HARROGATE BOROUGH COUNCIL

RETAIL STUDY

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APPENDICES

1. INTRODUCTION

1.1 CB Hiller Parker (now CB Richard Ellis) was instructed in December 2002 by Harrogate Borough Council to undertake a Retail Capacity Study for the District to help inform their review of the Harrogate District Local Plan.

1.2 In response to the Council's Brief, we have prepared this Study on three clear bases, these being:

- A Retail Capacity Analysis using survey based research;
- Advise on how the results of the Capacity Study might be used to formulate a retail strategy for the review of the Local Plan;
- Preparation of guidance for Harrogate Borough Council on Best Practice with regard to considering retail need, undertaking the 'sequential test' for retail development, and the factors that should be considered in assessing the vitality and viability of town centres.

This report covers the first two tasks above, with the third topic included in a separate document.

METHOD OF APPROACH

1.3 From discussions with the Council, it was determined that a full Household Survey of the District should be undertaken to assess current trends in retail patterns. A further household survey was also undertaken, encompassing areas outside the Harrogate Borough Council boundary to ensure full account was taken of any potential in-flow of trade to centres in the District and, in particular, Harrogate town centre. CB Richard Ellis' own National Survey of Local Shopping Patterns assisted in setting the parameters for this work.

1.4 A key data source used in this survey work was the Council's 2002 Floorspace Survey - one of the most comprehensive and detailed surveys undertaken by any UK authority.

1.5 In addition, we proposed to give an overview of retail trends nationally to provide a context for the consideration of the Harrogate District area, and undertook a stakeholder meeting with key parties in the District to help inform our work. This was undertaken in February 2003 involving representatives from the Chambers of Commerce, Town and Parish Councils, Departments of Harrogate Borough Council, civic organisations, retailers, public transport operators as well as property owners and agents.

1.6 The potential for new retail floorspace has been considered in detail up to 2011. Although the new plan period may move forward beyond 2011, it is prudent to consider in detail retail capacity issues to 2011 as retail patterns and development can change significantly over time. To assess these changes, it is usual to review retail capacity and new floorspace regularly to ensure that appropriate changes to policy can be considered in the future based on sound up to date research.

STRUCTURE OF REPORT

1.7 In order to set the context for the Retail Capacity Study, the next section of this report gives a national overview of retail trends and how this relates to Harrogate District. This is followed in Section 3 by a review of the current retail provision in the District including a broad overview of the performance of each centre, where information is available. A review of the results of the Household Survey (including a more detailed commentary on how the survey was undertaken) and an assessment of key statistics arising out of the survey results is presented in Section 4. These survey results relate directly to Section 5 of the report - the Retail Capacity Assessment for Harrogate District. This is presented on a centre-by-centre basis covering each of the main towns, with commentary on other centres as appropriate.

1.8 In Section 6, we present our conclusions arising from the Retail Capacity Assessment, and the potential options for a retail strategy that Harrogate Borough Council will need to consider. This is followed in Section 7 with a summary of the Study's output and overall conclusions provided.

2. RETAIL TRENDS

2.1 National retail trends indicate a contraction in the number of shop units, a slow-down in the growth of non-food retail sales (although recently published statistics indicate that comparison sales growth is again increasing) and limited growth in the convenience food sector. More recently there has also been a slow down in the development of out of centre retail floorspace and a revival in town centres. However, this is not a uniform trend; there is a clear polarisation towards larger centres.

POLARISATION

2.2 This key trend of polarisation by comparison retailers towards larger centres is being reinforced by new development. According to CB Richard Ellis research, almost half the shopping centre floorspace in the pipeline is destined for the top 70 centres in the country, which will further enhance their market share. The concentration of activity in larger town and city centres has been at the expense of medium and smaller centre high streets and centres where development has not occurred, or it has been too small in scale to increase significantly the range and quality of shopping.

NEW TECHNOLOGY

2.3 The advent of new technology, such as internet or digital television home shopping, is unlikely to have a universal effect. Certain sub-sectors are likely to be more affected than others; in particular the internet is attractive for retailing books, CDs, videos and high value electrical goods. Centres that offer a range of complementary, non-retail attractions and smaller centres, which offer a high level of convenient shopping facilities, are likely to be more resilient to these changes. Depending on their role and relative health, other smaller centres may be challenged by the growth of internet shopping, as one of a number of factors.

THE MULTIPLE RETAILERS

2.4 Significant changes are occurring in the traditional high street, as evidenced by closures, rationalisation and refurbishment. For example, operators such as Arcadia (whose high street fascias include Top Man, Burton, Dorothy Perkins, Evans, Top Shop, Miss Selfridges, Warehouse and Wallis) are rationalising, reducing the number of outlets across the country. In recent years, C&A withdrew entirely from the UK. The trading difficulties of Marks & Spencer are well documented which led to a dramatic cutback in this retailer’s development programme and a concentration on rebranding of products and focusing on the internal business.

2.5 Whilst new retailers are also emerging, including the international fashion stores such as Mango and Zara, they are only seeking representation in large centres. Retailers such as Gap, Next and H&M Hennes are all seeking increasingly larger store formats to carry their full range of goods. Larger stores, often referred to in the retail industry as 'flagship stores', mean that retailers can maintain or increase their market share from a smaller number of stores in fewer centres.

DEPARTMENT STORES

2.6 Department stores have generally experienced a renaissance as the age profile of shoppers has shifted toward a younger audience. Top-end department stores, such as Selfridges and Harvey Nichols, are expanding into major regional cities. Mid-market chains including Debenhams and House of Fraser are undergoing progressive expansion and refurbishment whereas the smaller and independent chains and Co-operative stores are rationalising. Mergers/takeovers are also taking place such as Fenwicks' acquisition of Bentalls, and the ongoing takeover battle for Debenhams. This highlights the importance of continual evolution and investment, and even successful shopping centres will need to adapt to changing retailer needs and customer expectations.

THE DISCOUNT SECTOR

2.7 Many discount non-food retailers have recognised the benefits of serving smaller centres where the market size may not be as great as the larger centres, but space is considerably cheaper. These retailers often recognise the benefits of trading together (sometimes with discount foodstores) both in and out-of-centre. Retailers include Poundstretcher, WEW, Peacocks and Brunswick. These businesses often trade alongside multiple video hire businesses such as Choices.

RETAIL WAREHOUSES

2.8 Whilst there has been a slow-down in out of centre floorspace development, where opportunities arise, there is continued pressure for large store formats. DIY retailers such as B&Q have expanded with their warehouse stores while others have merged, such as Focus Do-It-All. The increasing specialisation of retail formats, even within one sector such as DIY, is reflected in the proportion of non-retail trade sales varying significantly, from Homebase which caters almost entirely for DIY enthusiasts, whilst the proportion of trade sales is higher in both B&Q warehouse stores and Wickes.

2.9 New formats such as Woolworth's Big W have also emerged and others such as Matalan have expanded aggressively. In large urban areas, formats with a very selective representational requirement such as IKEA and Decathlon, may draw trade from wide areas and typically across local authority boundaries. In such circumstances, the sequential site assessment should cover the geographical area to which the need relates.

2.10 Another key feature of the retail warehouse market is that there are only a limited number of potential occupiers. This means that a balance needs to be struck between the provision of new floorspace and the implications of occupiers vacating outdated floorspace to move to new premises, which meet corporate requirements. Certain types of retailers, such as those selling electrical goods, now demand significantly larger units than 10 years ago.

2.11 Single unit, 'first generation' retail warehouses are generally not favoured by operators, which are seeking the benefits of joint attraction arising from retail warehouse parks. These are often located in industrial areas, which may be less visible to passing trade. However, accessible industrial areas, which may lie adjacent to existing retail uses, are likely to continue to experience pressure for retail development. When retailers vacate outdated premises, it has proved important to determine the future of such space, including the potential to revert back to commercial uses or redevelopment for non-retail uses such as housing.

FOOD/GROCERY RETAILING

2.12 Food retailers are continuing to innovate and as part of the re-evaluation of high street shopping, new store formats are being conceived. However, the pressure for larger superstores and hypermarkets will continue, such as Tesco 'Extra' and Asda Wal-Mart, including pressure for the further expansion of out of centre foodstores, driven by consumer demand. This follows the significant expansion of Tesco and Sainsbury's floorspace by store extensions, especially over the last three years. The major next change however will be the result of the takeover bids for Safeway. This could lead to either the consolidation of the main food retail sector into 4 key players, or the rapid introduction of a new player. M&S have now begun to turn their attention to growing their food retail business and could bid for stores if they are asset stripped. Conversely if Safeway is actively managed it may remain as a key retail operator.

2.13 Following the publication of the latest version of PPG6 in 1996, the major operators introduced small store formats including Tesco 'Metro' and Sainsburys 'Central'. However, the development of these stores has generally been limited to larger metropolitan centres rather than district centres. This reflects that these stores serve a niche market in the convenience shopping sector, catering primarily for people working in the immediate area or visiting the centre for other purposes. As such, these formats tend to be less reliant on the resident population.

2.14 The slow growth in expenditure on food and other convenience goods has meant that individual retailers have only been able to increase their market share at the expense of other chains or by merger. The only significant entrants in the last decade have been the continental discount retailers Lidl, Netto and Aldi. Their entry has been at the expense of Kwik Save. They can operate from a variety of locations including retail parks, as freestanding units outside of centres or within centres. However, they tend to have a common requirement for adjacent surface level parking. The relatively small size of units makes these retailers particularly suitable for district centres.

2.15 The grocery retailers have developed home shopping and electronic commerce initiatives. These vary according to the retailer and include sourcing from stores or dedicated depots, home delivery to customers who have previously visited the store, office deliveries, 'call and collect' and electronic home shopping. Tesco is the leading retailer in this initiative.

FOOD AND DRINK

2.16 In addition to retailing, there has been a dramatic increase in the number of ancillary food and drink uses in town centres. Coffee shops such as Starbucks, Costa Coffee, Coffee Republic and Caffe Nero have all expanded, as have chains of sandwich shops such as Pret a Manger. In shopping centres throughout the country, they are occupying an increasing proportion of floorspace as the benefits of these uses in encouraging longer shopping times is recognised.

2.17 Even in smaller centres where national multiple A3 businesses are unlikely to choose to be represented, A3 occupiers are accounting for an increasing proportion of floorspace. This can prove to be a valuable function where the supply of floorspace may reflect a historically more significant shopping function than is played at present. In centres where the supply of floorspace is restricted, pressure from A3 uses can lead to displacement of convenience and comparison retailers.

PUBS/RESTAURANTS

2.18 A similar pattern of national chains is emerging in the pub/bar market. However, it has been found that the rollout of formats which are generally tested in the south east do not always appeal in the regions. The expansion of formats such as 'All Bar One' and

'Pitcher and Piano' has been scaled down elsewhere, as a result of this characteristic.

FLOORSPACE REQUIREMENTS

2.19 National multiple comparison retailers have very specific occupational requirements. These reflect their experience of operating effectively around the country and are generally only varied where the market is attractive and there is only a limited supply of suitable premises. The size of units required has tended to increase progressively, in part reflecting the trend of polarisation where a fewer number of larger stores can account for the same market share as a larger number of smaller stores. This trend is exaggerated in major cities where multiples often require large 'flagship' stores.

3. HARROGATE DISTRICT AREA – RETAIL REVIEW

RETAIL HIERARCHY

3.1 Although there is no specific policy in the existing Harrogate District Local Plan, there is a broad acknowledgement of the general hierarchy of centres within the Harrogate Borough area, as follows:

- Major town centre – Harrogate;
- Town centres – Ripon, Knaresborough;
- Small town centres – Boroughbridge, Masham & Pateley Bridge;
- District centres (Harrogate town)

3.2 This hierarchy is exemplified by considering the key results of the Household Survey work presented in the following section of this report.

RETAIL CHANGE SINCE 1990

3.3 Harrogate District has undergone major changes with regard to retail development throughout the 1990's. This has included the development of three brand new food stores in out of centre locations around Harrogate and Ripon (Sainsbury, Morrisons and Safeway) and the development of Plumpton Park, Oak Beck in Harrogate and St James Retail Park in Knaresborough for bulky goods retail warehousing.

3.4 At the same time, Harrogate town centre has seen some significant developments. The Montpellier Quarter was developed and completed as a specialist retail area, the former Lowther Arcade has been redeveloped as a large Marks and Spencer department store, which subsequently allowed its former store to be taken by British Home Stores. The Victoria Shopping Centre was opened in 1992 and was refurbished and extended in the late 1990's. Ripon town centre has seen the development of the Arcade east of the market place adjacent to the Morrisons store.

3.5 Overall there is now some 111,500 sq m net (1.2m sq ft) of comparison retail provision in the District area and some 35,660 sq m net of convenience food shopping floorspace. These figures are taken from a comprehensive and up to date floorspace survey, undertaken by the Council to help inform this study.

3.6 In Ripon, plans are in the pipeline to develop land west of Market Place for a supermarket and unit shops. In Harrogate the only allocated site which offers potential for significant retail development is Station Parade, which will be the subject of a Development Brief. It is likely to have a reduced potential for new retail floorspace compared to that in the Local Plan.

3.7 With regard to outstanding planning consents, the Co-op in Harrogate has permission to extend its store by an additional 1,111 sq m net of retail floorspace. At Oak Beck there is also an extant permission for a bulky goods retail warehouse of 1,858 sq m net.

3.8 With regard to Knaresborough, planning consent has been forthcoming for food retailing at Chain Lane, but there has been no development so far. In addition, the bus station has been replaced with a small amount of new retail provision (300 sq m). There has been no development at Boroughbridge or the smaller centres of Pateley Bridge and Masham. The same is apparent for the small district centres around Harrogate.

BROAD OVERVIEW OF RETAIL PERFORMANCE – HARROGATE

3.9 It is clear from the readily available sources that Harrogate is a thriving town centre. In recent years, zone A rents have risen from £100psf (in June 1999) to £125psf (in June 2002). This is clear evidence of retailer confidence in the centre. However, such figures have to be considered in the context of the overall retail capacity study, which we review in section 5.

3.10 This is reflected in the level of demand from retailers, with 51 requirements (Source: Property Market Analysis Online – extract in accompanying document) for the town centre. The majority of demand is made up of high street retailers seeking representation in the town centre. The larger floorplate retailers comprise only a few names – Aldi, Argos, Pets at Home and World of Shoes. The largest floorplate demand is up to circa 1,500 sq m. These retailers requirement figures indicate a relatively strong demand from operators to locate in the town centre, but placed in context it is much lower than the major retail centres of Leeds and York, which both have over 100 ongoing retail requirements.

3.11 Retail unit vacancy rates are low at 8.35% compared to the national average of 10.57% (Goad centre report – June 2002).

3.12 The retail diversity is typical of a town of Harrogate's size and function, with the highest proportion being for clothing, footwear and fashion (43.5% of comparison floorspace). At the opposite end there is a very small supply of more bulky goods retailing with only 0.5% of comparison floorspace for DIY. For electrical and other durable goods this figure rises to 2.1% only. This reflects the supply of such types of retailers in out of town locations. There is a good supply of furniture and floor coverings (some 15.4% of floorspace).

BROAD OVERVIEW OF RETAIL PERFORMANCE – RIPON

3.13 As a smaller centre Ripon performs less well than Harrogate as a retail destination. Over the past three years, zone A rents have remained static at £40psf and yields have increased from 7.25% (in May 1994) to 8% (in May 2003), suggesting weaker investor confidence in the centre.

3.14 Ripon also has far less demand from retailers looking for space in the centre. However, the current enquiry level (19 as at October 2002 – Property Market Analysis Online – extract in accompanying document) is the highest that it has been for over a decade. Aldi, Argos, Halfords, and Peacocks are the larger floorplate demands (maximum circa 1,300 sq m) with the remainder being high street style traders. Again, though this is significantly less than Harrogate, this reflects the smaller catchment area that Ripon has.

3.15 Vacancy rates are above the national average. They currently stand at 14.29% (the average for Britain is 10.57% - Goad centre report – July 2002).

3.16 The pattern of retail diversity in Ripon shows that certain types of clothing goods are under-represented. For example, the national average shows that the greatest proportion of comparison goods floorspace is taken up by clothing, footwear and fashion, which accounts for 25.9% of the total. In Ripon, whilst this is still the dominant comparison goods type, the level of floorspace offering such items, 19.9%, is much lower. Additionally, the proportion of floorspace dedicated to women's/girl's clothing is roughly half the national average. However, DIY products are in good supply, making up 9% of comparison floorspace (a much higher figure than for Harrogate). There is also a good offering of furniture, carpets and textiles, and of books, arts, crafts, and stationers. These two categories each make up 11% of comparison floorspace.

BROAD OVERVIEW OF RETAIL PERFORMANCE – KNARESBOROUGH

3.17 Less information is readily available for Knaresborough than for Harrogate and Ripon. Zone A rents and retail yield levels give a firm indication of the health of the local market. CBRE research shows that typical zone A rents have risen from £40 per sq ft (May 1999) to £42.50 per sq ft (May 2003). Recent investment deals for Knaresborough reflect a yield of around 7-8%, which is comparable with towns of a similar size and function.

3.18 There are only 4 registered retail requirements for the town, - Aldi, The Card Store, Peacocks and Hawkshead (Property Market Analysis Online). This is low compared to the centres of Harrogate and Ripon, reflecting the town's much smaller catchment.

3.19 Vacancy rates in Knaresborough are above the national average outlined above and stand at 12.35% (Goad centre report – July 2001).

BROAD OVERVIEW OF RETAIL PERFORMANCE – OTHER CENTRES

3.20 There is no readily available data to help inform our views of each of the remaining centres in the Harrogate District area and the Council could rectify this (to an extent) by undertaking their own vitality and viability tests, as well as helping to expand upon the data already available for the larger centres. The amount of suitable data that may be available could however be limited given the paucity of likely sources – a reflection in part of the smaller size of these centres, and less transactional evidence.

3.21 It is evident from our own visits and through the Stakeholder meeting that Boroughbridge has a limited function as a centre, catering primarily for the surrounding local area, together with some reliance on tourism. The shop units in the centre are small scale and there appears to be few vacant units. The centre though is physically constrained in its ability to provide new shops.

3.22 A similar position is evident in Masham and Pateley Bridge, with a reliance on local trade and tourism. No figures are available to further consider their relative position, and it may be difficult to establish any key trends from data collation given their small size.

3.23 There is also no readily available data for the district centres around Harrogate to help form a judgement on their relative performance.

CURRENT ISSUES FOR THE HARROGATE DISTRICT AREA

3.24 From our own analysis of background documentation provided and through issues arising at the Stakeholder meeting several themes have emerged which we comment on below. These are given firstly on a centre-by-centre basis, then food and non-food retailing.

Harrogate

3.25 Harrogate's key strengths are its historic environment and in terms of retail categories, namely its role as a key location for the conference sector. It is therefore serving the population at two levels; as a main shopping centre for local people, and secondly as a key visitor destination. Although its historic nature can be a constraint, it is also an advantage in drawing in shoppers who wish to have more of a leisure experience.

3.26 It will never be able to compete with nearby major city centres (for example Leeds), but can at least provide a more competitive edge than may be expected of similar sized towns elsewhere in the country. Bath is a further example of this type of town, using its historic character to attract shoppers. It further leads to the attraction of specialist shops as well as major high street retailers, thus diversifying the retail offer overall.

3.27 Harrogate's conference and tourism attraction puts greater pressure on allowing non-retail uses in the town centre and this is a trend which the Council should, ideally, monitor. Although diversifying the centre, this can lead to negative effects on the attraction of the centre.

Other Centres

3.28 Ripon has begun to concentrate on improving its retail offer and to diversify into the tourism sector. This may lead to a widening of non-retail uses in the town, a trend which could be determined through further survey evidence. A diversification of uses may lead to it becoming a more attractive centre overall with a consolidation of key retailing areas around the Market Place. Again, only by monitoring can a judgement be made through this future evidence. Knaresborough appears to have not significantly improved its retail offer or diversified. As with other towns in the District the centre has tourism attractions but is also hampered by physical restrictions and the historic layout.

3.29 The remaining centres of Boroughbridge, Masham and Pateley Bridge offer a very localised retail function which also benefits to a degree from passing through / tourist trade. Again, these centres are hampered by physical restrictions and historic layout.

Main Food Retail Trend

3.30 Although the position remains uncertain, the result of the Safeway takeover is likely to have implications for Harrogate and Ripon. If Asda, Sainsbury or Morrisons win, then the Safeway in Harrogate could close (particularly if Asda win - given their close proximity) unless they are forced to sell to other competitors. In this circumstance it is possible that a new entrant such as Tesco or Waitrose could come into the market. Tesco could clearly enter the market if they are successful although the size of the current Safeway unit may be unattractive to them for a main food store operation.

3.31 A further uncertainty with regard to Ripon is if Morrisons win then they could have two stores serving the town, although it is expected that the Competition Commission would force the sale of some stores. Morrisons town centre store, whilst poorly configured, enjoys a wide market share. The critical issue will be if they consolidate their retail position, and operate out of only one of the two stores. If the out of centre store were kept open, the in-town store could potentially free up space for town centre comparison retailing.

Comparison Retailing

3.32 The previous Retail Study which informed the current Local Plan considered that there was potential capacity for a further 10,000 sq m net of bulky goods retail floorspace by 2006 across the whole District. The Plan acknowledges that up to 50% of this would be accommodated in town centres. With a significant amount of retail development having taken place since the last study and the consents given, it is clear that a fresh view must be given by the Retail Capacity Study for the District, in order to identify the need for additional development.

3.33 In addition, the 'Class of Goods' approach advocated by the Government means that we cannot look at bulky goods in isolation. It is essential that we consider this in line with Government advice. This advice indicates that comparison retailing must be considered in terms of retail capacity and need before considering, if necessary, whether specific types of goods are lacking in any given town.

3.34 Likewise convenience retailing needs to be considered on an overall basis and then a judgement made on whether deficiencies exist in certain retail areas or broad locations that may need to be planned for.

DEVELOPMENT PRESSURES

3.35 In certain circumstances continued development pressures from particular retail operators can often exemplify particular retail deficiencies. In the Harrogate District area there are additional factors that are relevant to the way in which new development pressures are coming forward, in terms of type and location. These are highlighted below.

I) HISTORIC TOWNSCAPE

3.36 In each of the main towns, the nature of the townscape means that it can be much more difficult to find readily developable sites. This can lead to smaller scale opportunities and greater difficulty in bringing together several sites to create a more viable development.

3.37 In addition, a stronger emphasis on design also means that there may be constraints imposed on developers in relation to flexibility (and potentially development costs), which may not suit retail occupiers.

3.38 Furthermore, the historic land use patterns also means that the road network can be convoluted and therefore difficult to achieve appropriate servicing and car parking solutions.

3.39 However, Harrogate and Ripon have accommodated new retail schemes within such an environment, at the Victoria Centre in Harrogate and east of Market Place in Ripon. Clearly, as the more obvious sites are redeveloped, it becomes more difficult to identify further new sites within the constraints of the historic townscape.

II) COMPETING LAND USES

3.40 Government policy not only advocates retail uses in town centres but also a range of other uses to create vibrant mixed use areas. In addition, the sequential approach also applies to leisure development and A3 uses, and increasingly (through Regional Policy) office uses. This can create problems in terms of prioritising land use. Although retail development often creates higher value than other uses, office, hotel and residential uses can often be developed at greater densities and thus compete on value accordingly. Harrogate in particular has significant pressure from tourism and leisure uses linked to the conference centre sector, and these operations are competing with retail uses. This often comes forward in the form of changes of use to A3 restaurants or pubs e.g. the Royal Baths.

III) LOCAL PLAN ALLOCATIONS

3.41 Retail sites allocated in the Local Plan have now either been developed for shopping centre purposes or are yet to be developed, thus reducing the amount of currently identified potential retail capacity on these sites.

3.42 The Local Plan identifies that the bulky goods need previously identified could be accommodated in town centre sites. However, this has not been achieved to any great extent.

IV) OUT OF CENTRE DEVELOPMENT

3.43 The current development pressures facing Harrogate Borough Council specifically relate to extensions to superstores, these being Morrisons and Sainsburys in Harrogate and the Safeway at Ripon. Pressure also exists for bulky goods retail floorspace expansion at Ripon (adjacent to the existing Safeways). All of these proposals are in out of centre locations.

CONCLUSIONS

3.44 In taking account of all of the above matters it is evident that this new up to date survey-based Retail Study must clearly inform Harrogate Borough Council on the potential for additional retail development, to inform the review of the Local Plan. The Study considers such capacity on a District-wide and town based approach with due regard to the hierarchy that exists to ensure that where there is potential retail capacity and need identified, this is brought forward in appropriate locations to maximise the objectives of sustainable development. The basis for this retail capacity assessment is the evidence gained from the specifically commissioned Household Survey.

4. HOUSEHOLD SURVEY REVIEW

4.1 The Retail Capacity Study is based upon a detailed Household Survey undertaken across the District and beyond in order to establish actual retail shopping patterns for both food and non-food trips.

METHOD

4.2 The basis for the survey was taken from the CB Richard Ellis' National Survey of Local Shopping Patterns (NSLSP). This is the largest single survey of its type in Europe (some 2million responses) and provides a broad guide as to current retail patterns for food and non-food shopping across the UK.

4.3 The NSLSP data determined a catchment area for all of the towns in the District. In addition, we considered that it would be prudent to widen the Study area, as the **Harrogate town centre** catchment appeared to extend beyond the District boundary. We therefore determined that it would be best to survey both the District - through the Council's Panel - and do a snapshot telephone survey of areas beyond the District boundary. Plan 1 shows the extent of the survey area and is compared with the District boundary.

4.4 The survey area is broken down into definitive zones to accurately reflect trade patterns, catchment areas and the location of the population across the study area. Harrogate main town area and Knaresborough is split into 4 areas (North, South, East, Central), with Boroughbridge zoned on its own, as is Ripon and surrounding. The remaining areas are outside the District boundary and are based on key centres / urban zones (Skipton, North Leeds, York, Thirsk)

4.5 A total of 1000 people responded from the Panel. Outside the District boundary, the survey response rate was as follows:-

- Area 1 - 50 interviews
- Area 2 - 100 interviews
- Area 3 - 75 interviews
- Area 4 - 75 interviews

The full survey response is enclosed in separate Appendices.

4.6 Areas are grouped according to postcode and geography (See Plan 1) as a way of being able to assess in detail the current shopping patterns and issues such as trade leakage.

SURVEY - KEY RESULTS

4.7 We have highlighted some of the key survey results below:

QUESTION 1 – WHERE DO YOU DO MOST OF YOUR MAIN HOUSEHOLD FOOD SHOPPING?

4.8 Over 90% of those respondents based in Harrogate Central undertake their main food shopping in Harrogate stores, with over 38% using the Asda foodstore. In Harrogate North, 78% of respondents choose the Harrogate foodstores. The vast majority of available convenience expenditure arising from Harrogate South has also retained its trade in the Harrogate area. However, approximately 10% goes to Wetherby. In Harrogate East nearly 41% of the shopping population elect to go to Boroughbridge for their main food shopping trip.

QUESTION 4 – WHERE DO YOU DO MOST OF YOUR HOUSEHOLD TOP UP FOOD SHOPPING?

4.9 Across all zones, a far greater proportion of shoppers undertake top-up trips at more local stores as opposed to a major superstore. For example, in Harrogate Central, the superstore attracting the highest proportion of top up shopping is Asda (16%), but local shops in this zone attract nearly 37% of this type of convenience shopping. The only area where the most popular destination for top up shopping is a superstore is in the Ripon and North area (Zone 6) where nearly 29% of trade goes to Morrisons, Ripon.

QUESTION 5 – WHERE DO YOU DO MOST OF YOUR HOUSEHOLD SHOPPING FOR CLOTHING, FOOTWEAR AND OTHER FASHION GOODS?

4.10 In Harrogate Central, North and South, more than 50% of respondents shop for clothing in Harrogate town centre. However, in Harrogate East 27.3% of respondents choose York town centre with over 10% going to York's out-of-centre retail park, Monks Cross. A further 11% visit Clifton Moor (also in York). As expected, whilst more than 15% of respondents from the Ripon and North area shop for their clothing in Ripon, a significant proportion (35.2%) instead choose Harrogate town centre.

QUESTION 6 – WHERE DO YOU DO MOST OF YOUR HOUSEHOLD SHOPPING FOR FURNITURE, CARPETS AND OTHER FLOOR COVERINGS?

4.11 At this point, it is worth noting, the significant proportion of respondents in the survey area who answered this question as "various", illustrating the exercising of consumer choice and a lack of loyalty to one particular retail outlet or centre. For example, in Harrogate South, 22.2% of respondents gave the answer "various". For respondents who did express a preference for a particular store or centre, there was a much greater range of answers given. Harrogate town centre draws a considerable amount of trade from Harrogate Central (in excess of 20% of the trade), Harrogate North (with a little under 20% of the trade) and Harrogate South (with a little under 15%).

4.12 As far as out of centre locations are concerned, the Clifton Moor Centre in York draws from Harrogate East (20.5%) and Boroughbridge (11.1%), whilst the Ripon Centre draws 13.3% of trade arising from the Ripon and North area.

QUESTION 7 – WHERE DO YOU DO MOST OF YOUR HOUSEHOLD SHOPPING FOR TEXTILES AND SOFT FURNISHINGS?

4.13 As is the case for Question 6, a significant number of respondents gave the answer "various" to this question (with an average of 12.2% of all respondents choosing this answer). Harrogate town centre again draws a significant number of respondents from Harrogate Central (over 35%), Harrogate North (over 25%) and Harrogate South (over 25%). Clifton Moor Centre in York is also a strong draw, taking 25% of trade from Harrogate East and 13.9% of trade from Boroughbridge. The other out of centre stores draw most of their trade from within their own localities.

QUESTION 8 – WHERE DO YOU DO MOST OF YOUR HOUSEHOLD SHOPPING FOR DOMESTIC ELECTRICAL APPLIANCES?

4.14 Harrogate town centre again retains around a third of the trade from Harrogate Central and draws a similar proportion from Harrogate North and about 25% from Harrogate South. Out of centre shopping destinations draw relatively strongly from surrounding zones. For example, Plumpton Park, Harrogate draws in excess of 10% of trade from Harrogate Central, North, South and East. Craggs of Boroughbridge attracts much of its trade from within Boroughbridge itself (drawing 36.1% of respondents from this zone) as well as drawing from Harrogate East (15.9% of trade).

QUESTION 9 – WHERE DO YOU DO MOST OF YOUR HOUSEHOLD SHOPPING FOR TV, HI-FI, RADIO, MUSICAL INSTRUMENTS AND PHOTOGRAPHIC EQUIPMENT?

4.15 Harrogate town centre’s draw is high from the Harrogate Central, North and South zones, particularly to the Comet store, (which draws 17%, 15.4% and 7.9% of trade from each of these zones respectively). Plumpton Park also draws strongly from these zones (drawing 17.3% from Harrogate Central, 19.5% from Harrogate North and 22.1% from Harrogate South). Craggs of Boroughbridge draws 30.6% of this type of trade from the Boroughbridge area as well as attracting a considerable trade draw from Harrogate East (11.4%). The other out of centre location attracting a high proportion of trade is Clifton Moor in York (drawing 34.1% from Harrogate East and 13.9% from Boroughbridge).

QUESTION 10 – WHERE DO YOU DO MOST OF YOUR HOUSEHOLD SHOPPING FOR DIY GOODS?

4.16 As expected, out-of-centre stores offering bulky products, achieve higher trade draws than the town centres. Both Homebase and Focus (Oak Beck / New Park) in Harrogate perform particularly well, with Homebase drawing in excess of 55% of trade from the Harrogate South area and the Focus retail warehouse drawing close to 27% from Harrogate Central. Also of significance is the large amount of leakage to stores outside of the Harrogate district. B&Q in York draws 27.3% from Harrogate East and 30.6% from Boroughbridge. B&Q at Northallerton draws 14.4% from the Ripon/North area. Clifton Moor in York draws 25% from Harrogate East.

QUESTION 11 – WHERE DO YOU DO MOST OF YOUR HOUSEHOLD SHOPPING FOR BOOKS, JEWELLERY, CHINA, GLASS WATCHES, RECREATIONAL AND LUXURY GOODS?

4.17 This category like several others has a large proportion of respondents answering “various”. However, the most popular response for shoppers in Harrogate Central, North and South is, again, overwhelmingly Harrogate town centre, with over 50% of respondents in the Harrogate Central area choosing to shop locally. Harrogate town centre also draws a third of the Boroughbridge respondents.

4.18 In terms of leakage, 36.4% of respondents from Harrogate East elect to go to York city centre for these goods, but a relatively small proportion go to Monks Cross in York (6.8%) or other major centres such as the White Rose Centre in Leeds (which draws only 2.4% from Harrogate South and 2.8% from Boroughbridge).

OUTER AREA RESULTS

4.19 In terms of food shopping, none of the major stores in the Harrogate survey area score well for those respondents from the Skipton, Wetherby, York or Thirsk areas. Morrisons, at Boroughbridge, performs the best attracting 8% of trade from Wetherby.

4.20 In terms of clothes shopping, Harrogate town centre still performs fairly well, attracting 24% of shoppers from Skipton, 34% from Wetherby, 8% from York and 12% from Thirsk. The other centres perform poorly or do not register at all.

4.21 For furniture, Harrogate town centre performs less well but still manages to draw 13% of trade from Wetherby and 8% of trade from Thirsk.

4.22 For textiles, 17% of those in Wetherby use Harrogate town centre but the vast majority (an average of 57.3%) visit other towns or city centres. For domestic, electrical appliances, the vast majority of respondents (an average of 55%) choose to visit other towns and city centres outside of the Harrogate District area. The same is true of those respondents purchasing TV, Hi-Fi, radio, video, musical instruments and photographic equipment goods.

4.23 For DIY goods, 70% of those responding from Skipton choose to go to other town and city centres, with a similarly high figure for Thirsk (66.7%). The same pattern is seen for those shopping for books, jewellery, china, glass, watches, recreational and luxury goods.

QUALITATIVE RESPONSES

4.24 44.2% of respondents in Harrogate Central found that it was easy to park near to the shops. This figure is well below the average of 54.3% across all zones. Boroughbridge was seen to be the best for parking with 77.8% of respondents choosing this as a key reason why they like this centre. Harrogate Central performs best on the “close to home” category with 75.3% of respondents in the Harrogate Central zone choosing this answer. It is also viewed locally as having an attractive environment, is easy to get to by car and feels safe.

4.25 The results of the survey work have been fed directly into the CB Richard Ellis REASN Model, which provides a detailed measure of the actual turnover of particular centres and individual stores. This also helps to inform the client as to the relative performance of each centre and helps to provide a full picture to analyse such issues as trade leakage and the opportunity for additional retail floorspace. The results of this modelling are presented in the following section.

5. RETAIL CAPACITY ASSESSMENT

BACKGROUND

5.1 A detailed report on Retail Need Assessment and Best Practice is included in the separate report as part of the overall piece of work commissioned by the Council. We have summarised below our analysis of the 'Retail Capacity' for the study area. The detailed 'capacity' tables are provided in Appendix 1, and follow the CBRE REASN Model which has been used many times to inform Local Authorities about potential future retail capacity for convenience (food) and comparison (non-food) goods.

5.2 Tables 1 and 2 of Appendix 1 set out the population and expenditure data for the study area. This area is grouped into zones that is defined using our National Survey of Local Shopping Patterns. They were also considered in light of settlement patterns.

5.3 The population figures adopted for the retail capacity analysis are derived from MapInfo Illumine data forecasts. However, the recently published 2001 Census statistics indicate that the population of Harrogate is below the MapInfo forecast as at 2001. Arguably, this variation in population figures would minimally impact on the level of capacity identified from our assessment, reducing the amount of comparison goods retail expenditure by some 2.9%. In our view, this variation is insignificant, especially given the long term nature of the forecasts, and coupled with the advice contained in Briefing Note 1, in the separately bound supporting document to this report.

5.4 The retail capacity forecasts are calculated using a combination of population projections combined with estimates of future retail expenditure. Separate growth rates are adopted for convenience and comparison goods expenditure. These are derived from URPI ultra-long term trends (URPI Briefs 99/2), and are 0.1% per annum for convenience goods and 3.6% per annum for comparison goods. These growth figures allow for a reduction due to special forms of trading – 0.9% for convenience goods and 7.5% for comparison goods. For convenience goods, special forms of trading encompasses sales from petrol filling stations, and mobile operations, whilst for comparison goods a reduction is made for catalogue sales. In addition, we have made an allowance for the impact of e-commerce, reducing the retail growth attributable to shop sales by 0.6%.

5.5 The remaining tables illustrate the actual retail patterns for food and non-food shopping across the Harrogate District. These are grouped into appropriate areas, based on the detailed District Panel Survey responses. These areas are Harrogate / Knaresborough and Ripon / Boroughbridge, as well as for out of centre retailing.

5.6 The comparison goods assessment is based on future retail capacity on the assumption that there is growth in people's expenditure. It also assumes that retail patterns do not change. We have however assessed the potential for changes to these retail patterns in the future for certain centres.

5.7 For convenience goods (food) it has been appropriate to compare the estimated actual expenditure going to food stores and centres with company average expectations where possible. This provides a basis for potential capacity for future new convenience floorspace, albeit with recognition that, where stores are located within town centres, there is no policy principle to determine that they should for example decrease turnover to be near to the company average.

RETAIL CAPACITY RESULTS – HARROGATE/KNARESBOROUGH AREA

5.8 It is clear from the key trends emerging from the Household Survey results that Knaresborough clearly coexists with Harrogate but as a subordinate centre. The proportion of the population in the Harrogate and Knaresborough area using Harrogate as a main centre for comparison goods shopping is significantly greater than for Knaresborough. For example 60% of the Central area (Zone 1) use Harrogate as opposed to just 2% who use Knaresborough (Table 3, Appendix 1). In terms of floorspace, Harrogate has 53,837 sq m (579,281 sq ft) of net comparison floorspace in the shopping centre as opposed to 4,042 sq m (43,502 sq ft) net comparison floorspace in Knaresborough's shopping centre.

Comparison Goods Analysis - Harrogate

5.9 Harrogate is evidently the dominant centre for the District and beyond with the shopping population from a much wider field being drawn in accordingly. As commented upon in the Retail Trends (Section 2), historic centres within an attractive environment can exploit their position to be attractive to a wider catchment than perhaps would be the case for other similar sized centres.

5.10 Harrogate town centre currently achieves a comparison goods turnover of some £226.3m. (Table 4, Appendix 1. This equates to an average turnover of £4,205 per sq m, which from our experience of other studies is lower than we would expect. Based on trade patterns not changing over time, the turnovers will rise by some £18.1m by 2006. This equates to a potential for an additional **4,027 sq m net** at 2006, and this capacity increases to **11,962 sq m net** by 2011, reflecting a growth in turnover of £53.8m. (Table 5a, Appendix 1).

5.11 These capacity figures are forecast on a low turnover per square metre aspiration for Harrogate based on current performance. The broad performance indicators show that Harrogate is still doing well in terms of rents, yields, vacancy rates and retail requirements. This reflects the tourism / conference factor, which we have not included in our workings. When planning for additional floorspace we would recommend a precautionary approach with expenditure derived from tourism not included. Such trade can fluctuate seasonally and is also affected by other external factors. In the case of Harrogate this could, for example, be due to competing with other conference locations in the UK.

5.12 In addition, if we were to assume a higher turnover for existing floorspace for Harrogate, we would also have to use a higher figure for future turnover of new floorspace, thus potentially leading to little difference in the capacity we have determined.

5.13 The core catchment for Harrogate is Zones 1-4. Core catchment zones are those areas where a significant amount of the shopping population is drawn to a specific location. In the case of Harrogate, we consider that Zones 1-4 form the core catchment area, given that 35% or over of the shopping population are attracted to the town centre from these areas for comparison shopping. However, Harrogate also draws trade from wider afield and this must be accounted for or the potential capacity would be reduced considerably. Other centres from outside the District may take market share by attracting back shoppers currently residing outside the main catchment of Harrogate. For example, if other centres (particularly Leeds and York) increase their attraction then Harrogate's core shoppers may decide to go further afield to alternative retail destinations, leading to a lower turnover for Harrogate. However, our capacity analysis maintains current market shares for Harrogate, and it is considered to be an accepted approach.

Comparison Goods Capacity - Knaresborough

5.14 For Knaresborough, there is very limited forecast growth in capacity given its already limited role as a comparison goods retailing destination. It only achieves a turnover of some £11m on comparison goods as at 2003. On current patterns the potential growth will amount to **298 sq m** by 2006 and increasing to **883 sq m** by 2011 (Table 5b, Appendix 1). This does not, however mean that additional floorspace should be ignored if it would genuinely result in a positive change in retail patterns that would lead to more sustainable trips. Accommodating increased floorspace in Knaresborough (over and above the level identified in the capacity assessment) must however be balanced with the likely scenario that such a 'clawback' of trade would most probably be from Harrogate, thus reducing that centre's own capacity for additional floorspace to 2011.

Convenience Capacity – Harrogate/Knaresborough

5.15 The Harrogate area includes a number of out of town centre food stores. We have assessed the potential capacity for additional convenience retailing having regard to this area overall rather than either specifically for Harrogate or Knaresborough town centres. On this basis, it is clear that the main retailers' foodstores are out performing, when compared to their company average expectation. This is summarised below:

Store	Co. Average Turnover	Actual Turnover from Survey (Estimated)
Asda	26.8m	48.6m
Morrisons	25.9m	40.7m
J Sainsbury	32.6m	41.8m
Safeway	11.7m	9.6m
Total	**97m**	**140.7m**

Note: Derived from Table 5c, Appendix 1. Turnover quoted is for actual stores in Harrogate, based on company average turnover per sq m sales area.

5.16 A key aspect regarding Harrogate's retail patterns for convenience goods is the amount of trips that clearly take place from north of Harrogate town centre (from the Harrogate North and Ripon areas) to other locations across the town, notably Morrisons and Sainsburys. We have calculated that this equates to some £20m of expenditure, which is a significant figure.

5.17 The Asda store also trades very well. Given the store's edge of centre location we have considered potential future convenience capacity based on it not being identified as part of the town centre. If the store were designated as part of the centre, then a judgement would need to be made, based on further analysis, as to whether diversion of trade to any new convenience provision would be acceptable in terms of sustaining Harrogate town centre's vitality and viability.

5.18 The estimates we have made suggest that there is a clear capacity for additional main food provision in the Harrogate / Knaresborough area. Currently, this capacity amounts to some £50m. This is derived from the difference between the company average expectation and the actual trade profile of the main food stores around Harrogate - this is a widely accepted method of measuring convenience goods capacity. However, again a judgement would need to be made about the exact size of future additional provision, taking account of food store locations and their contribution or otherwise to town centre turnover.

5.19 The forecast capacity for Harrogate/Knaresborough does not rise significantly over time given the relatively low growth forecast in convenience spend. An important consideration will be how any future provision can help reduce journey lengths and as the prime aspiration positively enhance and sustain Harrogate and/or Knaresborough town centres. In addition, the available convenience capacity might be directed to more than one type of development, and will need careful consideration. It could be beneficial for Harrogate to broaden its range of convenience retailing to address the capacity requirement, for example by combining a main food store, smaller discount provision, and local centre facilities.

5.20 The actual potential floorspace has not been calculated as different end users have very different potential turnover potential for main food retailing, ranging from approximately £12,000 per sq m to £9,000 per sq m. As a guide however, working on a broad basis of £10,000 per sq m there is potential for some 5,000 sq m net of main food retail floorspace. If this is divided into different types of retail offer (e.g. discounters / local convenience) this figure may change accordingly.

5.21 With regard to Knaresborough, the amount of convenience spend retained in and around the town is low and there is clear evidence of people either travelling to the Morrisons and Sainsburys' stores in the south east Harrogate area or to the Morrisons near Boroughbridge. The implementation of the Co-op consent may assist on maintaining expenditure within the town, but it is unlikely that this could effectively compete with the retail offer available to customers at the existing main food locations. Therefore, implementing the Co-op development would have a minimum effect on changing main food shopping patterns in the area.

RETAIL CAPACITY RESULTS – RIPON / BOROUGHBRIDGE

5.22 Ripon does not perform strongly as a comparison shopping centre, exemplified by an average turnover of only £1,929 per sq m and an overall comparison turnover of £19.6m. A significant amount of its population go elsewhere for comparison shopping, with only 22% using Ripon regularly. (Table 6, Appendix 1).

5.23 However, expectations on the amount of additional floorspace that could readily be provided in Ripon have to be balanced with the size of its immediate catchment, some 28,000 by 2006, (Table 1, Appendix 1) and its position in the retail hierarchy. Interestingly though, Harrogate town centre accounts for only 17% of the Ripon area's comparison spending, (Table 3, Appendix 1) with the remainder being dispersed outside of the District.

Comparison Goods Analysis – Ripon

5.24 Based on a lower turnover per sq m for new shops than Harrogate (£3,000 per sq m as opposed to £4,500) there would be a capacity for 535 sq m net of additional comparison retailing at 2006, increasing to a capacity of **1,585 sq m** by 2011(Tables 6, 7 and 8a, Appendix 1). However, this assumes the same pattern of retail expenditure and does not account for the potential return of trade to Ripon from claw back of expenditure. It is difficult to be accurate over the justifiable level of such claw back through this study since this will vary depending on scheme content and any particular proposal may provide the opportunity for claw back and/or actually impact on Ripon itself. It will therefore be important to assess each proposal individually. However, it is noticeable that in this context there has been a rise in the number of retailers now wishing to occupy space in Ripon.

5.25 If there is a change to convenience retail provision through Morrisons taking over Safeway, then this could lead to the provision of additional comparison floorspace (through, for example, Morrisons closing its town centre store) which could help Ripon meet the comparison floorspace capacity identified.

Comparison Goods Analysis – Boroughbridge

5.26 Boroughbridge does not readily function as a key comparison town centre shopping destination given its size, and due to its geographic position much of its local population elect to shop in York, Ripon or Harrogate for their shopping needs. It only draws some 2% of its immediate catchment for main comparison retailing. On current market share the capacity for further floorspace only rises by some **66 sq m** by 2006 and increases to **197 sq m** by 2011 (Table 8b, Appendix 1). As with Ripon any proposals that may be higher than this figure will need to be assessed individually as to whether they would genuinely assist in retaining further expenditure in Boroughbridge.

Convenience Goods Analysis – Ripon / Boroughbridge

5.27 The Morrisons store in Ripon dominates convenience shopping patterns in the area, with a draw of some 37% of Ripon's main catchment area population (Zone 7) and a total turnover of £18.6m in 2003 (Tables 6 and 7, Appendix 1). Conversely, even though the Safeway is more easily accessible to a wider area it does not perform well compared to Morrisons with only a 14% share of Ripon's available expenditure from Zone 7 and an estimated total turnover of £6.9m in 2003 (Tables 6 and 7, Appendix 1).

5.28 With regard to Boroughbridge, the town's convenience shopping pattern is dominated by the stand-alone Morrisons, which draws trade from a wider area than the town does for comparison shopping. The Morrisons' store attracts 34% of Harrogate East's spend (Zone 4), and 72% of Boroughbridge area's spend (Zone 5). Its total turnover is some £23.6m.

5.29 Overall across the centres of Ripon and Boroughbridge there is capacity for additional convenience provision of some **1,058 sq m** at 2006 and this rises to **1,373 sq m** at 2011 (Table 8c, Appendix 1). The proposals for West of Market place in Ripon may account for this spare capacity, if they come to fruition.

PATELEY BRIDGE / MASHAM

5.30 The retail capacity findings do not show any significant retail trade drawn to each of these centres. The figures we have compiled for local shops overall include these centres, but their actual turnovers for comparison and convenience spending is very low. We have therefore not carried out a modelling exercise for these centres.

DISTRICT CENTRES – HARROGATE TOWN

5.31 The survey results provide little clear evidence as to the real turnovers of the district centres around Harrogate on an individual basis. On a comparison goods basis there is little evidence of any real spend going to such locations. However, they do perform a vital role in terms of limited convenience spending. For example, all local shops around the immediate Harrogate area account for a total of £23.8m of convenience trade (Table 4, Appendix 1). There is a total of 3,106 sq m net of convenience floorspace in these centres and a further 5,145 sq m of other local shops in the Harrogate area.

5.32 On combining these shops with the turnover assigned to them this equates to an average convenience goods turnover of some £2,885 per sq m, which for such type of provision (i.e. local shop provision) is a reasonable level. The overall convenience turnover rises to some £24.2m by 2006 and £24.7m by 2011 (Table 4, Appendix 1), providing very limited capacity for new retail floorspace. As with other smaller centres however, additional floorspace should be considered if it can be shown that it would help to sustain such centres and provide retail facilities for the local area. In determining location(s) for convenience shopping (given the identified additional capacity) in the Harrogate/ Knaresborough area, the potential for the district centres to accommodate main food retailing may also need to be considered.

OVERTRADING / UNDERTRADING – CONVENIENCE GOODS

5.33 We have commented specifically above on the trade profile of the main food retailing sector/stores around Harrogate, and there is strong evidence of ‘overtrading’ occurring, when compared to company average expectations. This therefore raises the prospect of the need to consider additional food retailing to address this imbalance.

5.34 With regard to other centres in the study area there is less evidence of significant overtrading occurring. In addition, if in-town store locations (such as Ripon) are considered to be overtrading, this is a less material consideration, as the aim of retail policy is to increase centre performance. The potential capacity for both Ripon and Boroughbridge to absorb additional food retailing is therefore more limited.

5.35 Other centres cannot be measured individually on the data available to us. The district centres however do perform a vital local role and from our site visits they appear to be performing at a stable level. There is, however, no benchmark that can be used for such a judgement and therefore additional vitality and viability measures will be needed as part of the Council's future work to complete the overall assessment of such centres.

OVERTRADING / UNDERTRADING – COMPARISON GOODS

5.36 With regard to comparison goods, it is difficult to assess whether centres are truly overtrading or undertrading. Again, factors such as vitality and viability analysis can assist, when making a judgement. For the purpose of this study, a judgement has been made as to the performance of relevant district centres based on our experience of other retail studies and analysis.

5.37 Fundamentally, the 'capacity model' assesses the potential for additional retail development, based on future growth in expenditure only. It is forward looking and is based on the assumption that retail spending patterns will not change. However, we have noted above that Harrogate may be vulnerable to wider competition and could see its market share diminish if additional retail development is not brought forward in order to compete effectively with other higher order centres (Leeds and York), which continue to expand their city centre retail offer.

5.38 The smaller centres, including district centres, cannot be readily identified to be over or undertrading. The results of the survey demonstrate that there is very little retail data available that can be used to benchmark these centres. In reality they provide very localised small-scale retailing which will continue to be complementary to the role of the larger centres in the Distrct.

RETAIL TRADE LEAKAGE

5.39 When assessing the retail capacity results, we have based the potential for additional retail floorspace on the assumption that current retail spending patterns will remain unchanged up to 2011. It has also been evident that Harrogate town centre for example not only draws trade from wider afield, but also still continues to lose trade from its core area (i.e. Zone 1) to competing centres. The same applies to other centres in the District to varying degrees.

5.40 It is important to recognise that there may be potential for clawing back trade if deemed appropriate for certain centres. We have considered this issue accordingly.

5.41 For example, Harrogate town centre retains 60% of comparison spending from its core (Harrogate Central) area. Some of the remainder is taken up by the retail parks and Knaresborough (totalling some 18.5%). Therefore some 21.5% of available comparison expenditure is 'leaked' from the centre. There is no rule as to what is an "acceptable" amount of trade leakage and evidently centres such as York and Leeds will always attract some shoppers from this area. This 'leakage' figure is, in our view, though reasonable for a town such as Harrogate.

5.42 It will only require a minor shift in trade patterns to lead to a drop in turnover for the town, and were this to occur it would be an issue of concern. As noted, the tourism / conference trade is helpful, but should not be relied upon to make policy decisions over future retail floorspace requirements and the role of Harrogate in the overall retail hierarchy.

5.43 As a guide, however, 5% of the Harrogate central area (Zone 1) expenditure on comparison goods (some £8.8m), equates to some **1,950 sq m** of floorspace based on a turnover of £4,500 per sq m at 2011. This could be a reasonable amount of increased trade retention that could be planned for, particularly from the Central area, and which might reasonably be expected to be spent in Harrogate. This should be kept under review in the first 5 years of the new Plan and re-considered by 2008.

5.44 It is unlikely that additional retail floorspace in Knaresborough would significantly change trade leakage from the Harrogate/Knaresborough area.

5.45 The retention of trade for convenience shopping in the Harrogate area is much higher to the point of there being no significant leakage.

5.46 With regard to Ripon, the expenditure retention on comparison goods is much lower, some 22% of its main catchment area. Relatively speaking, it would be expected that the town's trade retention will be lower than Harrogate's. This figure is, however, low and ideally needs to be addressed. Targeting expenditure retention to some 33% would equate to retention of a further £8.5m of available expenditure. On a base of £3,000 per sq m this would equate to a further requirement of 2,833 sq m, which is substantially more floorspace than based on current retail patterns. However, the Ripon's immediate population (i.e. Zone 6) is substantial, some 28,000 people, and compared to Harrogate Central (some 63,000) and its current trade retention, Ripon could benefit from clawing back some of this lost food expenditure. This increased market share target is therefore reasonable to aim for up to 2011.

5.47 With regard to other smaller centres, trade leakage is unlikely to be ever challenged or changed significantly given their role/function in the retail hierarchy and the role of higher order centres. These smaller centres perform local retail functions, with an element of tourist trade. We do not envisage any opportunity to significantly change retail patterns in the future. The low measure of retail patterns from the survey work reinforces their subordinate status and this will, in our opinion, continue in the future.

RETAIL LEAKAGE – PARTICULAR GOODS

5.48 To assess leakage, we have primarily considered market share overall for Harrogate and Ripon, given evidence of expenditure 'loss' in the comparison goods sector.

5.49 On analysing the trade patterns for certain types of comparison goods (as described in Section 4), it is evident that leakage is higher in certain circumstances. All goods categories are, in some way, subject to expenditure leakage. It is the extent to which this is due to the centre's position in the retail hierarchy (and what might reasonably be expected to be 'lost') or whether there is a clear deficiency in retail provision that is important to consider.

5.50 With regard to Harrogate, there could be the potential to increase its trade retention on clothing, fashion and footwear to a limited degree, given that from its eastern catchment 37.3% of this area go to York or Monks Cross. This could occur as a result of providing for the capacity we have identified, which in turn would lead to a greater critical mass and thus more trade retention.

5.51 A similar pattern of trade leakage also occurs from Harrogate east for furniture and carpets, textiles and soft furnishings and DIY goods. The electrical sector is well catered for by such locations, such as Plumpton Park, and this is reflected in lower trade leakage for these goods. The relative weight that should be given to promoting stores for such goods must be balanced with having to consider retail capacity overall in the first instance.

5.52 The trend that we have noted above for Ripon is the propensity for expenditure leakage on DIY goods to Northallerton. Overall, comparison goods expenditure leakage again must be considered in the first instance.

5.53 Knaresborough's secondary role to Harrogate means that there is little opportunity for it to readily assist in retaining specific goods expenditure that is measurable from this Study. Knaresborough could play a more defined role in offering niche goods linked to tourism, but this effectively is discounted from the figures adopted, as this is not locally based expenditure.

OUT OF CENTRE RETAILING

5.54 All of the potential floorspace capacity figures that we have presented above exclude the current retail expenditure going to out of centre locations in the Harrogate District area. These have been considered separately.

5.55 Historically, retail capacity studies have allowed for growth in expenditure to go to such locations, and in some circumstances different growth factors for such expenditure have been used that can lead to greater pressure for certain types of goods (often DIY or bulky goods). Given the overall 'class of goods' approach that we have advocated it is clear that one should not split out particular goods and directly plan for out of centre locations to grow. This would be counter to PPG6 policy.

5.56 However, the existing out of centre locations will continue to exist, and not acknowledging them would ignore the reality of retail trade patterns. Our figures have therefore included the potential growth in turnover at such locations, which is based on existing retail expenditure patterns continuing in the future. However, the capacity identified by such growth, which we have concluded is some 1,165 sq m by 2006 rising to 3,463 sq m by 2011 (Tables 9 and 10, Appendix 1), should not be accepted as having to be located in out of town locations, as the thrust of planning policy is to direct retailing to town centres wherever possible. It is also very important to note that this capacity is in addition to identified capacity for the other centres.

5.57 As a result of the out of centre capacity analysis, the Council needs to plan for this additional capacity, on top of the identified capacity based on Harrogate town centre (and other centres in the District) maintaining market share. The critical issue is whether there is a need to consider existing established retail locations (district/local centres) as preferred locations for additional retail development, if no town centre or edge of centre sites are available to meet overall identified need.

5.58 Having considered how each of the main centres and other locations are performing in retail terms, as well as taking account of trends and overall retail patterns, we consider in the next section how a retail strategy could evolve through the Local Plan Review, in light of our findings.

6. RETAIL STRATEGY

6.1 In line with government guidance, the clear retail strategy for the Review of the Local Plan must be to continue to sustain and enhance the District's town centres and promote sustainable development.

6.2 This must give cognisance to other development and, in particular, where there is growth in the population.

6.3 This can usually be done by focussing development in locations where all consumers can access facilities and do so by a variety of modes of transport. However, there must also be recognition of current retail patterns and whether they can continue to contribute to sustainable retail patterns or not. The need to maintain an efficient and competitive retail sector must also be supported. In addition, the ongoing role that local, smaller centres play in terms of access to facilities must also be supported.

6.4 The existing Local Plan Policies reflect the above key aims in broad terms. However, there will be a need for a considered view on specific policies to address the capacity and hence quantitative need for additional food and non-food retail floorspace in the Review of the Local Plan up to 2011. The revised version of PPG6 (termed PPS6) is currently at the Consultation Draft stage and the Council will also need to consider its content when preparing new policies.

6.5 The characteristics of each of the centres in the District in terms of their scale and role will mean that different policy responses are likely to be needed accordingly. We have highlighted some of these policy issues for consideration below.

MARKET SHARE

6.6 At the very least the Council should seek to plan for a continued stable market share for the principle centres in the District area. The study has considered the potential to increase market share for Ripon and Harrogate from their core catchments up to 2011. We believe that it is prudent for the Council to consider such increases in market share but on a gradual basis up to 2011. This can then be monitored and reviewed as development takes place through new survey work.

RETAIL HIERARCHY

6.7 It may be prudent to consider a specific policy, which confirms the retail hierarchy of the Borough. We have given an indication of how this may be established. However, issues have to be raised with regard to the actual definition of the smaller towns – Boroughbridge, Pateley Bridge and Masham, compared to Harrogate, and Ripon in particular. The key retail demands will undoubtedly focus on Harrogate and to a lesser extent, Ripon, followed by Knaresborough and then the smaller towns. The hierarchy policy should reflect this accordingly.

RETAIL CAPACITY

6.8 Specifically, the capacity study has shown that there is potential for the following:

- New main food store provision in the Harrogate / Knaresborough Area, with additional food retail provision in smaller scale outlets
- Potential for a major decrease in cross-town traffic, with the promotion of a main food store in a location more accessible to people living north of Harrogate town centre.
- Capacity for 4,027 sq m of comparison retailing in Harrogate by 2006, increasing to 11,962 sq m by 2011. By taking account of current out of town retail patterns further capacity for 1,305 sq m by 2006 and rising to 3,463 sq.m. by 2011 should also be planned for, but through considering in town and edge of town locations in the first instance.
- For Harrogate to potentially increase its comparison goods market share from its core catchment, then there would have to be a further 1,950 sq m of floorspace brought forward by 2011. However, this is also predicated on the ability of the centre to attract retailers who would in themselves assist on increasing such market share. This should be kept under review and reconsidered by 2008.
- Capacity for 535 sq m of comparison retailing in Ripon at 2006, rising to 1,585 sq m by 2011.
- Capacity for 1,058 sq m of convenience floorspace in the Ripon/Boroughbridge area.
- Minimal capacity for additional retail provision for the remaining centres in the District.
- Measures to address the evidence of trade leakage from Ripon based on providing a further 2,833 sq m of comparison floorspace by 2011.

ABILITY OF EACH CENTRE TO ACCOMMODATE IDENTIFIED CAPACITY

6.9 In terms of addressing the above results the Council will need to consider how provision for such development can best be accommodated within existing centres as far as possible, unless constraints to new floorspace provision are insurmountable. We have already identified that all of the centres are very tightly defined and thus the opportunity to accommodate identified capacity for food and non-food retailing may be limited.

- **Harrogate – Convenience Provision**

6.10 With regard to the main food store capacity for the Harrogate area, given its development constraints, it is probable that a main food store would have to be provided outside the town centre and thus the provision of a new district centre facility may need to be considered accordingly once the town centre and edge of centre sites have been fully appraised on a sequential test basis. Possibly, sites could be considered in Knaresborough town centre, albeit in geographical terms this location may not meet all of the forecast demand arising from Harrogate itself.

6.11 Instead, and subject to a sequential test analysis, the northern part of Harrogate should be considered for such a facility in order to attempt to provide a more sustainable pattern of main food retailing, especially if this can be shown to be consistent with residential development expansion proposals and/or generate significant traffic/highway benefits, such as reduced number/length of shopping trips.

6.12 The capacity for convenience retailing could also be met by limited extensions to existing food stores and / or the provision of a smaller scale discount sector facility. Again this has ramifications for the potential designation of existing food store locations. As mentioned, Knaresborough town centre might also fulfil the unsatisfied need (or at least part of it) arising from Harrogate.

6.13 It would be appropriate therefore to fully appraise Harrogate town centre, as well as the smaller district centres for their ability to meet convenience need in the first instance. If this were unrealistic, then new locations and expansion of existing stores would be appropriate. The role that discount retailing could play in meeting this in already identified district centres should also be investigated.

- **Harrogate – Comparison Provision**

6.14 Again the starting point for comparison provision must be Harrogate town centre as well as the smaller district centres around Harrogate. Many of the comparison demands are for town centre locations and this needs to be addressed accordingly. There is perhaps a greater importance in providing space for the comparison retailers in Harrogate as this will assist on giving the town further critical mass and prevent trade leakage. Only if all potential sites in and adjacent to all of the defined centres cannot accommodate comparison provision, should any review be undertaken of the potential to locate some (limited) new development out of centre.

6.15 If out of centre locations are required then the clear option for the Council to consider is the designation of particular areas as centres in retail terms. This must however, be very carefully considered to ensure that such locations do not compete with Harrogate town centre itself.

6.16 We would suggest that the potential capacity of sites in Harrogate is firstly considered and then compared to the retail quantitative need that we have identified. If there is a significant imbalance then new district centre designation(s) should be considered. However, the limitation on types of goods will need to be carefully considered to retain the balance between assisting in retaining trade in the Harrogate area and impacting on Harrogate itself.

6.17 If the new district centre option is not considered then there is potential for future retail provision to come forward on an ad hoc basis, which would not provide a clear direction for retailers and could lead to confusion over the assessment of non-centre sites. A consequence of this could be increased pressure on entirely new retail locations that would significantly change retail patterns.

- **Knaresborough**

6.18 There is little retail capacity for any major new retail development in Knaresborough. However, the provision of better quality food retailing should be supported, and would assist in meeting the overall capacity (or at least part of it) identified for the Harrogate / Knaresborough area. The size of convenience provision will be unlikely to compete with existing main food stores and will therefore form a more localised role.

6.19 There is also limited comparison retail capacity although Knaresborough is unlikely to increase its standing in this respect given its close proximity to Harrogate. Any proposals in the centre that could be brought forward should however be welcomed to assist on strengthening the centre overall.

- **Ripon**

6.20 The recent improvements East of Market Place in Ripon will no doubt address some retail capacity and may assist in drawing some trade back, albeit this is likely to be limited in nature.

6.21 Proposals for West of Market Place will address the capacity for convenience retailing and may also contribute to greater trade retention on comparison goods, again to a limited degree. These two developments will effectively meet the need identified to maintain current market share in the future.

6.22 However, although it is desirable to bring trade back to Ripon, the ability for the town centre to absorb such further development may continue to be constrained. Again, if following detailed analysis of further potential sites, none are considered appropriate, then new locations, preferably adjacent to existing retail facilities should be examined, with appropriate goods controls put in place so as not to divert trade from Ripon town centre.

- **Boroughbridge**

6.23 The centre has very limited retail capacity for future retail provision and therefore there is little need to identify future development sites.

- **Other Centres**

6.24 All of the other identified centres will have very little capacity for additional retail development in the future. They serve a very localised community on a day-to-day basis and this is unlikely to change in the future. Such smaller centres will need to focus instead on qualitative measures to continue to maintain their attractiveness as small-scale shopping locations and to maintain a degree of tourist spend. This could, in part, be achieved through various promotional policies as discussed below.

PROMOTIONAL POLICIES

6.25 Where it has been identified that there is retail capacity and the Council determines that, through an assessment of qualitative deficiencies and sustainable travel patterns, a need should be brought forward through the review of the Local Plan, then specific promotional policies should be used to assist on satisfying that need.

6.26 This can be made up of several components. The principle method will be a clear identification of an appropriate site and appraisal (and promotion) of it, using best practice, to ensure it is suitable, can be made available and that an appropriate range and mix of uses will be viable.

6.27 Following this, more active policies can be brought forward, either as part of the review of the Local Plan or subsequently through such avenues as Planning and Development Briefs and Supplementary Planning Guidance if necessary. However, we would advise that at the time of considering any suitable site, thought should be given to the ability of the site to be brought forward within a reasonable time period. An additional element in the evaluation would be the use of Compulsory Purchase powers. This may require further work where sites appear more difficult to assemble if a more comprehensive scheme is proposed.

6.28 An example of further work being done by the Council is the active promotion of a Development Brief for the Station Parade site in Harrogate.

6.29 In addition consideration may need to be given to longer term promotional approaches (not tied to any specific development) that complement the Local Plan policies, such as the instigation of Town Centre Management (TCM) and the potential promotion of Business Improvement Districts. There may be an opportunity to consider the grouping of centres for TCM opportunities (such as Harrogate and Knaresborough, Ripon and Boroughbridge) to try and achieve complementary approaches.

6.30 We would recommend that promotional policies be directed to address particular development needs that the Council may identify - sitting alongside broader supportive policies for the promotion and enhancement of all the centres.

6.31 Management strategies and/or environmental improvements can also seek to enhance centres as a shopping destination. These could be brought forward by specific Action Plans for centres as necessary, and will be more relevant to the lower tier centres such as Boroughbridge, Pateley Bridge, Masham and the district centres around Harrogate.

PROTECTIVE POLICIES

6.32 The protective policies will be able to set parameters for assessing development to ensure that need for any development is justified, that the sequential approach has been clearly adhered to and that there would be no undue impact on identified centres. This is currently clearly reflected in Policy S1 of the Local Plan, and should be carried forward accordingly.

6.33 This allows protection against unforeseen proposals that would have to satisfy a number of criteria before being supportable in retail policy terms.

7. SUMMARY AND RECOMMENDATIONS

7.1 CB Richard Ellis was commissioned by Harrogate Borough Council to provide an up to date Retail Study of the centres in the District to help inform the future review of the Harrogate District Local Plan. Using the Council's detailed retail floorspace statistics for 2002, this commission included a 'Capacity Study' to help inform the Council on the future need for retail development up to 2011. Best Practice Guides are included in this study (as separately bound appendices) and they advise the Council on assessing retail need, undertaking a sequential approach to identifying sites for retail development, and the indicators that need to be considered to inform the Council on the vitality and viability of centres.

7.2 The Study analyses national retail trends and how they may be of relevance to retailing in Harrogate District prior to the Capacity Study being undertaken, which draws upon a specifically commissioned Household Survey. This survey utilises Harrogate Borough Council's District Panel as well as sampling from a Telephone Survey outside of the District to ensure that a comprehensive picture on retail patterns was provided.

7.3 The Study specifically focuses on the potential need for food (convenience) retailing and non food (comparison) retailing up to 2011. This analysis does not extend beyond this period, as it will be desirable to review the need for additional retailing on a regular basis (every 2-3 years). It is difficult and potentially misleading to forecast beyond this period as the basis for making assessments can change through time – either through additional development, or due to changes in expenditure patterns.

7.4 The findings of the Capacity Study demonstrate that the District is highly reliant on Harrogate town centre as its key retail centre. This is followed by Ripon within the northern part of the District. The smaller centres of Knaresborough and Boroughbridge perform more of a supporting role to these centres and other smaller centres and district centres all perform much more localised roles.

RETAIL CAPACITY

7.5 In particular, the findings of the Capacity Study suggest the Council should consider the following additional retail provision up to 2011:

Food (convenience) Retailing

- Additional main food retailing in Harrogate town centre and/or serving the northern part of Harrogate town to assist on potentially reducing cross-town traffic movements;

- Additional smaller scale food retailing in Harrogate/Knaresborough incorporating discount/local stores in the district centres of Harrogate town and Knaresborough town centre;

- The overall capacity for additional convenience retailing in Harrogate/Knaresborough, which the Council may wish to plan for is up to some 5,000 sq m net floorspace. This will be dependant upon proposals and particular operators;

- Additional convenience floorspace of approximately 1,058 sq m for the Ripon/Boroughbridge area (noting that the proposals in Ripon on land west of Market Place may resolve this capacity);

Non-Food (comparison) Retailing

- Additional 4,027 sq m of comparison retailing for Harrogate town centre by 2006, increasing to 11,962 sq m by 2011. This assumes existing retailing patterns are maintained. If efforts were made for Harrogate town centre to also take market share from existing out of town retailing destinations then there will be a need to increase the above floorspace capacity by a further 1,305 sq m to 2006, rising to 3,463 sq m by 2011. Reducing the level of expenditure leakage from the Harrogate central area would also increase the floorspace requirement for the town. For example, recapturing 5% of this lost trade would result in an additional need for 1,950 sq m of floorspace by 2011.

- A further 535 sq m of comparison retailing in Ripon by 2006, rising to 1,585 sq m by 2011. Again, proposals for west of Market Place may address this quantitative capacity requirement. However, an increase in Ripon's market share from its immediate catchment area will result in a further capacity for 2,833 sq m of comparison floorspace by 2011;

- Whilst fulfilling very important roles as local shopping centres, there is extremely limited capacity for additional retail provision in Pateley Bridge and Masham. However, this should not stop the Council from seeking to improve centres over time (for example, by environmental improvements) to encourage local trade to remain in the centres and to boost tourism trade, where possible.

POTENTIAL CONSTRAINTS

7.6 Although this Study was not charged with identifying specific sites in order to meet any additional retail provision, we have broadly examined the potential of the centres in the District to accommodate additional retailing in the future. From this broad brush analysis, it is evident that all centres have a number of constraints that could lead to increased pressure for out of centre retailing, especially if the sequential test approach does not identify appropriate town/district centre sites.

7.7 If this proves to be the case, and subject to more detailed analysis undertaken as part of the Local Plan Review, then the Council may wish to consider alternative shopping centre designations to provide a focus for additional retailing in the future. This possible retail strategy would however only apply to Harrogate and Ripon, and if this course of action were pursued then it would have to be weighted against any potential impacts that could occur on existing retail centres, and development outside existing centres would need to be controlled accordingly.

PROMOTIONAL POLICIES

7.8 Where capacity for additional floorspace has been identified, combined with the Council determining that, through an assessment of qualitative deficiencies and sustainable travel patterns, a need should be brought forward, then promotional policies should be used to assist this process. These policies can include:-

- Clear identification of an appropriate site and appraisal;
- Preparing planning/development briefs and/or Supplementary Planning Guidance;
- Exercising Compulsory Purchase powers;
- Instigation of a Town Centre Manager;
- Setting up a Business Improvement District; and
- Devising specific Action Plans for centres.

PROTECTIVE POLICIES

7.9 Protective policies should also be deployed to ensure that retail development is appropriate. This will include policies stating that the need for development is justified, the sequential approach has been adopted and there would be no undue impact on established/existing centres.

TOWARD A RETAIL STRATEGY

7.10 We therefore recommend that, for the Council to evolve its retail strategy through its review of the Local Plan, there are a number of matters that should be addressed. Our recommendations relate to these matters accordingly:

RECOMMENDATIONS

i) Acknowledge through the Local Plan Review that there is a distinct retail hierarchy in Harrogate District. This should reflect the results of the Retail Study, which demonstrates that Harrogate is clearly the main focus for retailing activity in the District. This is followed by Ripon, Knaresborough and Boroughbridge with the remaining centres performing a much more localised function.

ii) The existing retail policies in the Local Plan be carried forward to reflect the government's national policy on retailing set out in PPG6. However, it would be prudent to await publication of the revised guidance (PPS6) prior to redrafting the policies of the Local Plan.

iii) The retail capacity identified within the Retail Study is taken forward and, as far as possible, planned for in the review of the Local Plan. To meet this capacity, further recommendations are set out below.

iv) The identification of a potential main food retailing location to serve the northern part of Harrogate town.

v) On identifying sites for additional retail development (be this food or non-food retailing) it is imperative that a very robust and detailed sequential site assessment is undertaken. The focus of this assessment should be existing centres in Harrogate and Ripon to ensure that, in the first instance, future retail needs are planned for in accordance with PPG6.

vi) If it is determined that no appropriate sites are likely to come forward (i.e. not suitable, available or viable), then the Council will need to consider whether other retail locations outside of the existing town/district centres be designated as district centres to provide a future focus for retailing. This process should occur through the Local Plan Review. In conjunction with this approach, it would be appropriate to seek controlling methods to ensure that future retail proposals in such locations are not competing with existing identified centres.

vii) The Council should endorse and utilise the Best Practice material provided as a supplement to this study to undertake the detailed Sequential Site Assessment and should produce or encourage the production of comprehensive vitality and viability indicator reports for all identified centres. Although there is existing material available, the centres should have their vitality and viability measured on a comparable basis in terms of appropriate indicators used, in order to provide benchmarking throughout the District.

viii) Where possible each of the main centres should, following appropriate vitality and viability auditing, have an appropriate Centre Action Plan prepared to guide the future improvement / development of retailing for each centre accordingly. This may, for example, lead to detailed site development briefs, or programmes of management/environmental improvements.

ix) The Council should ensure that a Planning Officer with retail planning skills is retained as a focal point for dealing with these matters, given the somewhat complex nature and evolving issues arising. This will ensure continuity to the monitoring and provision of retail information over time, which can build upon a significant amount of historical data already collated by the Council.

x) The findings of the Retail Study should, if possible, be monitored and updated frequently. Preferably this should be on a 2-3 year basis and incorporate survey based evidence in order to monitor changes to retail patterns and the performance of the District's main centres. This should be carried out in particular following any major new retail developments that come forward either in Harrogate District or in the key centres of Leeds and York.

APPENDIX 1

Retail Capacity Tables

This information is not currently available to view here.