilities within the Catchment Area, and the presence of foodstores further afield drawing trade out of the town centre. The replacement Asda store at Coronation Street did not significantly increase expenditure retention within South Shields town centre as whilst it enabled Asda to provide an improved customer shopping environment and stock a wider range of goods, it did not significantly enhance the choice of facilities for local residents.

6.12 The proposed foodstore, by providing an additional anchor retailer in the town centre, operated by an alternative retailer to Asda, will provide genuine choice to the existing Asda store. This will enhance the range of provision and enable residents to meet their convenience shopping needs more locally. As such the level of expenditure leakage can be reduced and the proportion of locally generated expenditure retained in South Shields increased, in accordance with the recommendations of the South Tyneside Retail Study.

6.13 Table 6.1 illustrates that, on the basis that the catchment area's market share increases to between 75% and 80%, there will be convenience goods expenditure capacity of between £37m - £45m to support additional convenience goods facilities by 2019. This is forecast to increase further to £43m - £49m by 2024. This would be more than sufficient to accommodate the turnover of the proposed foodstore.

6.14 An increased market share of this order is considered to be entirely achievable and realistic following the implementation of the proposed foodstore. Indeed, the economic assessment forecast that the market share will be increased to around 80% following the implementation of the proposed foodstore development, thereby achieving one of the key recommendations set out in the South Tyneside Retail Study.

6.15 It is assumed the foodstore would achieve a turnover to floorspace ratio of around £12,500 per sq.m, which based on information contained in the 2104 Verdict Report of Grocery Retailers and 2014 Mintel Retail Rankings is the median of the main foodstore operators with the exception of Asda (Morrisons, Sainsbury's, Waitrose and Tesco). On the basis, assuming the catchment area's market share increases to between 75-80%, the levels of capacity expenditure identified could support between 2,980 sq.m – 3,585 sq.m net convenience floorspace in 2019, increasing to 3,419 sq.m – 3,951 sq.m by 2024.

6.16 This capacity assessment is broadly in accordance with the findings of the South Tyneside Retail Study. As set out previously the retail study was prepared in 2012, towards the end of the economic recession, at a time when expenditure growth forecasts remain subdued. This assessment incorporates more up-to-date population and expenditure data, along with more recent data on growth rates and benchmark turnovers, which will result in some differences between the two studies. Furthermore, this assessment considers capacity across the defined catchment area as a whole, rather than within the individual South Shields and Harton zones, which is the approach adopted in the retail study. Notwithstanding these methodological differences and the application of updated data to the assessment, our conclusions accord with the retail study in that there is sufficient convenience goods expenditure capacity with the South Shields catchment area to accommodate a foodstore of circa 6,000 sqm gross, which would comprise around 2,415 sqm net convenience floorspace.

Solus Impact

6.17 In addition to the above expenditure capacity analysis, a quantitative assessment of the trade diversion likely to result from the development of the proposed foodstore in South Shields town centre has been undertaken.

6.18 Based on the approach outlined above and set out at **Appendix 6**, Figure 6.2 provides a summary of the anticipated trading effects of the proposal on the key retail destinations within the defined Catchment Area. **Table 9** at **Appendix 6** provides full detail of the forecast convenience goods trade diversion flows.

Table 6.2: Anticipated Impact on the Convenience Retail Turnover of Existing Retail Destinations in 2019

Centre	Facility	Solus

South Shields town centre	Asda, Coronation Street	-16.0%
	Morrison's, Ocean Road	-6.0%
	Local town centre shops	-2.3%
Other defined centres	Frederick Street district centre	-5.0%
	Dean Road district centre	-4.6%
	Harton Nook district centre	-3.2%
	Boldon Lane district centre	-6.4%
	Local centres	-1.2%
Other facilities	Tesco, Simonside Industrial Estate	-7.3%
	Asda , Boldon Colliery district centre	-4.7%
	Morrisons, Viking Precinct, Jarrow town centre	-2.2%
	Morrisons, Ocean Park, Sunderland	-5.6%

6.19 Given the nature of the proposed foodstore within South Shields town centre, and the draw of the town centre from the wider South Tyneside and north Sunderland area, as well as tourist trade, the impacts are forecast to be spread across a number of stores, within the catchment area and beyond.

6.20 The proposed foodstore will be operated by one of the main foodstore operators, and will compete on a like for like basis with these foodstores.

6.21 The most significant proportion of the new store's trade is expected to be drawn from the existing Asda store in South Shields. This reflects the objective of the proposed store in providing effective competition to this Asda store, and providing residents in South Shields with genuine choice in main food shopping provision. It is forecast that 30% of the proposed store's turnover will be drawn from the Asda store, which equates to a convenience trade diversion impact of £8.9m in 2019 (-16.0%). This level of impact, however, should be viewed in the context of the store's existing performance. As set out in **Table 5 at Appendix 6,** the store is trading very strongly, £20m (60%) above its company average level. Even after taking account of the forecast trade diversion to the proposed store, the Asda store is still estimated to be trading at 39% above its company average level (**Table 9 at Appendix 6**).

6.22 In relation to the Morrisons store, the trade diversion impacts are forecast to be more limited at around £1.2m (6.0%). This reflects the role this store currently plays as a secondary store to the existing Asda given its smaller size and more constrained location. It is not currently able to compete effectively with the Asda store for the main food shopping needs of local residents, a role the proposed foodstore is intended to meet. A trade diversions impact level of 6% upon this store does not give rise for concern regarding its long term viability. In any event, as recognised in the retail study, it is considered that the turnover of this store has been underestimated, as the surveys do not necessarily pick up the extent to which this store is used for top up shopping by visitors / workers in the centre. As such, it is consider the trade diversion impact forecast may be an over estimation.

6.23 In terms of the impact upon defined centres, the trade diversion impact upon convenience turnover of district and local centres within the catchment area are all forecast to be 6% or below. The majority of the impact is forecast to be on the national multiple convenience retailers within these centres, such as the Lidl stores at Frederick Street and Boldon Lane district centres, and the frozen food specialists and Co-op, Tesco Express and Sainsbury's Local convenience stores. The individual impact upon any one particular store is forecast to be limited, reflecting the role that these stores primarily play in meeting 'top up' or immediate shopping needs. The proposed foodstore is intended to provide a facility which is capable of providing residents with more choice and a genuine alternative to the Asda foodstore in the town centre, and those large stores further afield. The provision in the district centres which is targeted primarily at the top-up and specialist food shopping serves a different market to the proposed foodstore with the retail hierarchy. As such, it is considered by enabling residents to meet more of their needs locally, the proposed foodstore will strengthen the local retail hierarchy. .

6.24 In considering the impact upon the district centres, it is necessary to consider the role and function these centres currently play. The household survey results and our healthchecks have identified that these centres primarily function as local service centres, supported by day to day retail uses. All of these centres are dominated by service uses, a common feature of district, local and neighbourhood centres, and these will be unaffected by the application proposals. They will remain easily accessible to those residents living in the immediate surrounding area.

Comparison Goods Assessment

6.25 The retail impact assessment has focused primarily on the convenience goods floorspace within the foodstore. The comparison goods floorspace is a smaller element of the proposal and in a foodstore of this scale will comprise a significant proportion of 'ancillary' comparison items such as health & beauty products, medicines, pet food and greeting cards / seasonal products. It is expected that there will be an element of household products, clothing and toys / books sold within the store, but the choice and range of these products will be limited and will remain complementary to the core convenience business.

6.26 The comparison goods floorspace within the foodstore will primarily compete on a like for like basis with other foodstores, primarily the Asda store in South Shields town centre and stores further afield, including Tesco at Simonside, Asda in Boldon and Morrisons at Ocean Park, Sunderland. Indeed the comparison floorspace proposed will enable the proposed store to compete with the existing Asda store, and those larger stores further afield and provide a realistic alternative for residents, and reduce the levels of expenditure leakage out of the area.

6.27 **Table 12 at Appendix 6** sets out the anticipated impact upon comparison goods facilities within the catchment area. It should be noted that household surveys can often underestimate the comparison goods expenditure flows to foodstores, such as the Asda in South Shields town centre. It is likely that respondents have identified South Shields town centre as their main comparison goods location, and this will comprise a series of linked trips to a number of comparison goods retailers, of which Asda (as part of their food shopping) is likely to be one. As a result a proportion of the 30% of the store's turnover drawn from South Shields town centre will include trade drawn from the Asda store.

6.28 It is forecast that the proposed foodstore would have a 2.4% impact upon existing facilities within South Shields town centre. It is likely that this will be spread across a number of facilities. It is likely that the comparison goods sold within the proposed foodstore will compete with small elements of goods sold within individual comparison goods retailers in the town centre. With the exception of the Asda store, it would not compete directly with any individual store. Indeed, not all of the comparison uses would be directly affected by this proposal. Of the comparison goods uses present within the centres, a significant number sell goods that would not be sold within a foodstore of the scale proposed (e.g. carpets, bathroom / kitchens, pets, jewellery, DIY and ornaments / chinaware).

6.29 Whilst it is acknowledged that there will be some level of trade diversion from existing facilities within the town centre, the proposed foodstore, along with the wider outline planning application proposals, will overall have a positive impact upon the town centre facilities. The regeneration proposals contained with the current application, by enhancing the choice and range of retail and leisure facilities will increase the profile of South Shields town centre and draw in additional footfall, and with it expenditure. The proposed development is located across the extent of the town centre, ensuring that the benefits will be felt throughout and encouraging shoppers and visitors to traverse the full extent of the town centre.

6.30 The proposed comparison floorspace within the foodstore also needs to be considered in the context of the significant growth in expenditure generated within the catchment area. As set out in **Table 8B at Appendix 6,** the foodstore is forecast to achieve a comparison goods turnover of £11m. The catchment area is estimated to generate comparison goods expenditure of £264m in 2019, increasing to £342m by 2024. The foodstore turnover equates to just 4% of available comparison goods expenditure.

6.31 As with the convenience goods assessment, an analysis of comparison goods expenditure capacity has also been undertaken. As set out in **Appendix 6**, based on the household survey information contained within the South Tyneside Retail Study, the defined catchment area retains 44% of comparison goods expenditure generated by residents living in the area ('market share'). There is forecast to be over £25m expenditure capacity to support additional comparison goods retail development within the catchment area by 2019 if the existing market share is maintained. Should expenditure retention in the area be increased through the development of this foodstore and the other retail floorspace proposed in the current outline application, there is forecast to be £40m expenditure capacity in 2019 assuming a 3% increase in retention, increasing to £48m capacity within a 6% increase in retention.

6.32 It is clear that there is more than sufficient comparison goods expenditure within the development to support the comparison goods floorspace proposed within the foodstore. Furthermore, with forecast growth in comparison expenditure within the Study Area of around £6m per annum, the entire comparison goods turnover of the proposed foodstore would be accommodated by spending growth over a 12 month period.

6.33 In view of the above, it is considered that the comparison goods element of the proposed foodstore would not give rise to adverse impacts upon existing centres.

Impact upon Planned Investment

6.34 In undertaking an impact assessment of a proposed development, paragraph 26 of the NPPF makes clear that this should include an assessment of the impact on existing, committed and planned public and private investment in the centres in the catchment area of the development. As set out at paragraph 16 of PPG, planned investment for the purposes of the impact test should consider the extent to which an application is likely to undermine planned developments or investments based on the effects on current/ forecast turnovers, operator demand and investor confidence.

6.35 From our pre-application discussions with Planning Officers and knowledge of the local area, we are aware the main focus point for investment within the catchment area is the 365 Vision proposals.

6.36 As set out throughout the statement, the proposed foodstore forms part of a wider outline planning application for the development of a range of town centre uses throughout South Shields town centre. The outline planning application seeks to bring forward the regeneration proposals set out in the 365 Vision and as such the proposed foodstore forms part of the planned investment within the town centre.

6.37 It is recognised, however, that the proposed location of the foodstore differs to that identified within the 365 Vision, and that a foodstore is not in complete accordance with the site's allocation with the South Shields AAP.

6.38 The 365 Vision Masterplan identifies the siting of the foodstore on the northern part of the Fowler Street site, with a bulky goods retail unit on the southern part of the site. Following the preparation of the Masterplan more detailed design and site investigations have been undertaken by Muse. It has been identified that due to the sloping of the site and levelling requirements, the northern part of the site, which is closest to the PSA, was not suitable to accommodate a foodstore of the scale and nature proposed. It has been identified that the southern part of the site, which also abuts the PSA, was a more suitable location for the following reasons:

- it would enable the transport interchange and a retail unit to be developed on the northern part of the site, thereby ensuring the transport interchange is located within the heart of the town centre.

- Locating the store on the northern part of the site would provide a physical barrier to the proposed transport interchange, preventing the interchange from being fully integrated with the remainder of the town centre.

- Developing the store on the southern, at grade, part of the site meanwhile enables better access for both pedestrians, with direct connections to the Metro underpass connecting to Garden Lane.

- Provides better access arrangements for the servicing and avoids the need for delivery vehicles to access the store via Fowler Street.

6.39 Furthermore, by located the foodstore on the southern end of the Fowler Street site, this will increase footfall along Fowler Street as a whole and the car parking area will be sited to the north (front) of the store, providing a 'town centre' car park, as opposed to a parking area just serving the foodstore. This would be of benefit to the town centre overall.

6.40 As set out in Section 3.0, the site is identified as a mixed use opportunity site for development within Use Classes A1 (bulky goods comparison), A2, B1, B2, C3, and / or D2. The AAP, however, was adopted in 2008, over 6 years ago, and this designation was put forward on the basis of the findings of the 2007 South Tyneside Retail Study, prepared by White Young Green. This study advised restricting the use of this site to bulky good retailing as it identified limited capacity for comparison goods retailing which should be focused on the re-use and redevelopment of existing PSA properties.

6.41 This has now been superceded by the conclusions of the 2012 Retail Study prepared by GVA. As summarised earlier this study identifies greater levels of expenditure capacity to support additional convenience and comparison goods shopping in South Shields than the previous study, including the provision of a new foodstore capable of competing effectively with the existing Asda store in the town. As set out in section 5.0, there are no sites within the primary shopping area capable of accommodating the scale of foodstore identified as required in the 2012 Retail Study.

6.42 In addition, reflecting the changing economic circumstances since the adoption of the AAP, demand for bulky goods retailing in this location has significantly declined. Planning permission was granted for bulky goods retail floorspace on land off Fowler Street, however this has not come forward due to lack of demand in this location for such floorspace.

6.43 Due to changing economic circumstances and site constraints the proposals for Fowler Street set out in the 365 Vision and South Shields AAP are not considered to be deliverable. The current detailed proposals, despite some divergence from the 365 Vision and South Shields AAP, provide a more appropriate solution to achieving the town centre regeneration aspirations, and delivering investment within the centre.

6.44 Indeed, the developments will have a positive impact upon the centre. As set out in **Table 11** at **Appendix 6**, the turnover of the foodstore would result in an uplift of £26m (11.7%) in the South Shields town centre turnover by 2019. The wider measures proposed in this current outline application, including new cinema and food & drink uses, will also increase the attractiveness of the town centre to shoppers and visitors, thereby having a further positive impact upon the overall performance of South Shields town centre.

6.45 It is clear therefore that the proposed foodstore element is an integral part of planned investment within South Shields town centre and could not be considered to have an adverse impact upon investment within the centre. Indeed, the capital returns achieved through the delivery of the foodstore element will assist in facilitating further phases of the town centre regeneration proposals.

Hebburn Town Centre Investment

6.46 We are aware of the ongoing aspirations of South Tyneside Council to bring forward a foodstore-led regeneration of Hebburn town centre. Tesco's regeneration arm, Spenhill, previously developed proposals for the site, but these did not reach planning application stage and it is understood that Spenhill have confirmed they will not be proceeding with this site.

6.47 We are aware that part of the site earmarked for the foodstore development is being brought forward for alternative community uses, thereby reducing the available size of the site for any future foodstore proposals. As such, should commercial interest emerge in the future, it would be for a foodstore of a smaller scale to that proposed in the current application.

6.48 In any event, as demonstrated by the household survey results, South Shields and Hebburn comprise two distinct catchment areas for convenience goods spending. The development of the proposed foodstore at Fowler Street in South Shields town centre would not affect the deliverability of a foodstore development in Hebburn town centre.

Overall Impact Conclusions

6.49 As demonstrated above, the proposed foodstore development on the foodstore site at Fowler Street would not have a significant adverse impact on the vitality and viability of any individual centre within the catchment area. The most significant impact would fall upon the Asda store within the town centre; however this store currently performs well in excess of its company benchmark turnover and would continue to do so following the implementation of the proposed foodstore development.

6.50 The limited trade diversion impacts from existing facilities within the Catchment Area should be viewed in the context of the significant benefits which would result from the foodstore development at Fowler Street. This includes enhancing choice in foodstore provision for South Shields' residents by providing a new store which alongside the existing Asda store provides genuine choice to South Shields residents and reduces the need to travel to facilities further afield, particularly those in out-of-centre locations.

6.51 In addition, it should be noted that the proposed foodstore development, along with the other uses proposed in the current outline planning application and the detailed application for a Transport Interchange, will deliver the significant town centre improvements identified in the 365 Vision and subsequent Masterplan. The development proposals will have a positive impact upon South Shields town centre, through both increased turnover and generating linked trips with existing facilities in the centre.

6.52 In considering the implications of the potential impact on South Shields town centre it is important to highlight the following:

- Overall, the proposed foodstore development will have a positive impact upon convenience and comparison goods turnover of the centre, resulting in a net increase of £26m in 2019.

- The proposed foodstore forms part of a wider package of measures (the subject of the current outline planning application and a detailed application for new Transport Interchange) which will deliver a range of town centre improvements leading to positive impacts on the centre.

- The proposed foodstore will provide an anchor retail facility at the southern end of the centre, assisting in strengthening not only this end of the town centre through increased footfall and enhanced commercial interest, but the town centre as a whole through linked trips and delivery of the other town centre developments within the current applications

- The service, leisure, civic and community uses will be unaffected by the proposed foodstore, and will continue to attract visitors to the town centre who will undertake linked trips to the other retail uses within the centre.

- Other shops will continue to benefit from growth in expenditure over the assessment period which, along with the increased footfall and expenditure arising from the wider town centre proposals, will offset the trade diversion forecast.

6.53 In summary, our assessment confirms that the effects of the current proposal will not lead to a significant adverse impact on the continued role and function of South Shields town centre, or any defined centres within the defined catchment area. Indeed, the proposal will provide genuine choice in foodstore provision within South Shields town centre, reducing the need for residents to travel to facilities further afield. This will result in increased expenditure retention with the town centre, in line with the recommendation set out in the South Tyneside Retail Study, and overall have a positive impact upon the role and function of South Shields town centre.

7. Assessment against Policy and Conclusions

7.1 In this section of the report we assess the proposals in relation to the retail policy framework drawing on the impact and sequential analysis outlined in the previous sections. We also set out a summary of key findings and our conclusions.

Policy considerations

7.2 The policy context is formed principally by NPPF, Core Strategy and South Shields AAP. The key considerations are:

- Sequential assessment of the proposed foodstore development, to consider whether any in-centre or edge-of-centre opportunities exist in South Shields town centre that could accommodate the development proposed; and

- Impact of the proposed foodstore development upon the vitality and viability of South Shields town centre and planned investment therein.

7.3 The conclusion of our assessment in relation to these matters is set out below.

Sequential Assessment

7.4 We have undertaken a sequential assessment focussing on South Shields town centre. Consideration has, however, been given to opportunities within the defined district centres within the catchment area for completeness. We have been unable to identify any available, suitable or viable alternative sites within a sequentially preferable location capable of accommodating the proposal.

7.5 The foodstore element of the development is linked inextricably to the South Shields town centre regeneration proposals. The foodstore is intended to enable residents within the South Shields catchment area to better meet their convenience shopping needs locally, by creating more choice and effective competition with existing provision. If the foodstore were to be located elsewhere (in whole or part), residents would be unable to meet their needs within South Shields town centre. The site of the proposed foodstore, being within the town centre boundary, is suitable for the use proposed by the applicant, a key consideration in the 'Dundee case' (Supreme Court). Applying the sequential approach on a flexible basis (as required by policy) there are no other suitable alternatives capable of meeting the identified need.

7.6 A sensible and logical interpretation and application of the 'sequential test' confirms that the proposal complies with the relevant locational provisions of NPPF. Moreover, our assessment demonstrates that, even adopting a flexible approach, there are no premises or sites in sequentially preferred locations that are capable currently of accommodating the foodstore element of the proposed development.

7.7 The proposed foodstore development is therefore in accordance with the sequential approach, and Core Strategy policies ST1 and SC1 which seek, inter alia, the locating of retail development within town centres and maximising the re-use of previously developed land.

Retail Impact – Vitality and Viability

7.8 To assess the implications of the proposal on the vitality and viability of defined centres, we have quantified the convenience and comparison goods impact of the proposed foodstore development on South Shields town centre and district centres in the catchment area. The outputs of the analysis have been summarised in the previous section.

7.9 The greatest impact of the proposed foodstore is forecast to be on the existing Asda store within the town centre. This reflects the objective of the proposed store in providing effective competition to this Asda store, and provides residents in South Shields with genuine choice in provision. This store, however, is trading very strongly at 60% above its company average level, and even after taking account of the forecast trade diversion to the proposed store, the Asda store is still estimated to be trading at 39% above its company average level.

7.10 Impacts upon other facilities within South Shields town centre are forecast to be low, reflecting the limited degree to which these facilities will compete directly with the proposed foodstore. Indeed, the proposed foodstore development will have a positive overall impact upon the convenience and comparison goods turnover of the centre, resulting in a net increase of £26m in 2019. The limited trade diversion impacts upon individual facilities should be viewed in the context of the significant benefits which would result from the foodstore development at Fowler Street. This includes enhancing choice in foodstore provision for South Shields residents, and increasing levels of expenditure retained within the town, by providing a new store which can compete effectively with the Asda in the town centre and facilities further afield. The foodstore element of the development proposals will also strengthen the southern end of South Shields town centre which is currently weaker than other parts of the centre; in accordance with Core Strategy Policy SC2, it will assist in reviving the borough's town centres and enhance their retail character and function.

7.11 The trade diversion impact upon convenience turnover of defined district and local centres within the catchment area are all forecast to be 6% or below, with the individual impact upon any one particular store forecast to be limited (reflecting the role these stores primarily play in meeting 'top up' or immediate shopping needs). The proposed foodstore would complement existing provision within these centres. The district centres primarily function as local service centres supported by day to day retail uses, and they will continue to do so after implementation of the proposed foodstore development.

7.12 We conclude that the proposal complies with policy relating to impacts on the vitality and viability of centres.

Retail Impact – Planned Investment in Centres

7.13 The proposed foodstore forms part of a wider outline planning application for the development of a range of town centre uses throughout South Shields town centre. The outline planning application seeks to bring forward the regeneration proposals set out in the 365 Vision and as such the proposed foodstore forms part of the planned investment within the town centre.

7.14 The development will have a positive impact upon the centre, with the proposed foodstore alone forecast to result in an uplift of £26m (11.7%) in the South Shields town centre turnover by 2019. The wider measures proposed in this current outline application, including new cinema and food & drink uses, will also increase the attractiveness of the town centre to shoppers and visitors, thereby having a further positive impact upon the overall performance of South Shields town centre. This in accordance with the requirements of South Shields AAP Policies SS1 and SS7.

7.15 The proposed foodstore element is an integral part of planned investment within South Shields town centre and could not be considered to have an adverse impact upon investment within the centre.

Assessing the significance of impact upon centres

7.16 As noted in Section 3 above, the NPPF (paragraph 26) identifies the impact considerations against which planning applications for main town centre uses (not in a centre and not in accordance with an up-to-date development plan) should be assessed. Applicants are required to consider two issues only:

- *'The impact of the proposal on existing, committed and planned public and private investment in a centre or 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 area, up to five years from the time the application is made...'*

7.17 Paragraph 27 of the NPPF sets out key guidance on the interpretation of the paragraph 26 'impact tests'. An application should only be refused where the proposed development is likely to have a '**significant adverse'** impact on 'one or more of the above factors' (NPPF, paragraph 27). This is critical consideration – impact alone does not justify refusal; unless impact is both **significant** and **adverse**, planning permission should not be withheld.

7.18 The significance of impact in relation to NPPF retail guidance was considered in an appeal case relating to a retail development in Derby in 2012 (Ref: APP/C1055/A/11/2161815). This decision confirmed that the demonstration of impact does not, of itself, mean that a retail proposal is unacceptable and in conflict with the NPPF. The Inspector in this case highlighted the following:

> *'To justify an objection to the proposal it is not sufficient to simply suggest that there will be an impact. There is no persuasive evidence of such a significant impact that would be likely to undermine the vitality and viability of the city centre, or in-centre trade/turnover in the wider area, arising from the appeal proposal'.* (Inspector's Report, paragraph 116)

7.19 The significance of impact, rather than evidence that some trade will be diverted from existing centres, is therefore the primary material consideration. In this case, our analysis indicates that the proposed foodstore will divert some expenditure from existing centres, but not to the extent that such impacts could be considered 'significantly adverse'.

7.20 Having regard to the outputs of our retail impact and health check assessments, we do not consider that the proposed foodstore development would undermine the vitality or viability of any existing centres within the catchment area, or any future investment prospects and performance, to a level that would lead to conflict with the NPPF. Indeed, the overall consequences for South Shields town centre are positive, through the delivery of a new anchor foodstore and the wider planning application proposals.

Summary

7.21 This report has provided an assessment of the foodstore element of the proposed South Shields town centre regeneration proposals against relevant retail policies, namely NPPF impact and sequential tests. The foodstore, along with the 'The Word' civic use and range of leisure and retail uses proposed in the current application are considered to be in conformity with national retail and town centre policy.

7.22 It has been demonstrated that there are no alternative sequentially preferable sites which are fully suitable, available and can viably accommodate foodstore development of the scale and nature proposed.

7.23 This statement has also demonstrated that the proposed foodstore meets the requirements of the retail impact test in that:

- The foodstore element of the proposed development would not result in a significant adverse impact upon the vitality and viability of South Shields town centre, or adversely impact upon the defined network of centres.

- Overall, the foodstore would have a positive impact upon South Shields town centre, through increasing the turnover of the centre and strengthening the southern end of the town centre.

- There is a qualitative need to provide improved choice and foodstore provision within South Shields to address overtrading within the existing Asda store, reduce expenditure leakage and create more sustainable shopping patterns. The proposed foodstore would meet this identified need.

- There is sufficient expenditure capacity within the defined Catchment Area to support the foodstore.

- It will contribute to planned investment in the centre, along with the wider outline planning application proposals, in delivering the regeneration proposals set out in the 365 Vision document and subsequent Masterplan.

7.24 As demonstrated above and in the accompanying planning application documents, the development of a foodstore of the scale proposed on the application site, along with the wider Masterplan proposals will help to deliver a number of significant benefits. These include facilitating the delivery of the wider town centre regeneration proposals through capital receipts; providing residents with greater choice of retail and leisure destinations; better enabling residents to meet their convenience shopping needs with the town centre; and reducing expenditure leakage to facilities further afield.

7.25 Additionally, the economic benefits to be delivered through the foodstore element of the development, including construction and operational jobs, business rates and indirect spending in the local economy, should be taken into consideration.

Appendix 1: Retail Assessment Scoping

Muse, South Shields Town Centre Regeneration – Proposed Foodstore Retail Assessment Scoping

August 2014

Introduction

1 This note sets out for the agreement of South Tyneside Council (STC) the proposed scope of retail assessment work to accompany the foodstore element of the South Shields Town Centre Regeneration development proposed by Muse Developments ('Muse').

2 The note sets out:

- Details of the proposed development;
- Scope of the assessment;
- Details of the proposed retail assessment methodology and principal data sources; and
- The matters for agreement with STC.

Proposed Development

3 The current proposal relates to the development of a foodstore to be located on land bounded by Crossgate, Garden Lane and Fowler Street, South Shields. The foodstore forms part of a wider mixed use development proposed by Muse. The site is located within the boundary of South Shields town centre as defined on the adopted South Shields Town Centre and Waterfront Area Action Plan ('South Shields APP) (2008). The eastern boundary and south eastern corner of the site are located within the defined Primary Shopping Area (PSA), with the remainder of the site immediately adjoining the PSA. The proposed foodstore will be highly visible from the PSA with strong pedestrian connectivity. As such, in retail policy terms, the site is currently considered to be a very good edge-of-centre site, however when complete it is likely the store would function as an in-centre store.

4 The proposal comprises a 6,039 sq.m (65,000 sq.ft) gross foodstore, of which 3,716 sq.m (40,000 sq.ft) would comprise net sales area. The operator of the foodstore is currently unconfirmed, however it is likely to be one of the main foodstore operators – Morrison's, Sainsbury's, Tesco and Waitrose. Given that Asda currently operate a store of a comparable size within the South Shields town centre it will be assumed that Asda would not be the operator of the store.

5 As such, the assessment will be undertaken on a generic occupier profile. On basis of foodstores of this scale it would be expected around 65% of the net sales would comprise convenience goods sales (2,415 sq.m) and 35% comparison goods floorspace (1,301 sq.m).

6 The application will also include a new cinema. The cinema is in centre, therefore in line with national and local planning policy will not be subject to either the sequential assessment or impact assessment.

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Scope of Assessment

7 The assessment will respond to the current planning policy framework. The policy context is provided by NPPF (2012), South Tyneside Core Strategy (2007) and South Shields APP (2008). The scope and methodology of the assessment undertaken will reflect the NPPF Planning Practice Guidance published in March 2014.

8 The South Tyneside Retail, Health and Capacity Study, which was prepared by GVA in October 2012 ('2012 Retail Study') on behalf of STC, provides the most up-to-date assessment of retail capacity within the South Tyneside area. This study predates the currently adopted LDF documents and forms part of the evidence base for the emerging STC's policy documents and as such the conclusions of the retail study supercede the retail requirements set out in Core Strategy Policy SC2 and South Shields AAP Policy SS7.

9 This study concludes that there is a need to plan for an additional foodstore in South Shields to increase the main food market share from the town's catchment and reduce the over-dominance of the Asda store. Paragraph 14.9 goes onto to state that any new development will need to centrally located within the town centre to provide an anchor to the town centre and the benefits this would deliver, including linked trips, generating footfall, shared car parking etc. The retail study considers that any new provision outside of the town centre is likely to negatively impact on town centre vitality and viability going forward.

10 As set out previously, whilst the site is partially located with the PSA and when complete would function as a town centre store, the majority of the site currently falls outwith the PSA. For the purpose of the RA, and to adopt a robust approach, it is considered to be an edge-of-centre site. As such, in light of national planning policy and the conclusions of the 2012 Retail Study, it is necessary to consider whether there are any alternative sites within South Shields PSA capable to accommodating the proposed development (sequential site assessment) and assess the impact of the proposed development on South Shields town centre (impact assessment).

11 The Retail Assessment (RA) will include the following elements:

- Analysis to establish the vitality and viability of centres based on indicators set out at paragraph 006 of the NPPF Town Centres Practice Guidance;
- An assessment of the impact of the proposed foodstore on South Shields town centre, having regard to current vitality and viability indicators and any planned investment within the centre; and
- Sequential site analysis.

Methodology

Quantitative analysis

12 The retail analysis will follow an established step-by-step methodology. This will comprise the following:

13 **Step 1: Catchment Area**. In relation to the catchment area, as a starting point it is proposed to utilise 2012 Retail Study zones 1 (South Shields) and 2 (Harton). These zones are identified within the retail study as comprising the catchment area for an additional foodstore in South Shields town centre.

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14 **Step 2: Population and Generated Expenditure**: Quantify population and retail expenditure in base (2014) and design years (2019 and 2024 – 5 and 10 years from the time the application is made). Per capita population and expenditure date will be obtained from Pitney Bowes and trend based growth rates (using Pitney Bowes ultra-long term trends) will be used to quantify spending in the design years. The population to be generated by the proposed residential development will be incorporated into the assessment, with an allowance made for the proportion of 'new' residents to the catchment area.

15 **Step 3: Turnover Estimates for Existing Centres and Stores**: Calculate the turnover of existing retail facilities using information from variety of sources, including publicly available household surveys, local authority retail studies and planning application information. Where data is not publicly available sales densities will be adopted using information from Verdict Report on Grocery Retailers and Mintel Retail Rankings where available.

16 **Step 4: Scheme Turnover and Commitments**: calculate the turnover of the proposal and commitments with planning permission in the design years. In the absence of a confirmed operator, the turnover level will be calculated using the average sales density for the main 4 foodstore operators identified previously sourced from Verdict. No committed developments within the catchment have been identified to be accounted for in the assessment.

17 **Step 5: Impact**: Apportion scheme turnover to existing centres and stores to calculate trade diversion and retail impact as a percentage of design year turnover. This will be undertaken on a solus (individual scheme) and cumulative basis (scheme plus commitments should any commitments be identified by STC).

Qualitative analysis

18 Quantitative impact analysis will be supplemented by a town centre 'health check' based on NPPF Practice Guidance indicators. This will be based on a combination of research within the centre (vacancy counts and occupier surveys) and commercial, property and market data obtained from published sources including CoStar, Verdict, EGi and GOAD.

19 Given the proposed foodstore is intended to function as an anchor retailer to South Shields town centre, the health check will focus on South Shields town centre as the only relevant centre to this proposed development.

20 The qualitative assessment will also consider the potential impact of the proposed foodstore upon planned investment in South Shields town centre, if any relevant schemes are identified by STC.

Sequential site assessment

21 The RA will include a sequential site assessment to consider whether there are any suitable, available and viable sites within a sequentially preferable location to accommodate the proposed foodstore.

22 Given the status of the subject site, partially within and immediately abutting the PSA, only sites within the defined South Shields PSA could be sequentially preferable. As such, the sequential site assessment will focus on opportunities within the PSA of South Shields town centre, as defined on the South Shields AAP proposals map.

Summary

23 The proposed RA will provide a robust assessment of the foodstore element of the South Shields Town Centre Regeneration development against policy requirements. The proposal will be assessed against the impact upon South Shields town centre and the sequential approach. The RA will include a comprehensive review of relevant retail policies as a basis for this assessment.

24 To ensure the RA submitted within the planning application meets STC's requirements we would welcome confirmation of the following:

- The scope of assessment proposed is appropriate, including the catchment area proposed, the extent of sequential site assessment and town centre health check to be undertaken;
- Whether STC are aware of any committed retail developments within the proposed catchment area which should be accounted for within the quantitative assessment;
- Whether STC are aware of any planned investment within South Shields town centre which should be considered within the qualitative impact analysis; and
- Whether there are any sites STC would require to be assessed as part of the sequential site assessment.

Contact

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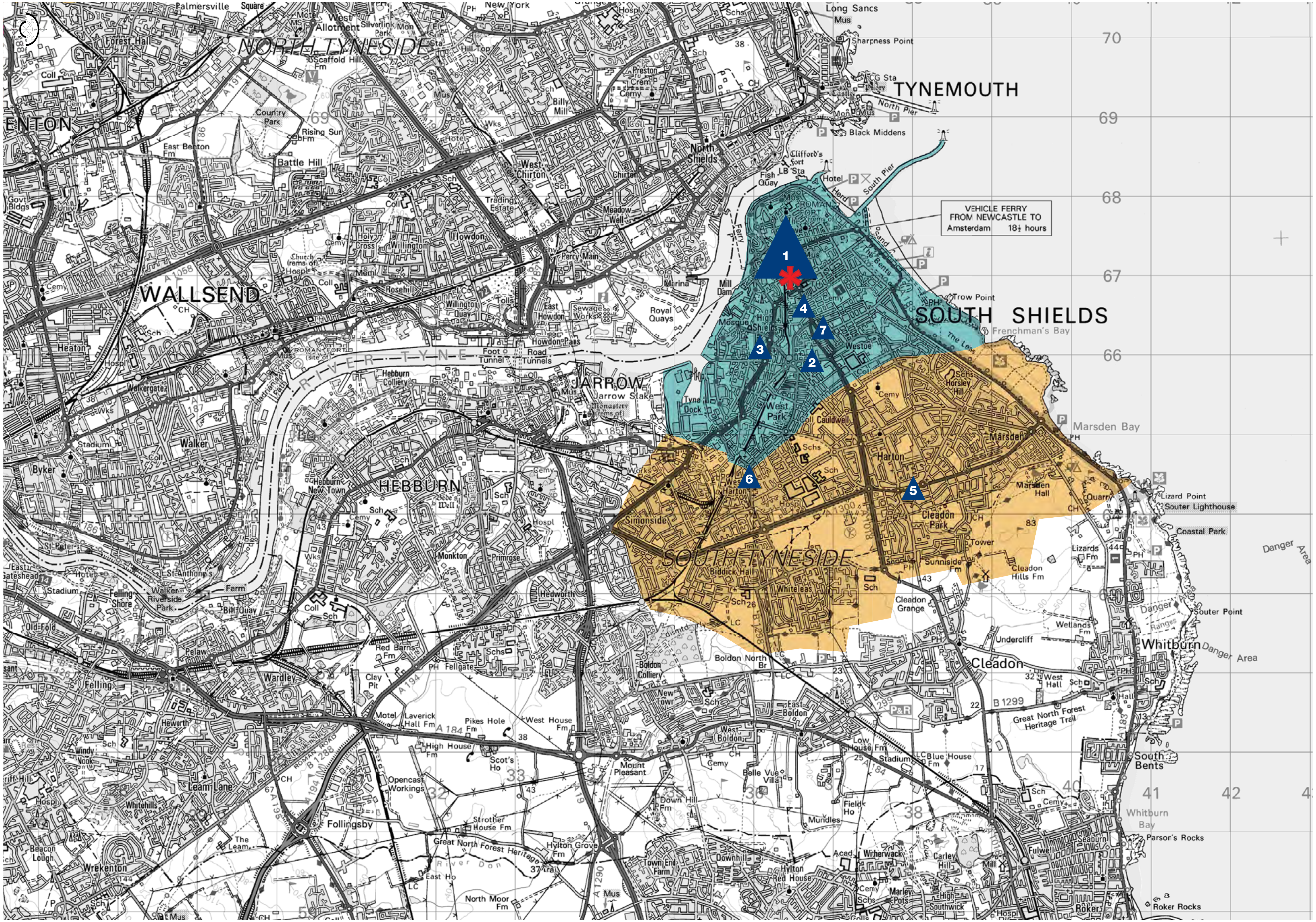
Turley

Appendix 2: Catchment Area Plan



Key:

- Application Site
- 1 South Shields, Town Centre
- 2 Dean Road, District Centre
- 3 Frederick St, District Centre
- 4 Westoe Bridges, District Centre
- 5 Harton Nook, District Centre
- 6 Boldon Lane, District Centre
- 7 Westoe Road, Local Centre
- Zone 1 - South Shields
- Zone 2 - Harton

Client:
Muse Developments

Project:
South Shields Town Centre Regeneration

Drawing:
Catchment Area

Scale: **1:50,000 @ A3**

Status: **Final**

Project Number:
MUSY2001

Drawing Number:
1000

Date: **December 2014**

Revision: **-**

0 metres 2500
(1:50,000)

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Appendix 3: Town Centre Healthchecks

Appendix 3: Town Centre Health Checks

1.1 Health Checks of the following defined centres within the catchment area of the proposed development were undertaken to assess their vitality and viability.

Town Centre

- South Shields

District Centres

- Dean Road
- Frederick Street
- Westoe Bridges
- Harton Nook
- Boldon Lane

Local Centres

- Westoe Road

1.2 The town, district and local centres are set out within the South Tyneside Core Strategy (2007), and the boundaries of the centres are defined within the Site-Specific Allocations DPD (2012) The centres to be assessed were discussed and agreed during pre-application discussions with South Tyneside Council in August 2014.

1.3 Site visits were undertaken to the centres listed above on Friday 10 October. The specific times are detailed within individual health checks.

1.4 The health and performance of centre is material when assessing the significance of trade diversion / impact associated with new floorspace. Below is a full assessment of the vitality and viability of major centres based on PPG guidance indicators.

South Shields Town Centre

1.5 The site visit was undertaken on Friday 10 October between 12pm and 2pm.

1.6 South Shields is the borough's largest town. The centre includes a range of shops, services and other facilities to meet the needs of South Shields residents and those further afield in South Tyneside and beyond. South Shields is also a popular tourist destination, and attracts significant number of visitors to attractions on the coastline and for the Great North Run each September.

1.7 The main shopping streets which comprise the defined Primary Shopping Area (PSA) are King Street, Ocean Road and Fowler Street. There are also some small indoor shopping facilities such as the Denmark Centre off Fowler Street and a traditional market place which opens three times per week.

1.8 South Shields town centre is subject to regeneration and redevelopment proposals as part of the South Shields 365 Master Plan project, whereby improvements to public facilities such as a new library, transport interchange, market and retail offer, and supermarket are proposed. The current outline planning application seeks permission for a range of these improvements including cinema and food & drink uses, additional retail units and the subject foodstore.

1.9 The proposed foodstore application site is located within the town centre boundary, with the south eastern corner of the site falling within the defined PSA.

Diversity of Uses

1.10 A total of 216 ground floor units within retail and service use (as defined by GOAD) are present within the defined town centre of South Shields. Table 1.1 sets out the composition of uses within the defined centre.

Use	No. of Units	% of total	National Average
Convenience	12	5.6%	8.9%
Comparison	91	42.5%	40.6%
Services	67	31.3%	36.7%
Miscellaneous	4	1.9%	1.3%
Vacant	40	18.7%	12.5%
Total:	**214**	**100%**	**100.0%**

Table 1.1 South Shields town centre composition of uses

1.11 As shown in Table 1.1, convenience uses account for just 5.6% of all ground floor uses within the centre, reflecting the stronger role that comparison retailing plays in the centre's offer. In terms of quantum of floorspace, the Asda foodstore at Coronation Street dominates provision, supported by the Morrison's store at Ocean Road, which was formerly occupied by Asda before the store at Coronation Street was developed. The Asda store anchors the western part of the town centre and provides town centre car parking. The remainder of the convenience offer is spread throughout the town centre in the form of primarily independent newsagents, butchers and bakers.

1.12 The majority if the units in the town centre are either in comparison retail (42.5%) or service (31.3%) use. The range of comparison retail uses within the centre is diverse and meets a variety of needs, reflecting the role of South Shields as the main retail centre in South Tyneside. Whilst the town centre has been affected in recent years by the economic climate and the downsizing or closures of certain national multiple retailers, the centre does still contain a good range of comparison good retailers. The purpose built Waterloo Square development at the western end of the centre provides a strong anchor comparison destination and is home to Debenhams, River Island, Next and Bhs. In addition, national retailers including Argos, Superdrug, Boots and a number of mobile phone network providers are present on the King Street, the main shopping street. Independent retailers are primarily located towards the southern area of the town centre along Fowler Street.

1.13 In addition to the range of retail and service uses present in the centre, other leisure and community uses within South Shields town centre, include Gala Bingo, a range of pubs and bars, betting shops and amusement arcades, museum and South Tyneside Council offices. These uses play a significant role in attracting visitors and footfall to the centre.

Vacancy

1.14 Of the 214 units, 40 units (18.7%) were vacant at the time of the site visit. It is recognised that this vacancy rate is above the GOAD national average of 12.5%.

1.15 Whilst the majority of the retail units are small scale and located towards the peripheries of the centre, there are some significant vacant units within the PSA. One of these is the former M&S unit, which became vacant following the decision of Marks & Spencer to close the South Shields store. The majority of commercial units within the PSA are within historic buildings, converted into retail use rather than purpose built retail premises. As such, it is likely that many of these units do not meet modern retailer requirements, particularly when compared with more modern units, potentially contributing to the higher than average occurrence of vacant units.

1.16 12 vacant units were identified on Fowler Street at the southern end of the centre. Again these units are primarily small scale, however the number of units does detract to a degree from the vitality and viability of this part of the town. The 365 Masterplan proposals by providing an anchor foodstore in this location and new transport interchange will increase footfall in this area, which is likely to increase the commercial interest in units.

1.17 Whilst the vacancy rate is above the GOAD national average, as a whole it does not significantly detract from the appearance or performance of the centre. The current application proposals, by providing a range of new retail, leisure, transport and community uses across the town centre will increase the attractiveness of the town centre as whole. This would be expected to increase visitor numbers and resultant demand for commercial floorspace within the centre.

Environmental Quality

1.18 Overall, the environmental quality of South Shields is considered to be good. There is a variety of types of retail units across the centre, varying from modern purpose built new units at the western end to older more traditional retail units at ground level with commercial above along King Street, Ocean Road and Fowler Street. Generally the buildings are in a good state of repair, however the quality of shopfronts does decline towards the peripheries and along parts of Fowler Street.

1.19 There is an array of Listed Buildings throughout the town centre, predominantly along King Street, whilst the market place features the Grade I Listed Old Town Hall. The heritage assets contribute towards the attractive physical environment and character of the town centre. There are many elements of public realm that encompass street furniture across the centre that are well kept and used.

Pedestrian Flows

1.20 Footfall was high at the time of visit, the South Shields market was open in the market place, contributing to pedestrian flows. Pedestrians circulated around the town centre, to and from the public transport interchanges and public car parks. The main high street is a pedestrian only zone throughout the day, which aids the safe movement of pedestrians around the centre.

1.21 At the time of visit, footfall was primarily concentrated around Kings Street and Ocean Road. Footfall along Fowler Street was lower than the other main shopping streets;

Perception of Safety

1.22 Perception of safety is considered to be good throughout the centre; there is a mix of retail units using shutters and glass frontages on the main high street on Kings Street, Ocean Road and Fowler Street. There were some CCTV surveillance cameras within the centre, although these were not prominent and blended into the street frontages.

Accessibility

1.23 South Shields town centre is considered to be very accessible, with the bus station and Metro station located centrally within the town centre.

1.24 The Metro service provides frequent links across South Tyneside, as well as to Newcastle and Sunderland City Centres. As such, whilst the metro facilitates ease of access into the town centre, it also provides easy access to competing shopping facilities further afield. Bus services across the town centre run every 10-20 minutes, serving local areas, as well as Jarrow, Hebburn, Durham, Newcastle and Gateshead.

1.25 There are a number of public car parks located around the town centre, including to the west and east of Fowler Street, to the north of the town centre and off Mile End Road. Morrisons and Asda also provide car parking that is available for public use.

1.26 Within the town centre car parks charges generally apply. The Morrisons and Asda car parks provide pay and display, however if more than £5 is spent in store the monies can be recouped. Car parking is available on-street within close proximity of the town centre for permit holders, or up to an hour for those without permits.

Summary

1.27 Overall South Shields town centre, when considered against the indicators of vitality and viability, is displaying a number of strengthens. There is a broad mix of retail and service uses operated by both national and independent retailers set within a good quality physical environment. The town centre, however, does display some weaknesses in the form of a higher than average vacancy rate and a weaker quality physical environment and retail offer towards the peripheries. The recent closure of the M&S store in King Street may also have knocked commercial confidence in the centre, and it is continuing to feel the pressures from easily accessible competing centres. The wide range of improvements proposed through the 365 Masterplan, and subject of this application, will contribute to enhancing the offer and attractiveness of the town centre to commercial occupants and shoppers alike.

Dean Road District Centre

1.28 The site visit was undertaken on Friday 10 October between 10am and 11am.

1.29 Dean Road is a traditional centre, set within a residential area comprising ground floor commercial units with residential units on the upper floors. The district centre is focused on the northern side of the Dean Road, extends onto Imeary Street. Residential uses are present on the southern side of Dean Road and also interspersed between the commercial units. The centre is around 1km south of the proposed foodstore site.

1.30 A total of 55 retail and service uses (as defined by GOAD) were identified in the defined district centre of Dean Road. Table 1.2 sets out the composition of uses within the defined centre.

Sector	No. of units	Proportion of Units	UK average
Convenience	3	5.5%	8.9%
Comparison	15	27.3%	40.6%
Service	28	50.9%	36.7%
Vacant	8	14.5%	12.5%
Miscellaneous	1	1.7%	1.3%
Total	**55**	**100.0%**	**100.0%**

Table 1.2 Dean Road district centre composition of uses

1.31 The district centre is dominated by service uses, with only 3 convenience uses in the centre. These convenience uses are dominated by the Co-op convenience store, however this store along with the other two convenience outlets, are not of a significant scale and only cater for the top-up and immediate shopping needs of local residents.

1.32 The comparison uses within the centre all comprise independent retailers which again focus on local shopping needs and are unlikely to exert influence on expenditure flows beyond the immediate area. Generally, the centre reflects the role as a local service centre meeting the immediate shopping and service needs of surrounding residents.

1.33 At the eastern end of the centre at the junction of Dean Road and Imeary Street, there are a number of leisure and community uses which draw people into the centre. The Mecca Bingo unit has recently closed down and the premises is awaiting reoccupation, however the South Shields & Westoe sports club, and a number of public house and restaurants continue to contribute to the centre's attractions.

1.34 Of the 55 units, 8 units were vacant. This equates to a vacancy rate of 14.5% which is slightly above the GOAD national average. These vacant units, however, are of small scale and there is no evidence of clustering within specific areas of the district centre. Generally, it is considered that the vacancies do not detract from the overall performance of Dean Street district centre.

1.35 The general environment is considered to be of good quality. To the west there are wide pedestrian walk ways and an uncluttered street scene. Whilst, there are no elements of public realm within the district centre, reflecting its nature as a traditional shopping centre, the general street scene is clean and well maintained.

1.36 Pedestrian flows were steady throughout the centre, primarily from the surrounding residential streets and Metro station.

1.37 Chichester Metro Station is located at the western end of Dean Road district centre and provides frequent links to South Shields town centre, Jarrow and Hebburn as well as Gateshead, Newcastle and Sunderland further afield. The centre is also served by regular bus services running through the centre which also provide a connection to South Shields and Jarrow town centres. The high level of accessibility, whilst assisting shoppers to come to the centre is also likely to have the effect of drawing local residents out of the centre to alternative shopping locations..

1.38 Although there is no dedicated car park for the district centre, unrestricted on street car parking is available at the front of the shops and services.

Summary

1.39 Overall, the centre is in reasonable health and generally appears to performing effectively in meet the service and immediate retail needs of those in the adjoining residential streets. The centre benefits from excellent transport links, however this can also increase the attractiveness of other retail centres in proximity.

Frederick Street District Centre

1.40 The site visit was undertaken on Friday 10 October between 11am and 12pm. Frederick Street district centre, located 0.6km south west of the foodstore site is set on Frederick Street, Laygate and New Green Street. It comprises a primarily traditional retail centre serving the surrounding community, anchored by a purpose built Lidl supermarket.

1.41 The centre is undergoing a major redevelopment as part of South Tyneside Council's Riverside regeneration initiative. As part of this, the commercial units at the southern end of the centre are being prepared to be demolished as part of the new housing scheme known as Trinity South. The northern half of Frederick Street district centre will remain and will be integrated with the new neighbourhood. The remaining retail offer is 'expected to thrive as a smaller core adjacent to the new estate'.

1.42 Preparation for the development of Trinity South has meant that the southern part of Frederick Street has fallen into disrepair. This area is not therefore considered to form part of the district centre for the purposes of this assessment.

1.43 A total of 55 retail and service units were identified in the defined district centre of Frederick Street. Table 1.3 sets out the composition of uses within the centre.

Sector	No. of units	Proportion of Units	UK average
Convenience	9	16.4%	8.9%
Comparison	17	30.9%	40.6%
Service	17	30.9%	36.7%
Vacant	11	20.0%	12.5%
Miscellaneous	1	1.8%	1.3%
Total	**55**	**100.0%**	**100.0%**

Table 1.3 Frederick Street district centre composition of uses

1.44 The district centre hosts a variety of national and local independent retailers. The centre is anchored by Lidl foodstore to the north of Frederick Street, whilst other convenience national multiples present include Greggs and Heron Foods.

1.45 In addition, there is a selection of community and leisure uses within the centre, including public houses and a medical centre on New George Street which draw visitors into the centre and contribute to its vitality and viability.

1.46 Of the 55 units, 11 units (20.0%) were vacant, which is above the current national GOAD average (12.5%). Whilst this does exclude the southern end of the centre, earmarked for the Trinity South development, until the regeneration proposals are implemented and new communities development in the area, there is likely to be reduced demand for retail and commercial uses within the centre. It is expected, therefore, that commercial interest in the vacant units will increase once the redevelopment is complete.

1.47 The general environment is considered to be good, the area surrounding the Lidl store, which anchors the centre, is well maintained. Although there are limited areas of public realm, the open areas create a good sense of place and openness for visitors to gather.

1.48 Reflecting its anchor status, the greatest concentration of footfall at the time of our site visit was in the areas surrounding the Lidl foodstore and the northern part of Frederick Street. As the redevelopment proposals come forward in the southern part of the centre it is expected that footfall will increase in this area.

1.49 Bus stops are located on New St George Street and Laygate, which are served by bus routes connecting frequently to South Shields town centre, Boldon Colliery and Harton Nook. The centre is well served by car parking, with the Lidl store, on-street and a public car park to the rear of retail units on the western part of Frederick Street.

Summary

1.50 Overall, the district centre is performing adequately as a district centre. It provides a good mix of retail and service uses occupied by both national multiple and independent business. The Lidl store anchors the centre and is likely to some generate linked trips with other shops and services. The centre will benefit from the delivery of the Trinity

South which will improve the physical environment at the southern end of the centre, and bring additional population to the area to utilise the shops and services.

Westoe Bridges District Centre

1.51 The site visit was undertaken on Friday 10 October between 2pm and 3pm.

1.52 Westoe Bridges district centre adjoins South Shields town centre to the south, which could be seen as an extension to the town centre. It appears to function as a secondary retail and service area for the town centre. The majority of units are at ground level with residential units on the upper floors. The district centre is located just 260m to the south east of the foodstore application site.

1.53 A total of 29 units are identified in the defined district centre of Westoe Bridges. Table 1.4 sets out the uses within the defined centre.

Sector	No. of units	Proportion of Units	UK average
Convenience	3	10.3%	8.9%
Comparison	8	27.6%	40.6%
Service	12	41.4%	36.7%
Vacant	5	17.2%	12.5%
Miscellaneous	1	3.4%	1.3%
Total	**29**	**100.0%**	**100.0%**

Table 1.4 Westoe Bridges district centre composition of uses

1.54 Westoe Bridges provides a mix of mainly comparison and retail services. Convenience uses within the centre are limited with just 3 units within convenience use in the centre. National multiples are also limited, with the Co-Operative Funeral Care the only national multiple represented within the district centre. Independent comparison uses are well represented however, with carpet and fireplace sales and fitters, art gallery and gifts shops present. It is clear that the centre performs a limited convenience goods function and is unlikely to exert influence on convenience goods expenditure patterns outwith the immediate top up shopping needs of local residents. The centre's role is primarily as a secondary comparison retail location to the town centre, providing some comparison goods, alongside service facilities serving the immediately surrounding residential area.

1.55 Of the 29 units, 5 were vacant at the time of our site visit. Whilst in percentage terms this is above the GOAD national average it equates to just 5 units. Furthermore, these vacant units are dispersed throughout the district centre, with no significant clustering and are all small in size. As such, they are not considered to detract from the vitality and viability of the centre as a whole.

1.56 Environmental quality is considered to be good, the centre is set on the main road leading to and from South Shields town centre, thereby attracting a proportion of ‘pass by’ trade. The footpaths within the centre are well maintained with street furniture provided throughout the centre.

1.57 In relation to accessibility, bus services connect the district centre to and from South Shields town centre. The services run every 5-10 minutes, providing access to surrounding areas including Jarrow, Hebburn, Washington, Durham and Chester-Le-Street. The centre is in easy walking distance from the southern end of the town centre.

1.58 There is no designated car parking within the district centre, however on-street parking is available in the surrounding streets parking free for up to one hour. The centre is accessible on foot from the surrounding residential areas. The commercial units are generally at ground level with access provided for less able and disabled pedestrians. Footfall was moderate at the time of visit with steady flow on pedestrians along Westoe Road.

Summary

1.59 The centre is considered to be in reasonable health, and given the location immediately adjoining South Shields town centre, it is considered to provide a secondary retail location to the town centre whilst also provide service facilities for the immediate local area. Generally, it is unlikely to exert significant influence on expenditure patterns outwith the immediate surrounding area.

Harton Nook District Centre

1.60 The site visit was undertaken on Friday 10 October between 3.30pm and 4.30pm.

1.61 Harton Nook district centre is a traditional district centre set on Prince Edward Road and Sunderland Road. The majority of retail units are at ground level, whilst residential units are on the upper floors. The centre is located around 2.8km south east of the proposed foodstore site.

1.62 A total of 71 units within retail and service use (as defined by GOAD) are located within the defined Harton Nook district centre. Table 1.5 sets out the composition of uses within the defined centre.

Sector	No. of units	Proportion of Units	UK average
Convenience	16	22.5%	8.9%
Comparison	17	23.9%	40.6%
Service	33	46.5%	36.7%
Vacant	4	5.6%	12.5%
Miscellaneous	1	1.4%	1.3%
Total	**71**	**100.0%**	**100.0%**

Table 1.5 Harton Nook district centre composition of uses

1.63 Harton Nook has a good mix of uses. Convenience uses are well represented, with over 20% of ground floor units within convenience use. This is above the national average, however the convenience uses primarily comprise ‘top up’ food shopping, with convenience stores and frozen food specialist retailers, rather than meeting main food shopping needs.

1.64 National multiples are well represented within the centre, including number of national convenience retailers such as Tesco Express, Sainsbury’s Local, Farmfoods, Iceland and Heron Foods. The national convenience retailers are complemented a range of independent convenience uses including newsagents, butchers, bakers and green grocers.

1.65 The highest proportion of uses are within service use (46.5%) reflecting the role of a district centre in providing for everyday shopping and service needs of residents in the immediate surrounding areas, Again, national multiples are well represented and include Subway, William Hill, Barclays, Lloyds and Hays Travel.

1.66 Of the 78 units, just 4 units (5.6%) were vacant at the time of our visit. This less than half the national average GOAD (12.5%), indicating ongoing commercial demand in the centre and reflecting a healthy and thriving district centre.

1.67 The environmental quality is considered to be good in Harton Nook; the district centre is set on Prince Edward Road, which is a main link road to and from the coast, and the centre is well maintained. There are elements of public realm that are well used.

1.68 The commercial units are in a good state of repair which contributes to the positive appearance of the centre. Prince Edward Road, is a main vehicular route, however pedestrian barriers are provided along the centre which contribute toward the perception of safety.

1.69 The centre is accessible by a variety of transport means. Bus services run through the district centre every 20-30 minutes, circulating around South Shields and surrounding areas, and provide links to Jarrow, Hebburn, Cleadon, Boldon, Sunderland and Newcastle.

1.70 Car parking is provided within the centre to the front of the shops in dedicated parking laybys. This parking is free for up to one hour. At peak times, however, access to and from the car parking areas can create some congestion.

1.71 The centre is largely flat, with all the retail units at ground floor level, ensuring access to all users and providing ease of movement to pedestrians. Footfall was considered to be high at the time of visit throughout the centre.

Summary

1.72 Harton Nook is considered to be in very good health. There is a broad range of uses within the centre, with a good mix of both national multiple and independent retailers. Convenience uses targeting 'top up' or specialist shopping are well represented with a good level of choice and competition for local resident. The low vacancy rate, strong levels of pedestrian footfall and good quality physical environment further indicate the centre's vitality.

1.73 The centre is highly accessible to local residents and is performing strongly in its role as a district centre.

Boldon Lane District Centre

1.74 The site visit was undertaken on Friday 10 October between 4.30 and 5.30pm.

1.75 Boldon Lane district centre is a traditional centre set out on Boldon Lane and Stanhope Road, the centre is anchored by Lidl. The commercial units are primarily set at ground floor level with residential dwellings on the upper floors. The centre is located around 2.3km south west of the foodstore application site.

1.76 47 ground floor retail and service uses were identified in the defined district centre of Boldon Lane. Table 1.6 sets out the uses within the defined centre.

Sector	No. of units	Proportion of Units	UK average
Convenience	6	14.0%	8.9%
Comparison	12	27.9%	40.6%
Service	16	37.2%	36.7%
Vacant	8	18.6%	12.5%
Miscellaneous	1	2.3%	1.3%
Total	**43**	**100.0%**	**100.0%**

Table 1.6 Boldon Lane district centre composition of uses

1.77 Boldon Lane district centre hosts a varied retail offer. The centre is anchored by a Lidl supermarket, whilst other national multiples present include Costcutter, Betfred, Ladbrokes and William Hill. Independent uses include a butchers, hair and beauty salons and barbers' amongst takeaway shops. Council offices, public houses and a community hall also attract visitors to the centre and increase dwell time.

1.78 The district centre reflects the role of a local service centre, in providing for everyday necessities for residents in the surrounding areas. The Lidl store provides a good local shopping facility and is likely to generate a degree of linked trips with other shops and services within the centre.

1.79 Of the 43 units, 8 units are currently vacant, which is above the current national GOAD average. However, the vacant units were set throughout the district centre with no significant or prominent vacant commercial units and this position is generally reflective of comparable district centres in the region. As such it is considered the level of vacancies does not suggest a significant issue with the weakness and performance of Boldon Lane.

1.80 The environmental quality is considered to be satisfactory within the district centre. Whilst there are no elements of public realm in the centre, reflecting its form alongside a traditional street, retail units are generally kept in good repair and do not detract from the centre's vitality.

1.81 The centre is accessible by public transport, with bus services running through the district centre every 10-30 minutes, with services circulating around South Shields and surrounding areas, and provide links to Chester-Le-Street and Durham. The centre is predominantly flat, and retail units offer easy access for less able and disabled users through ground level openings.

1.82 There is no dedicated district centre public car park; however Lidl facilitates free parking for visitors to the centre. Due to the width of Boldon Lane there is limited on-street parking available within the centre.

Summary

1.83 The centre is considered to be in reasonable health, and performing its function in meeting the immediate and top-up shopping and service needs of local residents.

There is a strong mix of national multiple and independent operators present in the centre. Whilst the vacancy rate is above the national average, these units are dispersed throughout the centre and do not detract from the centre's overall vitality.

Westoe Road Local Centre

1.84 The site visit was undertaken on Friday 10 October between 3pm and 3.30pm.

1.85 Westoe Road local centre lies south of Westoe Bridges district centre, and could be considered to form a further continuation of Westoe Bridges district centre and South Shields town centre. The centre is located around 600m south east of the foodstore application site.

1.86 The local centre is set on a one-way street whereby retail units are set on ground floors and residential units are on the upper floors.

1.87 A total of 16 units are identified in the defined local centre of Westoe Road. The centre comprises an independent-led mixed retail and service offer. Uses in the centre include newsagents, travel agents, car parts, laundrette, insurance broker and takeaways, however there are no convenience facilities of any significance. The centre reflects that of a neighbourhood service centre serving the immediate needs of local residents.

1.88 Of the 16 units, just 2 units were vacant which is reasonable for a centre of this scale and function. The environmental quality is considered to be moderate. The centre is clean and well maintained with a mix of roller shutters and glass frontages used by retailers. At the time of visit, these were all open, therefore facilitating an active retail frontage.

1.89 On-street car parking is provided throughout the centre, however the one-way traffic movements may limit the amount of traffic movement and 'pass by trade' within the centre.

Summary

1.90 Overall, Westoe Road performs well as a local centre. It provides a good range of uses expected in a centre of this scale and nature, however will exert limited influence on expenditure patterns outwith the immediately surrounding area.

1.91 The centre is very accessible to and from South Shields town centre via bus whilst allowing free car parking for an adequate 30 minutes.

Appendix 4: Sequential Assessment

Sequential Assessment

Site 1: South Shields Bus Station

Key Information

Location	Within town centre boundary and defined South Shields primary shopping area. In-centre in retail policy terms
Site Area	0.4 ha
Existing Use	South Shields bus station

Availability

The bus station is currently operational, however as part of South Shields 365 Master Plan, a new transport interchange is proposed. The new interchange, as set out in the master plan, will incorporate part of the current bus station site. As such the site is considered to be unavailable to accommodate the proposed foodstore.

Suitability

At just over 0.4ha the site is of insufficient size to accommodate a foodstore of the scale and nature proposed within the current application. In addition, the elongated shape of the site and potential access constraints would create difficulties in developing a foodstore which meets modern operator requirements.

Viability

The site does not present a viable option to accommodate the proposed foodstore development as it could not accommodate either the scale or format of development required.

Conclusions

In summary, the site is too small to accommodate the application proposals and is proposed for alternative development proposals as part of the master plan for South Shields. As such, this site is neither available nor suitable to accommodate the proposed foodstore development. It is therefore not sequentially preferable to the application site.

Sequential Assessment

Site 2: Land at Barrington Street, South Shields

Key Information

Location	Within the town centre boundary and defined South Shields primary shopping area. In-centre in retail policy terms
Site Area	1ha
Existing Use	Bank, office premises, job centre, dance studio and public house

Availability
The site is currently fully occupied by a range of uses. Part of the site forms part of the master plan for South Shields whereby new retail and leisure uses are proposed, including the formation of a new public square. The site is not coming forward for alternative uses and is not considered to be available over a reasonable time period.

Suitability
The site comprises a Grade II listed building and a locally listed building. The leisure and retail scheme for the site set out in the 365 Masterplan includes the retention of these listed buildings, whilst the development of a foodstore would require the demolition of these heritage assets. As such this site is not considered to be suitable for the foodstore development proposed.

The site is located adjacent to the Asda foodstore, the main foodstore anchor in the town centre. The application proposals seek to provide additional store at the southern end at the centre to assist in strengthening that end of the centre and encouraging shopping trips throughout the centre. The development of a foodstore of this site would, therefore, be unable to meet that need.

Viability

The site is currently in a number of uses, which would need to be assembled in order to bring forward a foodstore development on this site. This combined with the costs involved with the existing heritage assets on the site are likely to render the development commercially unviable.

Conclusions

The site is identified to accommodate new retail and leisure uses as part of South Shields master plan so is not considered to be available. Furthermore, the site is considered unsuitable and unviable to accommodate a foodstore of the scale proposed due to the land assembly required and demolition of listed buildings.

Sequential Assessment

Site 3: Former Marks & Spencer, King Street, South Shields

Key Information

Location	Within South Shields defined primary shopping area – in-centre in retail policy terms
Site Area	0.13 ha / 1,306 sq.m m
Existing Use	Vacant former Marks & Spencer department store

Availability

The site is currently vacant following closure of the Marks & Spencer's store. The site is not being actively marketed so it is unclear whether the site is available.

Suitability

The site is just over 1 ha and set over two floors comprising c. 750 sq.m m net of floorspace on each level. As such it is of insufficient size to accommodate the floorspace proposed in the current application.

Furthermore, the building is Grade II Listed Building on the main shopping street within South Shields. It would be necessary to demolish the building in order to accommodate the development of the scale and nature proposed, which is not considered to be appropriate due to the heritage designation and impact upon the King Street streetscape. The site is not, therefore, suitable.

Turley

Viability

Due to the heritage constraints developing a foodstore on the scale and nature proposed is not considered to be viable. In any event, the site does not present a viable option as it could not accommodate the scale of development required.

Conclusions

The site is not suitable as it comprises a Grade II Listed Building with insufficient floorspace to accommodate the proposed foodstore development. In addition it is unclear whether it is available. It is not therefore sequentially preferable.

Sequential Assessment

Site 4: Land at Albermarle Street, South Shields

Key Information

Location	Within the town centre boundary and partially within the primary shopping area partially 'in-centre' and partially edge-of-centre in retail policy terms
Site Area	0.9 ha
Existing Use	Royal Mail delivery office, retail units, car park and vacant land

Availability

The site is in a mix of ownerships and is currently in full use. The western part of the site is identified within the South Shields 365 Master Plan to accommodate the new transport interchange, whilst a retail unit of circa 2,000 sqm gross is proposed on the eastern part of the site. It is, therefore, considered to be coming forward for alternative development and is not available to accommodate the foodstore element of the application proposals.

Suitability

At less than 1ha, the site as a whole is of insufficient size to accommodate the foodstore proposal. In addition, as the western part of the site will form part of the new transport interchange, the potential developable area for retail uses is reduced further to a level which is clearly insufficient to accommodate a foodstore of a scale which could effectively compete with the existing Asda store. The site is, therefore, considered to be unsuitable.

Viability

Given the existing mix of ownership, there would be extensive land assembly required to develop the entire site for the foodstore proposals. Furthermore, the potentially available area of land is too small to develop a store of this size identified as required in this location. The site is not commercially viable.

Conclusions

In summary, this site is identified as coming forward for alternative uses, including a transport interchange and retail unit so is not available. The site is of insufficient size, particularly after removal of the area identified for the transport interchange, to accommodate the scale of foodstore proposed. It is therefore unsuitable and is not considered to be sequentially preferable.

Sequential Assessment

Site 5: Former Mecca Bingo, Dean Road

Key Information

Location	Within Dean Road District Centre boundary. In-centre in retail policy terms
Site Area	0.2 ha
Existing Use	Former Mecca Bingo hall

Availability

The site is currently vacant following Mecca Bingo's decision not to renew the lease with owners Rank Group. This site is not being actively marketed so it is unclear whether the site is available for reoccupation or redevelopment.

Suitability

At just 0.2 ha, the site is not considered to be suitable as it is of insufficient size to accommodate the proposed development. The site is constrained by occupied commercial and residential properties so it is not considered possible to amalgamate with adjacent land to create a site of a suitable size.

In addition, the vehicular access to the car park is shared with the Army cadet premises to the north, which would need to be retained thereby limiting redevelopment options.

Viability

This site does not present a viable option to accommodate the proposed foodstore as it could not accommodate the scale of development required.

Conclusions

The site is of insufficient size to accommodate the proposed development. Furthermore, any development on this location, given its location outwith South Shields town centre, would be unable to meet the same need as the application proposal in providing an anchor foodstore and increasing choice within South Shields town centre. It is therefore unsuitable.

Appendix 5: Economic Assessment Methodology

Appendix 5 – Economic Assessment Methodology

Baseline Assumptions

Catchment Area

1. In order to establish the retail context of the proposal, the proposed development's catchment should be first identified, i.e. the geographical area from where the proposed foodstore will draw the majority of its trade.

2. The South Tyneside Retail, Health and Capacity Study prepared by GVA in 2012 ('Retail Study') concludes there is need to plan for an additional foodstore with South Shields town centre to address the overtrading within the existing Asda store and reduce leakage out of the area. The retail study identifies the South Shields catchment area to comprise household survey Zones 1 (South Shields) and 2 (Harton).

3. Given that the foodstore proposed in the current application seeks to meet the identified need for an additional foodstore in South Shields, for the purpose of this assessment, we have defined the Catchment Area as comprising Zones 1 (South Shields) and 2 (Harton). A plan showing the extent of the Catchment Area is contained at **Appendix 2**.

4. Whilst the majority of the foodstore's turnover will be generated from within the defined Catchment Area, given the function of South Shields as the main town centre within the South Tyneside area it will draw visitors from outside the catchment area. As, such allowance is made in the assessment for trade outwith the catchment area.

Base and Price Years

5. A base year of 2014 has been adopted to reflect the current position. All monetary values are expressed at 2013 prices.

Population

6. Population data is sourced from data providers Pitney Bowes, who supply detailed population and expenditure information throughout the UK. This information is based on the specific socio-economic profile of the defined Catchment Area.

Population Projections

7. Future growth in residential population is derived from Pitney Bowes (specific for the defined Catchment Area), which estimates that the resident population will increase by 2.1% between 2014 and 2019 and 4.5% between 2014 and 2024.

Expenditure

8. Per capita expenditure estimates for the Catchment Area have been sourced from Pitney Bowes. We have applied the latest ultra long-term growth rate for convenience and comparison goods identified by Pitney Bowes / Oxford Economics (as identified by the Retail Expenditure Guide, August 2013) of +0.5% for convenience goods and +4.9% for comparison goods per annum has been applied. This represents the most cautious trend based growth rate identified by Pitney Bowes / Oxford Economics.

Turley

9. In applying this growth rate, it is worth noting that there have been a number of recent decisions elsewhere in England where Inspectors have accepted the use of trend-based estimates, rather than by applying short-term forecasts, which can underestimate future growth in expenditure. Recent decisions include in Darlington (Ref: APP/N1350/A/10/213408), in Tithebarn, Preston (Ref: APP/N2345/V/09/2113472) and at McMullen's Brewery, Hertford (Ref: APP/J1915/V/09/2101286).

1.1 With regard to Special Forms of Trading (SFT), such as online shopping and mail order, an allowance has been assumed for both convenience and comparison goods as per guidance within the Retail Expenditure Guide.

Quantifying Impact

10. Based on applying the above baseline assumptions and approach, we set out below the methodology adopted.

11. The methodology we have adopted is well established and has been applied by retail planning practitioners throughout the UK.

12. The step-by-step approach is set out as follows:

- **Step 1**: Establish base / design years, and determine what is being assessed
- **Step 2**: Examine 'no development' scenario
- **Step 3**: Assess turnover and trade draw
- **Step 4**: Assess impact on existing centres and facilities
- **Step 5**: Consider the consequences of impact, including quantitative and qualitative issues.

Step 1: Establish the Base / Design Year

13. The base year has been identified as 2014 to reflect the current position. The design year is 2019. Given the proposed foodstore forms part of a wider development programme by Muse and South Tyneside Council within South Shields town centre, in accordance with the NPPF Guidance paragraph 26, consideration is also given to the effect over the longer term. As such an additional design year of 2024 is also considered.

Step 2: Examine 'No Development Scenario'

14. **Tables 3 and 6** at **Appendix 6** sets out the trading performance of existing convenience and comparison goods facilities within the Study Area at 2014. The market share of stores and centres within each of the two zones within the catchment area has been derived from the household survey results provided within the retail study.

15. In relation to convenience goods the market shares have been derived from Table 7 (Overall Market Share Analysis), thereby adopting the same split between 'main' and 'top-up' food shopping as the retail study. Comparison goods market shares have been derived from Table 15 (Overall Market Share), again ensuring the same weightings for

each of the comparison goods categories are adopted in this assessment as the retail study. The monetary turnover of these facilities has then been calculated by multiplying the market share by the total convenience and comparison goods expenditure for each zone.

16. **Tables 4** and **7** of **Appendix 6** then projects the turnover of existing facilities forward to 2019 and 2024 assuming that no development comes forward and existing facilities maintain market share and benefit from growth in expenditure.

17. The floorspace of existing facilities has been taken primarily from the South Tyneside Retail Study, supported by on-site surveys undertaken in October 2014.

18. For convenience goods facilities, ‘benchmark’ turnovers have been calculated using company average sales densities sourced from Mintel UK Retail Rankings 2014 and Verdict UK Food & Grocery Retailers 2014, with professional estimates used for local facilities in centres where data is not available. In relation to comparison goods, it has been assumed that the centres are performing at equilibrium, as there are more uncertainties in providing accurate benchmark turnovers for such facilities.

Step 3: Assess Turnover and Trade Draw

Turnover of the Proposed Foodstore

19. The anticipated turnover of the proposal has been based on an average sales density of the main foodstore operators (Morrisons, Sainsbury’s. Tesco, Waitrose) as sourced from Verdict 2014. Asda has been excluded given that the presence of a comparably sized Asda store within the town.

20. In this context, our assessment is based on the assumption that the proposal will achieve a total retail turnover of £41.3m (at 2013 prices), of which £30.1m comprises convenience goods turnover and £11.1m comparison goods turnover (**Table 8A** at **Appendix 6**).

Trade Draw Assumptions

21. In addition to estimating the turnover, we have also identified the likely trade draw of the proposal. This is set out at **Table 8B at Appendix 6.** It is assumed that the proposed foodstore would draw 75% of its trade from the defined Catchment Area, a further 25% from the wider Retail Study area (primarily the remainder of the South Tyneside local authority area) and 5%from beyond.

22. The patterns of trade draw for the proposal consider the source of the turnover generated by the store from both the defined catchment area, and from the wider South Tyneside Study Area respectively.

Inflow

23. As set out above, we have also made an allowance for expenditure derived from the wider area.

24. South Shields does have an important tourism function, with a number of tourist and leisure attractions on the eastern edge of the town centre and along the coastline which draw people into the town, particularly in the summer months. In addition, as the main

centre in the borough, it is also home to a number of civic uses, including the Council Offices which will be located immediately opposite the proposed foodstore. Workers and visitors to the Council Offices and other civic uses, come from outwith the local authority area and the inflow allowance accounts for their spending within the store

Step 4: Assess Impact

25. **Tables 9 and 10** at **Appendix 6** sets out the anticipated effects of the development on convenience and comparison shopping patterns in 2019 and 2024.

26. In respect of the trade diversion impacts, these are forecast on the basis of professional judgement taking into account a number of factors. These include: current shopping patterns within the study area; the strength and proximity of the proposal and existing provision; and the general assumption that 'like competes with like'.

Step 5: Consider the Consequences of Impact on Existing Centres and Facilities

27. Based on the assumptions and approach outlined above, **Table 11** at **Appendix 6** outlines the estimated solus effect on existing centres within the study area of the proposal.

28. Reflecting established practice, the assessment sets out the potential implications of the proposal on the turnover of existing centres. This enables comparisons to be made to the change in shopping patterns following the introduction of new retail development.

29. The identified trading effects of the proposal are examined against the current vitality and viability of existing centres, based on key health check indicators. Health checks of the key centres are contained at **Appendix 3** of this statement.

Summary

30. Retail impact analysis is not an exact science and judgements have to be made at key stages. The outputs of the assessment are nevertheless considered to provide a reasonable and robust assessment of the implications of the proposal within the catchment area.

31. In this case the predicted impacts associated with the proposal do not, in our judgement, lead to adverse implications for the vitality and viability of town centres. Indeed, as demonstrated in the assessment the proposed foodstore would have a positive impact upon South Shields town centre. Our analysis confirms retail policy compliance.

Appendix 6: Economic Assessment

SOUTH SHIELDS TOWN CENTRE FOODSTORE

TABLE 1A: POPULATION AND CONVENIENCE GOODS EXPENDITURE WITHIN STUDY AREA

		Catchment Area	
	Zone 1 - South Shields	Zone 2 - Harton	Total
2014			
Population	28,802	51,697	80,499
Expenditure per Head (£)	1,855	1,757	
Total Expenditure (£m)	53.43	90.84	144.27
2019			
Population	29,648	52,547	82,195
Expenditure per Head (£)	1,902	1,802	
Total Expenditure (£m)	56.39	94.67	151.05
2024			
Population	30,577	53,544	84,121
Expenditure per Head (£)	1,950	1,847	
Total Expenditure (£m)	59.62	98.90	158.52
Population Growth 2014-2019	1,775	1,847	3,622
Expenditure Growth 2014-2019 (£m)	6.19	8.06	14.25

NOTES:

1. The study area comprises Zone 1 and Zone 2 of the South Tyneside Retail, Health and Capacity Study (GVA, October 2012)
2. Population and expenditure per capita derived from Pitney Bowes AnySite Report Data (2013 based estimates) for each zone
3. Expenditure per capita identified to grow at ultra long term growth rate of +0.5% p/a as identified by Pitney Bowes Retail Expenditure Guide, August 2013
4. SFT for convenience goods deducted at 2.7% as per Central Case SFT definition identified by Pitney Bowes Retail Expenditure Guide, August 2013

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TABLE 1B: POPULATION AND COMPARISON GOODS EXPENDITURE WITHIN CATCHMENT AREA

		Catchment Area	
	Zone 1- South Shields	Zone 2 - Harton	Total
Population	28,802	51,697	80,499
Expenditure per Head (£)	2,529	2,379	
Total Expenditure (£m)	72.85	122.98	195.83
2019			
Population	29,648	52,547	82,195
Expenditure per Head (£)	3,213	3,022	
Total Expenditure (£m)	95.25	158.78	254.03
2024			
Population	30,577	53,544	84,121
Expenditure per Head (£)	4,081	3,838	
Total Expenditure (£m)	124.78	205.50	330.29
Population Growth 2014-2019	1,775	1,847	3,622
Expenditure Growth 2014-2019 (£m)	51.93	82.53	134.46

NOTES:

1. 1. The study area comprises Zone 1 and Zone 2 of the South Tyneside Retail, Health and Capacity Study (GVA, October 2012)
2. Population and expenditure per capita derived from Pitney Bowes AnySite Report Data (2013 based estimates) for each zone
3. Expenditure per capita identified to grow at ultra long term growth rate of +4.9% p/a as identified by Pitney Bowes Retail Expenditure Guide, August 2013
4. SFT for comparison goods deducted at 15.1% as per Central Case SFT definition identified by Pitney Bowes Retail Expenditure Guide, August 2013

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SOUTH SHIELDS TOWN CENTRE FOODSTORE

TABLE 3: MARKET SHARE AND TURNOVER OF EXISTING FACILITIES (CONVENIENCE GOODS) - 2014

Destination	Catchment Area				Total within Catchment Area		Turnover from Wider Study Area and Inflow from beyond (£m)	TOTAL (£m)
	Zone 1 ('South Shields')		Zone 2 ('Harton')					
	Market Share	Turnover (£m)	Market Share	Turnover (£m)	Market Share	Turnover (£m)		
Within Catchment Area								
Zone 1 ('South Shields')								
<u>South Shields town centre</u>								
Asda, Coronation Street	45.4%	24.26	24.5%	22.26	**32.2%**	**46.51**	6.87	53.38
Morrisons, Ocean Road	13.2%	7.05	11.2%	10.17	**11.9%**	**17.23**	1.88	19.10
Local Shops and Market	4.0%	2.14	2.8%	2.54	**3.2%**	**4.68**	1.73	6.41
Sub-total	***62.6%***	***33.45***	***38.5%***	***34.97***	***47.4%***	***68.42***	***10.48***	***78.90***
<u>Frederick Street district centre</u>								
Lidl, Laygate	5.0%	2.67	0.8%	0.73	**2.4%**	**3.40**	0.19	3.58
Heron Foods, Frederick Street	2.8%	1.50	0.0%	0.00	**1.0%**	**1.50**	0.10	1.60
Sub-total	***7.8%***	***4.17***	***0.8%***	***0.73***	***3.4%***	***4.89***	***0.29***	***5.18***
<u>Dean Road district centre</u>								
Co-op, Dean Road	0.7%	0.37	0.0%	0.00	**0.3%**	**0.37**	0.25	0.63
<u>Local Centres</u>	3.5%	1.85	0.4%	0.34	**1.5%**	**2.19**	0.15	2.34
SOUTH SHIELDS TOTAL	**74.6%**	**39.84**	**39.7%**	**36.04**	**52.6%**	**75.88**	**11.17**	**87.05**
Zone 2 ('Harton')								
<u>Harton Nook district centre</u>								
Farmfoods, Sunderland Road	0.3%	0.16	1.5%	1.36	**1.1%**	**1.52**	0.30	1.83
Iceland, Prince Edward Road	0.0%	0.00	5.7%	5.18	**3.6%**	**5.18**	0.14	5.31
Sainsbury's, Prince Edward Road	1.1%	0.59	3.8%	3.45	**2.8%**	**4.04**	1.42	5.46
Tesco Express, Prince Edward Road	0.3%	0.16	1.0%	0.91	**0.7%**	**1.07**	0.24	1.30
Local Shops	0.0%	0.00	2.0%	1.82	**1.3%**	**1.82**	0.52	2.34
Sub-total	***1.7%***	***0.91***	***14.0%***	***12.72***	***9.4%***	***13.63***	***2.62***	**16.25**
<u>Boldon Lane district centre</u>								
Lidl, Boldon Lane	0.8%	0.43	2.8%	2.54	**2.1%**	**2.97**	0.64	3.61
<u>Local Centres</u>	0.0%	0.00	2.6%	2.38	**1.6%**	**2.38**	0.11	2.49
Tesco, Simonside Industrial Estate	4.5%	2.40	7.8%	7.09	**6.6%**	**9.49**	10.53	20.02
HARTON TOTAL	**7.0%**	**3.74**	**27.2%**	**24.73**	**19.7%**	**28.47**	**13.90**	**42.36**
Total within Catchment Area	**81.6%**	**43.58**	**66.9%**	**60.77**	**72.3%**	**104.35**	**25.07**	**129.41**
Within wider Study Area								
<u>Boldon</u>								
Asda, Boldon Colliery	3.8%	2.03	18.6%	16.90	**13.1%**	**18.93**	106.13	125.06
<u>Jarrow</u>								
Morrisons, Viking Precinct	3.0%	1.60	3.4%	3.09	**3.3%**	**4.69**	61.17	65.86
Out of centre								
Aldi, Chichester Road	2.8%	1.50	1.4%	1.27	**1.9%**	**2.77**	3.00	5.77
Iceland, Chichester Road	1.7%	0.91	0.0%	0.00	**0.6%**	**0.91**	0.41	1.32
Morrisons, Ocean Park, Sunderland	2.3%	1.23	2.7%	2.45	**2.6%**	**3.68**	48.48	52.17
Total within wider Study Area	**13.6%**	**7.27**	**26.1%**	**23.7**	**21.5%**	**30.98**	**-**	**-**
Other facilities within and outwith Study Area	**4.8%**	**2.58**	**7.0%**	**6.37**	**6.2%**	**8.95**		
TOTAL	**100.0%**	**53.43**	**100.0%**	**90.84**	**100.0%**	**144.27**	**-**	**-**

NOTES:

1. Convenience turnover from Study Area taken from Table 1A
2. Expenditure flows sourced from South Tyneside Retail Study with adjustments to reflect closure of M&S store, South Shields town centre
3. Allowance for expenditure from remainder of the study area taken from the South Tyneside Retail Study
4. Allowance made for inflow based on information within South Tyneside Retail Study and assumptions in relation to characteristics of individual facilities

May not cast due to rounding

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SOUTH SHIELDS TOWN CENTRE FOODSTORE

TABLE 4: FORECAST CONVENIENCE TURNOVER OF EXISTING CONVENIENCE GOODS FACILITIES WITHIN THE CATCHMENT AREA IN 2014, 2019 AND 2024

Destination	Survey Turnover from Catchment Area 2014	Market Share (%)	Inflow from beyond 2014	Forecast Turnover 2019	Forecast Turnover 2024
Zone 1 ('South Shields')					
South Shields town centre					
Asda, Coronation Street	46.51	32.2%	6.87	55.74	58.33
Morrisons, Ocean Road	17.23	11.9%	1.88	19.96	20.90
Local Shops and Market	4.68	3.2%	1.73	6.68	6.97
Sub-total	***68.42***	***47.4%***	***10.48***	***82.38***	***86.19***
Frederick Street district centre					
Lidl, Laygate	3.40	2.4%	0.19	3.75	3.93
Heron Foods, Frederick Street	1.50	1.0%	0.10	1.67	1.75
Sub-total	***4.89***	***3.4%***	***0.29***	***5.42***	***5.68***
Dean Road district centre					
Co-op, Dean Road	0.37	0.3%	0.25	0.65	0.68
Local Centres	2.19	1.5%	0.15	2.45	2.57
SOUTH SHIELDS TOTAL	**75.88**	**52.6%**	**11.17**	**90.90**	**95.11**
Zone 2 ('Harton')					
Harton Nook district centre					
Farmfoods, Sunderland Road	1.52	1.1%	0.30	1.91	1.99
Iceland, Prince Edward Road	5.18	3.6%	0.14	5.56	5.83
Sainsbury's, Prince Edward Road	4.04	2.8%	1.42	5.69	5.94
Tesco Express, Prince Edward Road	1.07	0.7%	0.24	1.36	1.42
Local Shops	1.82	1.3%	0.52	2.44	2.55
Sub-total	***13.63***	***9.4%***	***2.62***	***16.96***	***17.73***
Boldon Lane district centre					
Lidl, Boldon Lane	2.97	2.1%	0.64	3.76	3.93
Local Centres	2.38	1.6%	0.11	2.60	2.73
Tesco, Simonside Industrial Estate	9.49	6.6%	10.53	20.73	21.49
HARTON TOTAL	**28.47**	**19.7%**	**13.90**	**44.05**	**45.89**
Total within Catchment Area	**104.35**	**72.3%**	**25.07**	**151.05**	**158.52**
Within wider Study Area					
Boldon					
Asda, Boldon Colliery	18.93	13.1%	106.13	128.63	132.35
Jarrow					
Morrisons, Viking Precinct	4.69	3.3%	61.17	67.63	69.45
Out of centre					
Aldi, Chichester Road	2.77	1.9%	3.00	5.98	6.20
Iceland, Chichester Road	0.91	0.6%	0.41	1.37	1.43
Morrisons, Ocean Park, Sunderland	3.68	2.6%	48.48	53.56	55.01
Total within wider Study Area	**30.98**	**21.5%**	**219.19**	**257.16**	**264.44**
Other facilities within and outwith Study Area	**8.95**	**6.2%**			
TOTAL	**144.27**	**100%**			

NOTES
1. Available expenditure sourced from Table 1A
2. Assumes that existing facilities maintain market share and benefit from growth in expenditure

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SOUTH SHIELDS TOWN CENTRE FOODSTORE

TABLE 5: EXPECTED TURNOVER OF EXISTING CONVENIENCE GOODS FACILITIES WITHIN THE CATCHMENT AREA (2014)

Destination	Net Floorspace (sq m)	Net Convenience Floorspace (sq m)	Company Average Sales Density (£ per sq m)	Benchmark Turnover (£m)	Survey Derived Turnover (£m)	Trading Performance (£m)
Zone 1 ('South Shields')						
South Shields town centre						
Asda, Coronation Street	3,716	2,415	13,868	33.49	53.38	19.89
Morrisons, Ocean Road	2,741	1,864	13,651	25.45	19.10	-6.34
Local Shops and Market	1,792	1,792	3,000	5.38	6.41	1.04
Sub-total	***8,249***	***6,071***		***64.31***	***78.90***	***14.59***
Frederick Street district centre						
Lidl, Laygate	1,063	850	3,849	3.27	3.58	0.31
Heron Foods, Frederick Street	50	50	3,750	0.19	1.60	1.41
Sub-total	***1,113***	***900***		***3.46***	***5.18***	***1.72***
Dean Road district centre						
Co-op, Dean Road	28	28	8,726	0.24	0.63	0.38
Local Centres	-	-	-	2.34	2.34	0.00
SOUTH SHIELDS TOTAL	**9,390**	**6,999**		**68.02**	**84.71**	**16.69**
Zone 2 ('Harton')						
Harton Nook district centre						
Farmfoods, Sunderland Road	315	315	3,750	1.18	1.83	0.65
Iceland, Prince Edward Road	262	262	3,750	0.98	5.31	4.33
Sainsbury's, Prince Edward Road	747	672	13,891	9.34	5.46	-3.87
Tesco Express, Prince Edward Road	333	300	11,415	3.42	1.30	-2.12
Local Shops	-	-	-	2.34	2.34	0.00
Sub-total	**1,657**	**1,549**		**17.26**	**16.25**	**-1.01**
Boldon Lane district centre						
Lidl, Boldon Lane	791	633	3,849	2.44	3.61	1.17
Local Centres	-	-	-	2.49	2.49	0.00
Tesco, Simonside Industrial Estate	1,513	1,161	11,415	13.25	20.02	6.77
HARTON TOTAL	**3,961**	**3,343**	**15,264**	**32.95**	**39.87**	**6.92**
Total within Catchment Area	**13,351**	**10,342**		**100.97**	**124.58**	**23.61**
Within Wider Study Area						
Boldon						
Asda, Boldon Colliery	9,397	4,894	13,868	67.87	125.06	57.19
Jarrow						
Morrisons, Viking Precinct	3,202	2,515	13,651	34.33	65.86	31.53
Out of centre						
Aldi, Chichester Road	736	589	7,436	4.38	3.00	-1.38
Iceland, Chichester Road	650	650	3,750	2.44	0.41	-2.03
Morrisons, Ocean Park, Sunderland	3,530	2,471	13,651	33.73	48.48	14.75
Total outwith Catchment Area	**17,515**	**11,119**		**142.75**	**242.81**	**100.06**

NOTES

1. Floorspace figures sourced from South Tyneside Retail Study where available
2. Where benchmark turnover is not known it is assumed stores are trading at equilibrium and survey turnover = benchmark turnover
3. Benchmark turnover levels obtained from Mintel UK Retail Rankings 2014, Verdict UK Food & Grocery Retailers 2014 and professional estimates

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SOUTH SHIELDS TOWN CENTRE FOODSTORE

TABLE 6: MARKET SHARE AND TURNOVER OF EXISTING FACILITIES (COMPARISON GOODS) - 2014

Destination	Catchment Area				Total within Catchment Area		Turnover from Wider Study Area (£m)	TOTAL (£m)
	Zone 1 ('South Shields')		Zone 2 ('Harton')					
	Market Share	Turnover (£m)	Market Share	Turnover (£m)	Market Share	Turnover (£m)		
Within Catchment Area								
Zone 1 ('South Shields')								
South Shields Town Centre	39.6%	28.85	35.9%	44.15	**37.3%**	**73.00**	32.50	105.50
Asda, Coronation Street	2.1%	1.53	0.9%	1.11	**1.3%**	**2.64**	0.57	3.20
Sub-total	***41.7%***	***30.38***	***36.8%***	***45.26***	**38.6%**	**75.63**	***33.07***	108.70
Station Road, South Shields	3.9%	2.84	4.8%	5.90	**4.5%**	**8.74**	5.95	14.70
SOUTH SHIELDS TOTAL	**45.6%**	**33.22**	**41.6%**	**51.16**	**43.1%**	**84.38**	**39.02**	123.40
Zone 2 ('Harton')								
Harton Nook district centre	0.2%	0.15	0.2%	0.25	**0.2%**	**0.39**	0.25	0.64
Tesco, Simonside Industrial Estate	0.2%	0.15	0.4%	0.49	**0.3%**	**0.64**	0.25	0.88
HARTON TOTAL	**0.4%**	**0.29**	**0.6%**	**0.74**	**0.5%**	**1.03**	**0.49**	1.52
Total within Catchment Area	**46.0%**	**33.51**	**42.2%**	**51.90**	**43.6%**	**85.41**	**39.51**	124.92
Within wider Study Area								
Asda, Boldon Colliery	3.6%	2.62	4.0%	4.92	**3.9%**	**7.54**	21.38	28.92
Jarrow town centre	0.8%	0.58	0.6%	0.74	**0.7%**	**1.32**	13.29	14.61
Total within wider Study Area	**4.4%**	**3.21**	**4.6%**	**5.66**	**4.5%**	**8.86**	**34.67**	43.53
							-	-
Other facilities within and outwith Study Area	49.6%	36.13	53.2%	65.42	51.9%	101.56	-	-
Total	**100.0%**	**72.85**	**100.0%**	**122.98**	**100.0%**	**195.83**	**-**	-

NOTES:
1. Comparison turnover from Study Area taken from Table 1B
2. Expenditure flows sourced from South Tyneside Retail Study
3. Allowance for expenditure from remainder of the study area taken from the South Tyneside Retail Study
4. Allowance made for inflow based on information within South Tyneside Retail Study and assumptions in relation to charateristics of individual facilities

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SOUTH SHIELDS TOWN CENTRE FOODSTORE

TABLE 7: FORECAST TURNOVER OF EXISTING COMPARISON GOODS FACILITIES WITHIN THE CATCHMENT AREA IN 2014, 2019 AND 2024

Destination	Survey Turnover from Catchment Area 2014	Market Share (%)	Inflow from Study Area 2014	Forecast Turnover 2019	Forecast Turnover 2024
Within Catchment Area					
Zone 1 ('South Shields')					
South Shields Town Centre	73.00	37.3%	32.50	135.97	175.56
Asda, Coronation Street	2.64	1.3%	0.57	4.14	5.36
Sub-total	***75.63***	***38.6%***	***33.07***	***140.11***	***180.92***
Station Road, South Shields	8.74	4.5%	5.95	18.90	24.35
SOUTH SHIELDS TOTAL	**84.38**	**43.1%**	**39.02**	**159.02**	**205.27**
Zone 2 ('Harton')					
Harton Nook district centre	0.39	0.2%	0.25	0.82	1.06
Tesco, Simonside Industrial Estate	0.64	0.3%	0.25	1.14	1.47
HARTON TOTAL	**1.03**	**0.5%**	**0.49**	**1.96**	**2.53**
Total within Catchment Area	**85.41**	**43.6%**	**39.51**	**160.98**	**207.80**
Within wider Study Area					
Asda, Boldon Colliery	7.54	3.9%	21.38	33.36	42.50
Jarrow town centre	1.32	0.7%	13.29	17.96	22.84
Total within wider Study Area	8.86	4.5%	34.67	51.32	65.34
Other facilities within and outwith Study Area	101.56	51.9%			
TOTAL				**254.03**	**330.29**

NOTES
1. Available expenditure sourced from Table 1A
2. Assumes that existing facilities maintain market share and benefit from growth in expenditure

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SOUTH SHIELDS TOWN CENTRE FOODSTORE

TABLE 8A: ESTIMATED TURNOVER OF PROPOSED FOODSTORE IN 2019

Proposed Foodstore	Sales Area (sq m)		
	Total	Convenience	Comparison
Gross floorspace	3,716		
Sales Area (sqm)	2,415	2,415	1,301
Sales Density (£ per sqm)		12,500	8,500
Total Turnover	**41.25**	**30.19**	**11.06**

TABLE 8B: ESTIMATED TRADE DRAW OF PROPOSED FOODSTORE

		Convenience Goods		Comparison Goods	
	Trade	Turnover	Penetration Rate	Turnover	Penetration Rate
Catchment Area (Zone 1 & 2)	75.0%	22.64	*15.0%*	8.29	*3.3%*
Wider Retail Study Area	20.0%	6.04		2.21	
Beyond Study Area	5.0%	1.51		0.55	
Total	**100.0%**	**30.19**		**11.06**	

NOTES

1. Convenience / comparison sales area based on a 65% / 35% split
2. It has been assumes that the foodstore would achieve a turnover to floorspace ratio of £12,500 for convenience goods and £8,500 for comparison goods, which based on information contained in the 2104 Verdict Report of Grocery Retailers and 2014 Mintel Retail Rankings is the median of the main foodstore operators with the exception of Asda (Morrisons, Sainsbury's, Waitrose and Tesco)
3. Trade origin of development estimated on basis of nature, location and scale of proposal and location of comparable facilities within vicinity

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SOUTH SHIELDS TOWN CENTRE FOODSTORE

TABLE 9: ANTICIPATED TRADING EFFECTS OF PROPOSED DEVELOPMENT (CONVENIENCE GOODS) - 2019 & 2024

Destination	Forecast Turnover 2019	Forecast Turnover 2024	Diversion to Proposal 2019		Diversion to Proposal 2024		Resultant Turnover 2019	Resultant Turnover 2024	Solus Impact 2019	Solus Impact 2024	Relative to benchmark
	£m	£m	%	£m	%	£m	£m	£m	%	%	
Zone 1 ('South Shields')											
South Shields town centre											
Asda, Coronation Street	55.74	58.33	30%	-8.91	30%	-8.97	46.84	49.35	-16.0%	-15.4%	139%
Morrisons, Ocean Road	19.96	20.90	4%	-1.21	4%	-1.22	18.75	19.69	-6.0%	-5.8%	
Local Shops and Market	6.68	6.97	1%	-0.15	1%	-0.15	6.53	6.81	-2.3%	***-2.2%***	
Sub-total	***82.38***	***86.19***	***34%***	***-10.26***	***34%***	***-10.34***	***72.12***	***75.85***	***-12.5%***	***-12.0%***	111%
Frederick Street district centre											
Lidl, Laygate	3.75	3.93	1%	-0.24	1%	-0.24	3.51	3.69	-6.4%	-6.2%	
Heron Foods, Frederick Street	1.67	1.75	0%	-0.03	0%	-0.03	1.64	1.72	-1.8%	-1.7%	
Sub-total	***5.42***	***5.68***	***1%***	***-0.27***	***1%***	***-0.27***	***5.15***	***5.40***	***-5.0%***	***-4.8%***	
Dean Road district centre											
Co-op, Dean Road	0.65	0.68	0%	-0.03	0%	-0.03	0.62	0.65	-4.6%	-4.5%	
Local Centres	2.45	2.57	0%	-0.03	0%	-0.03	2.42	2.53	-1.2%	-1.2%	
SOUTH SHIELDS TOTAL	**90.90**	**95.11**	**35%**	**-10.60**	**35%**	**-10.68**	**80.30**	**84.44**	**-11.7%**	**-11.2%**	
Zone 2 ('Harton')											
Harton Nook district centre											
Farmfoods, Sunderland Road	1.91	1.99	0%	-0.06	0%	-0.06	1.85	1.93	-3.2%	-3.1%	
Iceland, Prince Edward Road	5.56	5.83	1%	-0.15	1%	-0.15	5.41	5.68	-2.7%	-2.6%	
Sainsbury's, Prince Edward Road	5.69	5.94	1%	-0.15	1%	-0.15	5.54	5.78	-2.7%	-2.6%	
Tesco Express, Prince Edward Road	1.36	1.42	1%	-0.15	1%	-0.15	1.21	1.27	-11.1%	-10.7%	
Local Shops	2.44	2.55	0%	-0.03	0%	-0.03	2.41	2.52	-1.2%	-1.2%	
Sub-total	**16.96**	**17.73**	**2%**	**-0.54**	**2%**	**-0.55**	**16.41**	**17.18**	***-3.2%***	***-3.1%***	
Boldon Lane district centre											
Lidl, Boldon Lane	3.76	3.93	1%	-0.24	1%	-0.24	3.52	3.69	-6.4%	-6.2%	
Local Centres	2.60	2.73	0%	-0.03	0%	-0.03	2.57	2.70	-1.2%	-1.1%	
Tesco, Simonside Industrial Estate	20.73	21.49	5%	-1.51	5%	-1.52	19.22	19.97	-7.3%	-7.1%	
HARTON TOTAL	**44.05**	**45.89**	**8%**	**-2.32**	**8%**	**-2.34**	**41.73**	**43.54**	**-5.3%**	**-0.17**	
Total within Catchment Area	134.95	141.00	43%	-12.92	43%	-13.02	122.03	127.98	**-9.6%**	**-0.29**	
Within wider Study Area											
Boldon											
Asda, Boldon Colliery	128.63	132.35	20%	-6.04	20%	-6.08	122.59	126.27	-4.7%	-4.6%	
Jarrow											
Morrisons, Viking Precinct	67.63	69.45	5%	-1.51	5%	-1.52	66.12	67.93	-2.2%	-2.2%	
Out of centre											
Aldi, Chichester Road	5.98	6.20	1%	-0.30	1%	-0.30	5.67	5.89	-5.1%	-4.9%	
Iceland, Chichester Road	1.37	1.43	1%	-0.30	1%	-0.30	1.07	1.12	-22.0%	-21.3%	
Morrisons, Ocean Park, Sunderland	53.56	55.01	10%	-3.02	10%	-3.04	50.54	51.97	-5.6%	-5.5%	
Total within wider Study Area	257.16	264.44	37%	-11.17	37%	-11.25	245.99	253.19	-4.3%	-4.3%	
Other facilities within and outwith Study Area			20%	-6.04	20%	-6.08					
TOTAL			100%	-30.13	100%	-30.35					

NOTES
1. Forecast turnover of existing facilities in 2019 and 2024 sourced from Table 4
2. Trade diversion to proposed foodstore forecast using professional judgement based on scale, nature and proximity of provision
3. Turnover of proposed foodstore in 2019 sourced from Table 8, with turnover in 2014 including allowance for growth in turnover efficiency of 0.5% per annum

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SOUTH SHIELDS TOWN CENTRE FOODSTORE

TABLE 10: ANTICIPATED TRADING EFFECTS OF PROPOSED DEVELOPMENT (COMPARISON GOODS) - 2019 & 2024

Destination	Forecast Turnover 2019	Forecast Turnover 2024	Diversion to Proposal 2019		Diversion to Proposal 2024		Resultant Turnover 2019	Resultant Turnover 2024	Solus Impact 2019	Solus Impact 2024
	£m	£m	%	£m	%	£m	£m	£m	%	%
Zone 1 ('South Shields')										
South Shields Town Centre	135.97	175.56	30%	-3.32	30%	-3.57	132.40	171.98	-2.4%	-2.0%
Asda, Coronation Street	4.14	5.36	15%	-1.66	15%	-1.79	2.35	3.57	-40.1%	-33.3%
Sub-total	***140.11***	***180.92***	***45%***	***-4.98***	***45%***	***-5.36***	***134.75***	***175.55***	***-3.6%***	***-3.0%***
Station Road, South Shields	18.90	24.35	5%	-0.55	5%	-0.60	18.31	23.76	-2.9%	-2.4%
SOUTH SHIELDS TOTAL	**159.02**	**205.27**	**50%**	**-5.53**	**50%**	**-5.96**	**153.06**	**199.31**	**-3.5%**	**-2.9%**
Zone 2 ('Harton')										
Harton Nook district centre	0.82	1.06	1%	-0.06	1%	-0.06	0.76	1.00	-6.7%	-5.6%
Tesco, Simonside Industrial Estate	1.14	1.47	3%	-0.33	3%	-0.36	0.78	1.12	-29.1%	-24.3%
HARTON TOTAL	**1.96**	**2.53**	**4%**	**-0.39**	**4%**	**-0.42**	**1.55**	**2.12**	**-19.7%**	**-16.5%**
Total within Catchment Area	**160.98**	**207.80**	**54%**	**-5.92**	**54%**	**-6.37**	**154.61**	**201.43**	**-3.7%**	**-3.1%**
Within wider Study Area										
Asda, Boldon Colliery	33.36	42.50	20%	-2.21	20%	-2.38	30.98	44.88	-6.6%	-5.6%
Jarrow town centre	17.96	22.84	5%	-0.55	5%	-0.60	17.37	23.44	-3.1%	-2.6%
Total within wider Study Area	**51.32**	**65.34**	**25%**	**-2.76**	**25%**	**-2.98**	**48.34**	**68.32**	**-5.4%**	**-4.6%**
Other facilities within and outwith Study Area			21%		21%					
TOTAL	254.03	330.29	100%	-8.68	100%	-9.35	263.38	339.64	-3.4%	-2.8%

NOTES
1. Forecast turnover of existing facilities in 2019 and 2024 sourced from Table 4
2. Trade diversion to proposed foodstore forecast using professional judgement based on scale, nature and proximity of provision
3. Turnover of proposed foodstore in 2019 sourced from Table 8, with turnover in 2014 including allowance for growth in turnover efficiency of 0.5% per annum

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SOUTH SHIELDS TOWN CENTRE FOODSTORE

TABLE 11: SUMMARY OF FORECAST TRADE DIVERSION IMPACTS - 2019 & 2024

Destination	Convenience Goods Impact		Comparison Goods Impact		Combined Impact			
	2019	2024	2019	2024	2019		2024	
	%	%	%	%	%	£m	%	£m
Within Catchment Area								
South Shields town centre (excluding proposed foodstore)	-12.5%	-12.0%	-3.6%	-3.0%	-6.8%	-15.24	-5.9%	-15.70
South Shields town centre (including proposed foodstore)	***24.2%***	***23.3%***	***4.3%***	***3.6%***	***11.7%***	***26.01***	***10.0%***	***26.63***
Frederick Street district centre	-5.0%	-4.8%						
Dean Road district centre	-4.6%	-4.5%						
Harton Nook district centre	-3.2%	-3.1%	-6.7%	-5.6%	-3.4%	-0.60	-3.2%	-0.61
Local Centres	-1.2%	-1.1%						
Tesco, Simonside Industrial Estate	-7.3%	-7.1%	-29.1%	-24.3%	-8.0%	-1.84	-8.2%	-1.88

NOTES
1. Forecast impact upon existing facilities in 2019 and 2024 sourced from Table 9 & 10
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